amigo**POS** Cloud

Help Manual

Built 11 November 2026 · en

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CHAPTER 1

Getting Started

Basics

Quick start: from zero to first order

View online ↗

Everything needed to get CloudPos running — choosing devices, authorizing your first station, adding more with a short code, setting up printing and the kitchen display, and ringing a test order.

This guide takes a brand-new store from nothing to a working register. No technical background needed — if you can install an app and type a password, you can do all of it. Plan for about an hour, most of which is deciding where things go.

Before you start, have these ready

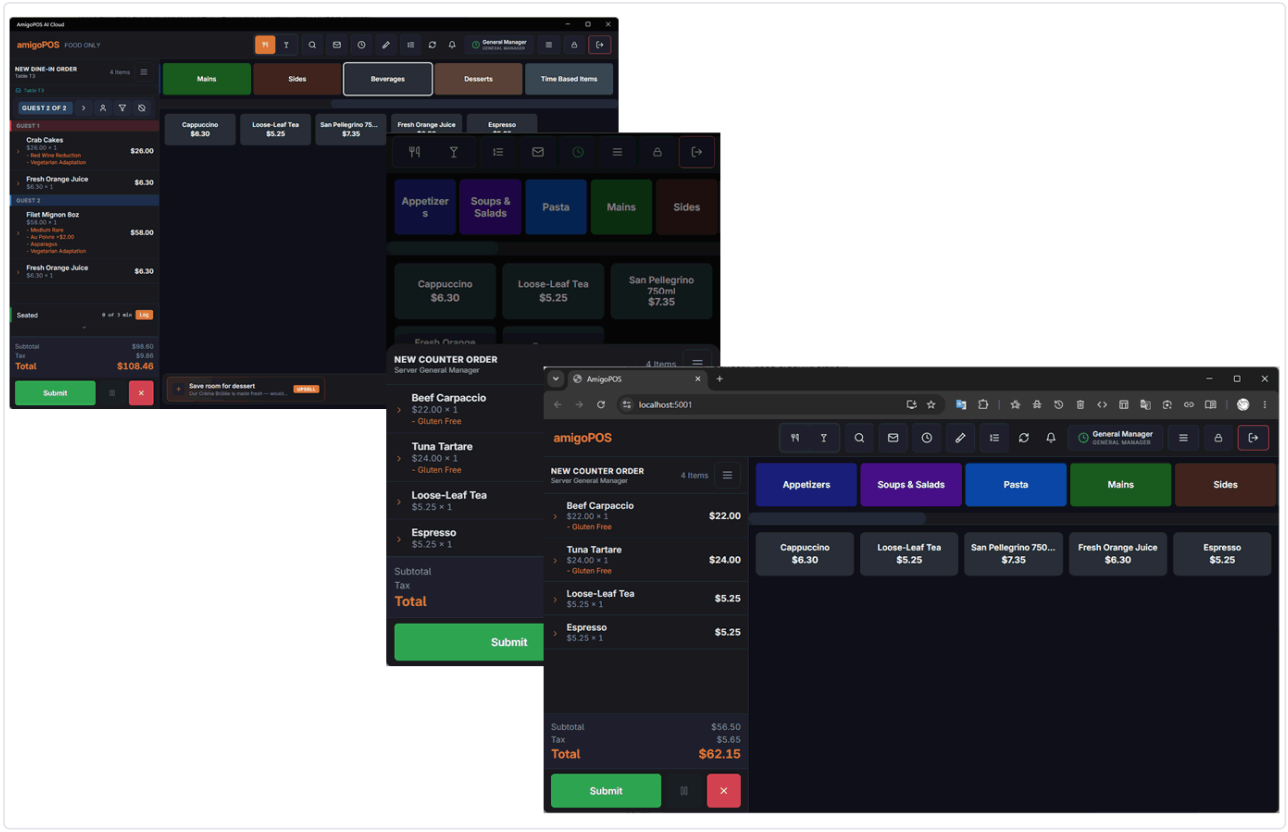
- Your CloudPos **username and password** (from your welcome email).
- A device for the register — a computer, tablet, or phone with an up-to-date browser, or a Windows / Android device.
- Wi-Fi or wired internet at the store.
- Any hardware you already own: receipt printer, kitchen printer, cash drawer, barcode scanner. None of it is required to start — you can ring orders with nothing but a screen and add hardware later.

Step 1 — Choose how each register runs

The register (the POS) runs three ways, and you can mix them freely across stations:

- **In a browser** (recommended for most stations) — nothing to install; open the web address, sign in, and you're running. Updates apply themselves the next time the page reloads. Works on computers, tablets, and phones.
- **As a Windows app** or **Android app** — install these where the station uses hardware the browser can't reach: a **barcode scanner**, or a receipt printer that must keep printing in **offline mode** (when the internet drops). If neither applies, the browser is the simpler choice.

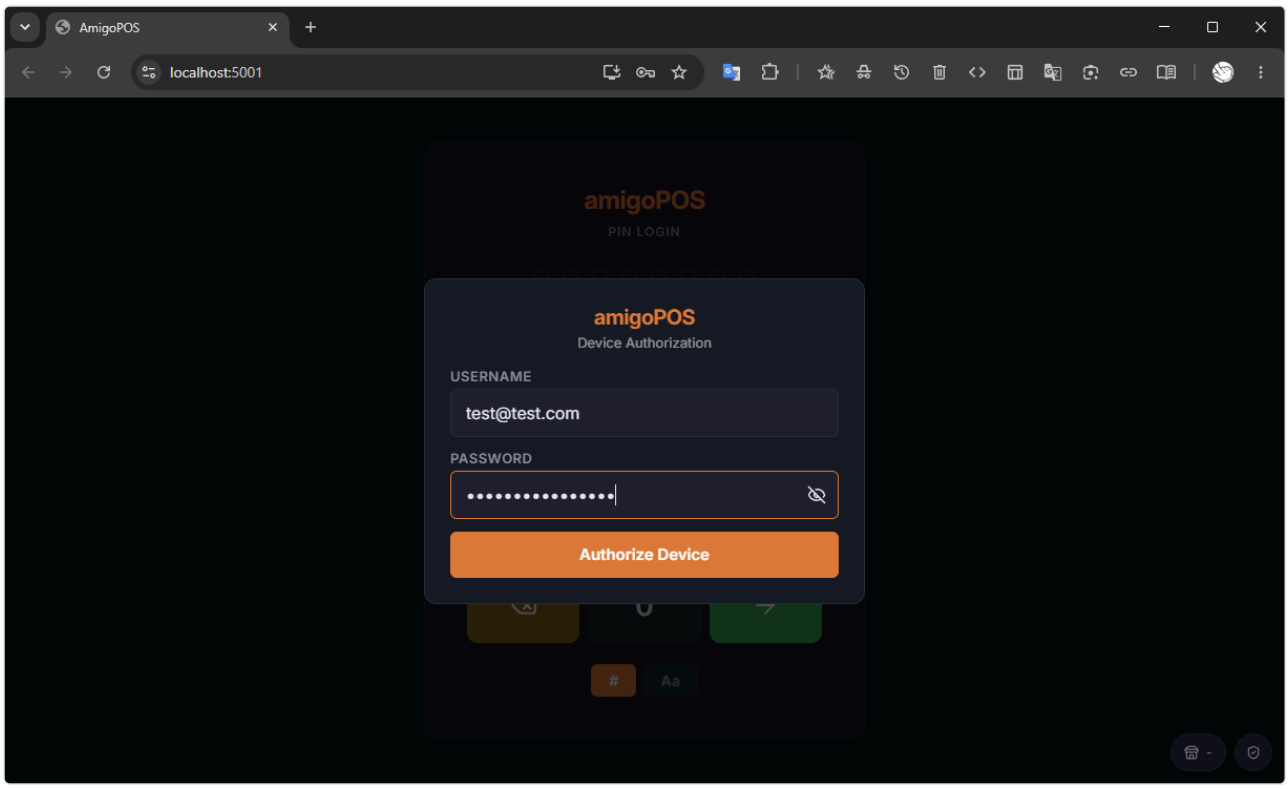
> The **Back Office** — where menus, prices, and settings are managed — runs on computers and tablets, not on phones. The register itself works fine on a phone; a phone in a server's hand is a perfectly good ordering station.



Step 2 — Authorize your first device

Every device that runs CloudPos must be authorized once, so only your devices can reach your store's data.

1. On your first device, open the POS (browser address or installed app).
2. Sign in with your **username and password**. This registers the device to your store.
3. Give the device a name you'll recognize — "Front Counter", "Bar iPad". Names show up in reports and settings, so pick names your staff would use out loud.



Step 3 — Add the rest of your devices with a short code

You don't type the password on every station. Instead:

1. In the **Back Office**, open the device registration page and generate a **short code** — a few characters, valid briefly, single use.
2. On the new device, open the POS and enter the code. The device authorizes itself and joins the store.
3. Name it, same as before. Repeat for every station.

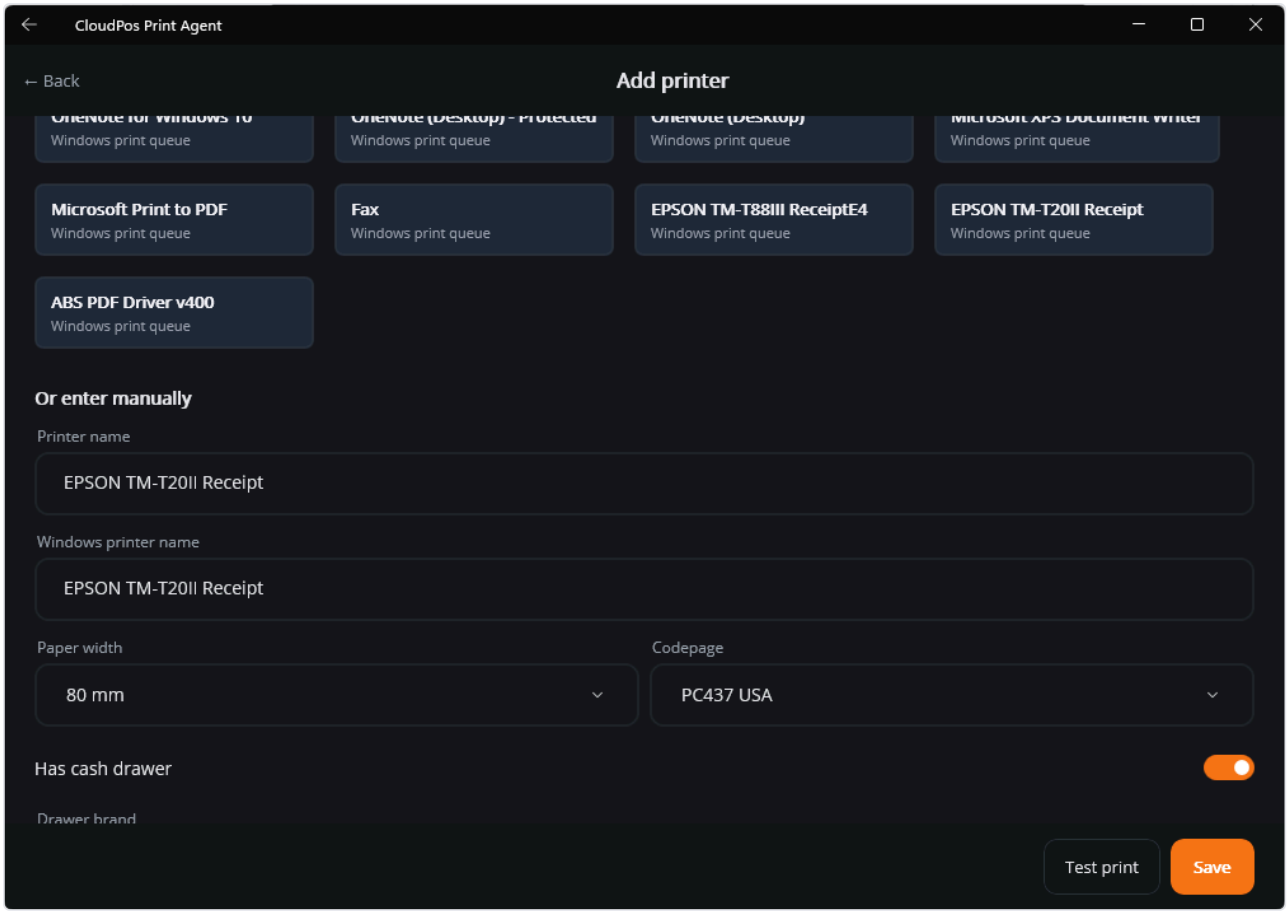
Generating codes is a manager-level action — that's deliberate, since a code is the key to your store. Treat codes like keys: make one when needed, use it, done. See *Device authorization and device mode* for the full details.

Step 4 — Set up printing with the Print Agent

Receipts and kitchen tickets print through a small helper app called the **Print Agent**. You install it on *one* device (Windows or Android) that can reach all of your printers — over the store network, or — on a Windows PC — through the printers installed in Windows. Every register then prints through it automatically; the registers themselves never need printer drivers or setup.

1. Pick a device that stays on during business hours and sits on the same network as the printers — a back-office PC or a dedicated tablet is ideal.
2. Install the Print Agent on it and authorize it (same short-code process as any device).
3. Add each printer in the agent (**+ Add Printer**) and run a test print on it, then give each one its job — receipts at the counter, prep tickets in the kitchen — in **Back Office › Hardware & Printing › Print Routing**. See *Setting up printing, start to finish*.

> A cash drawer plugs into the receipt printer, not into a computer — one cable, and the drawer pops when a cash sale settles. See *Drawer numbers and kick codes* once you're ready for that.



Step 5 — Kitchen display (optional)

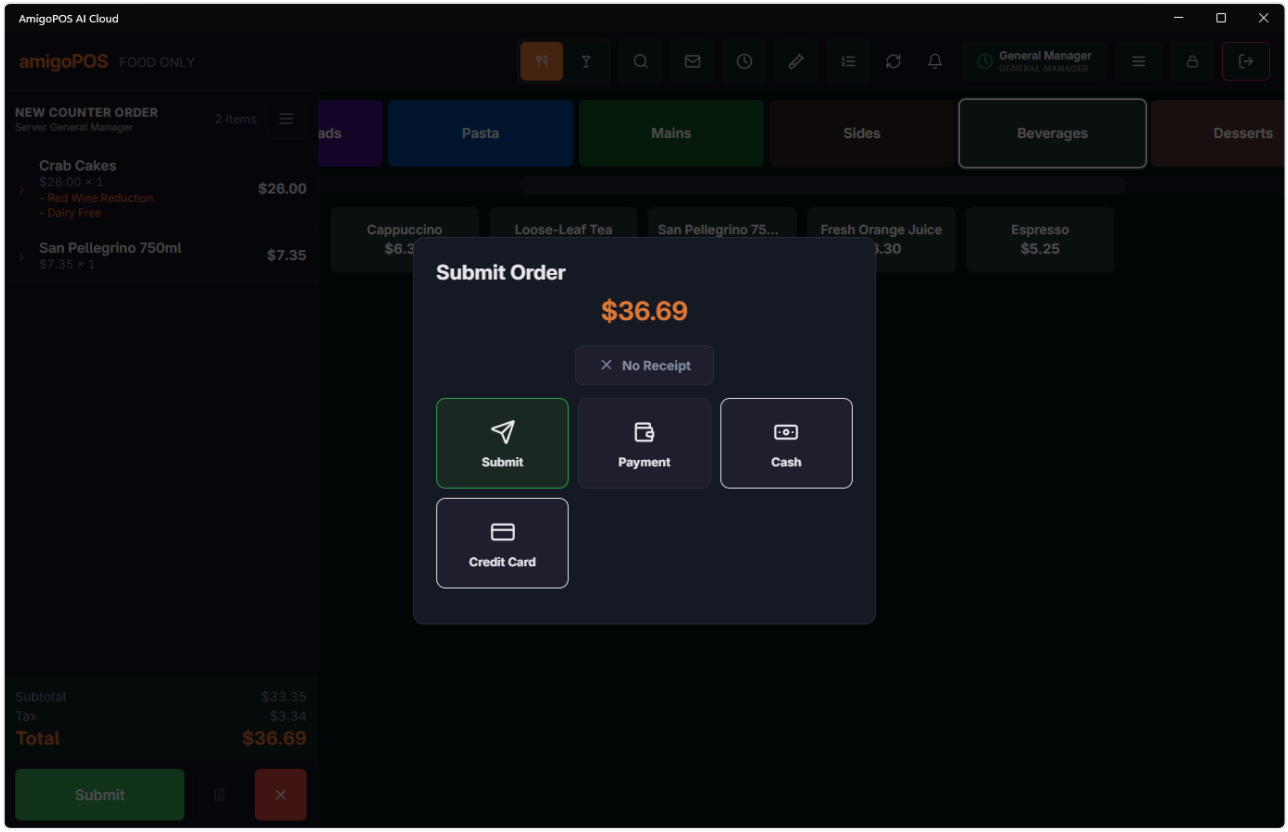
If the kitchen works from a screen instead of (or alongside) paper tickets, the **Kitchen Display** runs in a browser — any spare tablet or screen with a browser works. Open the KDS address on it, authorize it like any device, and orders appear as they're sent. See *Kitchen Display setup*.

Step 6 — Ring your first order

Your store comes with a starter menu so you can test before building your own:

1. On a register, sign in with your PIN and start an order.
2. Tap a couple of items, **send** (watch the kitchen printer or KDS react), then **settle** with the Cash button.
3. A receipt prints, the drawer pops if you have one, and your first sale is on the dashboard.

If all of that worked, the system is fully alive — everything from here is configuration, not setup.



What to do next, in order

1. **Build your menu** — categories first, then items: *Categories* and *Menu items*.
2. **Add your staff** — each person gets their own PIN and a job with the right permissions: *Employees* and *Jobs, roles & permissions*.
3. **Set your taxes** — before real sales, not after: *Sales tax setup*.
4. **Connect card payments** — when you're ready to take cards: *Integrations*.
5. **Learn the daily rhythm** — opening, cash drawers, end of day: the *Your first shift* section walks a complete day.

> Stuck at any point? The **Help** button is on every screen, the search finds topics by plain words, and the AI assistant answers questions in your own language — see *Getting help (the Help app)*.

What is CloudPos

Getting Started › Basics

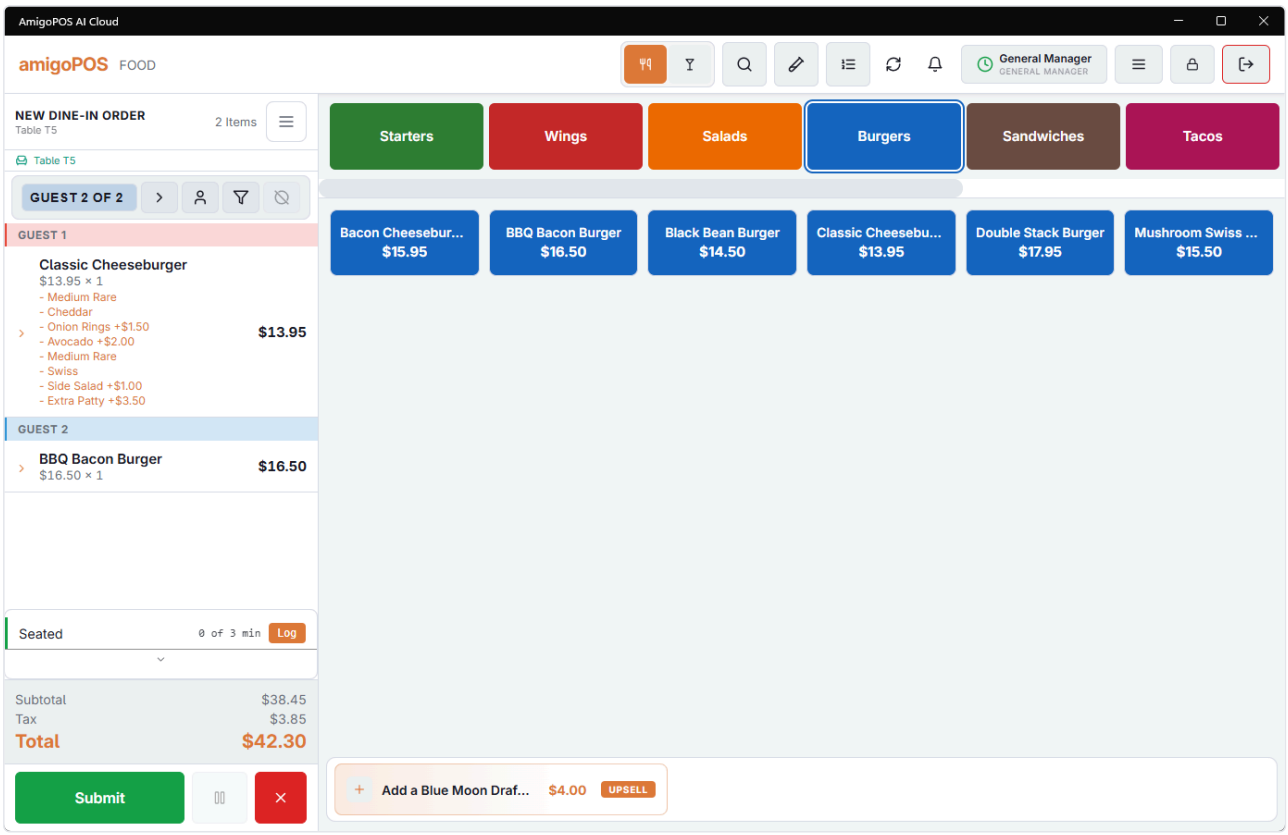
View online ↗

A quick tour of what the system does and where to find things.

CloudPos is a complete restaurant point-of-sale and call-center platform. The same application runs on register stations, tablets, phones, and call-center desks, and adapts its screens to the device it is running on.

What it covers

- **Order entry** — dine-in, take-out, delivery, bar tabs, and call-center orders with modifiers, courses, and per-guest seating.
- **Tables & service pace** — a live floor plan showing table states and how long each party has been waiting.
- **Payments** — cash, integrated card terminals, split tender, QR pay-at-table, gift cards, and house accounts.
- **Cash management** — drawers, floats, drops, banking, and end-of-day reconciliation.
- **Kitchen display** — tickets on a kitchen screen with course grouping and bump/recall.
- **Back office** — menu setup, employees, inventory, reports, and every program setting.



CloudPos keeps working when the internet goes down. Orders are stored locally and sync automatically when the connection returns — see *Technical Overview › Offline Mode*.

Where to start

1. Sign in with your PIN (*Signing in with your PIN*).
2. Clock in and claim a cash drawer if you handle cash (*Clocking in and out*).
3. Learn the layout in *Reading the order-entry screen*.

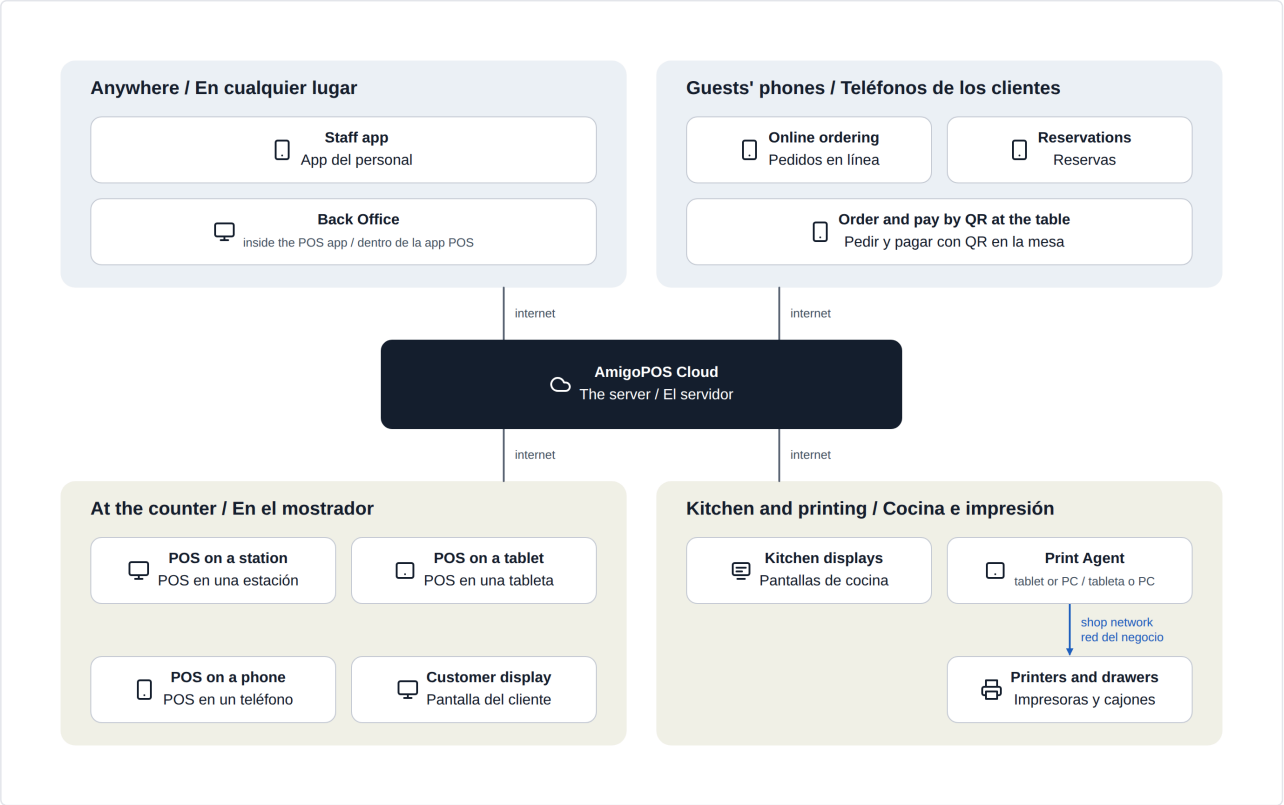
How everything fits together

Getting Started › Basics

View online ↗

The server, the registers, the kitchen, the staff apps and your guests' phones: what each piece is, where it runs and how they connect.

CloudPos is one system made of several apps. Each app runs on its own kind of device, and all of them talk to the same server over the internet. The apps do not talk to each other directly: each one talks to the server, and the server passes changes on to the others. In the diagrams the server is shown as AmigoPOS Cloud.



The four groups

- **At the counter.** The register is the POS app. The same app runs on a Windows station, an Android tablet or a phone, and adapts its screens to the device. A customer display shows the guest their order; it is a second screen on the register or a separate tablet paired with it.
- **Kitchen and printing.** Kitchen displays show tickets on a screen. The Print Agent is a small app that owns the printers: it receives print jobs from the server and sends them to the printers over the shop's network. Cash drawers are plugged into printers.
- **Anywhere.** Employees open the staff app on their own phones for their schedule, clocking in and out, tasks and messages. Managers get more on the same staff app: the day’s numbers and alerts, approvals and the log book. Back Office, where the system is set up and reports are run, is inside the POS app.
- **Guests' phones.** Guests order online, book a table, and order or pay at the table by scanning a QR code. They use the browser on their own phone; there is nothing for them to install.

Who uses what

App	Runs on	Who uses it	What for
Register (the POS app)	Windows station, Android tablet or phone	Servers, bartenders, cashiers	Orders, tables and payments
Back Office	Inside the POS app, on a station or tablet	Managers and owners	Menu, employees, settings and reports
Customer display	A second screen on the register, or a tablet paired with it	Guests at the counter	The order as it is rung up, the total, the tip and the receipt
Kitchen display	Windows or Android screen or tablet	Kitchen, bar and expo	Tickets to prepare and bump
Print Agent	Windows PC or Android tablet	Nobody day to day; it runs on its own	Printing tickets and receipts, opening cash drawers
Staff app (the staff site)	The employee's own phone, in the browser	Every employee; managers see more	Schedule, clocking in and out, tasks, messages, hours and tips; for managers, the day’s numbers and alerts

App	Runs on	Who uses it	What for
Online ordering	The guest's phone or computer	Guests	Takeout and delivery orders
Reservations	The guest's phone or computer	Guests	Booking a table
QR at the table	The guest's phone	Guests	Ordering and paying from the table

How printing works

A register does not print by itself. Every ticket and every receipt takes the same route:



1. **The register** sends the order to the server.
2. **The server** decides which printer each ticket goes to, from the print routing set up in Back Office.
3. **The Print Agent** receives the job and passes it to the printer, over the shop's network or, on a Windows Print Agent, a USB cable.
4. **The printer** prints. A cash drawer is plugged into its printer, and the printer opens it.

This is why the Print Agent has to stay running, and why one Print Agent can serve every register in the shop.

The one exception is an outage. A register that cannot reach the server prints straight to a printer on the shop's network. See Kitchen tickets during an outage.

What needs the internet

Every app talks to the server over the internet. Printers and cash drawers do not: the Print Agent reaches them over the shop's own network. If the internet drops, registers keep taking orders and cash, and catch up when it returns. See How offline mode works.

Where to go next

- What is CloudPos: what the system covers.
- Opening the back office.
- Customer display overview.
- KDS overview and ticket layout and The KDS app for Windows and Android.
- Print Agent overview, Setting up printing, start to finish and Print routing.
- Using the staff site on your phone: the staff app, and Today for managers.
- For guests: Incoming web orders at the register, Online booking and reminders, QR table ordering and QR pay at table.

Signing in with your PIN

Getting Started › Basics

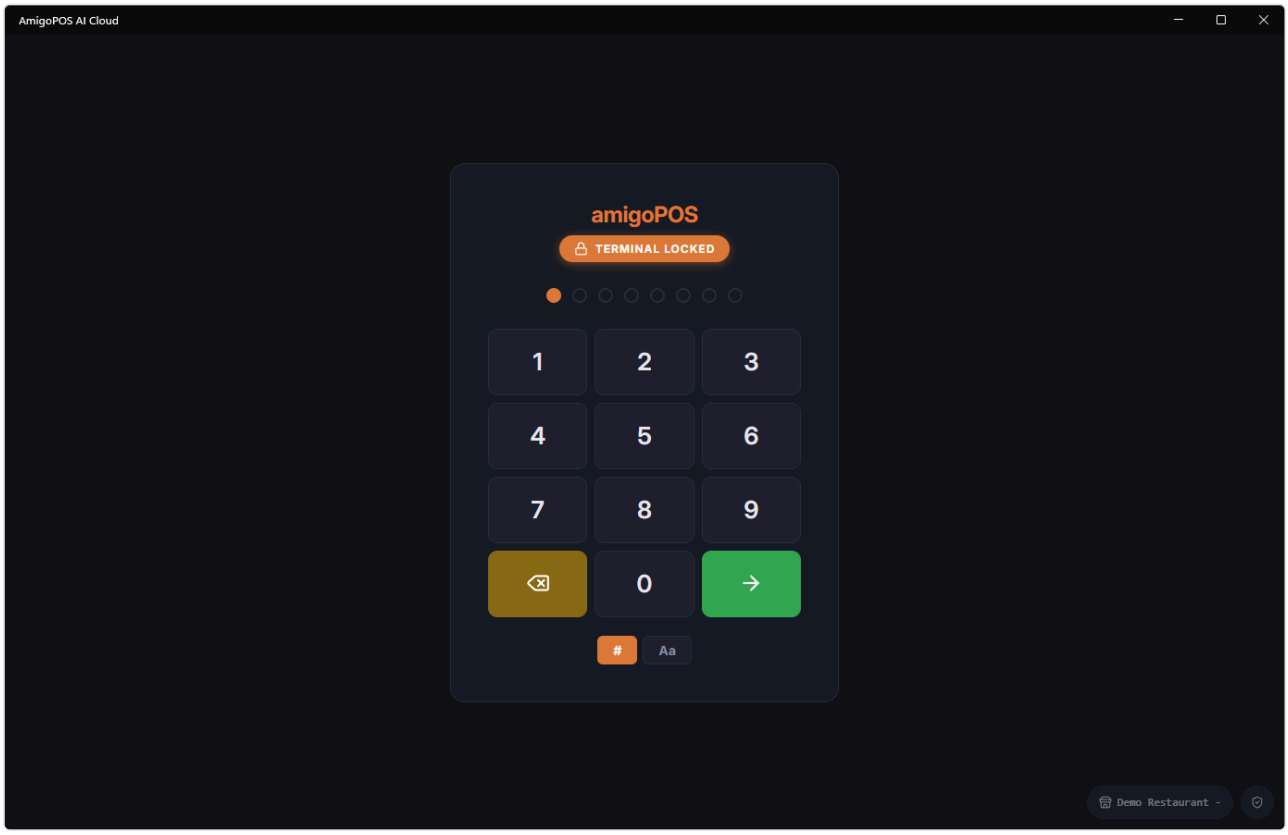
View online ↗

How PIN sign-in works on a register and what the common errors mean.

Every register uses a numeric PIN pad for sign-in. Your PIN identifies you, applies your permissions, and ties every order, payment, and drawer action to your name.

Signing in

1. On the lock screen, enter your PIN on the on-screen pad (or a keyboard).
2. The system signs you in automatically when the full PIN is entered — there is no separate *Enter* step.
3. If a time-clock rule applies (for example you are not clocked in yet), the Time Clock overlay opens first.



Common messages

- **Invalid PIN** — the PIN does not match any active employee. Check with a manager if you were recently added.
- **Terminal locked** — the station is locked to a specific user. Only that user (or a manager) can unlock it.

> PINs are personal. Never share yours — anything done under your PIN is recorded against your name in the audit trail.

> Forgot your PIN? A manager can reset it in Back Office › Employees › People › Employees List. To change your own PIN yourself, see *Changing your PIN*.

Opening the back office

Getting Started › Basics

View online ↗

Getting to the back office from the register, and why some sections are missing for some people.

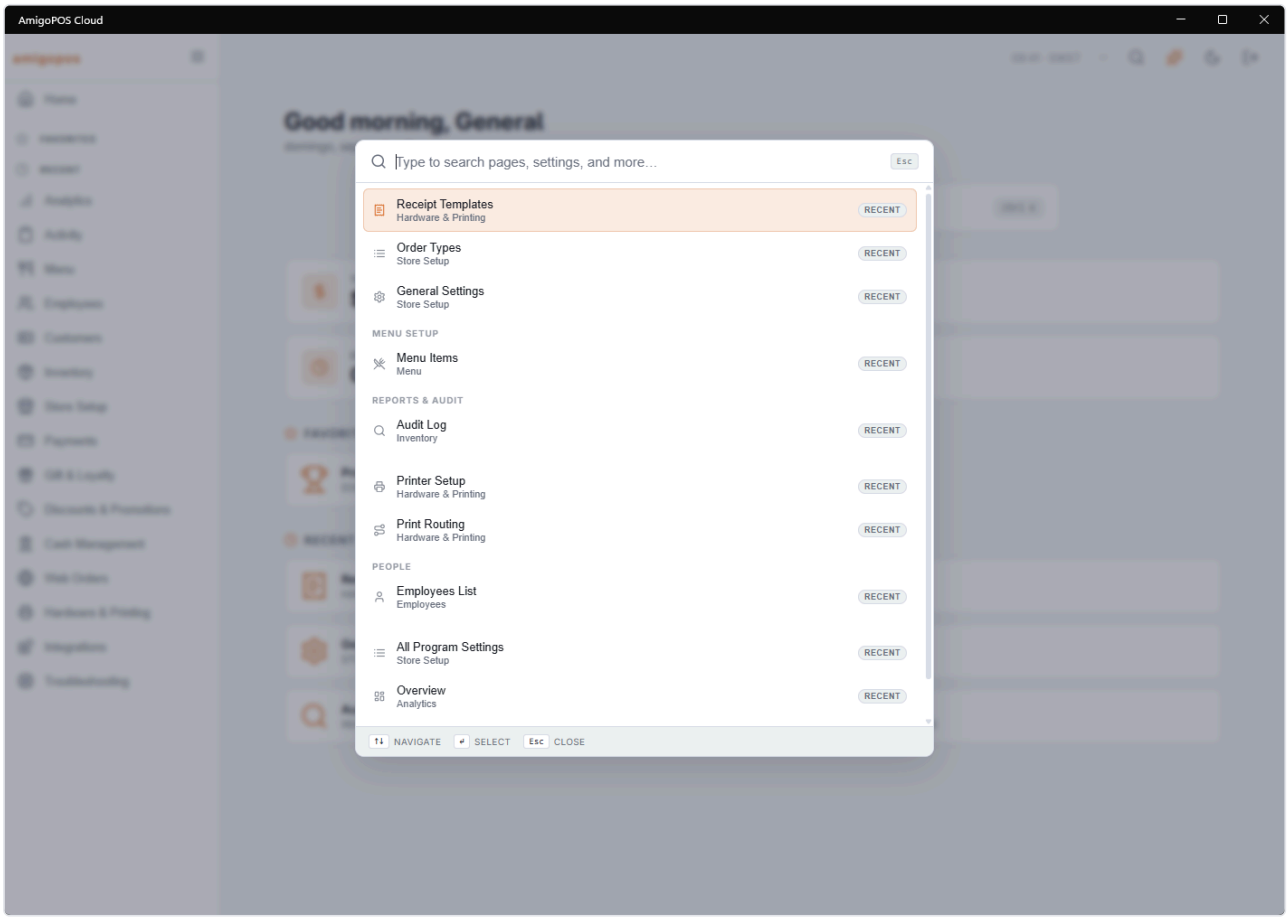
The back office opens from **More › Back office** at the register. You stay signed in as yourself — it is not a separate login, and nothing about the open order is lost.

Two levels of permission

Reaching the back office at all is one permission. Each **section** inside it is gated separately on top of that: analytics needs the reports permission, the menu editors need the menu permission, employees need the employees permission, and so on.

So somebody who can open the back office but finds half the navigation missing is not suffering a fault — they hold the outer permission and not the inner ones. That is usually deliberate: a shift lead who can look at yesterday's sales but cannot edit the menu.

If a section is missing that should not be, check the permission on the job the person actually signed in under. See **Troubleshooting › A permission you enabled is not taking effect**.



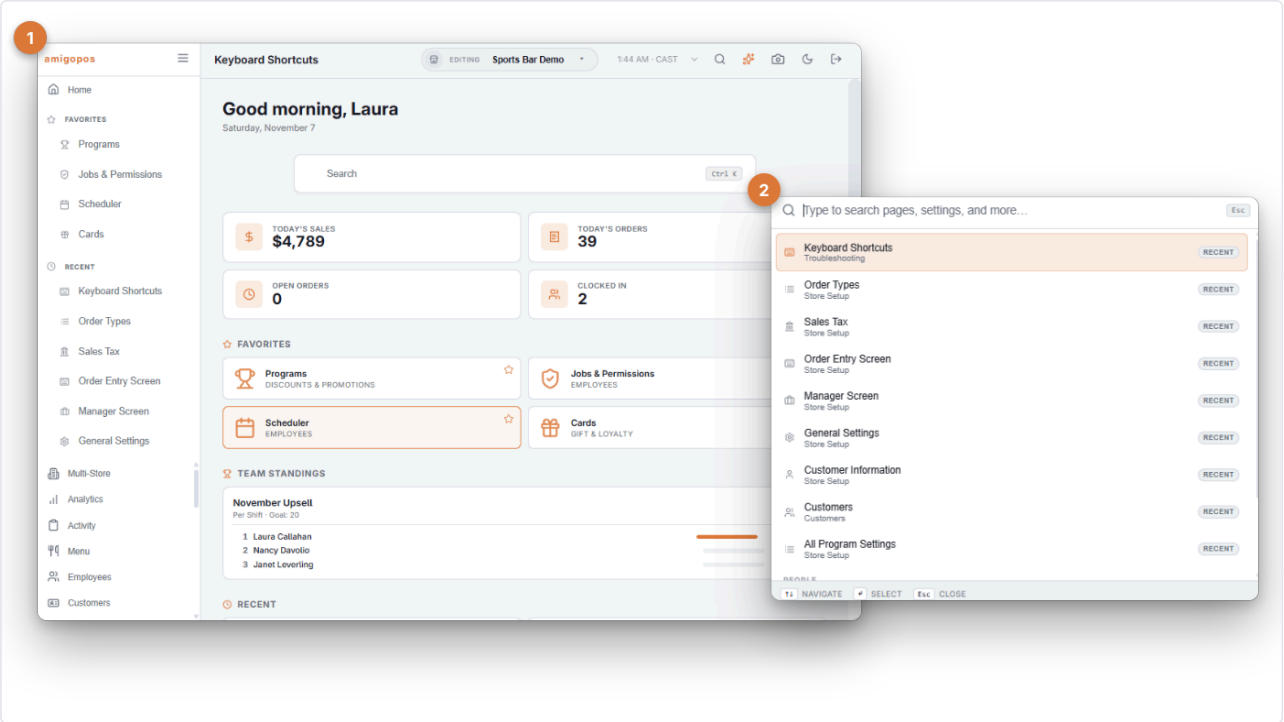
Command palette and favorites

Getting Started › Basics

View online ↗

Jumping to any back-office page by typing, and pinning the ones you use daily.

The **command palette** is the back office's search-to-navigate box: open it (the search field at the top, `Ctrl K` on a keyboard), type a few letters, and jump to any page — no menu digging.



Using it

- Matching is forgiving — “disc” finds Discounts, “print rout” finds Print Routing. Arrow keys move the selection, Enter navigates, Escape closes.
- **Recent** pages appear before you type, so bouncing between the two pages you’re working on is two keystrokes.
- The palette also reaches individual **settings** — searching a setting’s name lands you on it directly (the same index behind *All program settings*).

Favorites

Every back-office page has a **star** — tap it to pin the page to your Favorites section in the navigation. Favorites are per user: a kitchen manager’s list (Inventory, Recipes, Receiving) and an owner’s (Analytics, Payment Methods) coexist on the same store. Tap the star again to unpin.

> Train new back-office users on the palette first — it makes the size of the settings surface irrelevant, and it’s the fastest answer to “where is…?”

Locking vs. signing out on a shared station

Getting Started › Basics

View online ↗

What happens to your open order when you step away.

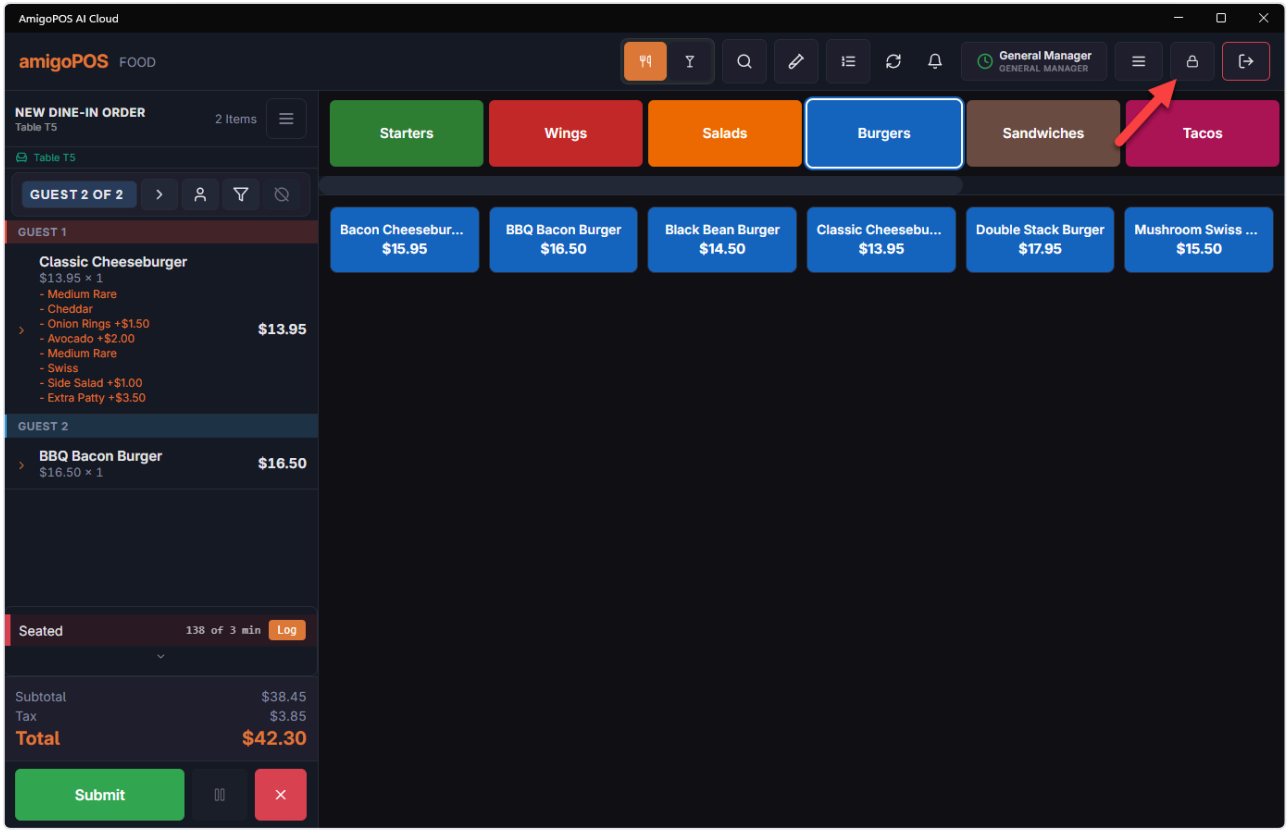
On a shared register, several employees rotate on the same station. CloudPos supports two ways to step away, and they behave differently with an unfinished order on screen.

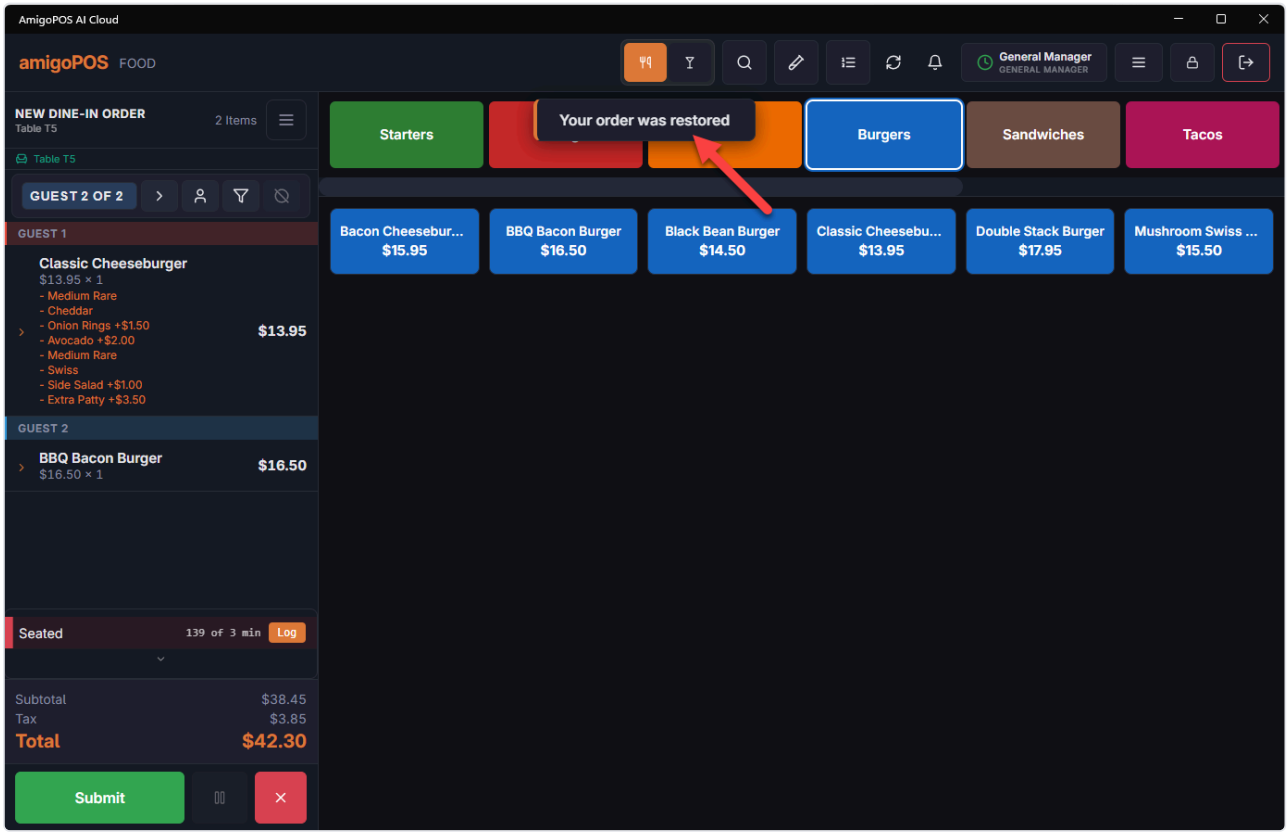
Lock (recommended between customers)

- Returns to the PIN screen but **parks your in-progress order**.
- Another employee can sign in and work normally; your parked order does not interfere.
- When *you* sign back in, your order is restored exactly as you left it.

Sign out

- Ends your session on the station completely.
- An unfinished order must be sent, settled, or discarded first — nothing is parked.


AmigoPOS AI Cloud
amigoPOS FOOD
General Manager
GENERAL MANAGER
NEW DINE-IN ORDER
Table T5
2 Items
Table T5
GUEST 2 OF 2
GUEST 1
Classic Cheeseburger
$13.95 × 1
- Medium Rare
- Cheddar
- Onion Rings +$1.50
- Avocado +$2.00
- Medium Rare
- Swiss
- Side Salad +$1.00
- Extra Patty +$3.50
$13.95
GUEST 2
BBQ Bacon Burger
$16.50 × 1
$16.50
Seated
138 of 3 min
Log
Subtotal
$38.45
Tax
$3.85
Total
$42.30
Submit
Starters
Wings
Salads
Burgers
Sandwiches
Tacos
Bacon Cheeseburger...
$15.95
BBQ Bacon Burger
$16.50
Black Bean Burger
$14.50
Classic Cheeseburger...
$13.95
Double Stack Burger
$17.95
Mushroom Swiss ...
$15.50


AmigoPOS AI Cloud
amigoPOS FOOD
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- Side Salad +$1.00
- Extra Patty +$3.50
$13.95
GUEST 2
BBQ Bacon Burger
$16.50 × 1
$16.50
Seated
139 of 3 min
Log
Subtotal
$38.45
Tax
$3.85
Total
$42.30
Submit
Your order was restored
Starters
Burgers
Sandwiches
Tacos
Bacon Cheeseburger...
$15.95
BBQ Bacon Burger
$16.50
Black Bean Burger
$14.50
Classic Cheeseburger...
$13.95
Double Stack Burger
$17.95
Mushroom Swiss ...
$15.50

Parked-order limits

> A parked order is held only for a limited time. If you sign back in much later, you may see *"parked order expired"* — the order was released so the station could keep operating. If the order changed on another station in the meantime, the stale parked copy is discarded and the current version is loaded instead.

Switching language

Getting Started › Basics

View online ↗

Changing the interface language, and what does and does not change with it.

Open **More › Language** and pick one. The interface changes immediately — buttons, prompts, menus and messages.

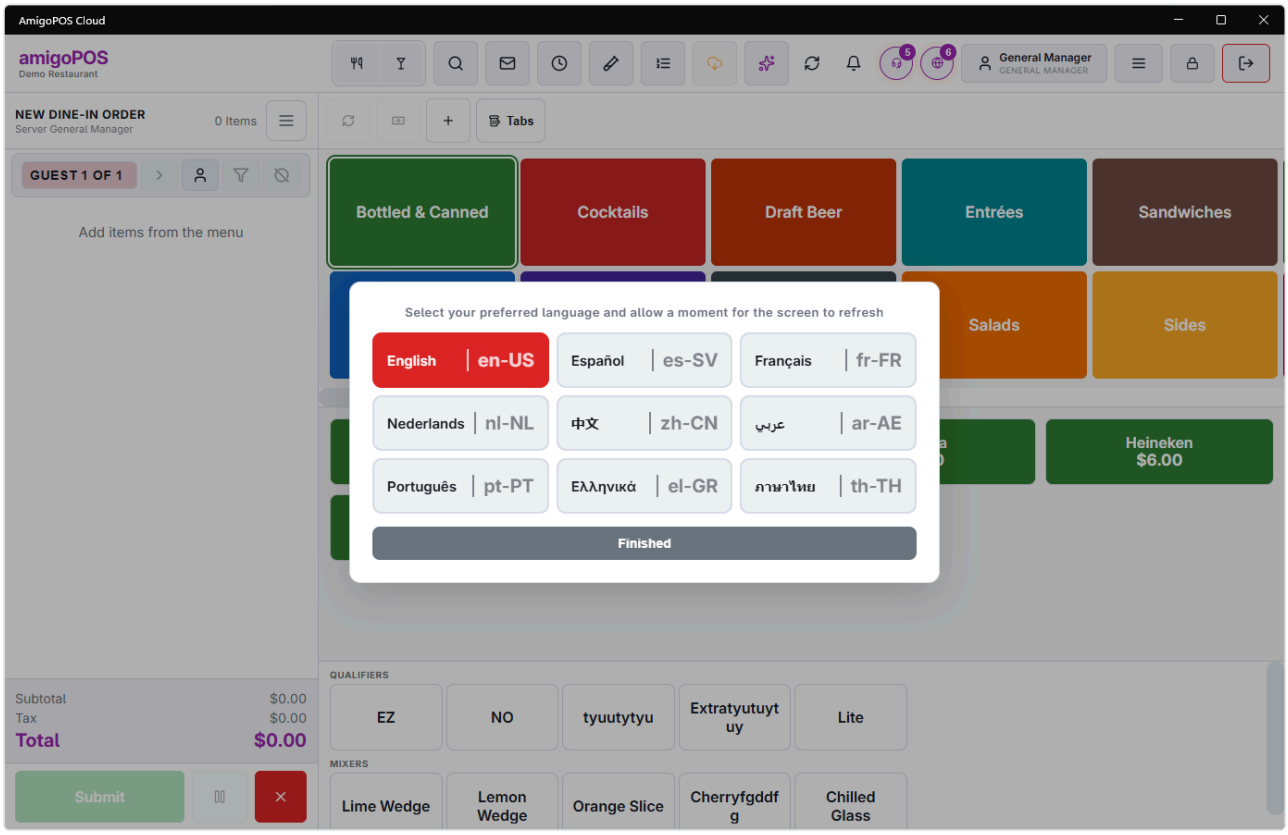
What changes and what does not

The language setting covers the **software**. It does not translate the things your store typed in: menu item names, category names, modifier names, reason lists and receipt templates all stay exactly as they were entered.

That is why a Spanish interface still shows English menu items unless somebody translated them in the back office. It is not a fault, and it is often what a store wants — the kitchen reads the item names it prints.

> A KDS screen carries its own language, chosen on that screen. The kitchen can read one language while the register reads another.

> Printed receipts and prep tickets follow their templates, not the screen language. If a receipt prints in the wrong language, the template is where to look.



Theme, touch mode and text size

Getting Started › Basics

View online ↗

The two quick toggles at the bottom of More, and where the real sizing controls live.

The quick toggles

At the bottom of the **More** menu, two controls are always within reach:

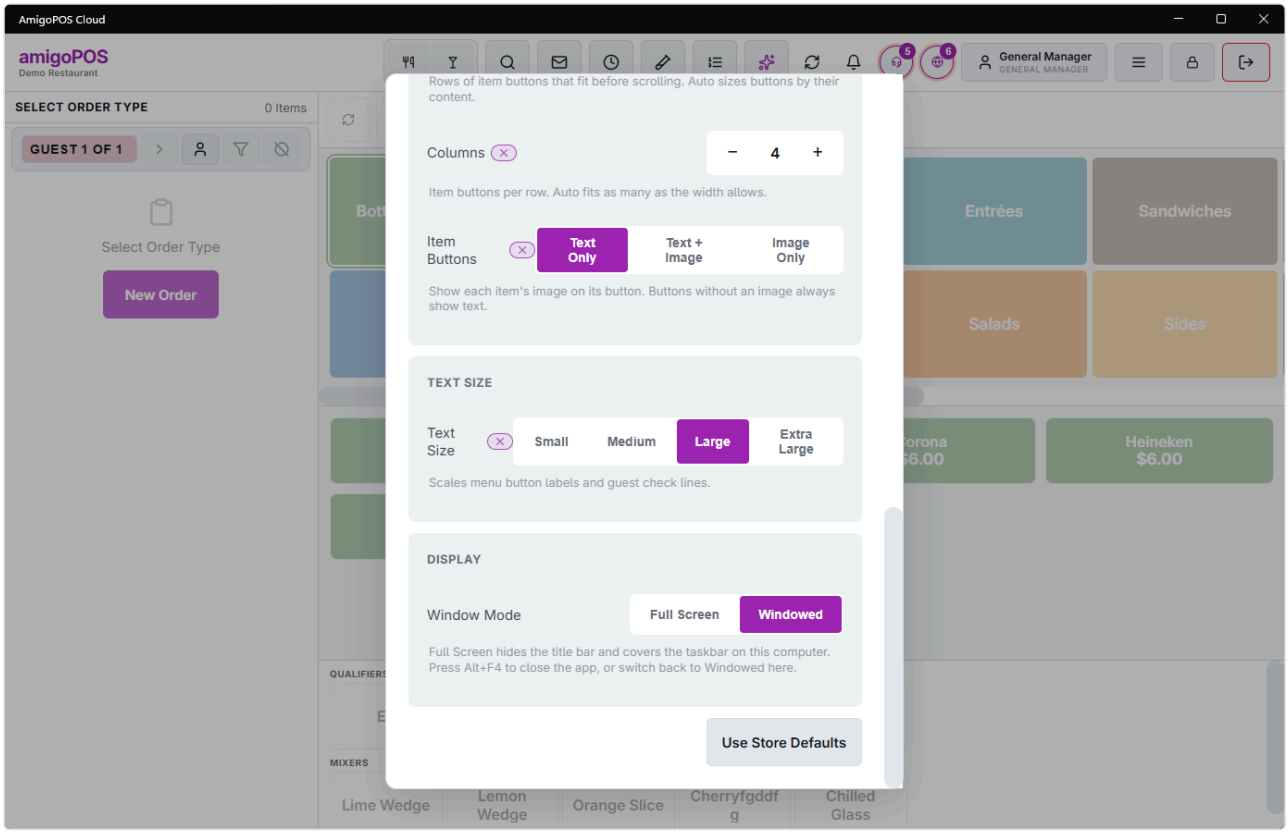
- **Theme** — switches between dark and light. Dark suits a dim bar; light suits a station facing a window. It is per station.
- **Touch / mouse mode** — tells the interface whether it is being poked or clicked. Touch mode gives larger hit areas and skips hover behaviour that means nothing on a tablet.

Real sizing lives in Layout

If the problem is that things are too small to read or too small to hit, the theme toggle is not the answer. A manager can open **Layout** from the same footer and set text size, category and item button sizing as rows and columns, and which side the guest check sits on.

Those settings have a store default with a per-device override, so one awkward station can be fixed without changing everyone else.

> Set the store default for your commonest screen size, then override the odd ones. Overriding every station individually is how they drift apart.



Changing your PIN

Getting Started › Basics

View online ↗

Setting your own PIN, and what to do when you cannot get in to change it.

Open **More › Change PIN** while signed in and set a new one.

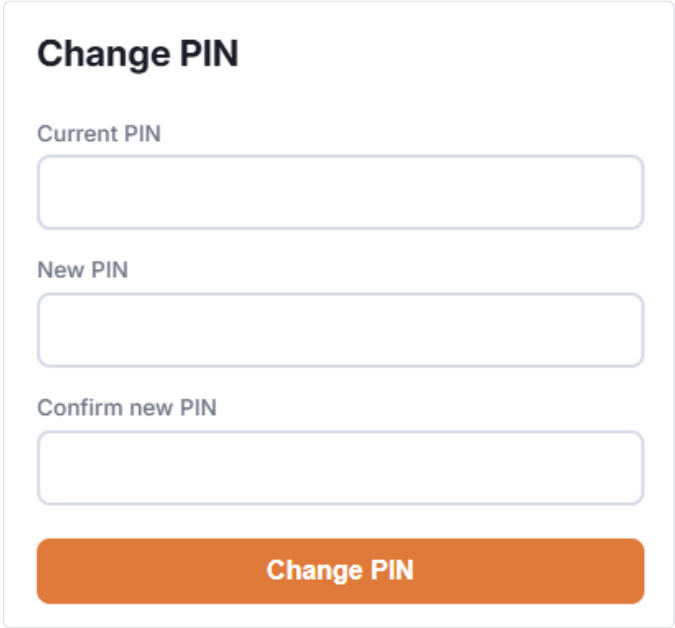
Choosing one

Your PIN is your signature. Every void, comp, discount, drawer opening and override is recorded against whoever was signed in, so a shared or guessable PIN makes those records worth nothing.

Avoid the obvious: 1234, your extension, your birthday, the year. Do not use the PIN somebody set up for you on day one, and do not tell anybody what it is — including a manager, who does not need it to reset it.

Cannot sign in to change it? A manager resets it in **Back Office › Employees › People › Employees List**, and you set your own from here afterwards.

If somebody else knows your PIN, change it now rather than at the end of the shift. Anything done under it is, on the record, done by you.



Support mode and admin recovery

Getting Started › Basics

View online ↗

Two escape hatches: one for a support technician working across stores, one for a store with no users at all.

Two separate mechanisms exist for situations normal sign-in cannot cover. They do different things and neither is a PIN reset.

Support mode

Support mode lets an amigoPOS support technician work against a particular merchant and store from a station. It is opened from the manager section of **More**, requires an **amigoPOS admin account** — not a store manager login — and then asks which merchant and store to enter.

While it is active the POS shows a banner naming the merchant and store being worked on, with an **Exit** button. The banner is deliberate: nobody should be in support mode without it being obvious on screen.

Admin recovery

Admin recovery, from the login screen, solves one specific problem: **a store with no POS users**. A brand-new store, or one whose data was purged, has nobody to sign in as, so PIN login cannot work by definition.

1. Sign in with the administrator account for the merchant.
2. Choose the store that needs a user.
3. Create the first POS user with a username and PIN.

That user can then sign in normally and create everyone else.

Admin recovery **does not reset an existing employee's PIN** and does not unlock a station. A forgotten PIN where the store still has users is a manager reset in **Back Office › Employees › People › Employees List** — see **Troubleshooting › Locked out, or a forgotten PIN**.

Your first shift

Clocking in and out

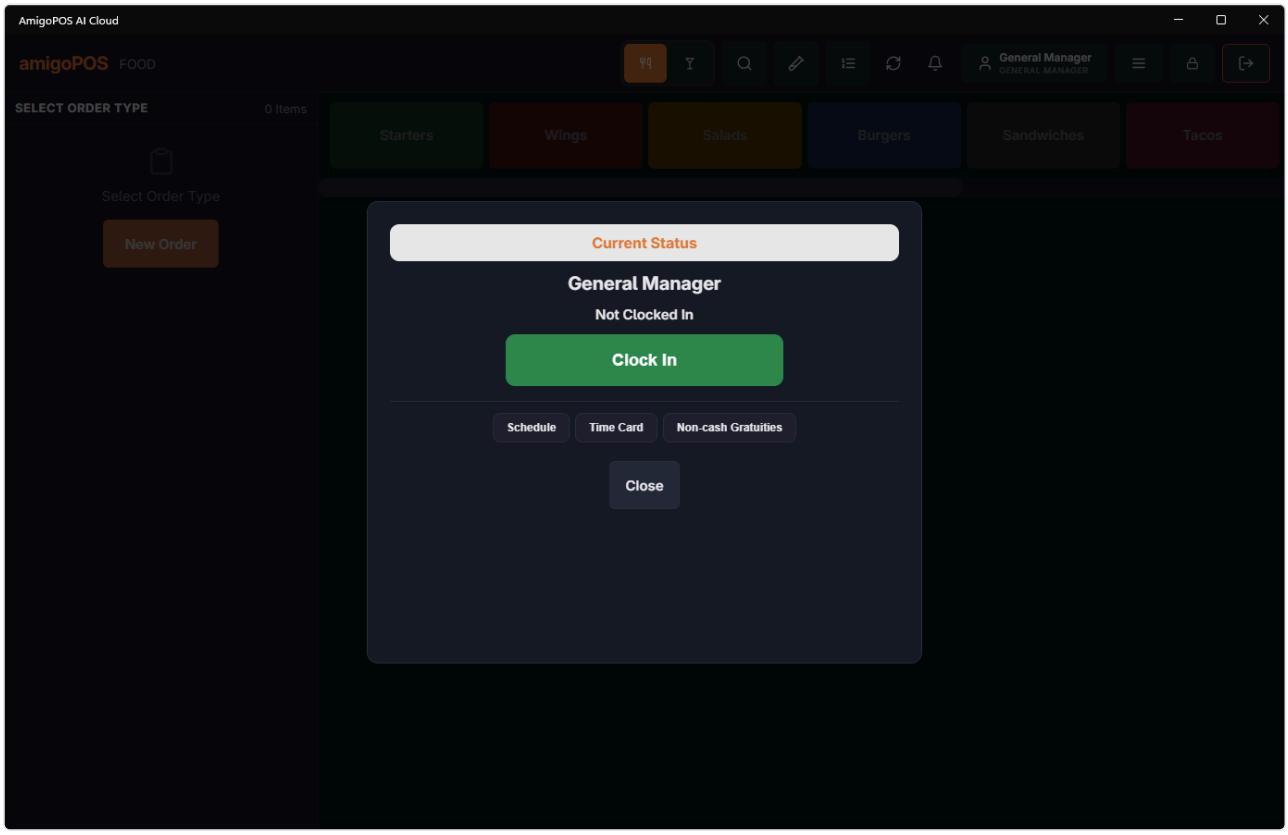
View online ↗

Time clock basics: punches, breaks, and what can block a clock-out.

The time clock runs right on the register. Punches drive timesheets, labor reports, and — if enabled — who is allowed to take orders.

Clocking in

1. Enter your PIN. If you are not clocked in, the Time Clock overlay opens automatically (or open it from the More menu).
2. Pick your **job** if you have more than one.
3. If your job handles cash, you may be prompted to **claim a cash drawer** — see *Claiming a cash drawer at clock-in*.
4. Confirm. The overlay shows *Clocked in at…* with the time.



Breaks

Start and end breaks from the same overlay. An open break must be ended before you can clock out.

What can block a clock-out

- **Open orders or liabilities** — servers and drivers must settle, void, or transfer their open orders first. The overlay lists the blocking items. Orders the employee has **banked** do not block: they stay in their bank and are closed when End Shift is run (Employee banking and deposits).
- **Open break** — end the break, then clock out.
- **Unreconciled drawer** — if a count is required at shift end, the drawer count opens before the punch is accepted.
- **Gratuity declaration** — where enabled, you are prompted to declare cash tips at clock-out.

> Schedule enforcement (when turned on) can prevent early or unscheduled punches without a manager override. See Time Clock settings.

A printed slip

Where the store has turned on **Print clock-in confirmation** or **Print clock-out confirmation** (General Settings › Time Clock Printing), the station's receipt printer prints a slip at the punch with your name, your job and the time. See General settings.

Claiming a cash drawer at clock-in

Getting Started › Your first shift

View online ↗

Taking a cash drawer when you clock in, and what claiming one makes you responsible for.

When your store assigns drawers to users, you claim a cash drawer as part of clocking in. The drawer stays tied to you for the whole shift, so every cash sale, payout, and no-sale is accountable to you until you clock out and the drawer is counted.

> **Note:** This step only appears when a manager has turned on **Assign cash drawers to users** (Cash Management › Cash Drawers). If it's off, drawers belong to the station and you won't be prompted.

Claiming your drawer

1. Clock in with your PIN.
2. When prompted, choose an available drawer for your station.
3. Confirm the opening float. The drawer is now assigned to you for the shift.

> If the drawer you expect isn't listed, it's probably still assigned to another user who hasn't counted out yet. A manager can release it from the cash-drawer tools.

During and after your shift

Your assigned drawer follows you across the order-entry and settle screens. At the end of your shift you count the drawer out; once it's reconciled it's freed for the next user.

The More menu

Getting Started › Your first shift

View online ↗

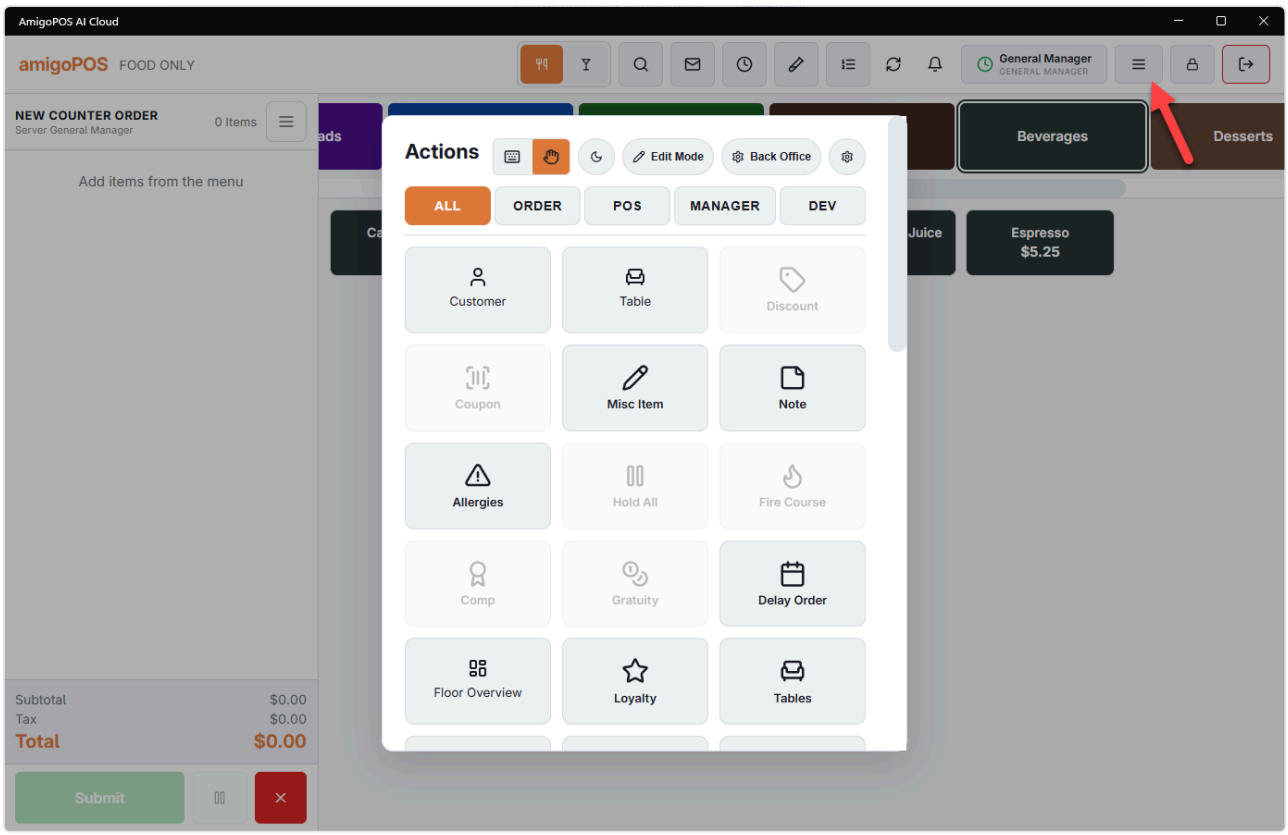
Every register function that isn't a menu button lives in the More menu — organized by filter tabs, with quick station controls in its header.

The **More** button on the order-entry screen opens the register's full command menu. If a function isn't a menu button or on the check panel, it's here.

Finding things: the filter tabs

Across the top, tabs narrow the grid:

- **All** — everything your sign-in can use.
- **Order** — actions on the current order: customer, table, discount, coupon, misc item, order note, allergens, hold, fire course, comp, gratuity, delay order. Actions that need an order (or items on it) are dimmed until there is one.
- **POS** — station functions: search, refresh, time-based items, floor overview, loyalty, tables, deliveries, gift cards, customer accounts, account payment, time clock, change PIN, no sale, payout, credit cards, sticky notes, language.
- **Manager** — appears only for sign-ins with manager functions: cash drawers, spot count, drawer states, pre-EOD summary, end of day, reports, cash drops, tip adjust, audit trail, drawer activity log, variance report, customer display, shift banking, coupons log, event pricing, prep printers, drawer settings, AI assistant, item counters, labor efficiency, registered devices, support mode, and shut down.



The header quick controls

Along the top of the panel:

- **Keyboard / touch toggle** — switches the station's input mode (on-screen keyboards and larger touch targets vs. mouse-and-keyboard behavior).
- **Theme** — light/dark for this station.
- **Edit mode** (managers) — turns on in-place menu editing: rearrange buttons and edit items directly from the order screen.
- **Back office** (with permission) — jumps to the back-office pages.
- **Station settings** — device-level settings for this register.

Notes

- The menu is permission-aware: employees only see what their job allows, so a cashier's More menu is much shorter than a manager's. If something described here is missing, it's a permission, not a bug.
- A dimmed button isn't broken — it needs an open order or items on the check first.
- Each function has its own help topic; this page is the map, not the manual.

Lights

Lights, in the POS group, opens the lighting panel: Last Call, zones and single lights. It shows for managers and for jobs with the Light Control permission. See The Lights panel at the POS.

Call The Bar sends a short message to the bar screen — see Calling the bar.

Waste

Waste (managers) records a spoiled ingredient or a plate that was thrown away without leaving the register — see Waste and shrinkage.

During an outage

Items that need the server are dimmed and carry a small no-connection mark, and a line at the top of the menu explains it. Tapping a dimmed item shows a message and the menu stays open. See Working offline.

Training

With the Training Mode permission, the Manager group also holds **Start Training** and, while in training, **End Training**, **Reset Training** and **Refresh Training Menu**. See Training mode: a practice register.

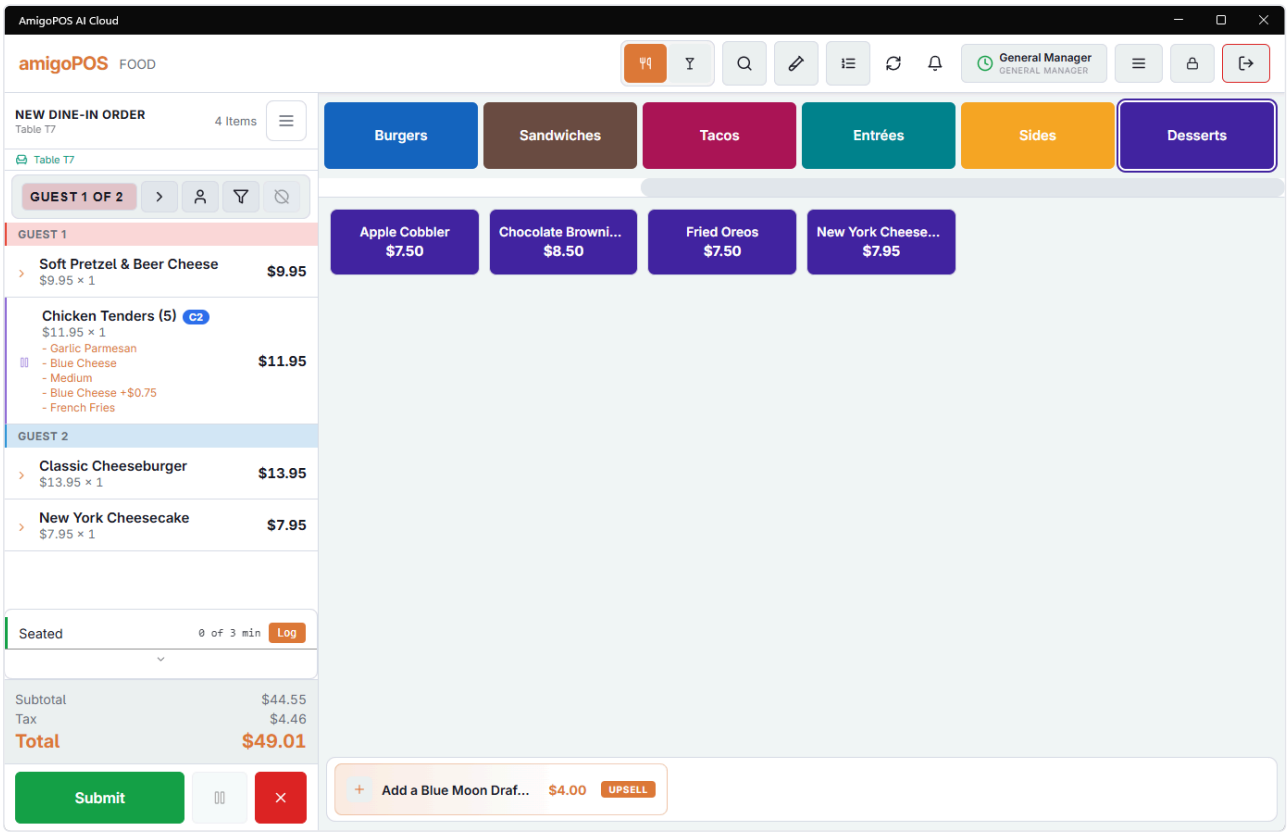
Reading the order-entry screen

Getting Started › Your first shift

View online ↗

A guided map of every region of the main POS screen.

Everything in day-to-day service happens on this one screen. Here is the map.



The regions

1. **Top bar** — current user, order type, table/tab name, clock, and quick actions (lock, help, more).
2. **Order panel** (left) — the running check: items, modifiers, seat and course badges, quantities, and line prices. Tap a line to open the item detail panel.
3. **Menu grid** (center/right) — category buttons and item buttons. The grid changes with the selected category and shows 86'd items dimmed with remaining counts.
4. **Item detail panel** — opens when a line is selected: quantity, seat, course, notes, discounts, remove.
5. **Action bar** (bottom) — Send, Settle, guest count, and the most-used order actions for the current order type.
6. **More menu** — everything else: manager functions, tabs, recall, fire course, language, change PIN.

> On phones the layout condenses: the menu grid and order panel become tabs, and the action bar keeps only Send and Settle. All the same functions live in the More menu.

Getting help inside the app

View online ↗

Three ways to get an answer without leaving what you are doing: the AI assistant, the help site and a support ticket.

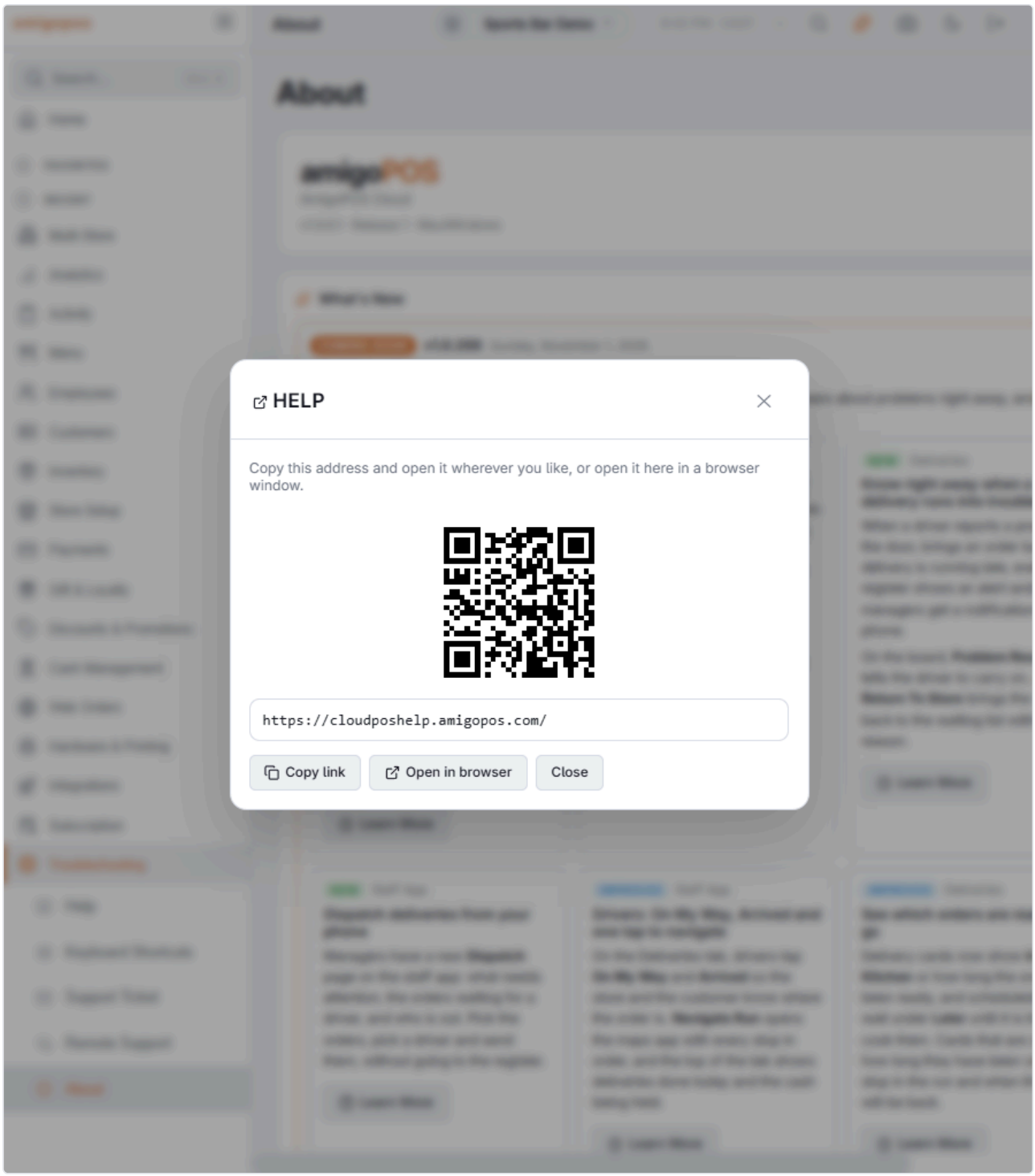
You do not have to leave what you are doing to find out how to do it. The **Back Office › Troubleshooting** section gathers the ways to get help: the help site, keyboard shortcuts, a support ticket, remote support and the About screen.

The AI assistant

Ask in plain words — *how do I split a check?*, *where do I set a delivery zone?* The assistant searches the help articles and answers, and shows the articles it used as cards you can tap. It can also do many things directly rather than telling you where to click. See What the AI Assistant can do.

The help site

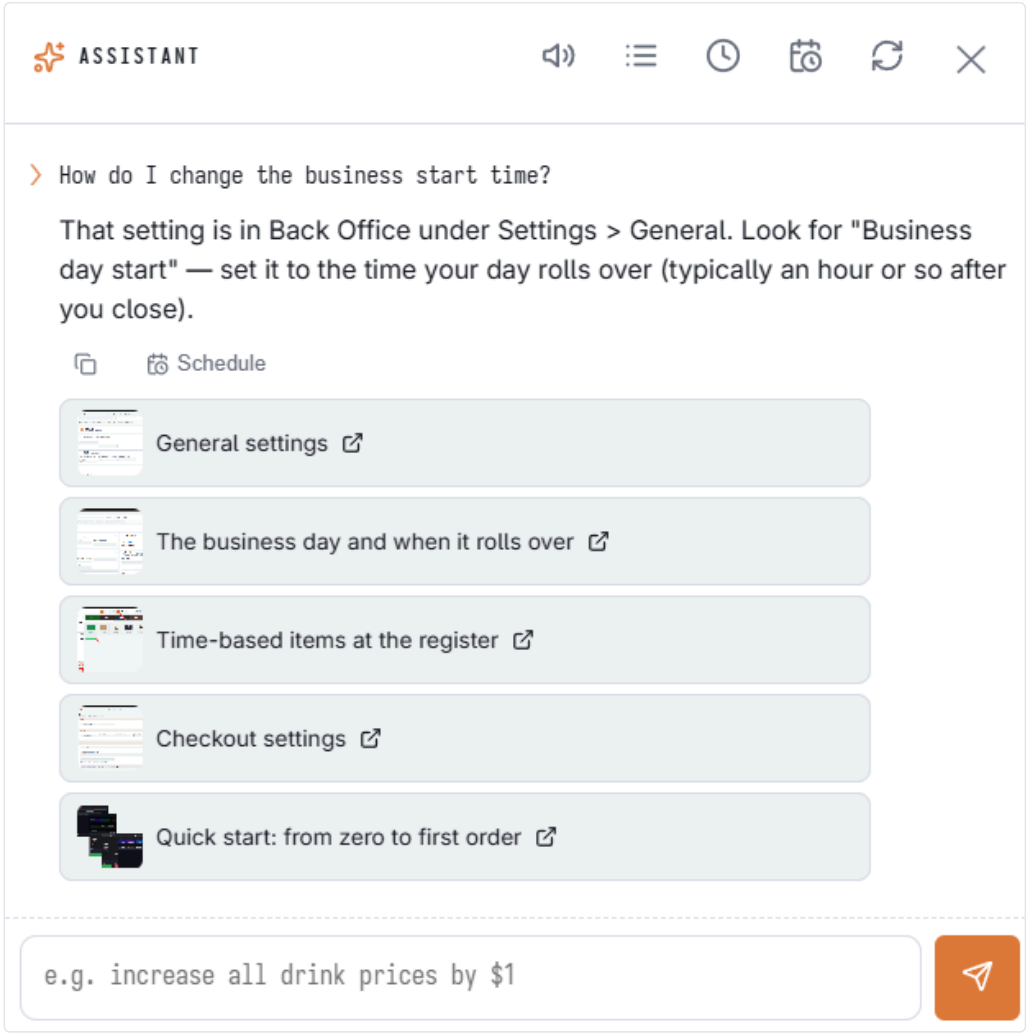
Back Office › Troubleshooting › Help shows the address of the help site in a window, with a QR code. **Open in browser** opens it in a browser window on this device, **Copy link** copies the address, and scanning the QR code opens it on a phone. The help site has every topic, to browse and search.



A support ticket

When it is a fault rather than a question, send a ticket from **Back Office › Troubleshooting › Support Ticket**. See Submitting a support ticket for what to include so the first reply is a fix. For help on the phone, see Remote support.

> Ask the assistant first for anything shaped like “how do I”. It is faster than searching, and it answers in the language you ask in.



Device setup

Device authorization and device mode

View online ↗

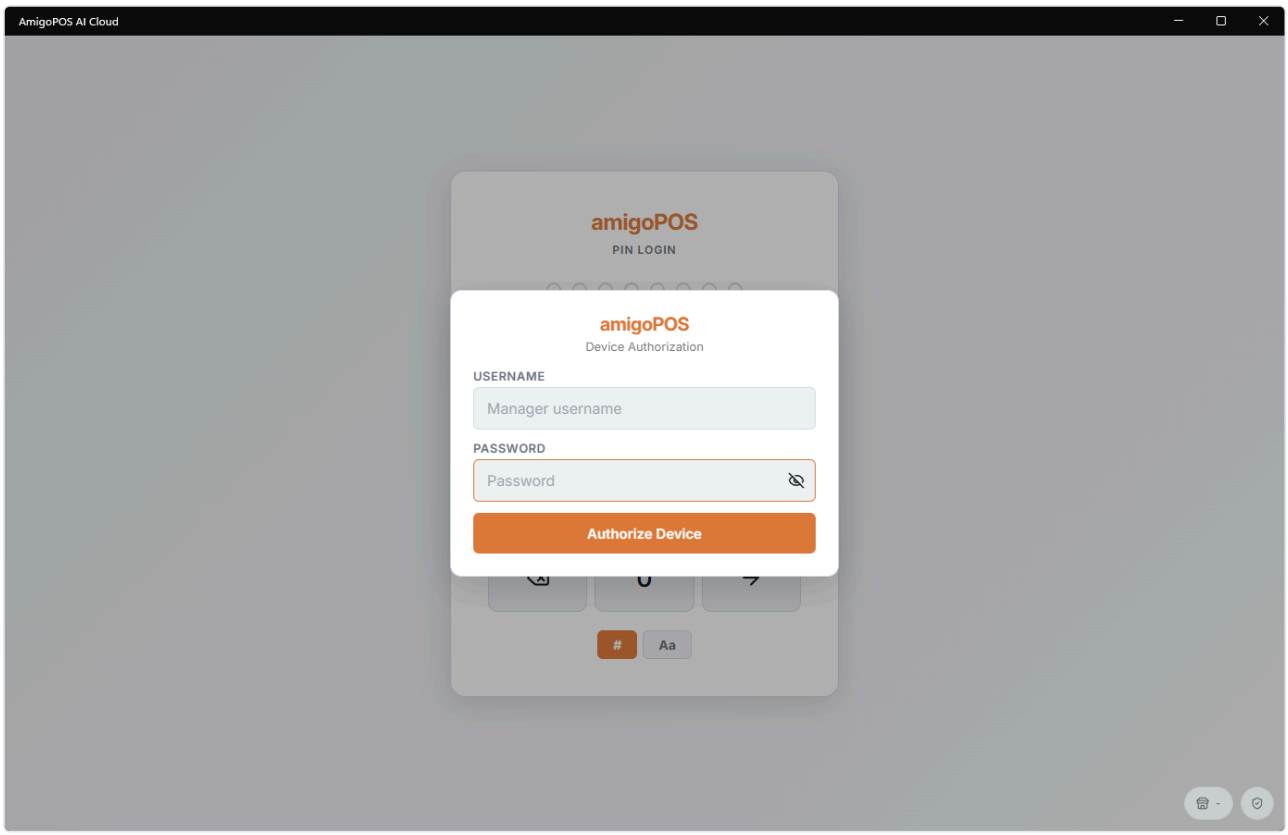
How a device joins your store, and where it is decided what kind of device it is.

Before a device can take orders it must be **authorized** — joined to one of your stores. It is done once per device.

Authorizing with an activation code

1. In **Back Office › Hardware & Printing › Registered Devices**, choose the store and what the device will be, and press **Generate Code**.
2. Launch the app on the new device and type the code. A code is good for 15 minutes and for one device.
3. Give the device a name. Name it for where it is — Bar, Patio, Front — so it is easy to pick out later.

The code already carries the store and the kind of device, so nobody has to sign in on the new device. See Activation codes and device limits for the details and for what the store's plan allows.



Authorizing by signing in

When there is no Back Office to make a code with — the first device of a new store, for example — sign in on the device's authorization screen with a manager **username and password**, select the **store** (multi-store accounts only) and pick the **station**, so drawers, printers and reports know which physical register this is.

What kind of device it is

- **POS station** — the full register: order entry, payments, drawers.
- **Call center seat** — the phone-order workflow: customer lookup first, store routing, no local drawer.
- **Kitchen display** — the KDS ticket screen; see Connecting a KDS display.
- **Print agent** — the helper that drives the printers; see Activating an agent for the right store.
- **Customer display** — the customer-facing second screen, paired to its register; see Pairing a separate display.

The kind is decided when the code is generated. A register can later be switched between POS station and call center seat, but only in Back Office, where the store's plan is checked; the register shows its mode and cannot change it. See POS station or call center seat.

Every device that has joined is listed in Registered Devices: every device on your account.

> Authorization is per device. A lost or retired device is removed in **Back Office › Hardware & Printing › Registered Devices**, which turns it away the next time it connects; see Deactivating a device. To put a new device in its place, see Replacing a register.

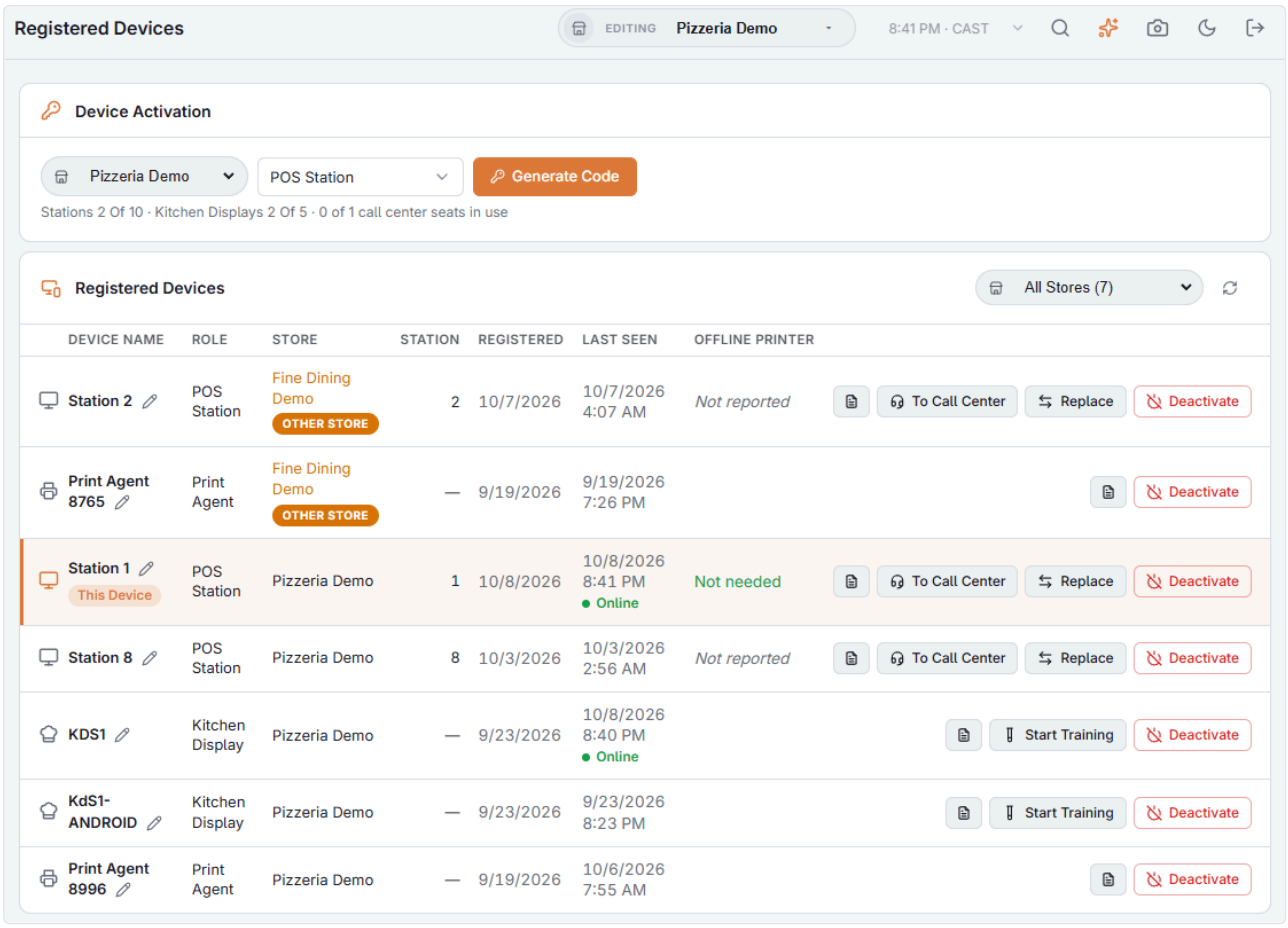
Registered Devices: every device on your account

Getting Started › Device setup

View online ↗

The Back Office page that lists every register, kitchen display, print agent and customer display on the account, shows which are running, and is where devices are added, renamed, replaced and removed.

Back Office › Hardware & Printing › Registered Devices lists every device that has joined your account: registers, call center seats, kitchen displays, print agents and customer displays, for all of your stores. It is also where a new device gets its activation code, and where a device is renamed, switched, replaced or removed. The same page is listed under **Subscription** too.



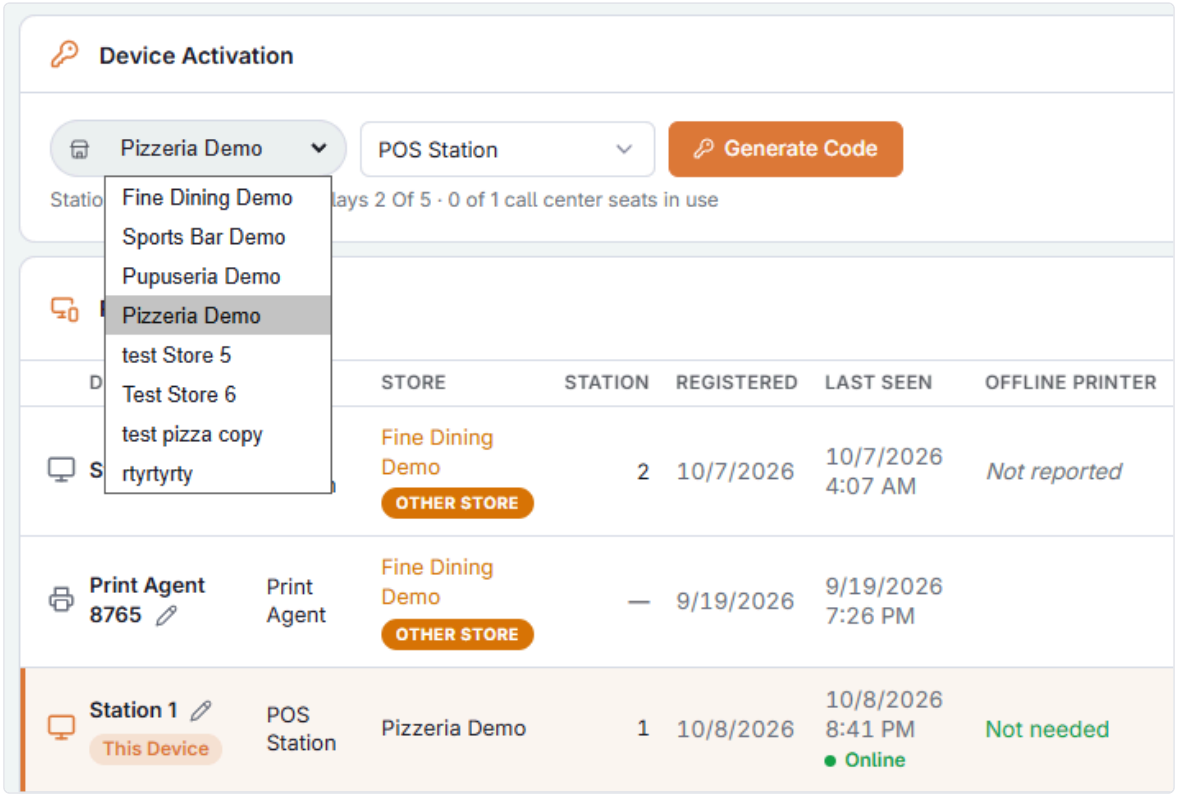
Reading the list

- **The icon on the left** is the kind of device: a monitor for a POS station, a headset for a call center seat, a chef's hat for a kitchen display, a printer for a print agent, and a monitor with a phone for a customer display.
- **Device Name** — the name it was given when it was activated. The device you are working on is tinted and tagged **This Device**.
- **Role** — what it is. A kitchen display in training also carries a **Training Mode** tag.
- **Store** — where it is. A device of a store other than the one Back Office is editing is tagged **Other Store**.
- **Station** — the station number of a register, or of the register a customer display is paired to. Kitchen displays and print agents show a dash.
- **Registered** and **Last Seen** — when it joined, and when the server last heard from it.
- **Offline Printer** — for POS stations only: the backup printer the register uses while it cannot reach the server.

Offline Printer shows	Meaning
Not reported	The register has not reported its offline printer yet, for example because it has not been online since it was updated. It does not mean that nothing is set up.
Not needed	The register is set up not to print while offline.
Not set up	No offline printer is set. Receipts will not print during an outage.
address — **tested** *date*	A printer is set and a test print reached it on that date.
address — **never tested**	A printer is set but has never been tested. Test it before you rely on it.

See Preparing a station for offline mode.

Rows are sorted by store name, then by kind of device, then by station number. When your devices are in more than one store, a store picker appears in the header of the list. **All Stores** shows every device; each entry shows how many devices it has. The refresh button next to it reloads the list.



Online, and not seen for a long time

Under Last Seen, **Online** means the device was in touch within the last five minutes. **Not Seen In 30 Days** marks a device that has been silent for a month — usually one that was retired without being removed. It keeps its place in your plan until you deactivate it; see Deactivating a device.

> The page never says “offline”. A device that has just lost its connection stops showing Online a few minutes later. A kitchen display or print agent that only listens can be running without showing Online. The list is a snapshot: press the refresh button for the current picture.

Renaming a device

Press the pencil next to the name, type the new one and press **Save** (or Enter; Escape cancels). Names are unique within a store: if another device there already has the name, the page says so and leaves the box open for you to correct it.

The buttons on a row

- The **document icon** (**Logs**) opens the log bundles the device has uploaded; see Analyzing station logs with AI.
- **Start Training** or **End Training**, on a kitchen display, sends the screen to the store’s training store or back to the live store. Restart the screen afterwards. See Training mode: a practice register.
- **To Call Center** or **To POS Station** switches a register between the two; see POS station or call center seat.
- **Replace**, on a POS station or call center seat, hands its place to a new device; see Replacing a register.
- **Deactivate** removes the device; see Deactivating a device.
- **Unlock** appears when sign-in on that device is paused after too many wrong attempts.

Paused sign-in

When sign-in on a register has been paused, its row shows **PIN Sign-In Paused Until** *time* (or **Password Sign-In Paused Until** *time*) under the name, with an **Unlock** button. Pauses that do not belong to a device in the list — a web Back Office sign-in, or a register of another

store — are listed in a **Paused Sign-In** card above the list, with who it is, until when, how many wrong attempts there were today, and **Unlock**. See Sign-in lockout (too many wrong PINs).

Adding a device

The **Device Activation** card at the top makes the one-time code a new device joins with. See Activation codes and device limits.

Who can do what

Action	Who
See the list and open a device's logs	Anyone who can open the page.
Rename, Deactivate, Unlock	A job with the **Register Devices** or **Manager Screen** permission, or an administrator.
Device Activation, To Call Center / To POS Station, Replace	A job with the **Register Devices** permission, or an administrator.
Start Training / End Training	A job with the **Training Mode** permission.

Buttons you may not use are not shown.

Activation codes and device limits

Getting Started › Device setup

View online ↗

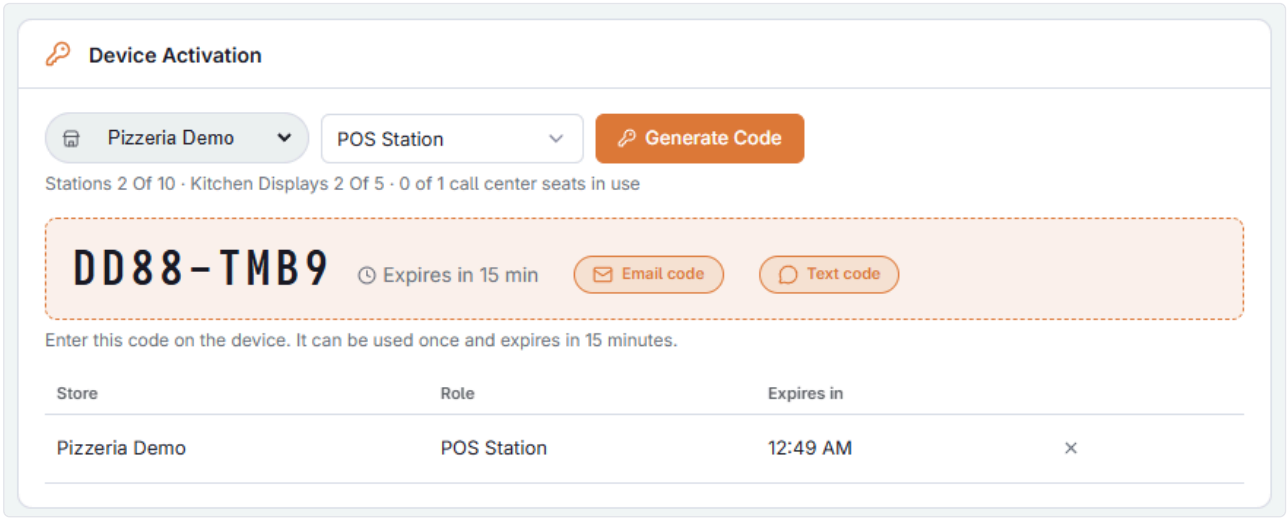
Generating the one-time code a new device joins with, and what the page tells you about how many stations, kitchen displays and call center seats the store's plan allows.

A new device joins a store with a one-time **activation code**. Codes are generated in the **Device Activation** card at the top of **Back Office › Hardware & Printing › Registered Devices**.

Generating a code

1. Choose the **store**. The picker starts on the store Back Office is editing.
2. Choose what the device will be: **POS Station**, **Call Center**, **Kitchen Display** or **Print Agent**.
3. Press **Generate Code** and confirm.
4. Type the code on the new device. It is good for 15 minutes and for one device.

The code is copied to the clipboard, and **Email Code** and **Text Code** send it to whoever is standing at the device. Codes that have not been used yet are listed under the card with their store, what they are for and when they run out; press **×** to cancel one.



A customer display does not use this card. It is paired to its register; see Pairing a separate display.

What your plan allows

Under the role list, a line shows what the chosen store has against what its plan allows, for example *Stations 2 Of 5 · Kitchen Displays 2 Of 3 · 0 of 1 call center seats in use*.

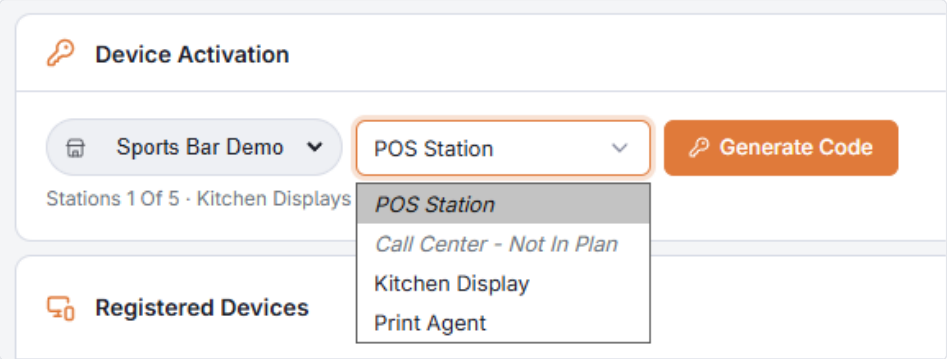
- **Stations** are registers. POS stations and call center seats share the store's station numbers.
- **Kitchen displays** are the screens the plan includes, plus any that were added to it.
- **Call center seats** are shown only when the store's plan includes the call center.

Print agents are not counted.

When an entry is greyed out

When the store has no room for a kind of device, its entry in the role list is greyed and says why — so you find out here, and not at the new device with a code that will not work:

- **No Station Free**, on POS Station and Call Center — every station number of the store is in use, or the account has reached its device limit.
- **No Display Free**, on Kitchen Display — the store already has every kitchen display in its plan. **Not In Plan** there means the plan includes none.
- **Not In Plan** or **No Seats Free**, on Call Center — the store's plan has no call center, or all of its seats are taken.



To make room, deactivate a device that is no longer used — one marked **Not Seen In 30 Days** is the usual candidate; see Deactivating a device — or have stations, displays or seats added to the store's plan.

> A limit only ever stops a *new* device from joining. A store that is over a limit keeps every device it has.

If a code is refused on the device itself, see A device will not activate.

POS station or call center seat

Getting Started › Device setup

View online ↗

A register is one or the other. The choice is made in Back Office, where the store's plan is checked, and the register itself only shows it.

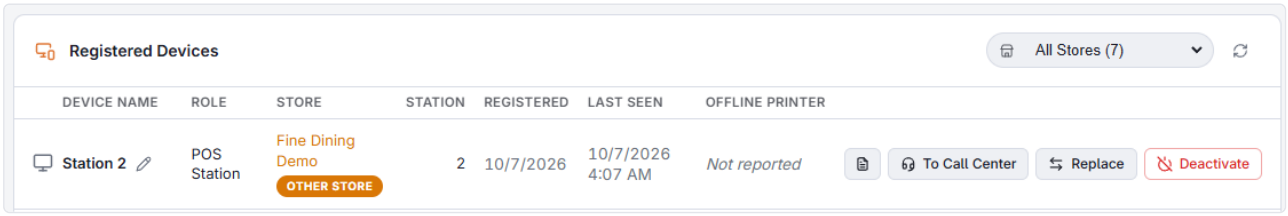
A register works either as a **POS station** — the full till: orders, payments, drawers — or as a **call center seat**, which starts from the customer and sends each order to a store. It is one or the other; a register cannot flip between the two by itself.

The choice is made in **Back Office › Hardware & Printing › Registered Devices**, because that is where the store's plan can be checked. It used to be a switch on the register; that switch is gone.

Switching a register

1. Find the register in the list.
2. Press **To Call Center** — or **To POS Station** to go back — and confirm.
3. The register signs out. Whoever signs in next gets the other set of screens.

If it is the register you are working on, the confirmation says so: you are signed out as well.



When the button is missing or greyed

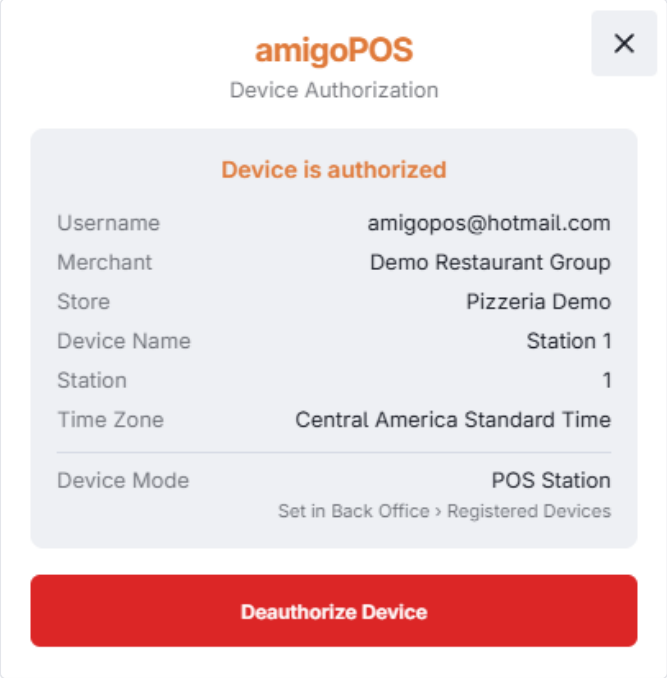
- **To Call Center** is offered only at stores whose plan includes the call center. At other stores the rows show nothing new.
- It is greyed, with the reason as its tooltip, when every call center seat of the store is taken.
- **To POS Station** is always available: a seat can always go back to being a till.

Adding a seat instead of converting a register

Generate an activation code with the role **Call Center** and enter it on the new device; see Activation codes and device limits.

On the register

More › Settings › License Status shows the register's **Device Mode**, and only shows it. To change it, use Back Office as above.



For what a seat does once it is one, see Taking a call-center order.

A seat's own location

A seat is usually registered to an office rather than a store. The office is a store record of its own (no menu needed), and a seat's Back Office keeps the pages that belong to it — Registered Devices, Print Routing, Caller ID — while hiding the store-bound ones. The office line, the office receipt printer and the seat's copy of each order are set up there: The call center's own hardware.

Replacing a register

Getting Started › Device setup

View online ↗

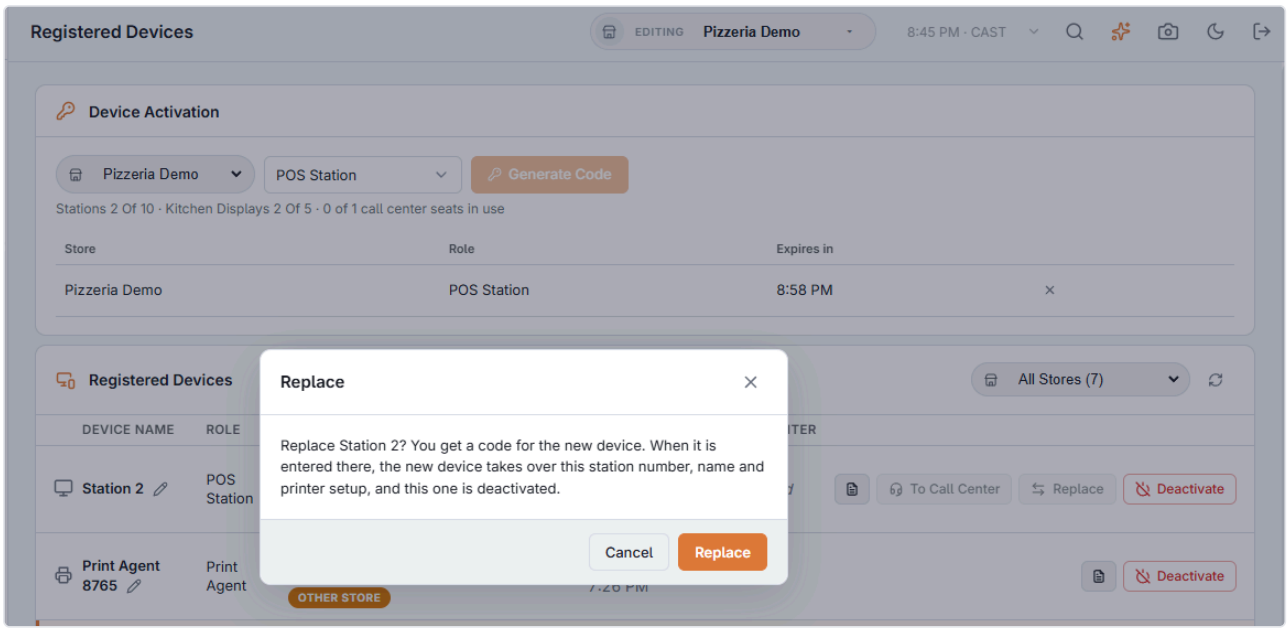
Hand a register's station number, name and printer setup to a new device with one code, instead of deactivating the old one and starting again.

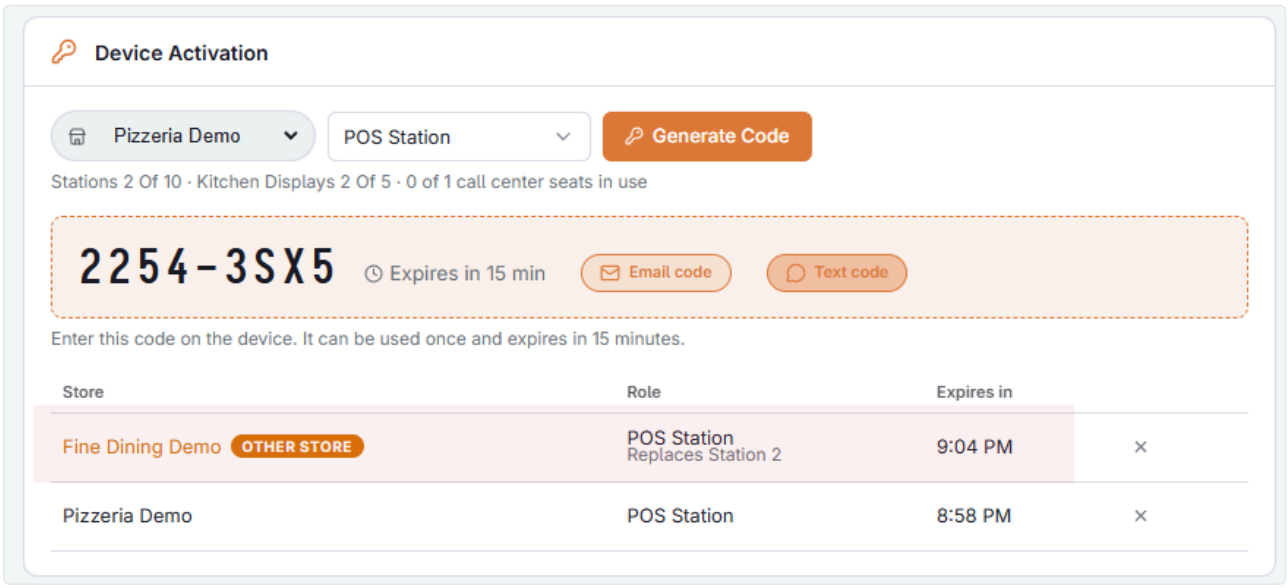
When a register breaks, is lost or is being upgraded, **Replace** gives its place to a new device: the same station number, the same name, the same role, and the printers that were chosen for that station. An ordinary activation code would give the new device the lowest free station number instead — and with it, another station's cash drawers.

Replacing

1. In **Back Office › Hardware & Printing › Registered Devices**, press **Replace** on the register's row and confirm.
2. A code appears in the Device Activation card, as when generating any code. In the list under the card it is marked **Replaces Station *n***.
3. Install the app on the new device and type the code. Type a name only if you want a different one.

The moment the code is accepted, the new device takes over and the old one is deactivated. Until then nothing has changed: the old register keeps working and keeps its station number, and a code that is never used simply runs out after 15 minutes.





What moves and what does not

- **Moves:** the station number, the name, whether it is a POS station or a call center seat, the cash drawers of that station, and the printers chosen for that station in Print routing.
- **Does not move:** orders and time punches the old device had not sent yet. If it last reported any, the confirmation says how many. When the old device still works, let it finish sending first; see After an outage.
- **Set again on the new device:** its backup printer for working offline; see Preparing a station for offline mode.

> Replace is for registers: POS stations and call center seats. A kitchen display or a print agent is deactivated and then activated again with a new code; see Connecting a KDS display and Activating an agent for the right store.

Deactivating a device

Getting Started › Device setup

View online ↗

Removing a device from the account, from Back Office or from the device itself, and what the confirmation warns you about first.

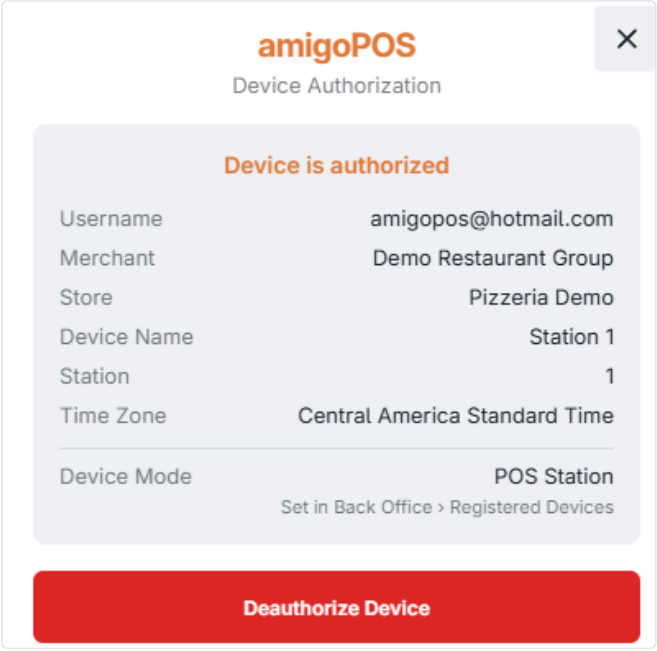
Deactivating removes a device from your account. It can no longer sign in, and its station number, its name and its place in your plan are free again. The sales, drawers and reports it produced stay exactly as they are.

From Back Office

In **Back Office › Hardware & Printing › Registered Devices**, press **Deactivate** on the device's row. This is how a lost, stolen or broken device is removed: it does not have to be there, or working.

From the device

On a register, **More › Settings › License Status** has **Deauthorize**. A manager has to approve it: a manager who is signed in simply confirms; when someone else is signed in, the manager override is asked for; and from the sign-in screen it asks for a manager's PIN.

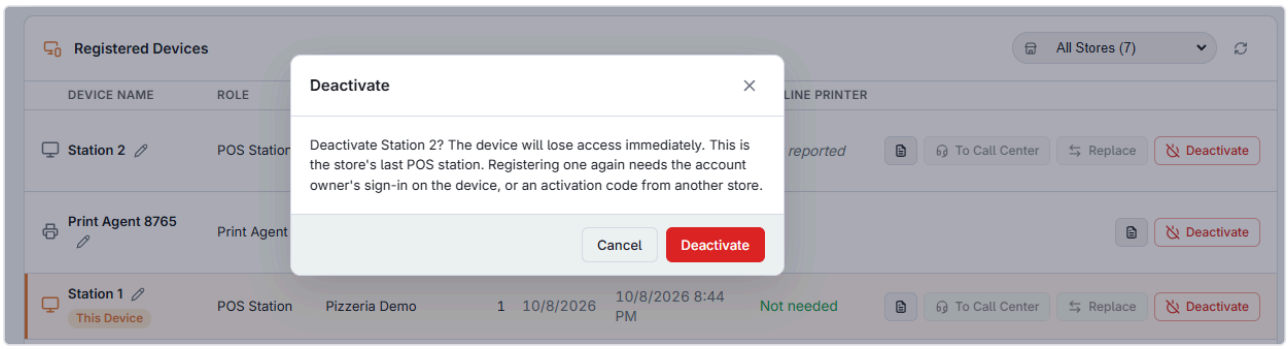


> If the device cannot reach the server at all, Deauthorize goes ahead without asking for a manager, so that a device can always be taken out of service. Deactivate it in Back Office as well: the server was never told.

What the confirmation tells you

Before anything is removed, the confirmation lists what the device would leave behind. None of it stops you — a broken device must still be removable — but read it:

- **Orders not sent yet.** Orders taken while the device was offline that have not reached the server. Once it is deactivated they can no longer be sent, and End Of Day stops waiting for them.
- **Time punches not sent yet.** Clock-ins and clock-outs made offline, for the same reason.
- **A drawer that still needs a reset.** Cash was taken on this station and its drawer has not been reset. End Of Day will still ask for that reset; it can be done from another station with **Reset Here** — see Running end of day.
- **The store's last POS station.** With none left the store cannot ring up sales, and activating one again needs the account owner's sign-in on the new device.



From Back Office, the numbers are what the device last reported; on the device itself they are counted on the spot. A device on an older version of the app does not report time punches, and then nothing is said about them — that means unknown, not none.

> If the device still works, let it send what it holds before you remove it: connect it, wait until it has nothing left to send (see After an outage), and reset its drawer.

Afterwards

A device that is still running is turned away the next time it contacts the server and goes back to its activation screen. To use it again, give it a new code; see Activation codes and device limits. To put a new device in its place, use Replace instead of deactivating, because it keeps the station number; see Replacing a register.

Idle behaviour and locking

Getting Started › Device setup

View online ↗

What happens to an unattended station and to the order that was on it.

A station left idle does not sign you out and throw the order away. It **locks**, and the order is parked.

What happens

1. After the store's idle period, a **ten-second countdown** appears. Touching the screen cancels it.
2. If nobody does, the station locks: the order in progress is parked under whoever was signed in, and the PIN screen appears.
3. When that person PINs back in, **their parked order comes back**. Anyone else PINing in gets a clean screen and can work normally.

Locking on purpose

The lock action does the same thing without waiting. On a shared station that is the right way to step away: it hands the till to the next person in one tap while keeping your check.

> The open order is saved continuously to the station, not just held in memory. A tablet going to sleep, a browser reload, a dropped connection or a closed app does not take the check with it.

> A parked order is not kept forever — one abandoned for hours is discarded rather than restored. Do not park a live check at the end of a shift and expect it tomorrow; settle it or leave it as a proper open order.

CHAPTER 2

AI Assistant

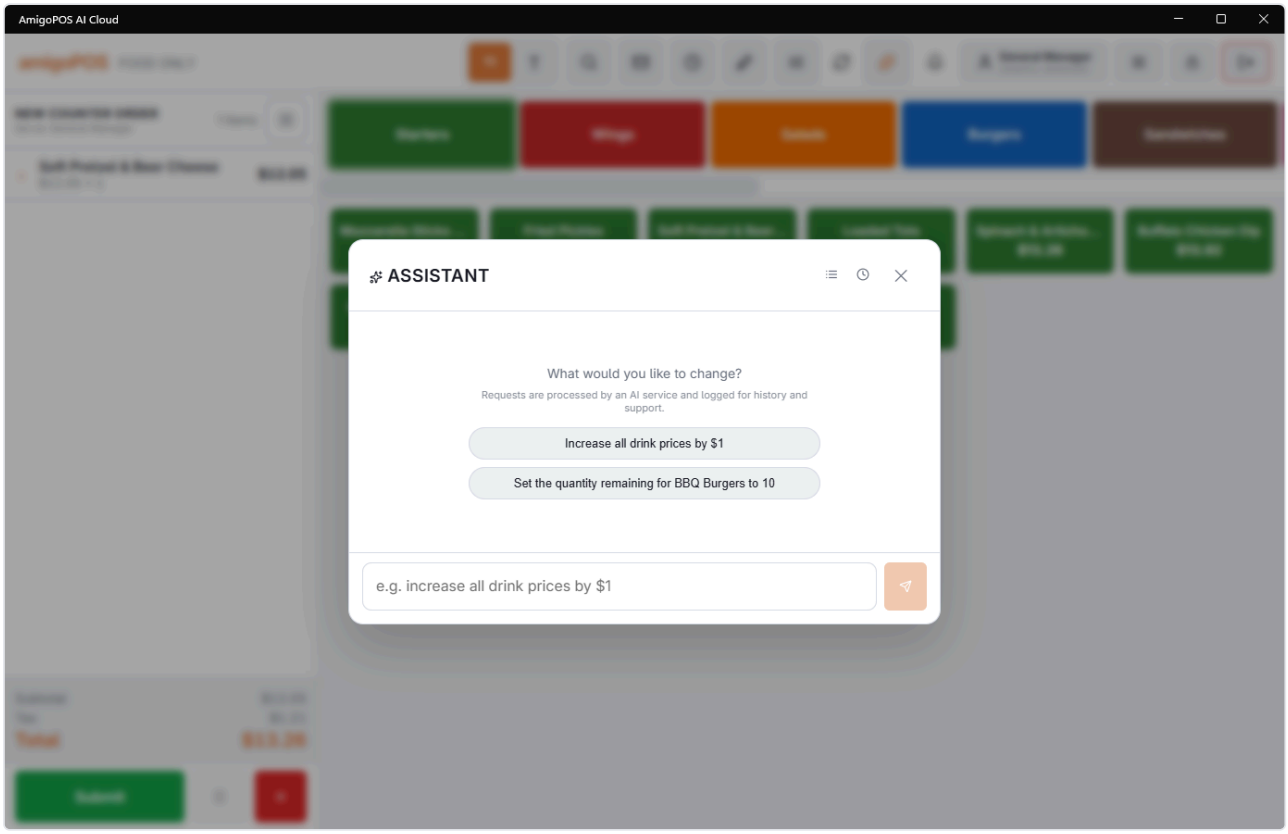
What the AI Assistant can do

AI Assistant

View online ↗

opening it, the seven capability areas including inventory and purchasing, the copy and schedule actions under each answer, what it deliberately doesn't touch, language behavior

The **AI Assistant** is a built-in helper you talk to in plain language. Instead of hunting through Back Office screens, you describe what you want — "raise all drink prices by a dollar", "how much should be in the bar drawer?", "what do I need to order this week?" — and the assistant looks up the real data, shows you exactly what will change, and applies it only after you confirm.



Opening the assistant

Tap the **Assistant** icon in the top bar. The overlay opens over whatever you are doing, and closing it never disturbs the order on screen. Each time you open it you start a fresh conversation.

What it can work with

- **Menu** — look up items and categories, adjust prices, set quantity-remaining counters, rename items, and create new categories, menu items, modifier groups, bar modifiers, and bar qualifiers (see *Creating menu content with the assistant*).
- **Cash drawers** — list drawers, check the live expected cash, review recent counts and over/short results, move or rename drawers, set count and drop thresholds, and free up a stuck drawer.
- **Employees** — create employees, assign jobs, change PINs, enable or disable accounts, and check who is clocked in.
- **Demand forecast** — how busy the coming days will be, what to prep tomorrow, how reliable the forecast has been, and any demand alerts.
- **Inventory and purchasing** — how much of each ingredient you will need for the coming days, what is on hand, what to order and roughly what it will cost, plus recipes with plate cost and actual ingredient usage (see *Inventory and purchasing questions*).

- **The app itself** — ask where a setting lives ("where do I turn on user drawer assignment?") and the assistant answers with the location and shows the matching help articles as tappable cards.
- **The market** — ask how your prices compare locally and it will check competitor menus on the web, with appropriate caveats about how fresh online prices are.

Under every answer

Each reply has two small actions beneath it: **Copy** puts the answer on the clipboard, and **Schedule** turns the question into a recurring email — daily, weekly, monthly, or at End of Day — so the morning order list or the weekend prep forecast shows up in your inbox without opening the app (see *Scheduling a question by email*).

What it deliberately does not do

The assistant only sees the areas listed above, only offers actions your PIN's permission group allows, and never applies a change without showing you a preview first. It cannot take payments, edit open orders, or touch anything outside your store.

> The assistant speaks your language — ask in Spanish, get answers in Spanish. It also knows today's date for your store, so "this weekend" and "next week" mean what you expect.

On the register

The assistant also works the order in front of you: add menu or misc items with prep instructions, repeat a round, print receipts, void with a reason, and settle cash — see *Working the register by voice or text*. And it navigates: *"clock out"*, *"no sale"*, or *"open Riley Server"* in Back Office opens the right screen or editor directly — see *Opening screens and records*. Replies can be read aloud with *Voice replies*.

More the assistant can do

- Guests — reservations that might not show, regulars who stopped coming, what sells together: Guests: reservations, regulars and upselling.
- Allergen questions (always to be verified) and what a price change would do: Allergen and price questions.
- Who is heading into overtime this week: Overtime questions.
- What might run out today, and drafting purchase orders: Inventory and purchasing questions.

Every change the assistant makes is recorded in The AI change log, and all AI use counts toward the monthly allowance: AI usage, limits and your monthly allowance.

Quick actions

The assistant now opens on the quick-actions launcher: tap an area and an action, fill in a short form and press **OK** — no typing, and no AI allowance used. The top of it shows what needs attention at the store. Typing or speaking a request in the box below works as before. See Quick actions: done in a few taps.

More things the assistant can do

The assistant also handles deliveries and drivers, guest surveys and offers, manager alerts, payroll and tips, the kitchen display and devices, Uber Eats, QuickBooks and Xero and pool tables and table time. Each appears only where the store uses it and your job allows it.



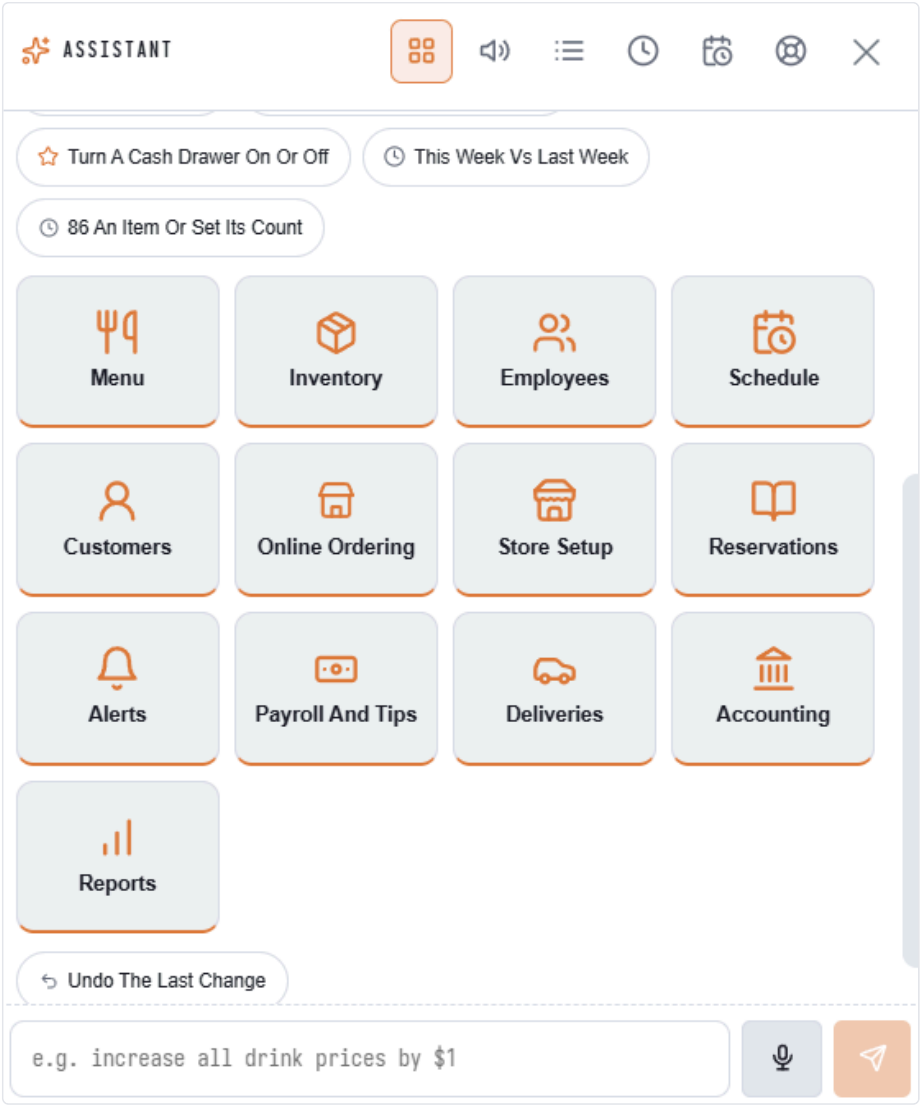
Quick actions: done in a few taps

AI Assistant

View online ↗

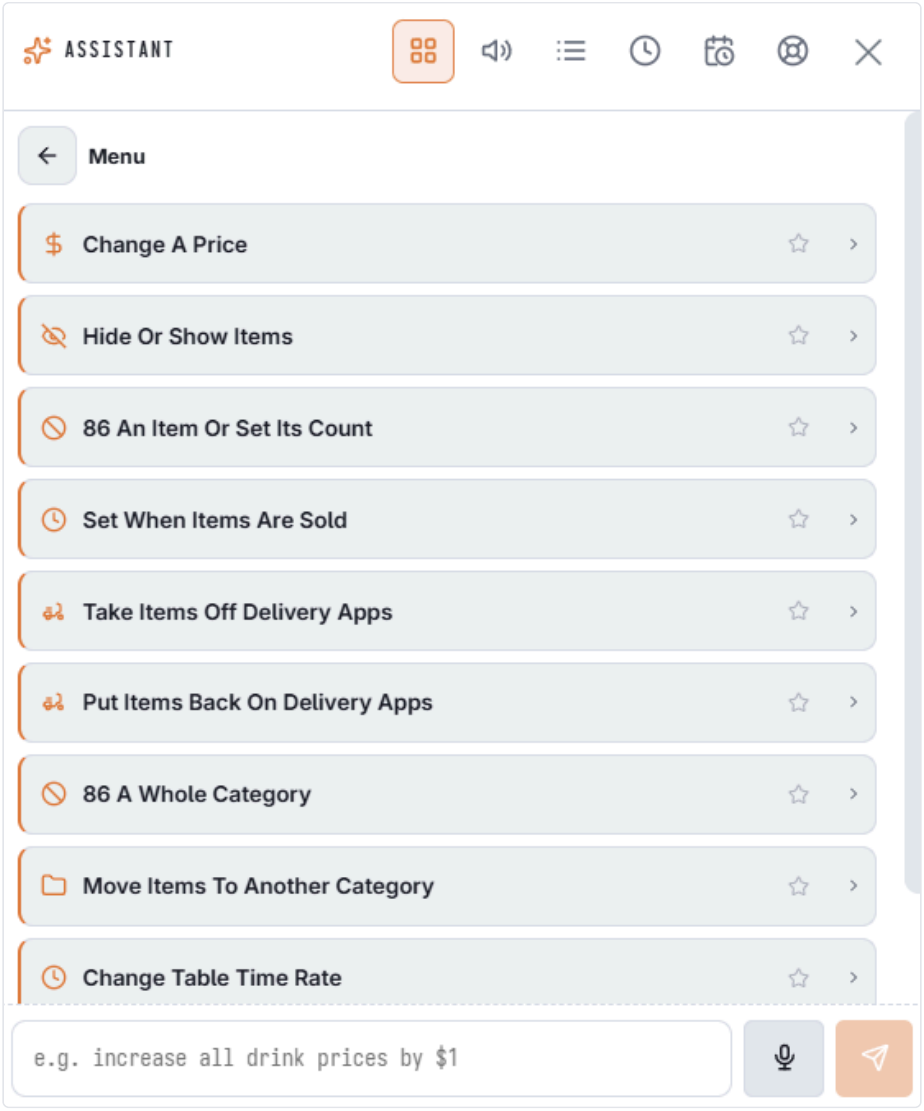
Do everyday Back Office jobs in the assistant by tapping an area and an action, filling a short form and pressing OK — instant, no AI allowance used.

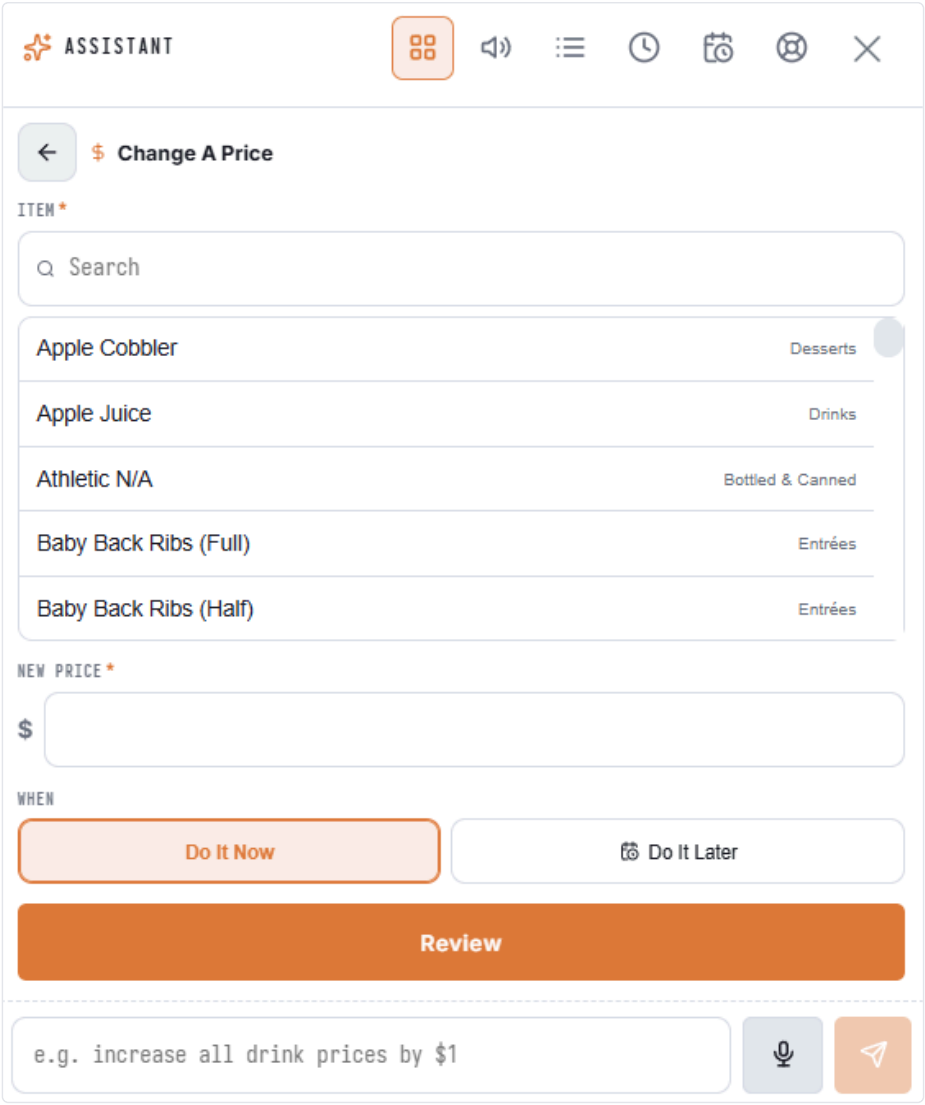
Quick actions let you do everyday Back Office jobs in the assistant with a few taps: change a price, 86 an item, fix a forgotten clock-out, pause online ordering, cover a shift. You pick from lists instead of typing, and the AI is not used, so a quick action is instant and does not count against your AI allowance.

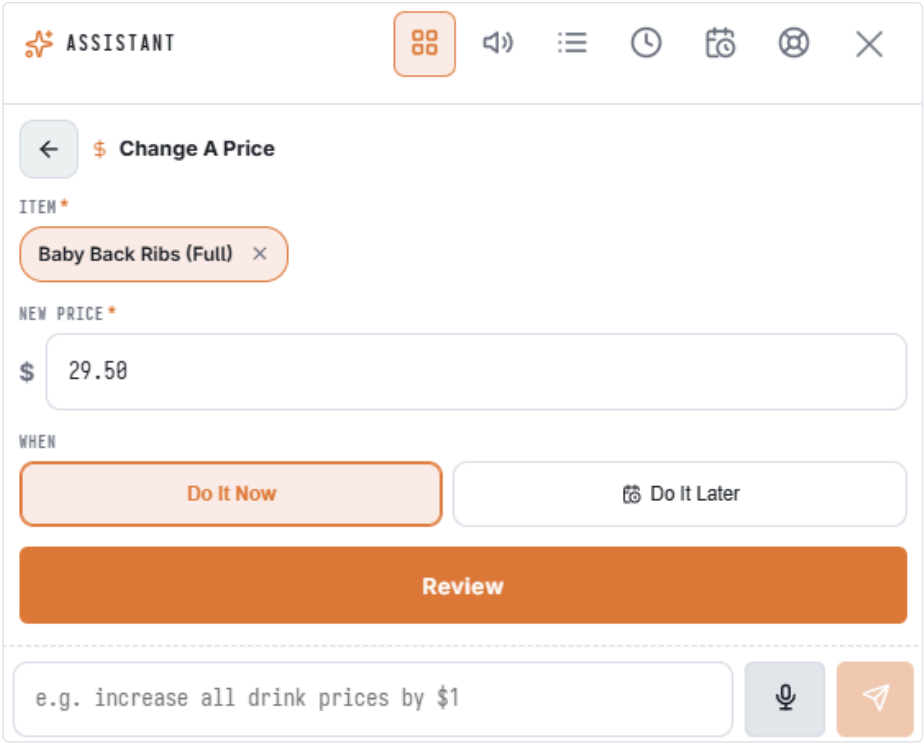


Doing a quick action

1. Open the assistant. The launcher shows first.
2. Tap an area tile (**Menu**, **Employees**, **Online Ordering** …), then the action you need.
3. Fill in the short form. Items, employees, shifts and customers are picked from a list — type a few letters to narrow it.
4. Tap **Review**. A card shows exactly what will change.
5. Tap **OK** to apply it, or **Cancel** to go back and change something.


ASSISTANT
Menu
Change A Price
Hide Or Show Items
86 An Item Or Set Its Count
Set When Items Are Sold
Take Items Off Delivery Apps
Put Items Back On Delivery Apps
86 A Whole Category
Move Items To Another Category
Change Table Time Rate
e.g. increase all drink prices by $1

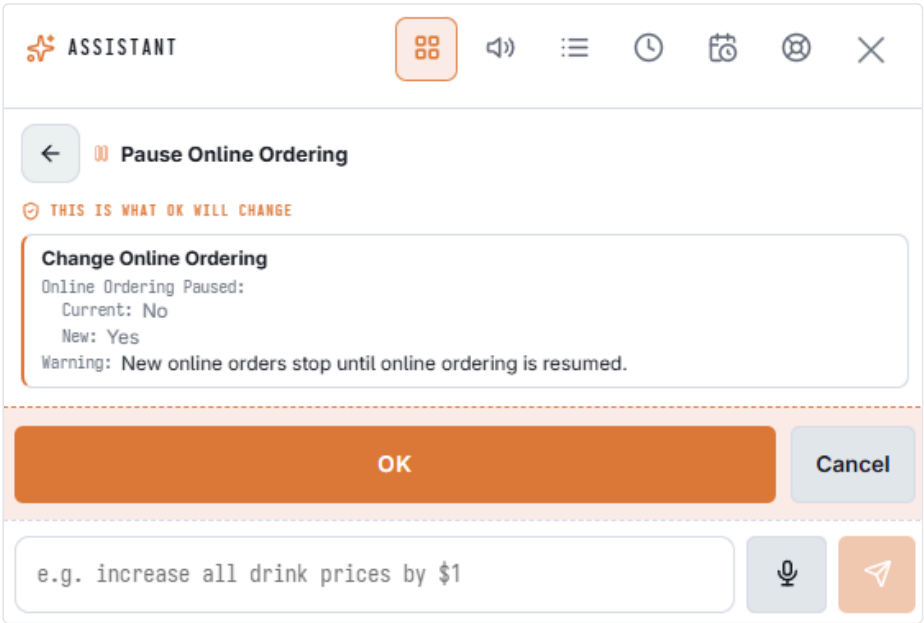

ASSISTANT
$ Change A Price
ITEM *
Search
Apple Cobbler
Desserts
Apple Juice
Drinks
Athletic N/A
Bottled & Canned
Baby Back Ribs (Full)
Entrées
Baby Back Ribs (Half)
Entrées
NEW PRICE *
$
WHEN
Do It Now
Do It Later
Review
e.g. increase all drink prices by $1



Nothing changes until you press **OK**. Changes that touch many records ask you to type a word or number from the card first, the same as in the chat.

After OK

You see what was done. **Undo This** reverses most changes for a short time afterwards, and a follow-up chip offers the next likely step — for example **Resume Online Ordering** after a pause. **Do Something Else** goes back to the tiles.



Do it later

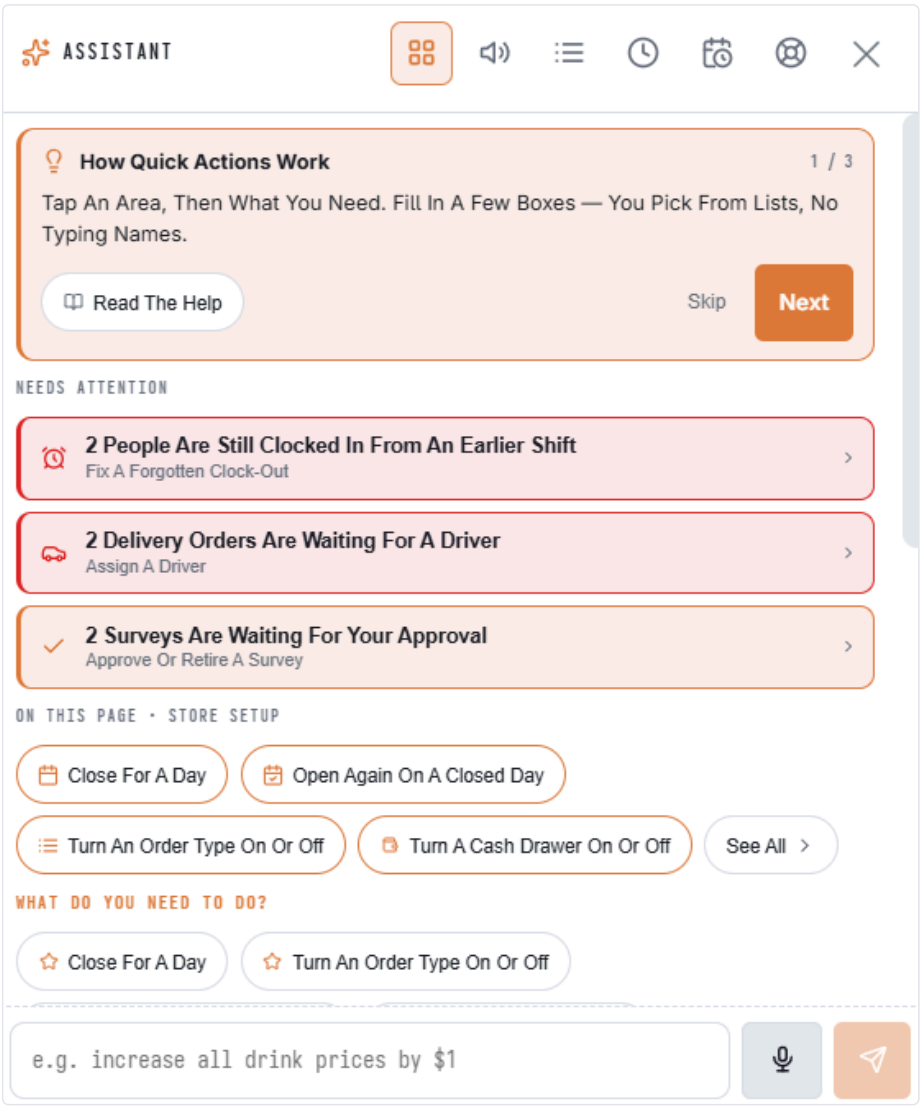
Many actions have a **Do It Now / Do It Later** switch. Choose **Do It Later** and a time to schedule the change — for example, resume online ordering at 6 pm. You approve it now; it runs at that time. To see or cancel changes waiting to run, ask the assistant *"what changes are scheduled?"*.

Favorites and recent

Tap the star next to an action to keep it on the launcher's first screen. The actions you used last show there too. Both are remembered for you on this device.

First-time tips

The first time you open the launcher on a device, three short tips explain how it works. Tap the **i** button next to *What Do You Need To Do?* to see them again.



What you see

The launcher only shows actions your job may do and features your plan includes. Reports and lookups (such as *How Are Sales Today?*) are answered by the assistant in the chat and do use the AI. You can always type or speak a request in the box below the tiles instead. See Every quick action, by area and Needs Attention and On This Page.

Working the register by voice or text

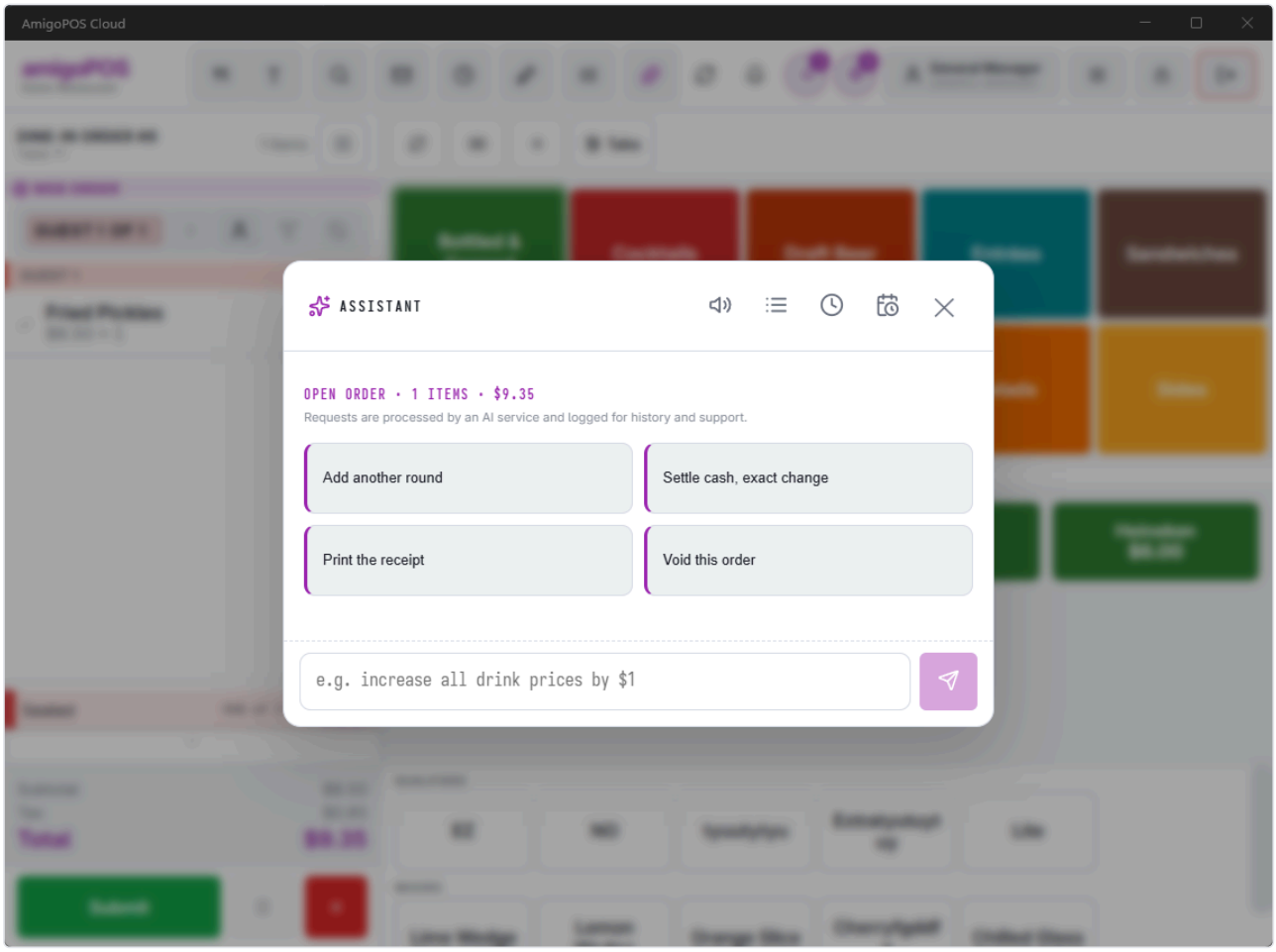
AI Assistant

View online ↗

Add items, another round, or a misc item to the open order, print receipts, void, and settle cash — by typing or speaking, with the same guards as the touch screen.

The assistant can work the **open order** for you. Say what you want in plain words — *"add a small Coke, no ice"*, *"add another round"*, *"add a misc item, side bacon, 3.50"* — and the item appears on the check exactly as if you had tapped it in, with the same pricing rules,

event pricing, and prep routing.



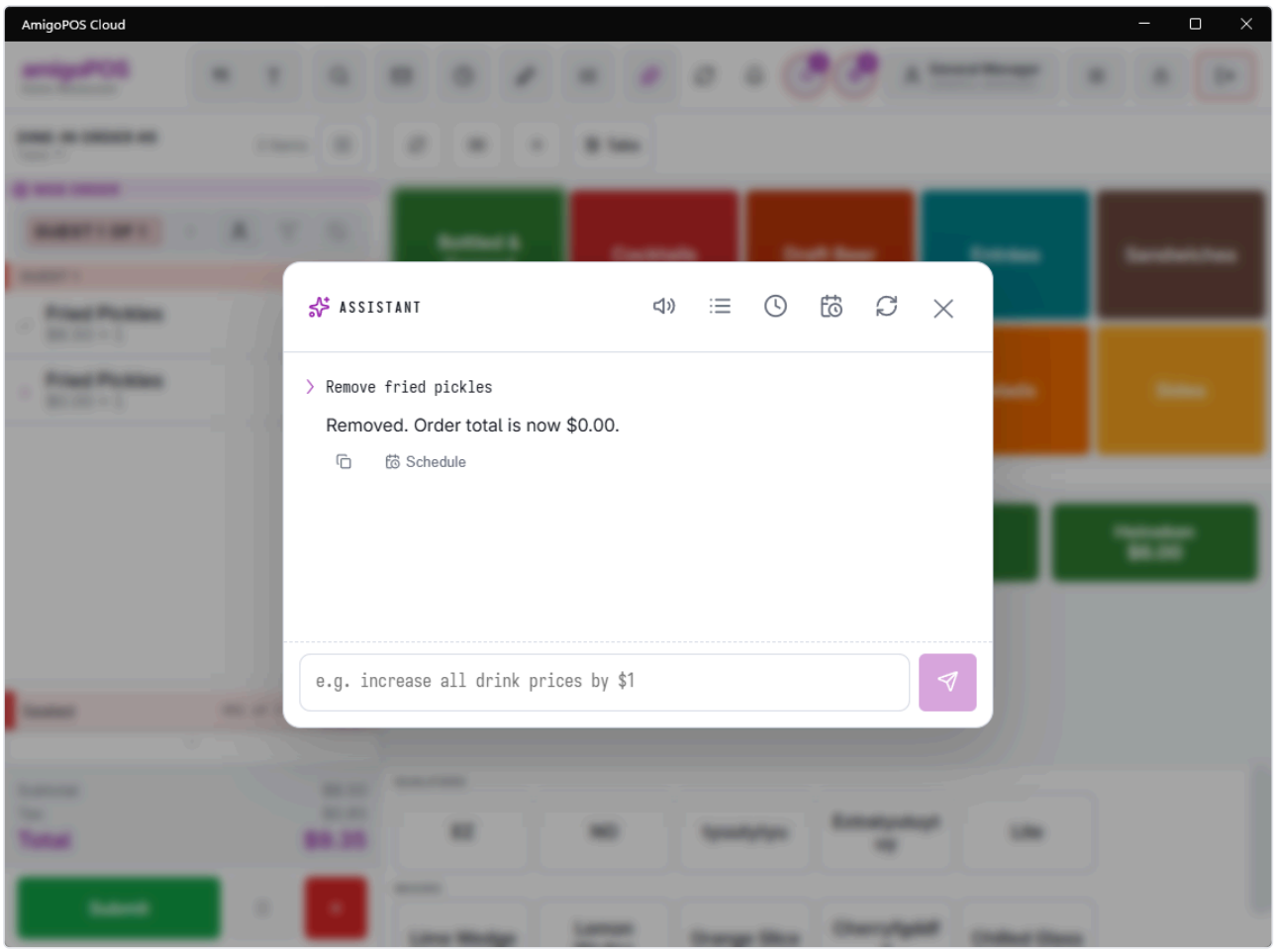
Adding items

- **Menu items** — name the item and any prep instructions: *“add two Margaritas, no salt”*. Prep instructions ride along as no-charge modifiers, exactly like notes keyed at the register. If several items match the name, the assistant asks which one.
- **Another round** — duplicates every active item on the order, modifiers included — the same Round button bartenders already use.
- **Misc items** — anything not on the menu: give a name and a price (*“misc item, side bacon, 3.50”*). If you skip the price, the assistant asks for it.

Order commands

Beyond adding items, the assistant can act on the open order or the order selected in the **orders list**:

- **Print receipt** — reprints on this station’s printer. The order must already be saved. For an order selected in the orders list it needs the **Reprint** permission, as the list’s Print button does; without it, a manager approves.
- **Void** — give the reason in your own words (*“void this order, took too long”*); it is matched to your configured void reasons.
- **Settle cash** — *“settle cash, exact change”* tenders the balance due; name an amount and the assistant states the change due. The station’s cash drawer rules apply exactly as at the register — no active drawer, no cash settle.



What confirms and what doesn't

Adding items, rounds, and printing happen immediately — the result is right there on the screen in front of you, and removing a line takes one tap. **Voids and cash settles always confirm first**: the assistant restates the order and amount, and nothing happens until you say yes.

The assistant sees your screen

Every message you send includes a snapshot of the open order and the orders-list selection, so *"what's the total?"* or *"read this order back"* answers from the check in front of you — and the suggestion keys on the welcome screen change with what you are doing.

> The mic button dictates your request; pair it with *Voice replies* for a fully hands-busy exchange. Everything here works identically typed or spoken.

Needs Attention and On This Page

AI Assistant

View online ↗

What the top of the quick-actions launcher shows: things at the store one tap can fix, and the actions for the Back Office page you are on.

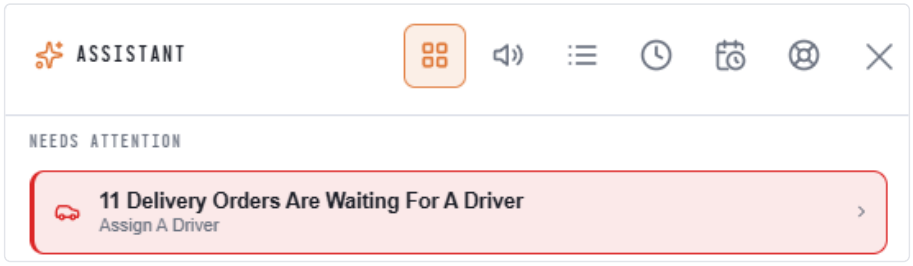
The top of the quick-actions launcher shows what needs doing now, and in Back Office the actions for the page you are on.

Needs Attention

When something at the store can be fixed with one quick action, it appears at the top with what to do. Tap it and the action opens with the form already filled in where possible. The list is checked each time you open the assistant and again after each change you make there.

- **Someone is still clocked in after 12 hours** — opens *Fix A Forgotten Clock-Out* (with that person picked when there is only one).
- **Online ordering is paused** — opens *Resume Online Ordering*.

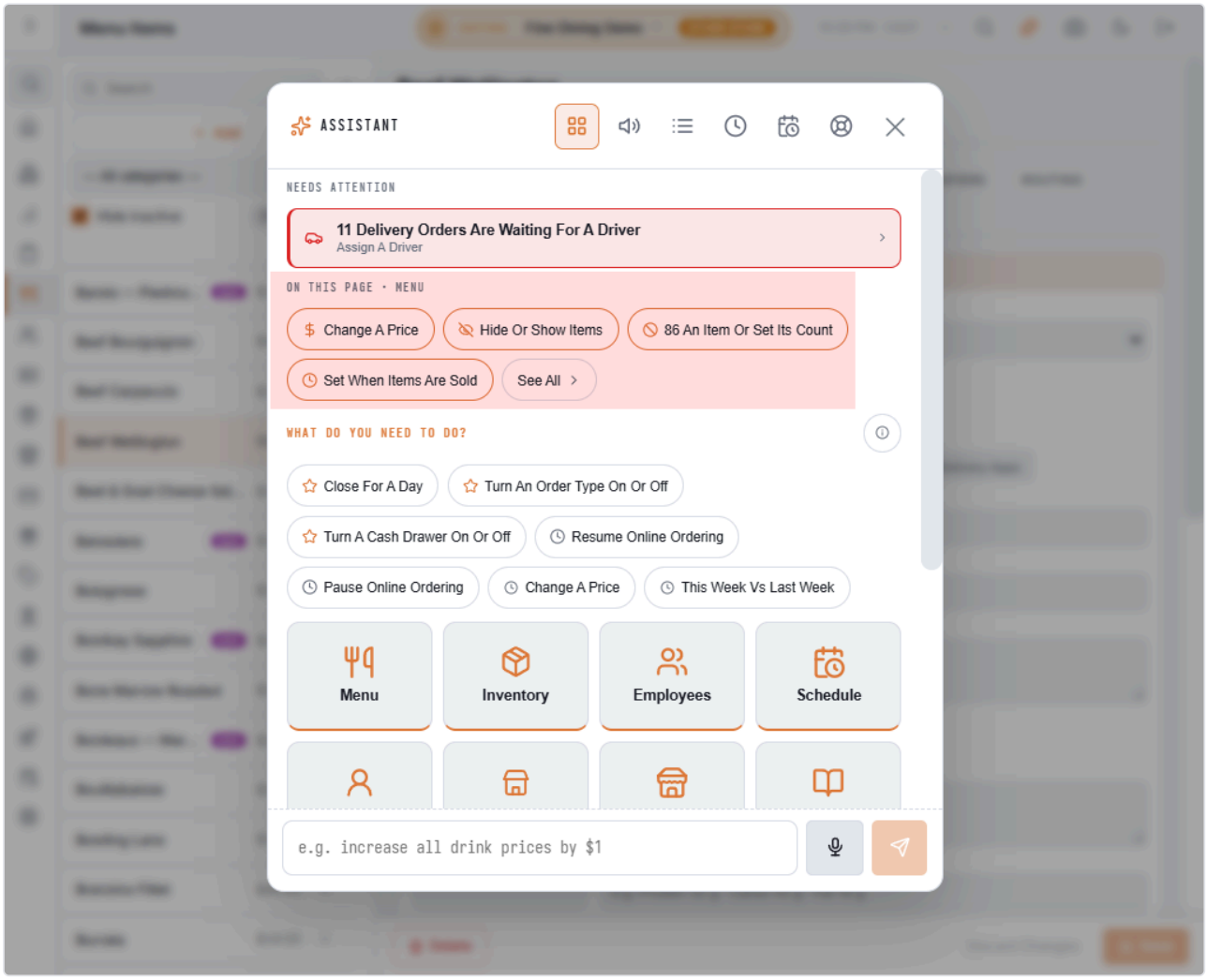
- **The store is marked closed today** — opens *Open Again On A Closed Day* for today.
- **Draft shifts are not published** — opens *Publish A Week* for that week. The count is the whole week, because publishing a week publishes every draft in it.
- **Time-off requests are waiting** — opens *Approve Or Decline Time Off*.



Items only show for actions your job may do. Urgent items, such as paused online ordering, are shown in the warning color.

On This Page

Open the assistant from a Back Office page and the actions for that part of Back Office appear first: menu actions on the menu pages, employee actions on the employee pages, and so on. **See All** opens the whole area.



See Quick actions: done in a few taps.

More items it can show

- **Manager alerts are open** — opens *I'm On It*; severe alerts are urgent.

- **Uber Eats is paused** — opens *Resume Uber Eats*.
- **An order is waiting for a driver** — opens *Assign A Driver*; urgent after 15 minutes. Orders with Entreo and scheduled orders not yet due are not counted.
- **A survey is waiting for your approval** — opens *Approve Or Retire A Survey*.

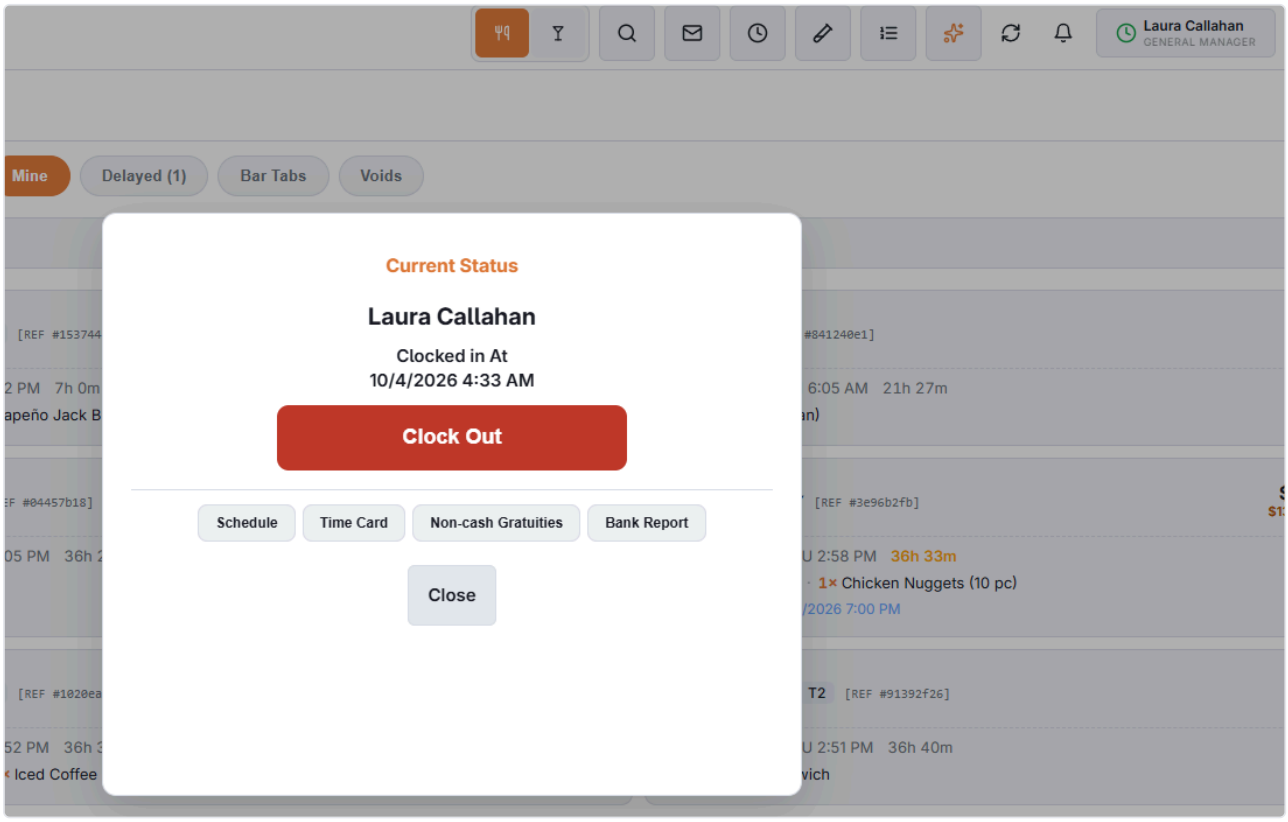
Opening screens and records

AI Assistant

View online ↗

Say where you want to go — "clock out", "no sale", "open Riley Server" — and the assistant opens the right screen or editor and gets out of the way.

The assistant doubles as a fast way **around** the app. Name the task — *"clock out"*, *"no sale"*, *"run end of day"*, *"change my PIN"* — and it opens the matching screen and closes itself. No exact wording is needed; it maps what you mean to the screen, in English or Spanish.



It only offers what's actually available

The assistant knows the live state of this station: whether you are clocked in, whether an order is open, whether a cash drawer is assigned, and what your permission group allows. Ask for the payout screen with no drawer and it tells you why instead of opening a screen that will refuse you. Manager screens — End of Day, Reports, Cash Drops, Shift Banking, and the rest — only appear for manager sign-ins.

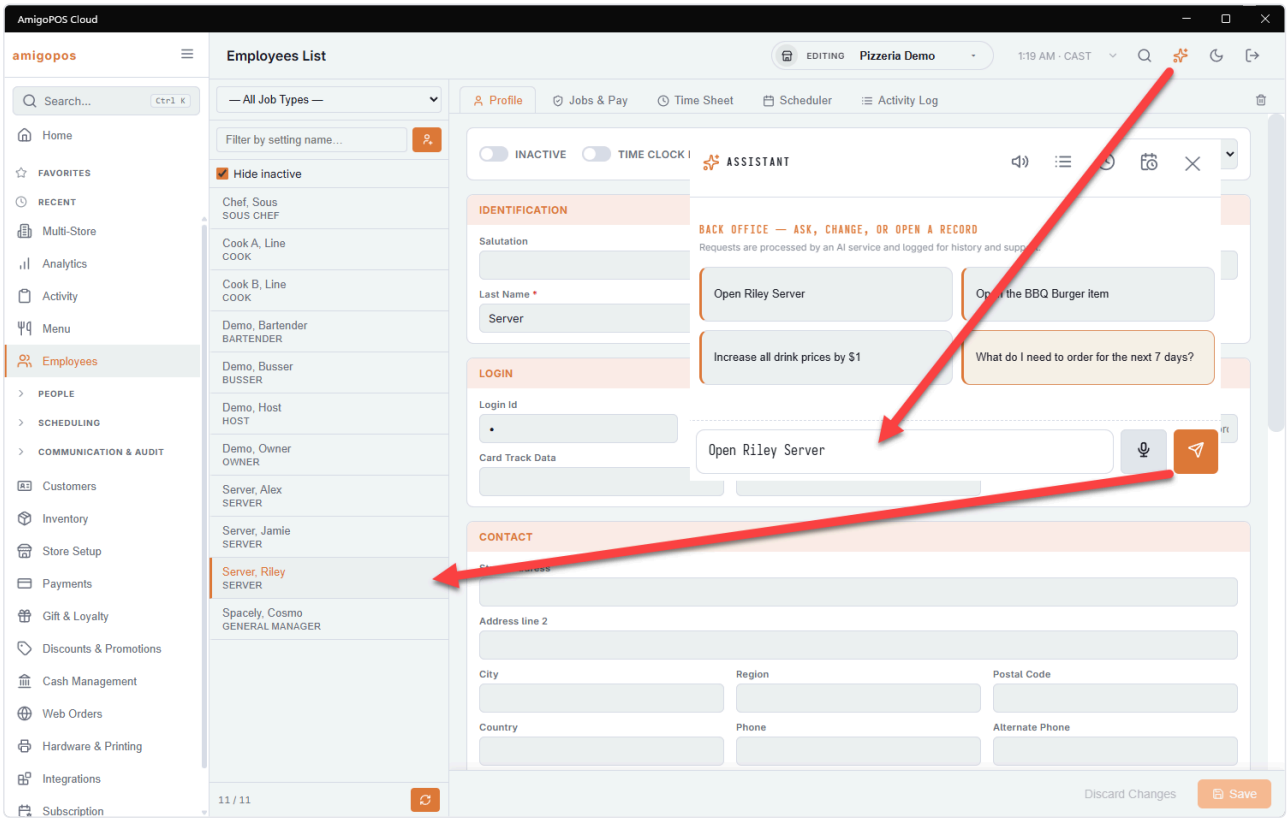
Everyday examples

- *"Clock in" / "clock out"* — opens Time Clock either way; the assistant already knows which one applies to you.
- *"Open the drawer"* — the No Sale function, with its normal drawer requirement.
- *"Gift cards"*, *"deliveries"*, *"floor overview"*, *"sticky notes"* — straight to the screen.
- *"Pre-EOD summary"*, *"variance report"*, *"tip adjust"* — manager functions, permission allowing.

In Back Office: straight to a record

Inside Back Office the assistant can open an editor **preselected to a specific record**. *"Open Riley Server"* lands on that employee's profile; *"open the BBQ Burger item"* opens the menu item editor with the item selected and its category filtered in. If the name matches more

than one record, the assistant asks which one before opening anything.



Station-level actions — wiping local data, applying updates, device authorization — are deliberately not reachable this way. Those stay behind their own screens.

Every quick action, by area

AI Assistant

View online ↗

The full list of quick actions in the assistant launcher, grouped by area, with notes on limits.

These are the quick actions in the assistant's launcher, by area. You only see the ones your job may do and the features your plan includes — Inventory, Schedule and Reservations need those features on the store's plan.

Area	Actions
Menu	Change A Price Hide Or Show Items 86 An Item Or Set Its Count 86 A Whole Category Set When Items Are Sold Move Items To Another Category Take Items Off Delivery Apps Put Items Back On Delivery Apps
Inventory	Record Waste Set A Par Level Count An Item Update A Case Cost

Area	Actions
Employees	Give Someone A New PIN Fix A Forgotten Clock-Out Message The Staff Add An Employee Give Someone Another Job Approve Or Decline Time Off Give Someone A Task List Turn A Task List On Or Off
Schedule	Cover A Shift Take Someone Off A Shift Copy A Week Publish A Week
Customers	Add A Customer Update A Customer Open A House Account Turn A Discount, Promo Code Or Printed Coupon On Or Off
Online Ordering	Pause Online Ordering Resume Online Ordering Change Pickup And Delivery Times
Store Setup	Close For A Day Open Again On A Closed Day Turn An Order Type On Or Off Turn A Cash Drawer On Or Off Change A Tax Rate Change An Exchange Rate
Reservations	Add To The Waitlist Book A Table Today’s Reservations
Reports	How Are Sales Today? This Week Vs Last Week Top Sellers This Week Who Is Working Now?

Good to know

- **Reports** are questions answered by the assistant in the chat, so they use the AI. Every other action runs without it.
- **Open A House Account** asks for the credit limit every time; 0 means no limit.
- **Change A Tax Rate** works on single-part rates up to 50%. **Change An Exchange Rate** lists only payment methods in another currency.
- **Give Someone A Task List** uses today's business day when you leave the date empty.
- Actions with **Do It Later** can be scheduled for a time; money, PIN, merge and reservation changes cannot.

See Quick actions: done in a few taps.

New areas and actions

Area	Actions
Alerts	I'm On It Snooze An Alert What Fired Today?

Area	Actions
Payroll And Tips	Lock A Pay Period Add A Paid Holiday Turn A Tip Pool Rule On Or Off Last Week's Payroll Yesterday's Tip Pool
Deliveries	Assign A Driver Take An Order Off A Driver Send To Entreo Late Deliveries Drivers Out Now Deliveries Today
Accounting	Post A Day Re-Post A Day Is Accounting Up To Date? Did Yesterday Post? What Lands In Uncategorized Sales?
Also new	Store Setup: Change Kitchen Display Times Kitchen Display Times For An Order Type Deactivate A Lost Or Replaced Device. Online Ordering: Pause Uber Eats Resume Uber Eats Change Uber Eats Prep Time. Customers: Turn The Guest Survey On Or Off Approve Or Retire A Survey Change The Survey Reward Turn A Guest Offer On Or Off. Menu: Change Table Time Rate Table Time Rates. Reports: Timers Running Now Table Time Today

Deliveries, Accounting, the Uber Eats and kitchen display actions and the table time actions appear only where the store uses those features.

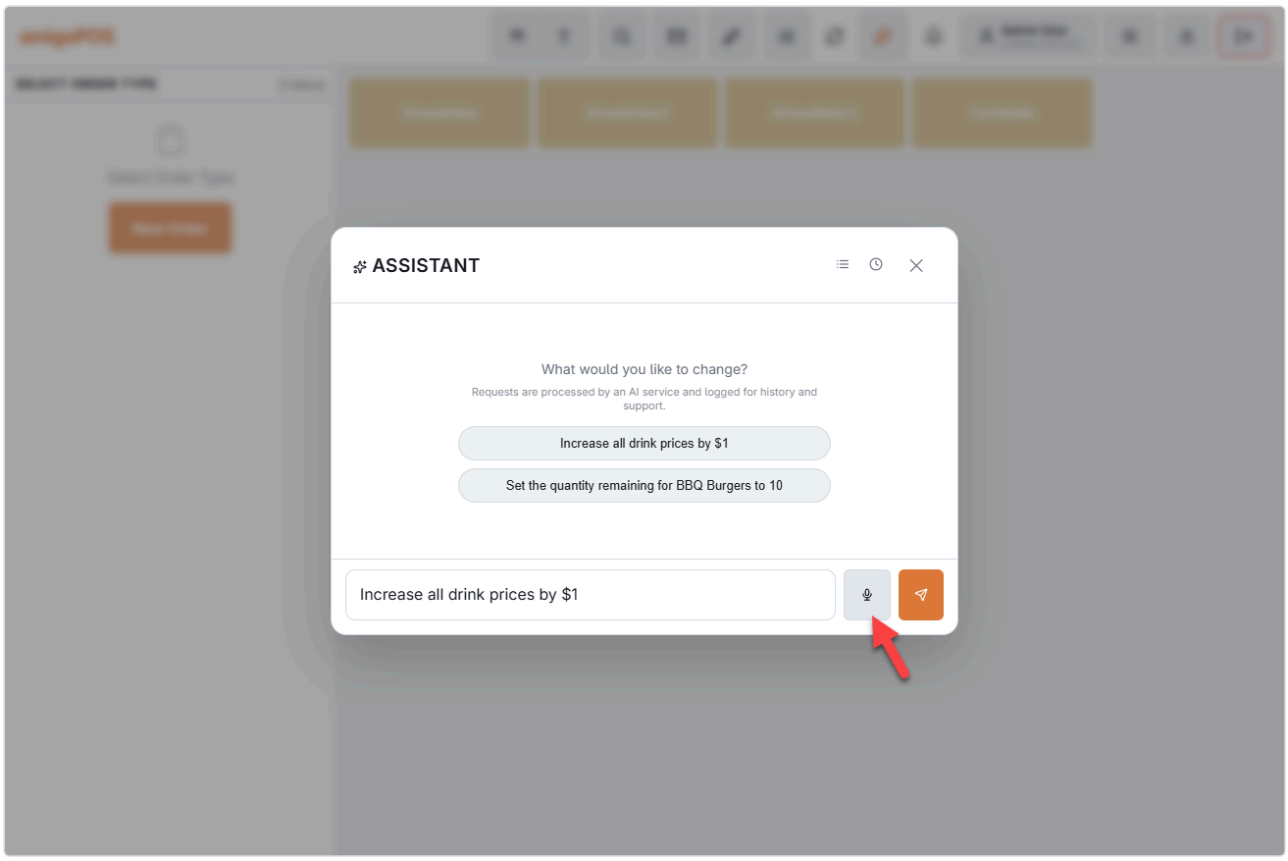
Voice replies

AI Assistant

View online ↗

Turn on the speaker toggle to have replies read aloud in a natural voice — off by default every time the assistant opens.

With **voice replies** on, the assistant reads its answers aloud in a natural voice — useful when your hands and eyes are on the bar, not the screen. Combined with the mic button for dictation, a whole exchange can happen without touching the keyboard.



How it works

- **The speaker button** in the assistant header turns voice on and off. It is **off every time the assistant opens** — deliberate, so a busy counter never starts talking unexpectedly.
- **The voice follows the reply's language.** Ask in Spanish, hear Spanish; ask in English, hear English — regardless of the station's interface language.
- **Starting dictation stops playback**, so the microphone never picks up the assistant's own voice. Closing the overlay or switching the toggle off stops it mid-sentence.
- **Opening a screen stays silent** — when a command closes the assistant to open Time Clock or an editor, the screen change is the answer.

> Voice replies use a cloud speech service, so a working internet connection is required — in offline mode replies appear on screen only.

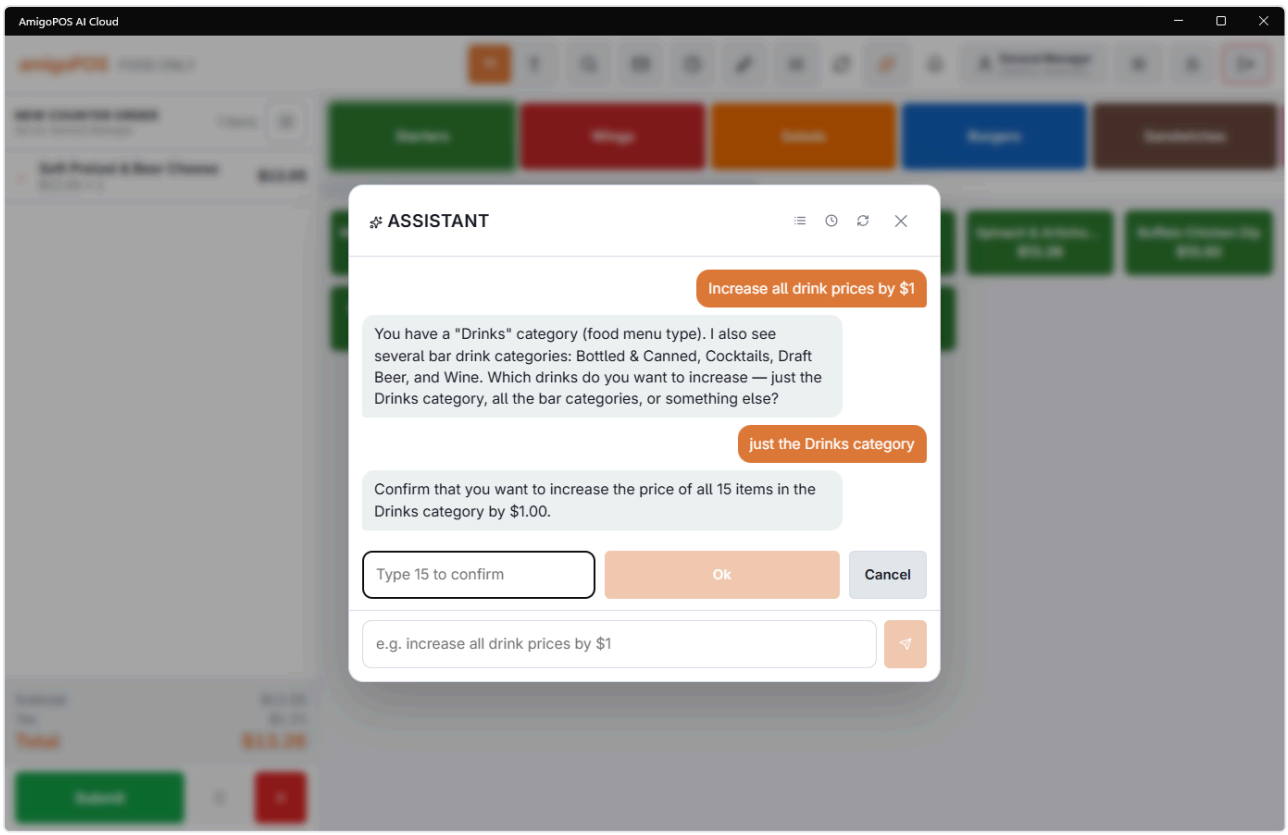
Previews, confirmations, and safety

AI Assistant

View online ↗

the handshake, why resolved-name wording matters, multi-step chains, the destructive/typed-challenge escalation, delete-permission block, and the drift recheck

Every change the assistant makes follows the same handshake, and it is enforced by the server — not just good manners. The assistant runs a dry run first, restates the change in one sentence built from the **actual** resolved names and numbers, and applies it only after you answer yes.



Why the wording matters

The confirmation sentence is built from what the system actually found, not from what you typed. If you say "raise the drink prices" and the assistant answers "Confirm that you want to increase the price of all 12 items in the Drinks category by $1.00", that count of 12 is real — if it is not what you expected, that is your moment to say no and be more specific.

Multi-step requests

A request like "create the category, add the items, and assign the modifier group" runs as separate steps, each with its own preview and its own Ok/Cancel. The assistant carries the results forward — you confirm each step once and it moves to the next.

Big changes get a bigger gate

A change that touches many rows at once is treated as destructive: the assistant states the affected count explicitly and asks you to type a short confirmation phrase instead of just tapping Ok. Sweeping changes past a certain size also require a manager with delete permission — without it, the assistant will tell you the change is too broad and suggest a narrower one.

If the data changes under you

The preview is re-checked at the moment of applying. If the world changed in between — say an item was added and "12 items" became 13 — the apply is stopped and the assistant previews again rather than doing something you did not see.

> Cancel is always free. Nothing is written until the moment you approve, and closing the overlay abandons any pending change.

Safety checks added in November

- **Typing the count is checked by the server.** When a change affects more than 10 records you type the number shown on the card; the server checks what you typed, not just the button. Arabic digits are accepted.
- **One OK applies a change once**, even if the same OK reaches the server twice.
- **No rights above your own.** The assistant does not let you give a job with administrative rights you do not have, change your own pay or jobs, or change the PIN, pay, status or employment of someone whose job has administrative rights you lack.
- **The same order.** Voiding or cash-settling the selected order is refused if a different order is on the screen when you press OK.
- **Training registers** can only look things up and work their own order screen.
- **If the reply fails after a change went through**, the assistant says the change was applied, so you do not make it twice.

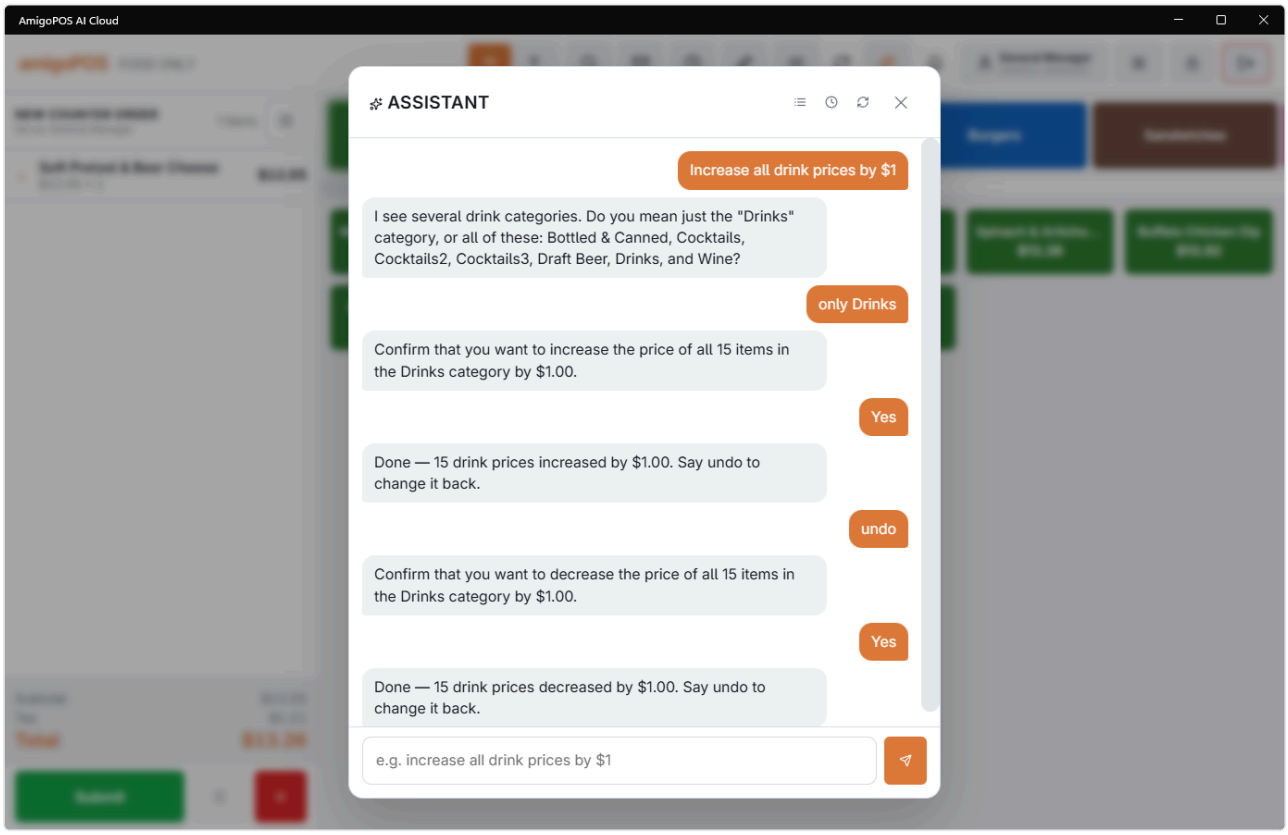
Undoing a change

AI Assistant

View online ↗

Reversing a change the assistant made, what can be undone, and what cannot.

Most simple changes the assistant makes can be reversed by just asking. When a change is reversible, the assistant says so after applying it — "Say undo to change it back." Type **undo** (or "revert that", or "change it back") and the assistant previews the reversal the same way it previews any change, then applies it after you confirm.



What can be undone

- **Reversible:** price adjustments, renames, counter changes, drawer settings like default floats and thresholds — anything where the old value can simply be put back.
- **Not reversible:** manager overrides like forcing a stuck drawer available, and structural creations. If a change cannot be undone, the assistant will not offer it — and will say so plainly if you ask.

How far back it reaches

Undo targets the most recent reversible change from your conversation, made recently. It is a safety net for "oops", not a change-history browser — for anything older, make the correcting change directly ("set the Margarita back to $9").

> Undo has its own preview and confirmation, so you always see exactly what will be restored before it happens.

Exactly the change on the card

Undo reverses exactly the change its card names, even if another change was made in between. It needs the same right as the original change, and the same change cannot be undone twice.

The AI change log

AI Assistant

View online ↗

Every change the assistant makes is recorded: what, who, when, and whether it can be undone.

Every change the AI Assistant makes after you confirm it is written to the store's AI change log: price changes, new menu items, employee edits, drawer changes, drafted purchase orders and so on. Questions and reports change nothing, so they are not logged.

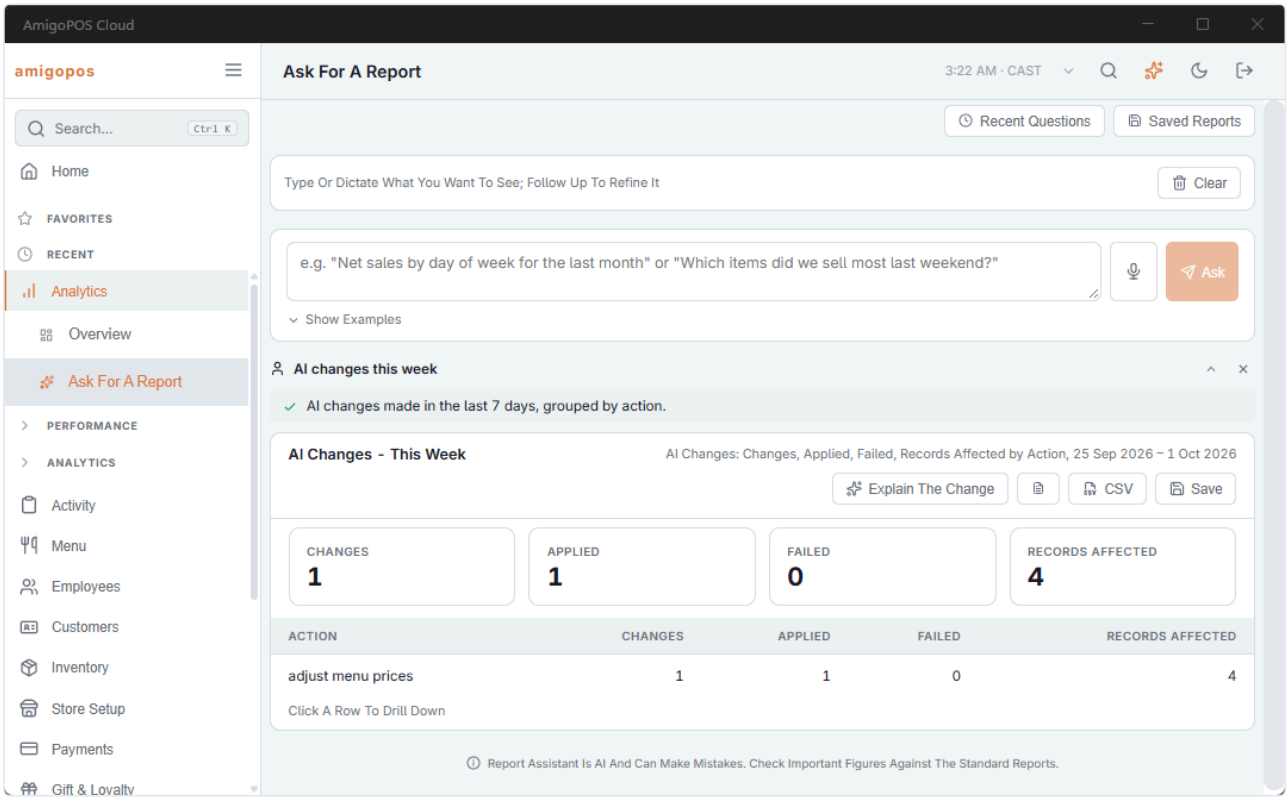
What each entry shows

- **What was done** — the same summary you saw in the preview before confirming.
- **Who and when** — the signed-in employee and the time.
- **How many records** it changed, and whether it was **applied**. A change that failed is logged too, so you can see it was tried.
- **Whether it can be undone**. An undo is its own entry, so the history stays complete.

PINs, passwords and other secrets are masked in the log.

Seeing the log

Open Ask For A Report and ask for it in your own words — for example *AI changes this week* or *what did the assistant change yesterday by employee*. The **AI changes** dataset can be grouped by day, employee or type of change like any other report.



To reverse a change, see Undoing a change. Changes always need a confirmation first — see Previews, confirmations, and safety.

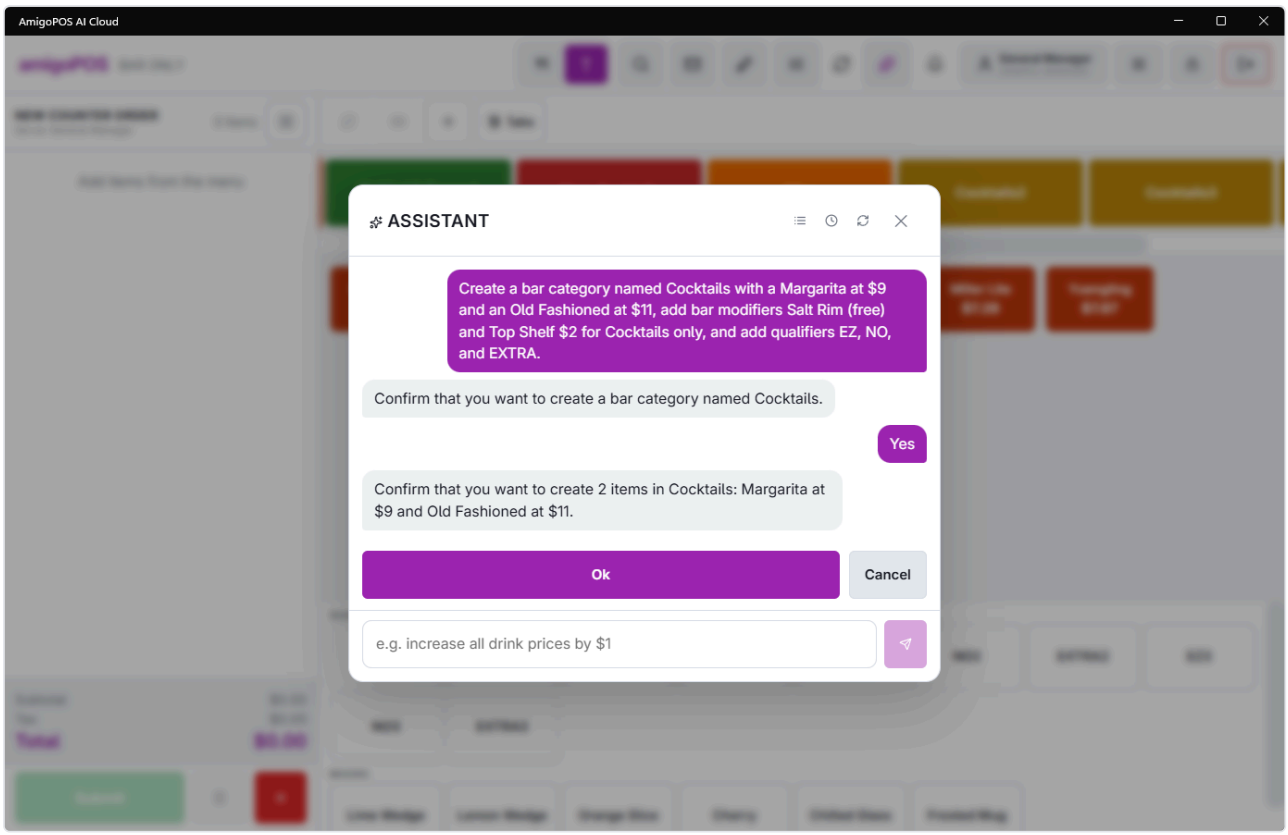
Creating menu content with the assistant

AI Assistant

View online ↗

the elicitation questions per entity type, the food-modifier vs. bar-modifier/qualifier distinction, duplicate-skip behavior, BO-identical defaults

The assistant can build out whole sections of your menu from one description. Tell it the category, the items with prices, and any modifiers, and it creates everything in the right order — asking first about the details that matter, so nothing lands half-configured.



The questions it asks

Before creating, the assistant gathers the setup details in one short message, offering sensible defaults for each:

- **Categories** — food or bar, the default tax rate (it lists your store's actual rates), and whether the category is limited to certain days or hours.
- **Menu items** — which tax rate applies and whether the items print to prep printers or kitchen display stations, and which ones.
- **Modifier groups** — whether the group has levels like *No* and *Extra* and how each level scales the modifier's price, and whether guests pick one modifier or several.

Answer what you care about and say "defaults for the rest" — or put everything in your first message and it will skip the questions entirely.

Food modifiers vs. bar modifiers

These are different systems and the assistant keeps them straight. Food **modifier groups** are created once and assigned to specific menu items. **Bar modifiers** are standalone buttons shown for bar categories (all of them, or ones you choose), and **bar qualifiers** are the prefix buttons like EZ, NO, and EXTRA. Ask for "extras for the cocktails" and the assistant will use the bar system; ask for "a topping group for the burgers" and it builds a food modifier group.

Duplicates are skipped, not doubled

Re-running a request never creates twins. Existing category and group names are refused with a clear message, and items that already exist in the category are skipped and listed as such in the result.

> New items get the same defaults the Back Office editor applies — visible, standard button colors, and the store's standard tax handling — so assistant-created items behave exactly like hand-made ones.

Allergen and price questions

AI Assistant

View online ↗

How the assistant answers allergen questions (always to be verified) and what a price change would do.

> **Allergen answers must always be verified.** The assistant works from the allergen lists your staff verified and from recipe ingredients; it can be wrong or incomplete, and it cannot see what is inside sauces or bought-in products, or cross-contact in the kitchen. Before a guest with an allergy orders, confirm with the kitchen or a manager. Making sure allergen information is correct is the restaurant's responsibility.

Allergen and dietary questions

Is the caesar salad gluten free? · Does the pad thai have peanuts? — any staff member can ask. The assistant:

1. Uses the item's **staff-verified allergen list** first, and says who verified it and when. See Allergens on menu items.
2. Without one, it goes by the item's recipe ingredients and names those that commonly contain the allergen.
3. Never calls an item safe or free of an allergen, and ends every answer by saying it must be verified with the kitchen or a manager.

An item with no verified list and no recipe gets "nothing on file — ask the kitchen".



What would a price change do?

What if I raise the burger to $12? · Should I put the wings up 10%? — needs the Back Office Reports permission. The assistant works from the item's own sales:

- **Now** — units per week, revenue and the average price actually paid over the last four weeks, plus gross margin when the item has a recipe.
- **Past price changes** — if the price moved 3% or more in the last six months, how sales responded, adjusted for how busy the store was.
- **At the new price** — weekly units, revenue and margin under that measured response and under a low, typical and high response.

It gives a range and says which case it finds most likely. These are estimates, not promises.

Inventory and purchasing questions

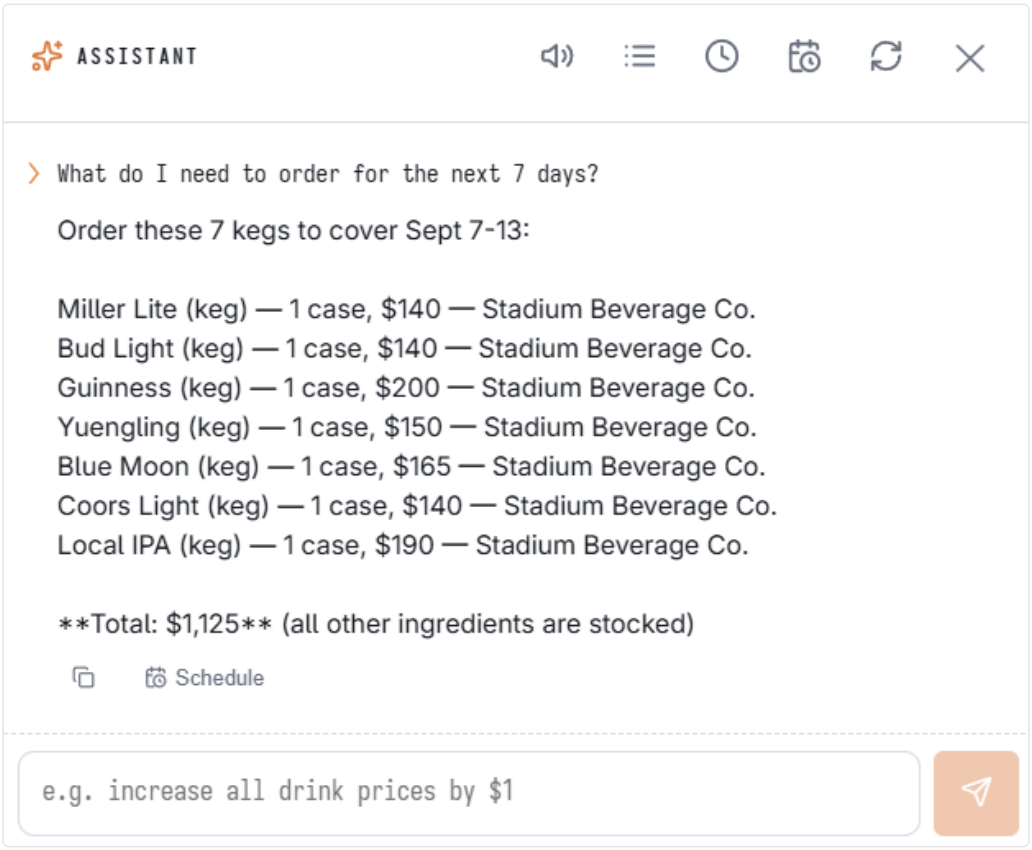
AI Assistant

View online ↗

forecast × recipe = purchasing list; needs for one item or the whole order, stock checks, recipes with plate cost, actual usage; how needed, on hand, shortfall and cases are computed; history fallback for low-volume items; items without recipes

Ask the assistant an inventory question and it does the arithmetic a manager would otherwise do on a notepad: it takes the **demand forecast** for each menu item, multiplies it through the item's **recipe**, adds everything up per ingredient, and compares the result with

what is **on hand**. The answer is a purchasing list, not a sales number.



What you can ask

- **Needs for one item** — "How much inventory do I need for caesar salads next week?" The assistant matches every item containing the words you used (Caesar Salad *and* Chicken Caesar), forecasts units per day, and lists each ingredient with quantity needed, on hand, shortfall, cases to order, estimated cost and vendor.
- **The whole order** — "What do I need to order for the next 7 days?" Same calculation across every item that has a recipe, sorted by shortfall, with a total estimated cost at the bottom.
- **Stock checks** — "How much romaine do we have?" or "What's low on stock?" (everything at or under its reorder level).
- **Recipes and plate cost** — "What goes into the burger?" or "What's my food cost on the burger?" — ingredients per portion, plate cost from current inventory costs, and food-cost percent against the menu price.
- **Actual usage** — "How much chicken do we go through a week?" — real consumption recorded from sales, with daily and weekly averages.

Reading the answer

Ingredients come first, biggest shortfall on top, then the forecast units behind them. **Needed** is forecast units × recipe quantity for the window you asked about (default: tomorrow for 7 days, up to 14). **On hand** is the current quantity across your received-inventory layers. **Shortfall** is needed minus on hand, never negative. **Cases to order** rounds the shortfall up to whole cases using the item's pack and case sizes, and the **estimated cost** uses the case cost when you have one, otherwise the weighted average cost of the stock on the shelf.

> The assistant does not subtract the reorder level — it tells you when an ingredient would drop below it after the window so you can pad the order yourself.

Where the numbers come from

Demand per item per day is the same nightly forecast shown on *Analytics › Performance › Demand Forecast*, so chat and dashboard always agree. The stored forecast covers your top 300 items for 7 days; for lower-volume items, or for days 8–14, the assistant uses a four-week same-weekday average from actual sales and marks those items as estimates from recent sales. Forecasts need about two weeks of history before they are trusted.

When an item has no recipe

An item without a recipe still forecasts units, but contributes nothing to the ingredient list — the assistant names those items so you know the purchasing total is incomplete. Recipes are set up in *Back Office › Inventory › Setup › Recipe Editor* (see *Recipes (yield, cost, ingredients)*); the more items that carry one, the closer the order list gets to a real shopping list.

> **Make it routine:** tap **Schedule** under the order-list answer and have it emailed every morning, or at End of Day for tomorrow's prep and purchasing in one message.

> Inventory questions require the *Back Office Inventory* permission; the assistant simply will not offer these tools to a PIN without it.

What might run out today

What are we going to run out of tonight? — the assistant compares each ingredient's forecast use for the rest of today (the day's forecast minus what was already used) with what is on hand plus deliveries due today. **Will run out** means the rest of the day needs more than that, with how much it is short; **tight** means within 20%.

Drafting purchase orders

Draft our orders for the weekend — one draft purchase order per supplier from the forecast, created after you confirm. See Drafting purchase orders from the forecast. Invoices can be photographed straight into Receive Inventory: Scanning a supplier invoice.

Guests: reservations, regulars and upselling

AI Assistant

View online ↗

Ask which reservations might not show, which regulars stopped coming, and what sells together.

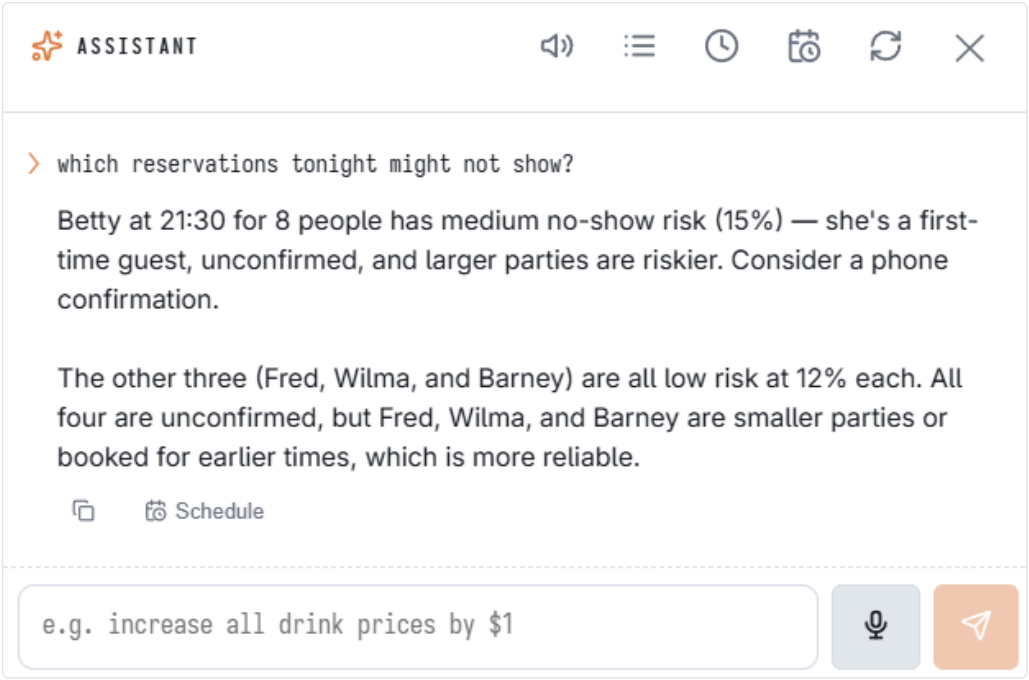
Three questions about guests. Ask them in your own words, at the register or in the Back Office.

Which reservations might not show?

Which reservations tonight might not show? · Any no-show risks tomorrow? — any staff member can ask. Each open reservation for the day gets a risk percentage and the reasons behind it:

- The guest's own history — past no-shows against visits, matched by customer, phone or email — blended with the store's no-show rate over the last 90 days.
- Higher when the booking is not confirmed, the party is six or more, or it was booked 14 or more days ahead.
- Lower when it was booked the same day or a card was pre-authorized.

High means 30% or more, medium 15% or more. A quick confirmation call to the high ones is usually worth it.



Which regulars stopped coming?

Which regulars stopped coming? · *Who should we win back?* — needs the Back Office Reports permission. It lists customers with four or more paid orders at the store in the last 180 days who have not ordered for 30 days, or two and a half times their usual gap between visits, whichever is longer. For each: orders, average spend, last order, days away and their usual order — handy for a personal call or an offer.

What sells together?

What should we upsell with the burger? · *What sells together?* — needs the Back Office Reports permission. Pairs of items on paid orders from the last 60 days, with how many orders had both, how often the second comes with the first, and how much likelier that is than on an average order. To have the register offer a pair, see Suggested pairings.

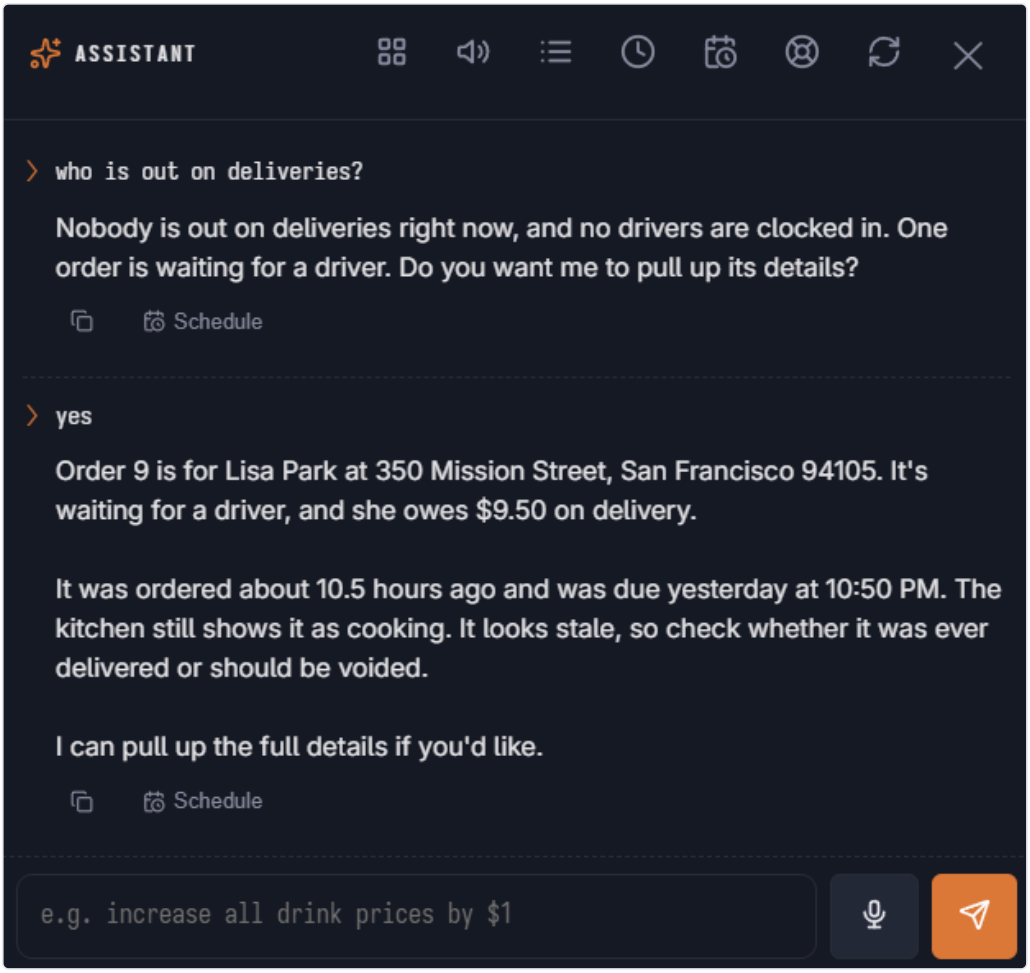
Deliveries and drivers with the assistant

AI Assistant

View online ↗

Ask what is waiting, late or out, who is carrying what, and assign, reassign or unassign drivers or send an order to Entreo from the assistant.

When the store dispatches its own deliveries, the assistant can read the delivery board and do the board's everyday jobs. It needs the **Manager** right, the same as the manager phone's Dispatch screen.



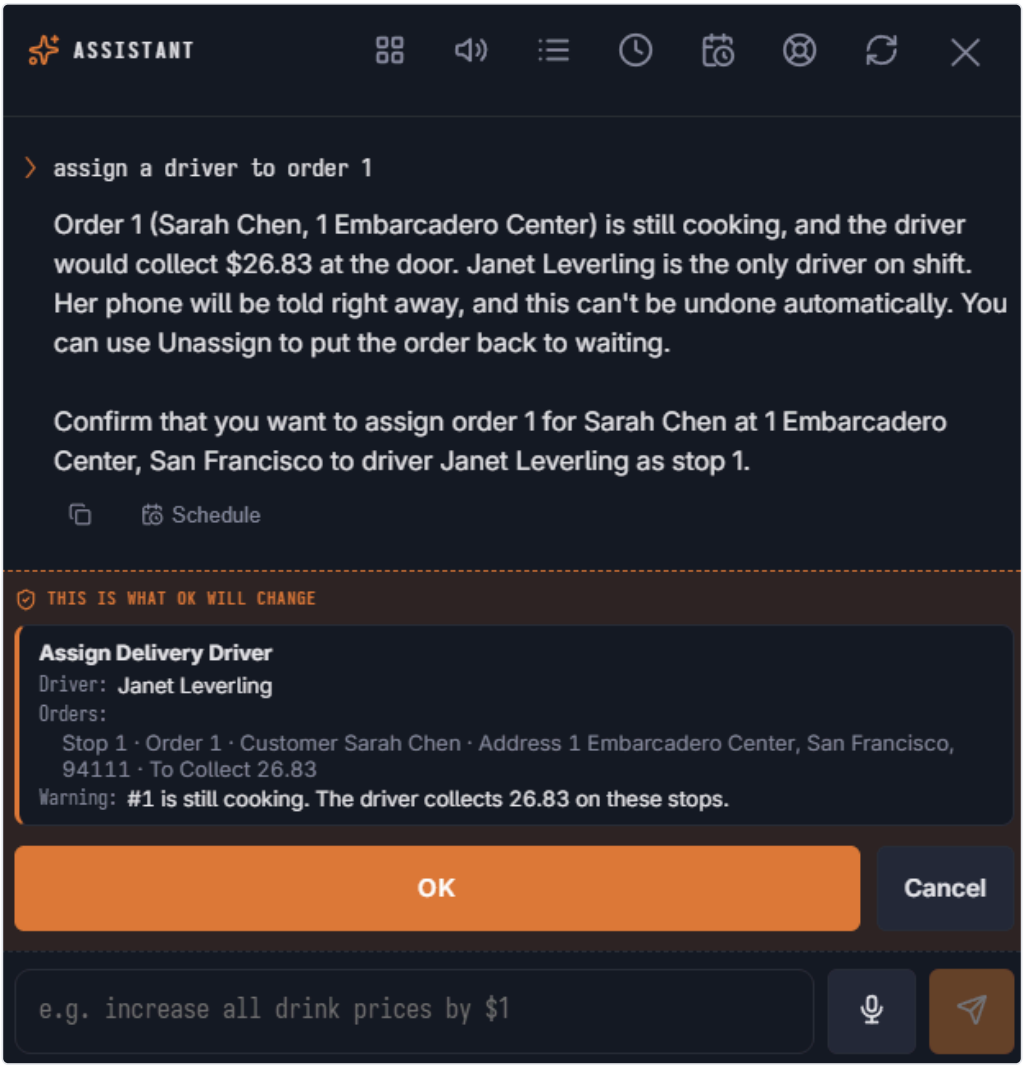
Ask

- *"What deliveries are late right now?"*
- *"Who is out on deliveries and what are they carrying?"*
- *"What happened with order 52?"*
- *"How much cash is each driver holding?"*
- *"How did deliveries go today?"*

Answers come from the same board the register shows: waiting, scheduled for later, with Entreo, out with a driver, and delivered but not checked in. The day summary uses the Delivery Performance figures and needs the Reports right.

Change

- **Assign a driver** — one or more orders, in the order the driver will deliver them. The driver gets the run on their phone and the customer is told the order is on the way, as when you dispatch from the board. Assigning an order that is already out with another driver moves it: it is taken off the first driver, and the customer gets a second "on the way" message.
- **Take an order off a driver** — only while it is out and not yet delivered at the door.
- **Send to Entreo** — queues the order for an Entreo driver exactly like the board. It is refused without a street, city and ZIP. This cannot be taken back from the assistant.



> Marking an order delivered, banking a driver and settling cash still happen on the register or the driver's phone — they need a cash drawer. None of the delivery changes can be undone with *undo*, because the driver and the customer have already been told.

In the launcher

The **Deliveries** area has **Assign A Driver**, **Take An Order Off A Driver** and, with Entreo on, **Send To Entreo**, plus three questions. An order waiting for a driver shows in **Needs Attention**, marked urgent after 15 minutes.

See How a delivery travels and Entreo on the delivery board.

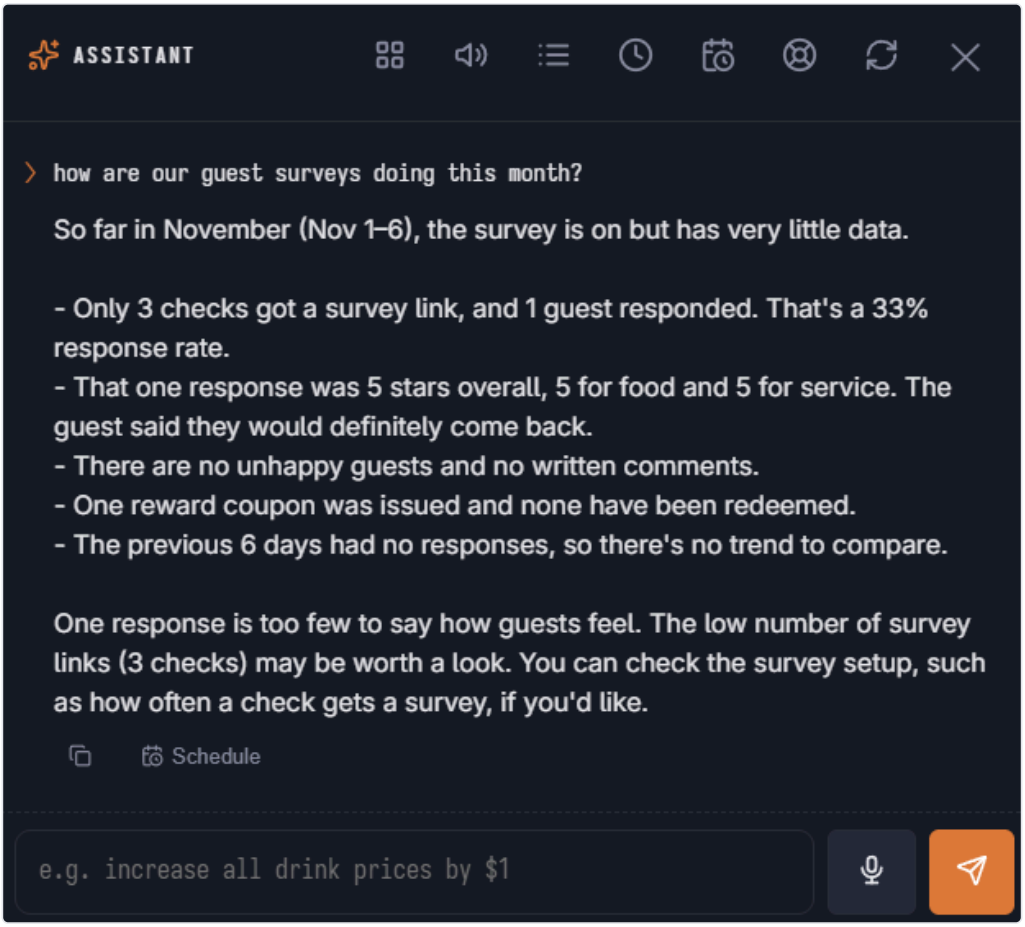
Guest surveys and offers with the assistant

AI Assistant

View online ↗

Ask how the guest survey is doing and what guests say, see who asked to be contacted, approve or retire surveys, change the reward and turn offer emails on or off.

The assistant reads the guest survey and the guest offers the same way their Back Office pages do. It needs the **Back Office configuration** right, like those pages.



Ask

- *"How are our guest surveys doing this month compared with last month?"*
- *"What are guests complaining about?"*
- *"Show the last 1 and 2 star comments."*
- *"Which unhappy guests asked us to contact them?"*
- *"Which surveys are waiting for my approval?"*
- *"Which guest offers are on, and how many coupons were used?"*

Results cover response rate, average stars and how they spread, happy and unhappy share, the trend against the period before, and the breakdowns of the Results tab. Answers stay as anonymous as the survey is set up to be: order, table and server only appear while the store keeps them.

> The assistant does not run **Summarize With AI** or **Generate With AI** — those spend your AI allowance and only run from their buttons. It points you to them.

Change

- **Turn the guest survey on or off.**
- **Approve or retire a survey** — the card shows its questions, when it is used and its reward before you approve.
- **Change the survey reward** — the discount the coupon gives and how many days it can be used, for the store or for one survey.
- **Turn a guest offer on or off** — win-back, birthday, celebration, first visit, order again, cart and coupon reminders, referrals and the online banner. When you turn an email offer on, its emails start going out automatically at the send hour; the card says so.
- **Mark a follow-up handled** once someone has called the guest back.

The on/off, approval and reward changes can be undone with *undo*.

In the launcher

The **Customers** area has the four changes above and three questions. A survey waiting for approval shows in **Needs Attention**.

See Guest survey, Survey results and AI summary and Guest offers.

Overtime questions

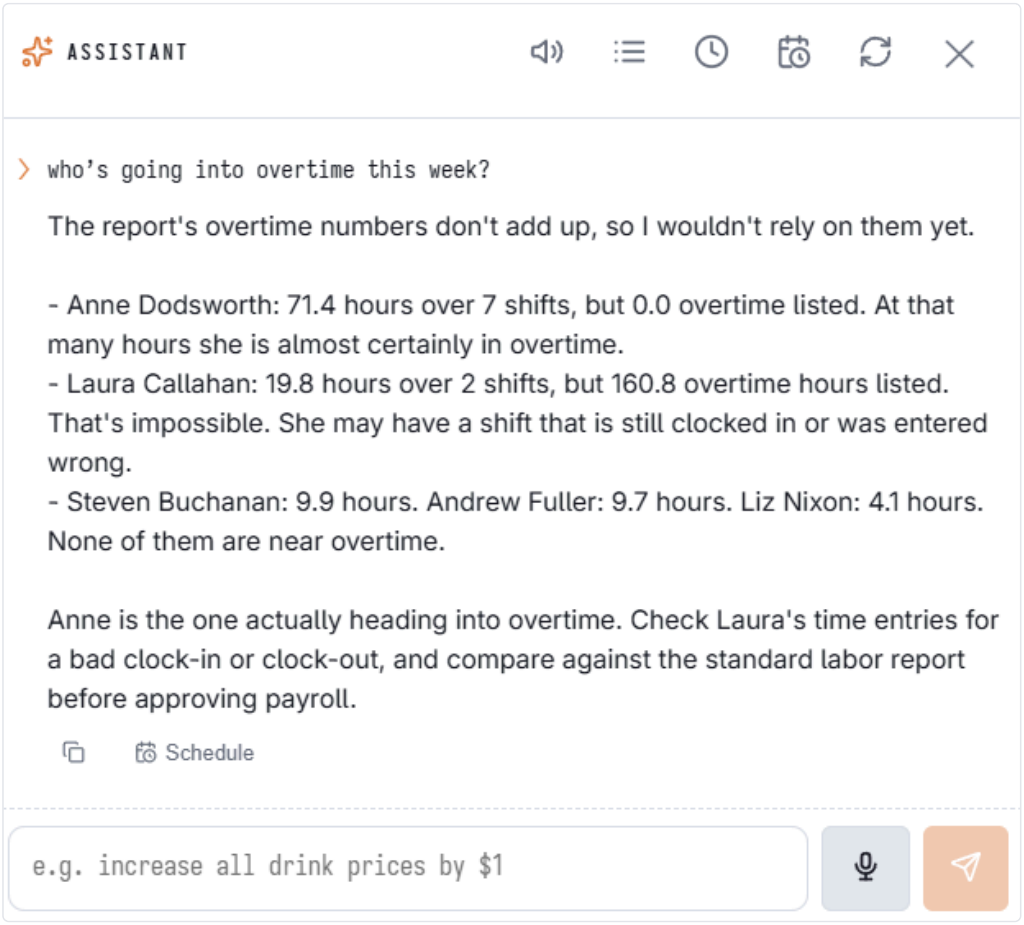
AI Assistant

View online ↗

Ask who is heading into overtime this week before you add shifts.

Who's going into overtime this week? · *Can I give Carlos another shift?* — needs permission to edit employees in the Back Office.

For each employee the assistant adds the hours clocked so far this business week to their published shifts still to come, and compares the total with the store's **Overtime Warning Threshold** (a Time Clock setting; 40 hours when it is not set). It lists who is already over, how far over each person will be, and which shift takes them over.



Managers also get an alert before such a shift starts — see Overtime alerts.

Manager alerts with the assistant

AI Assistant

View online ↗

Ask what fired today and why, take or snooze an alert, mute categories for yourself and change alert thresholds from the assistant.

The assistant reads and acts on the same manager alerts you get on the staff site and in Back Office. It needs the **Manager** right.

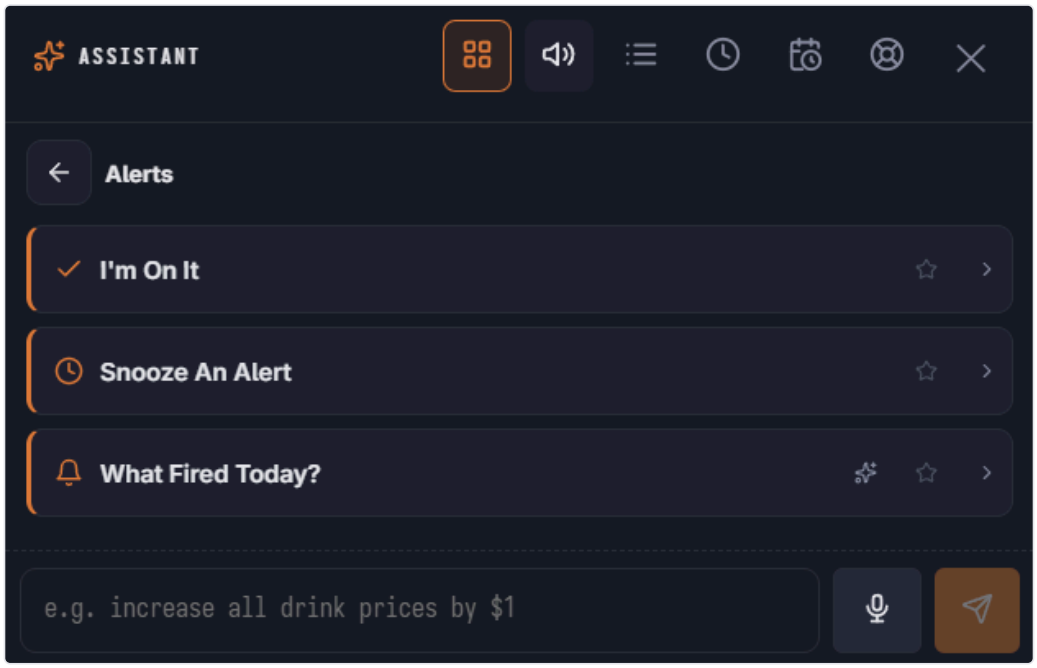
Ask

- *"Which alerts fired today and what should I do?"*
- *"Why did the labor alert fire?"*

- *“What are our alert thresholds?”*

Change

- **I'm on it** — takes an alert, with a note of what was done.
- **Snooze an alert** for 15 minutes, 30 minutes, 1 hour or 4 hours.
- **Mute or unmute alert categories** — for you only.
- **Change the alert settings** — alerts on or off, quiet hours and each rule's threshold (labor target %, kitchen ticket minutes, open check hours and the others).



In the launcher

The **Alerts** area has **I'm On It**, **Snooze An Alert** and **What Fired Today?**. Open alerts show in **Needs Attention**; the severe ones are marked urgent.

See Manager alerts.

Payroll and tips with the assistant

AI Assistant

View online ↗

Ask for a pay period summary, lock or unlock a pay period, manage paid holidays and tip pool rules, and see what the tip pool gave each person.

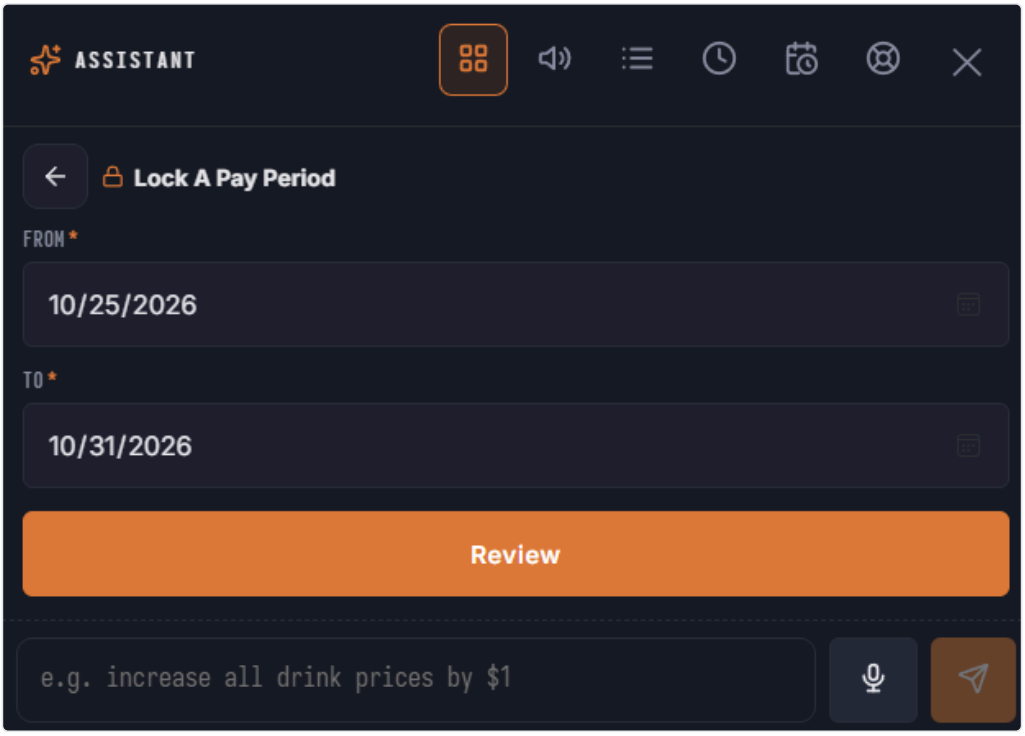
The assistant covers the same payroll and tip-pool work as Back Office › Payroll.

Ask

- *“Summarize last week's payroll: hours, overtime, labor cost and tips per employee.”*
- *“Which pay periods are locked?”*
- *“What did the tip pool give each person yesterday?”*
- *“What are our tip pool rules?”*

Change

- **Lock a pay period** — no punch in it can be changed afterwards. Locking needs the Reports right; **unlocking** also needs the Employee Editor right.
- **Paid holidays** — add or change one (name and pay multiplier, 1 to 5), remove one, or copy one year's holidays to the next. A day in a locked pay period is refused: unlock the period first.
- **Tip pool rules** — turn a rule on or off, or change the share pooled and kept.



> The default dates for **Lock A Pay Period** are last week by business day, so before the day starts (for example at 2 AM) the period never ends on the day still open.

In the launcher

The **Payroll And Tips** area has **Lock A Pay Period**, **Add A Paid Holiday**, **Turn A Tip Pool Rule On Or Off**, **Last Week's Payroll** and **Yesterday's Tip Pool**.

See Payroll period report and exports, Locking a pay period, Paid holidays and Tip pooling and tip-outs.

Kitchen display and devices with the assistant

AI Assistant

View online ↗

Change kitchen display times and an order type's ticket times and colour, see which items go to which station, list registered devices and deactivate a lost one.

Kitchen display

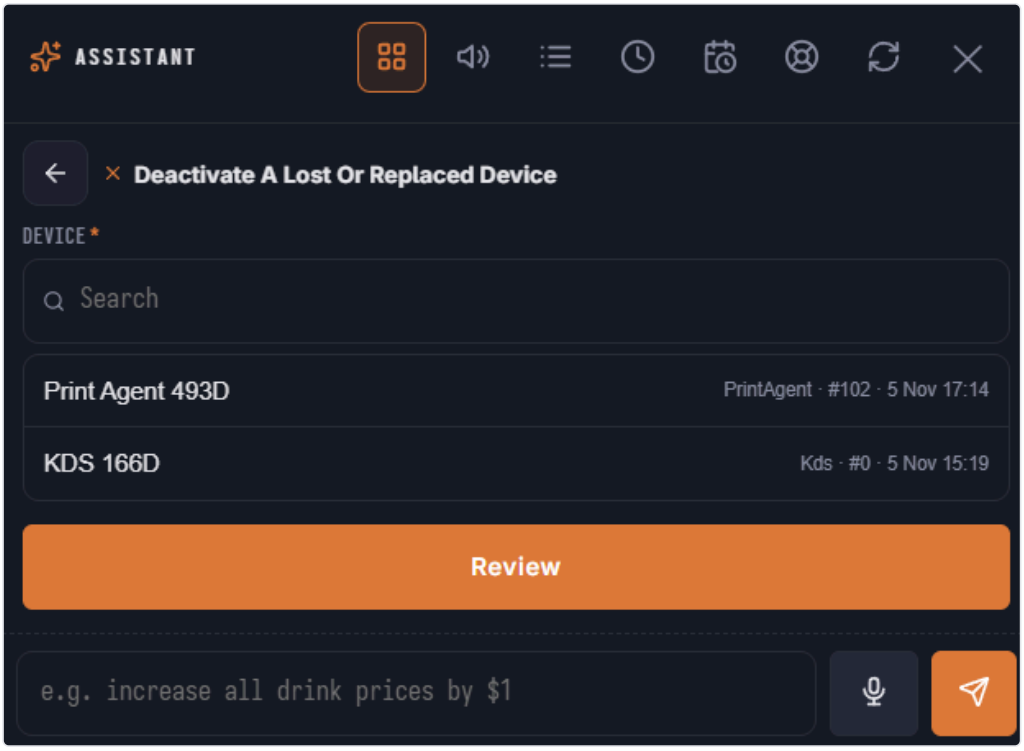
- *"When do kitchen tickets turn yellow and red?"*
- *"Make delivery tickets turn red after 25 minutes."*
- *"Which station do the burgers go to?"*
- *"How early do scheduled orders fire to the kitchen?"*

You can change the store's warning and late minutes (red always comes after yellow), give one order type its own times and ticket colour (0 uses the store's times), and change how early scheduled orders fire. Registers and kitchen screens reload the change. These need the Back Office configuration right, and the kitchen display on the store's plan.

Devices

- *"Which devices are registered at this store?"*
- *"When was the bar tablet last seen?"*

Deactivate a lost or replaced device signs it out and frees its station; it must be activated again to be used. The card lists what it leaves behind — orders not yet sent to the cloud, punches, drawers that still need a reset, or that it is the last register — and you type the device's name to confirm. The device you are using and another store's devices are never offered. It needs the Register Devices right *and* the Back Office delete right, and there is no undo.



In the launcher

The **Store Setup** area has **Change Kitchen Display Times**, **Kitchen Display Times For An Order Type** and **Deactivate A Lost Or Replaced Device**.

See KDS settings and Registered Devices.

Uber Eats with the assistant

AI Assistant

View online ↗

Ask whether the store is live on Uber Eats, pause or resume it, change its prep time and publish the menu from the assistant.

When the store is linked to Uber Eats, the assistant can check it and do the quick jobs of a busy night. It needs the **Manager** right and Marketplaces on the store's plan; publishing the menu needs the Back Office configuration right.

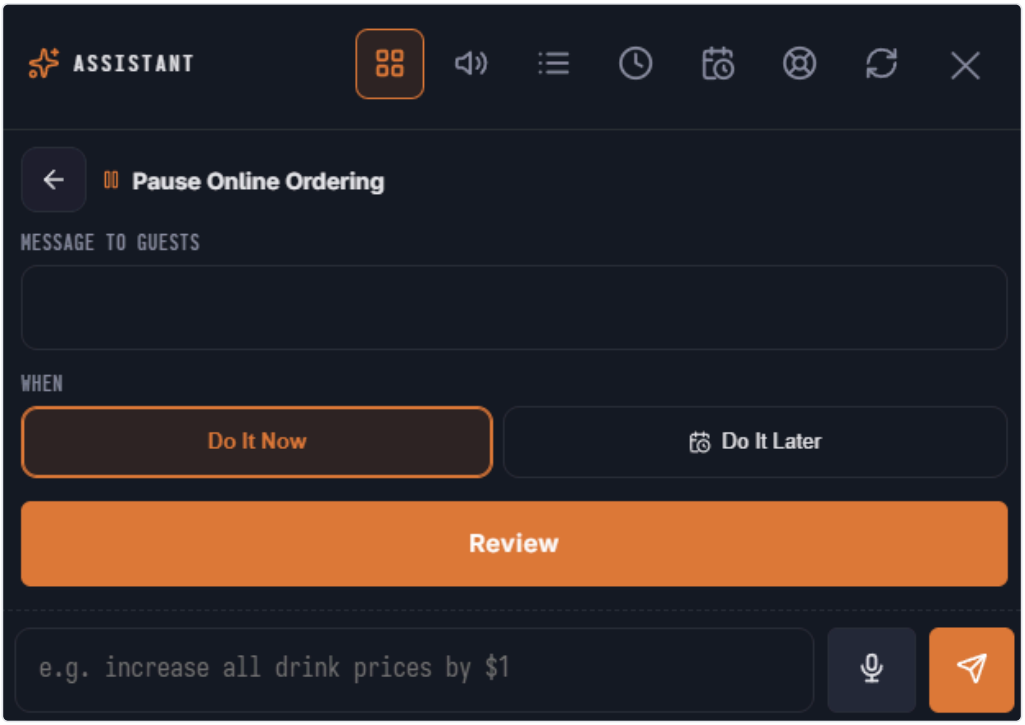
Ask

- *"Are we live on Uber Eats?"*
- *"Any Uber Eats orders waiting or failed?"*
- *"When did we last publish the menu to Uber Eats?"*

The answer says whether the store is online, paused by you (and until when), or offline for its menu hours — which Uber handles by itself.

Change

- **Pause Uber Eats** for some minutes or until a time, and **resume** it. A pause can be undone.
- **Change the prep time** Uber quotes guests and uses to send couriers (1 to 180 minutes). Set it back the same way after the rush.
- **Publish the menu** to Uber Eats now.



Every change goes to Uber through the same queue as Back Office, so it reaches Uber within moments.

In the launcher

The **Online Ordering** area has **Pause Uber Eats**, **Resume Uber Eats** and **Change Uber Eats Prep Time** when the store is linked. A pause shows in **Needs Attention**.

See Uber Eats overview.

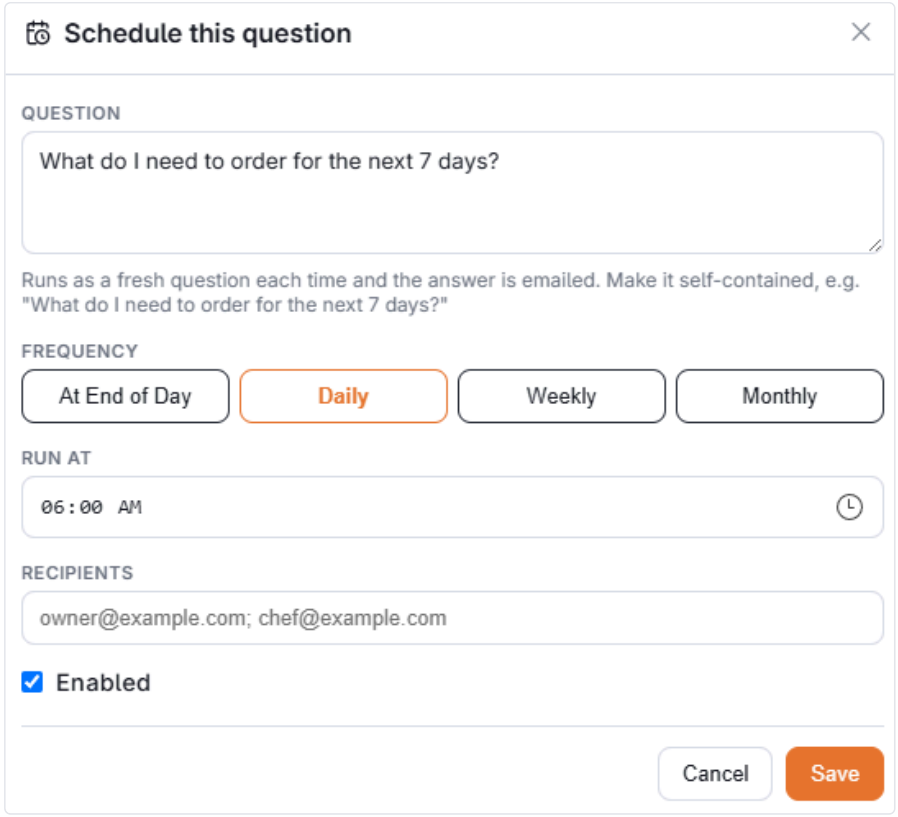
Scheduling a question by email

AI Assistant

View online ↗

turning an answer into a recurring email: the Schedule button and form, frequencies incl. End of Day, writing self-contained questions, the scheduled questions list with Send now, what the email contains, read-only/permission/timing behavior, good questions to schedule

Any question the assistant can answer, it can also answer **on a schedule and email to you**. The question runs fresh each time against that day's live data, so "what do I need to order for the next 7 days?" scheduled daily at 6:00 is a different, current list every morning.



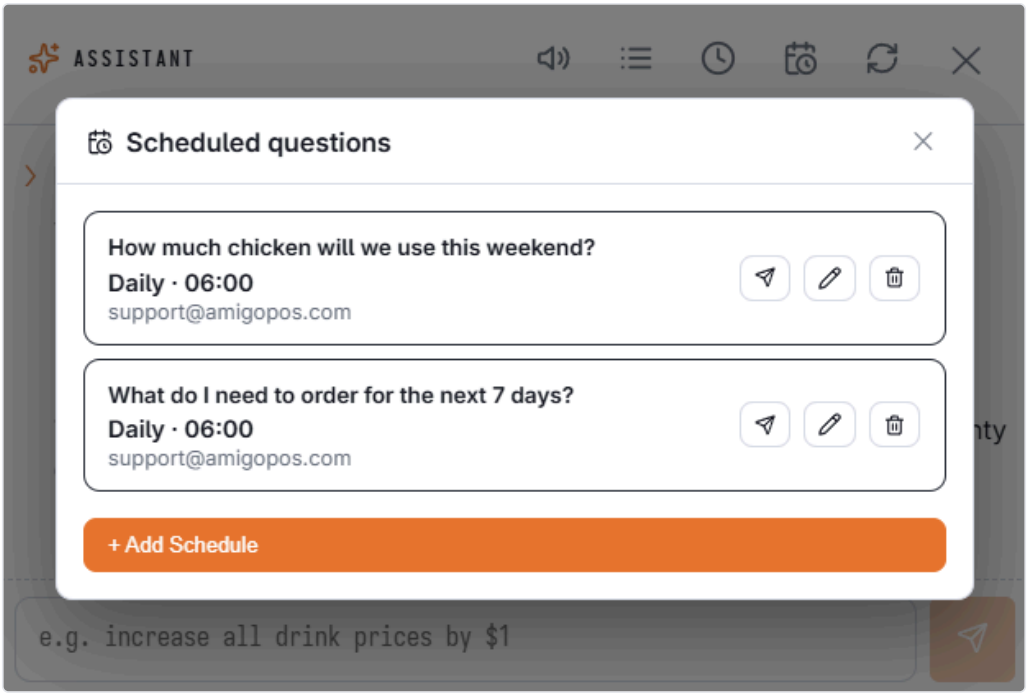
Scheduling a question

1. Ask the question and check that the answer is what you want.
2. Tap **Schedule** under the answer. The form opens with the question already filled in — edit it if you need to.
3. Choose a frequency: **At End of Day** (asked automatically when End of Day runs), **Daily**, **Weekly** (pick the day), or **Monthly** (pick the date). Daily, weekly and monthly schedules also take a run time in your store's local time.
4. Enter one or more email addresses separated by semicolons, then **Save**.

> **Write it to stand alone.** A scheduled run has no conversation around it. "And for the weekend?" means nothing on its own — "How much chicken will we use this weekend?" does. Include the window ("next 7 days"), the item, and anything else you would otherwise have said earlier in the chat.

Managing scheduled questions

Tap the **calendar** icon in the assistant's header to see every scheduled question for the store. Each row shows the question, its frequency and time, the recipients, and when it last ran. Use **Send now** to run it immediately — the easiest way to check the email before waiting for the schedule — the pencil to edit, or the trash can to delete. Untick **Enabled** to pause a schedule without losing it.



What the email looks like

A short message with the store name, your question as the heading, and the answer in plain language — the same lines you would see in the chat. There is no attachment; the answer *is* the email. It is sent from the same address as your scheduled reports.

How scheduled runs behave

- **Read-only.** A scheduled run can look things up but can never change anything — price changes, counters, employees and the like are simply not available to it, even if the question asks.
- **Your permissions.** The question runs with the permissions of the PIN that created the schedule. If that employee loses the Back Office Inventory permission, their inventory schedule starts reporting that the data is unavailable.
- **Complete answers.** In the chat the assistant may ask a clarifying question; on a schedule it never does — it picks the most useful reading, says which one it chose, and answers in full.
- **Store-local timing.** Times are your store's local time. Daily, weekly and monthly runs are picked up within about 15 minutes of the run time; End of Day runs happen inside End of Day itself.

Good questions to schedule

- "What do I need to order for the next 7 days?" — daily, early morning, to the person who places orders.
- "What should we prep tomorrow and what is low on stock?" — at End of Day, to the kitchen.
- "How busy will the next 7 days be and which days need extra staff?" — weekly on the day you write the rota.
- "Anything unusual in sales lately?" — daily, to the owner.

> Scheduled questions appear in the assistant's **History** like any other turn, so you can always see what was asked and answered.

Whose rights a scheduled question uses

A scheduled question always runs with the rights of the person who saved it, whoever runs End Of Day or presses Send Now. It can only answer what that person may see.

QuickBooks and Xero with the assistant

AI Assistant

View online ↗

Ask whether the daily sales are posting, why a day failed or is held, what lands in Uncategorized Sales, preview a day, and post or re-post a closed day.

The assistant reads the QuickBooks Online and Xero sync the way the Postings and Mappings tabs show it. It needs the **Back Office configuration** right and accounting on the store's plan. On a training register it does nothing.

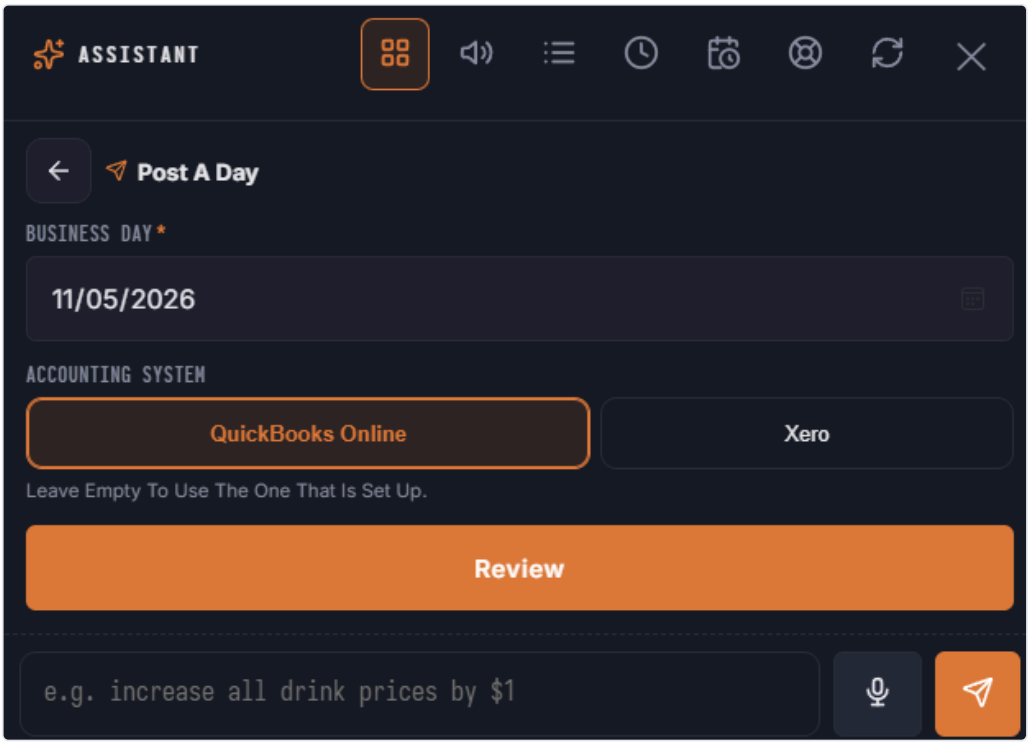
Ask

- *"Is QuickBooks posting working? Show any days that failed or need review."*
- *"Did yesterday's sales post? If not, why?"*
- *"What is landing in Uncategorized Sales, and which accounts are unmapped?"*
- *"What would Saturday send to Xero?"*

Each day reads as posted, needs review, failed, no sales or not posted, with the reason — for example an over/short above your review limit, or an unmapped account. A day's preview reads your own data only; nothing is sent to QuickBooks or Xero to show it.

Change

- **Post a day** — the same as the Post button. Only a day closed by End Of Day is posted, and not while its automatic post is still queued. Posting cannot be taken back from the assistant.
- **Re-post a day** that is already there — QuickBooks replaces the journal entry; Xero voids the invoice and raises the next revision. It needs the Back Office delete right and you type the date to confirm.



When a day posts by hand — from the assistant or from Back Office — that day's automatic post still waiting in the queue is closed, so it does not post the day again later.

In the launcher

The **Accounting** area has **Post A Day**, **Re-Post A Day** and three questions. Leave the system empty to use the one that is set up.

See Posting Daily Sales and Posting A Day.

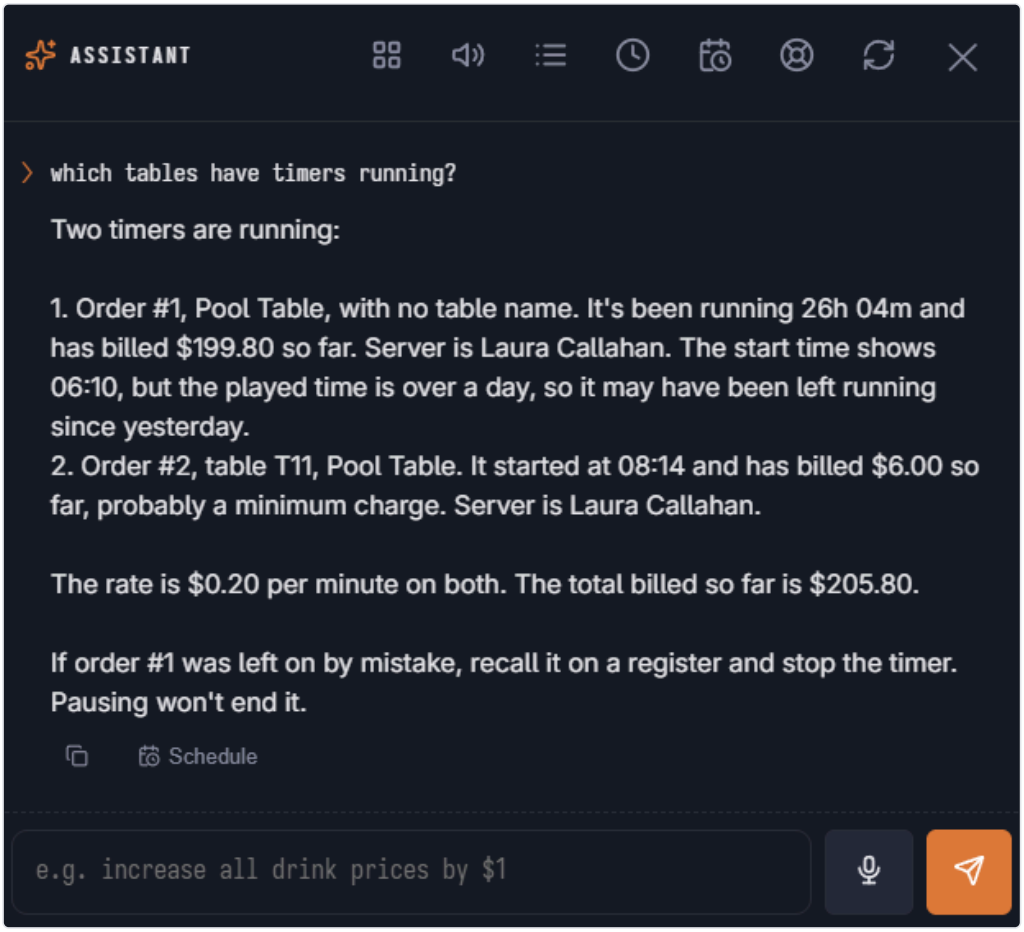
Pool tables and table time with the assistant

AI Assistant

View online ↗

Ask which timers are running and what they have billed, one table's timers, the rates and happy-hour rules, and table time sales; change a timed item's rate.

For stores that sell time — pool tables, lanes, karaoke rooms — the assistant reads the timers and the rates.



Ask

- *"Which tables have timers running right now, and what have they billed so far?"*
- *"What's on table 4?"*
- *"What do we charge for the pool tables, including happy hour?"*
- *"How did table time do today?"*

Running timers and one table's timers need the Manager right; table time sales need the same right as the Table Time report. Charges are worked out from the order as last saved, so they are close estimates while a game is running.

Change

Change Table Time Rate changes one timed item's rate, interval, minimum, grace, players included or extra-player price, like the item's Time-Based tab. Happy-hour and day-and-time rates are price rules — ask the assistant to change the price rule. The change can be undone.

> A timer that is already running keeps the rate it started with; the new setup applies to timers started after the change. Stopping, pausing, splitting or combining stay on the register.

In the launcher

When the store has timed items, the **Menu** area has **Change Table Time Rate** and **Table Time Rates**, and **Reports** has **Timers Running Now** and **Table Time Today**.

See Time-based items and Happy hour and rate changes during a game.

Sample prompts

eight prompt tiers from one-liners to the full Cocktails build plus inventory and purchasing questions, which ones are worth scheduling, with the closing note that specificity trades questions for previews

The assistant handles anything from a one-word question to a request that builds half a menu. These are real prompt shapes, roughly in order of complexity — use them as-is with your own names and numbers.

Quick lookups

- "List the cash drawers."
- "What tax rates do we have?"
- "Find every item with 'wings' in the name."
- "Who is clocked in right now?"
- "When was drawer 1 last counted?"

Sales, product mix and labor reports

- "How are we doing today?" (sales so far, projected close, same day last week)
- "Sales this week vs last week."
- "What was our average ticket yesterday?"
- "When was the rush on Saturday?" / "How did lunch compare to dinner?"
- "How much was delivery this month?" / "Who sold the most last night?"
- "Top 5 items this weekend." / "What isn't selling?"
- "What's my labor percent this week?" / "Which day was overstaffed last week?"
- "Sales from 2026-08-01 to 2026-08-15."

Every report question takes a period: *today*, *yesterday*, *this week*, *last week*, *last 7 days*, *last 30 days*, *this month*, *last month*, *this weekend*, *last weekend*, or two explicit dates. Weeks start on Monday, dates are the store's business dates, and the numbers come from the same services as the Analytics pages, so chat and Analytics always agree. Sales summaries include the prior period of the same length with the percent change; product mix includes the menu-engineering classes (stars, plowhorses, puzzles, dogs).

Single changes

- "Rename 'BBQ Burger' to 'Smokehouse Burger'."
- "Set the quantity remaining for BBQ Burgers to 10."
- "Change the Front Register drawer's default float to $200."
- "Disable the patio drawer."

Bulk changes

- "Increase all drink prices by $1."
- "Raise everything in the Appetizers category by 5%."

Bulk prompts get the full-size safety gate: the confirmation states the exact affected count, and very large changes ask you to type a confirmation phrase (see *Previews, confirmations, and safety*).

Cash management

- "How much should be in the bar drawer right now?"
- "Was drawer 2 over or short yesterday?"
- "Set a $500 mandatory drop threshold on the Front Register for USD."
- "Drawer 2 is stuck waiting for a count that's never coming — free it up."

Building menu content

- "Create a menu category named Smoothies and add: Orange & Banana Smoothie $5.50, Strawberry Smoothie $5.50, Spinach & Pear Smoothie $6.25."
- "Create a modifier group named Smoothie Extras with Whipped Cream $1, Stevia $1.25, Chopped Nuts $1.50, and assign it to every smoothie."

- "Create a bar category named Cocktails with a Margarita at $9 and an Old Fashioned at $11, add bar modifiers Salt Rim (free) and Top Shelf $2 for Cocktails only, and add qualifiers EZ, NO, and EXTRA."

Multi-part prompts like these run step by step — category, items, modifiers, assignment — each with its own confirmation. Include details like the tax rate or prep printers in your prompt and the assistant will skip asking about them.

Employees

- "Create an employee named Maria Lopez as a server."
- "Give Maria the bartender job too."
- "Reset Maria's PIN."

Demand forecasting

- "How busy will Saturday be?"
- "What should we prep tomorrow?"
- "What will be the top seller on Saturday?"
- "How many burgers will we sell Friday?"
- "How reliable is the forecast?"
- "Anything unusual in sales lately?"

Answers come from the same nightly forecast as the Analytics > Demand Forecast page, so chat and dashboard always agree. Expect the assistant to quote an expected range alongside the number and qualify it with the forecast's recent accuracy. Forecasts need about two weeks of sales history; item questions ("how many burgers") work up to 7 days out, sales questions up to 14.

Inventory and purchasing

- "What do I need to order for the next 7 days?"
- "How much inventory do I need for caesar salads next week?"
- "How much chicken will we use this weekend?"
- "Will we run out of romaine before Monday?"
- "What's low on stock?"
- "What's my food cost on the burger?"
- "How much chicken do we go through a week?"

These combine the forecast with your recipes and current stock, so the answer is an ingredient list — needed, on hand, shortfall, cases to order, estimated cost — rather than a sales number. Items with no recipe are named so you know what the total leaves out (see *Inventory and purchasing questions*).

Market comparison

- "How do our burger prices compare to nearby restaurants?"

The assistant pulls your items, checks competitor menus on the web, and gives a directional summary — noting that online menu prices are often stale and delivery-app prices run high.

Fixing a mistake

- "Undo."
- "Put the Margarita back to $9."

Worth scheduling

Any lookup above can be emailed on a schedule with the **Schedule** button under its answer. The ones that earn their keep: the weekly order list every morning, tomorrow's prep plus low stock at End of Day, the busy-days forecast on the day you write the rota, and last week's sales and labor summary first thing Monday (see *Scheduling a question by email*).

> The more specific the prompt, the fewer questions you'll get back. "Raise prices" earns a clarifying question; "raise all 12 drink prices by $1" earns a preview.

Register & navigation prompts

- "Add a small Coke, no ice."
- "Add another round."

- "Add a misc item, side bacon, 3.50, well done."
- "What's the total on this order?"
- "Print the receipt."
- "Void this order, customer walked out."
- "Settle cash, exact change."
- "Settle cash, fifty." (the assistant states the change due)
- "Clock out." / "No sale." / "Run end of day."
- "Open Riley Server." / "Open the BBQ Burger item." (Back Office)

AI usage, limits and your monthly allowance

AI Assistant

View online ↗

How AI actions are counted, what the monthly allowance covers, and what happens when you go over.

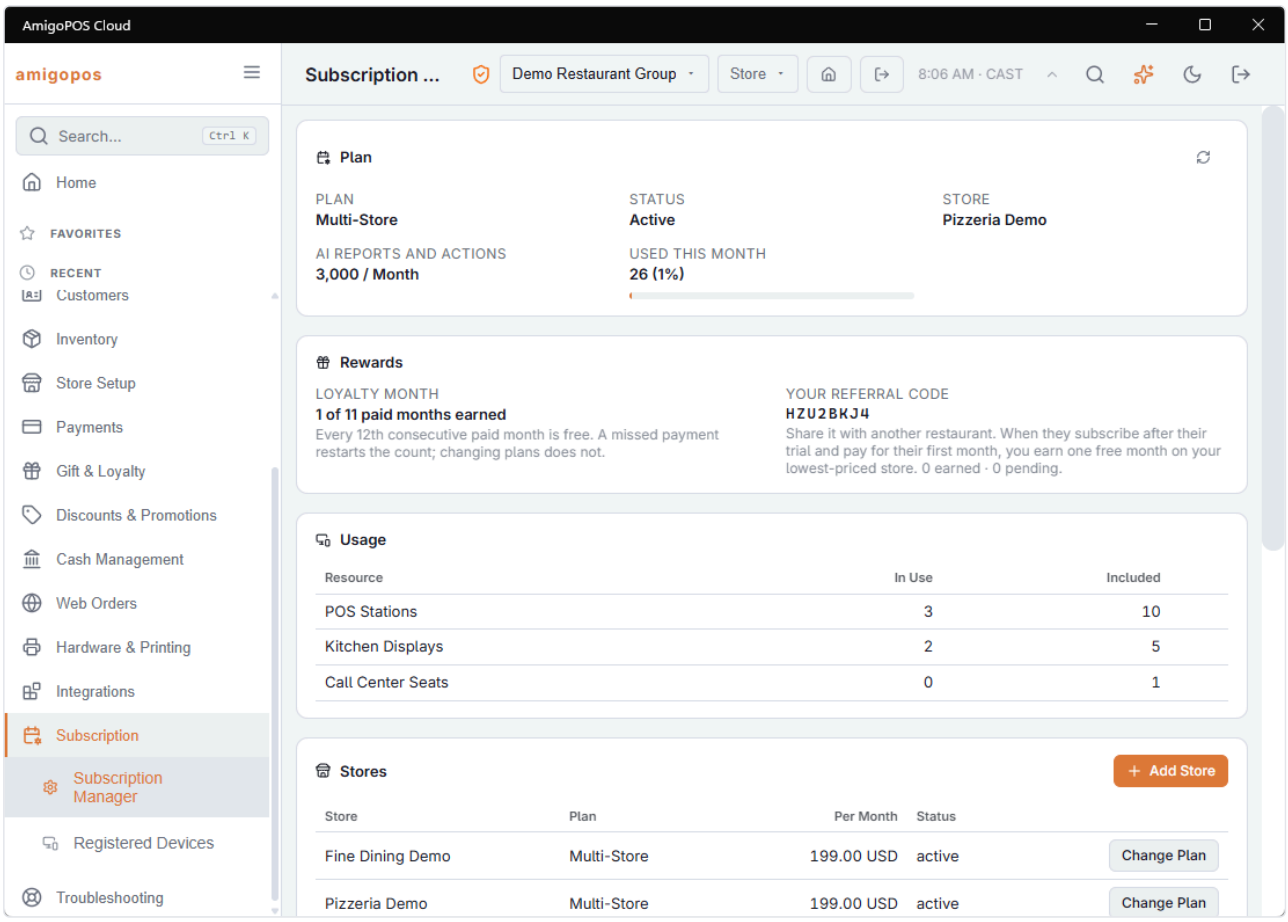
Every AI feature — the assistant, Ask For A Report, Menu Import, invoice scanning and the rest — counts toward the store's monthly **AI allowance**, which comes with your plan. AI add-on packs raise it.

How actions are counted

What you use	Counts as
A normal assistant question or change, a report question, an explanation, a written description, an allergen suggestion, the end-of-day summary	1 action
Scanning a supplier invoice	2 actions
An assistant research question (larger model or web search), analyzing station logs	3 actions
A Menu Import	5 actions

Watching your usage

The **Subscription** page in the Back Office shows a bar with this month's AI use against the allowance. It turns amber at 80% and red at 100%, and once you are over it shows how many extra actions there are and their price.



The account email also gets a message when a store reaches 80% and again at 100% of its allowance, once each per month. Trial stores are not emailed.

Going over the allowance

Nothing stops. AI keeps working, and actions beyond the allowance are billed as overage at your plan's price per extra action on the next statement.

Daily limits

Separately, each store has generous daily safety limits for the register assistant, voice replies and Back Office AI. They exist to stop runaway use; if one is reached, the assistant says so and it resets the next day.

CHAPTER 3

Order Entry

Introduction

Features

View online ↗

What the order entry screen can do, grouped by task, with a link to the topic for each feature.

The **Order Entry** screen is where you ring up everything a guest buys — from a single coffee to a split check for a table of ten. This topic is the map of what it does, grouped by the task you are doing, with a link to the topic that explains each feature. Everything here is live at the register; the Back Office pages that shape it are under **Store Setup › Order Entry Screen** (see Order-entry screen layout).

Starting an order

- **Order types** — dine-in, takeout, delivery, bar tab or any type of your own; each one runs its own workflow and prompts. Starting an order, Order types and workflow.
- **Tables and seating** — open a table from the floor plan and seat the party. Seating a party and opening a table.
- **Delivery** — attach the customer and address, with the delivery charge and zone applied automatically. Delivery orders and driver assignment.
- **Bar tabs** — open a named tab, hold a card on it, settle or transfer it later. Starting and naming a tab, Bar tabs on a card.
- **Call center** — take a phone order, find the customer and route the order to the right store. Taking a call-center order.

Building the order

- **Menu grid and search** — browse by category or type to search the whole menu. Adding items from the menu grid.
- **Bar menu** — the fast bartender layout with qualifiers and pour sizes. Bar modifiers and qualifiers.
- **Misc and open-price items** — ring up something that is not on the menu. Miscellaneous and open-price items.
- **Barcodes** — scan retail items, and price- or weight-embedded (GS1) labels from a scale printer. Scanning barcodes and price-embedded labels.
- **Weighed items** — by hand or from a connected scale. Quantity, repeat and weighed items, Scales for weighed items.
- **Pizza builder** — halves, sections and toppings. Pizza builder.
- **The item panel** — everything you can do to one line on the check. The item panel.

Modifiers and recipes

- **Food modifiers** — required and optional groups, with minimum and maximum picks and levels. Food modifiers and how they prompt.
- **Bar modifiers, qualifiers and upcharges** — neat, rocks, double, premium pours and the like. Bar modifiers and qualifiers, Bar menu upcharges.
- **Recipes and pour guides** — the build shown to the bartender. Bar modifiers, qualifiers, and recipes.
- **Mandatory beverage** — a beverage step in the order type's workflow. Workflow steps, stage by stage.

Working with items

- **Quantity, repeat, price change, notes** — The item panel, Item notes and special instructions.
- **Comps and line discounts** — Comps, line discounts and order discounts.
- **Removing a sent item** — with a reason, and the option to return the ingredients to inventory. Reason lists and word filters.
- **Allergies on the order** — Declaring allergies on an order.

Guests and seating

- **Guest count and guest names** — Setting and changing guest count, Guest names and per-seat ordering.
- **Items by guest** — Assigning items to guests.
- **Time-based items** — pool tables, lanes and rooms charged by the clock. Time-based items at the register.

Discounts and pricing

- **Line and order discounts** — Comps, line discounts and order discounts.
- **Coupons** — printed, scanned or typed. Applying a coupon.
- **Event pricing and price rules** — prices that change by time, day, guest or quantity. Special and event pricing, Price rules.
- **Cover charges and gratuity** — Gratuity and cover charges.
- **Surcharges, tax and rounding** — Surcharges and tax on the settle screen.

Loyalty and cards

- **Loyalty** — look a member up by card, phone or QR, earn and redeem. Enrolling a customer or loyalty card, Earning and redeeming points.
- **Gift cards** — sell, reload, check a balance and pay. Selling and reloading gift cards, Paying with a gift card.
- **The customer** — look up a guest, their history and "the usual". Customer lookup at the register, The usual.

Order actions

- **Hold, delay and courses** — Holding an item or the whole order, Delaying and timing an order, Course management and fire.
- **Recall** — reopen any open or held order. The orders list.
- **Split and combine** — by item, by guest or evenly; merge checks; several checks on one table. Split by item, Combining orders, Multiple checks on one table.
- **Transfer** — to another table or to another server. The table action panel, Transferring an order to another server.
- **Void, cancel, refund** — Voids and the void reason prompt, Cancelling or discarding an order, Refunds.

Payment and settle

- **Cash**, with change due and quick-cash buttons, in more than one currency. Cash payments and change due, Accepting foreign currency.
- **Cards** — through the terminal, keyed in by hand, or paid by the guest from a QR on the receipt. Card payments through the terminal, Manual credit card entry, QR pay at table.
- **House accounts and gift cards** — Charging orders and account payments at the POS, Paying with a gift card.
- **Split tender** — Splitting payment across methods.
- **Server banking** — Shift banking overlay.

Compliance and devices

- **Age verification** — ID prompts on age-restricted items. Age verification and ID-required items.
- **Barcode scanner** — USB barcode scanner.
- **Customer display** — the running order, tip prompt and receipt QR on a second screen or a paired device. Customer display overview.

Selling, kitchen and alerts

- **Suggestive selling** — add-on offers at the right moment, with attach goals. Suggestive offers at the register.
- **Calling the bar** and drinks-ready alerts — Calling the bar.
- **Ticket timing** — aging and late tickets on the kitchen display. Aging and late thresholds.
- **The AI assistant** — ring up and manage orders by voice or text. Working the register by voice or text.

Printing

- **Prep tickets, receipts and slips** — Print routing, Printing a receipt, Printing guest Wi-Fi details.

Offline mode

Order entry keeps working through a brief internet outage and syncs by itself when the connection returns. How offline mode works has the full list of what does and does not work without a connection.

Station layout and UI settings

Order Entry › Introduction

View online ↗

Put the guest check on the left or right, size the category and item buttons by rows and columns, and scale the text - per station or as a store-wide default, from the Layout overlay or by asking the assistant.

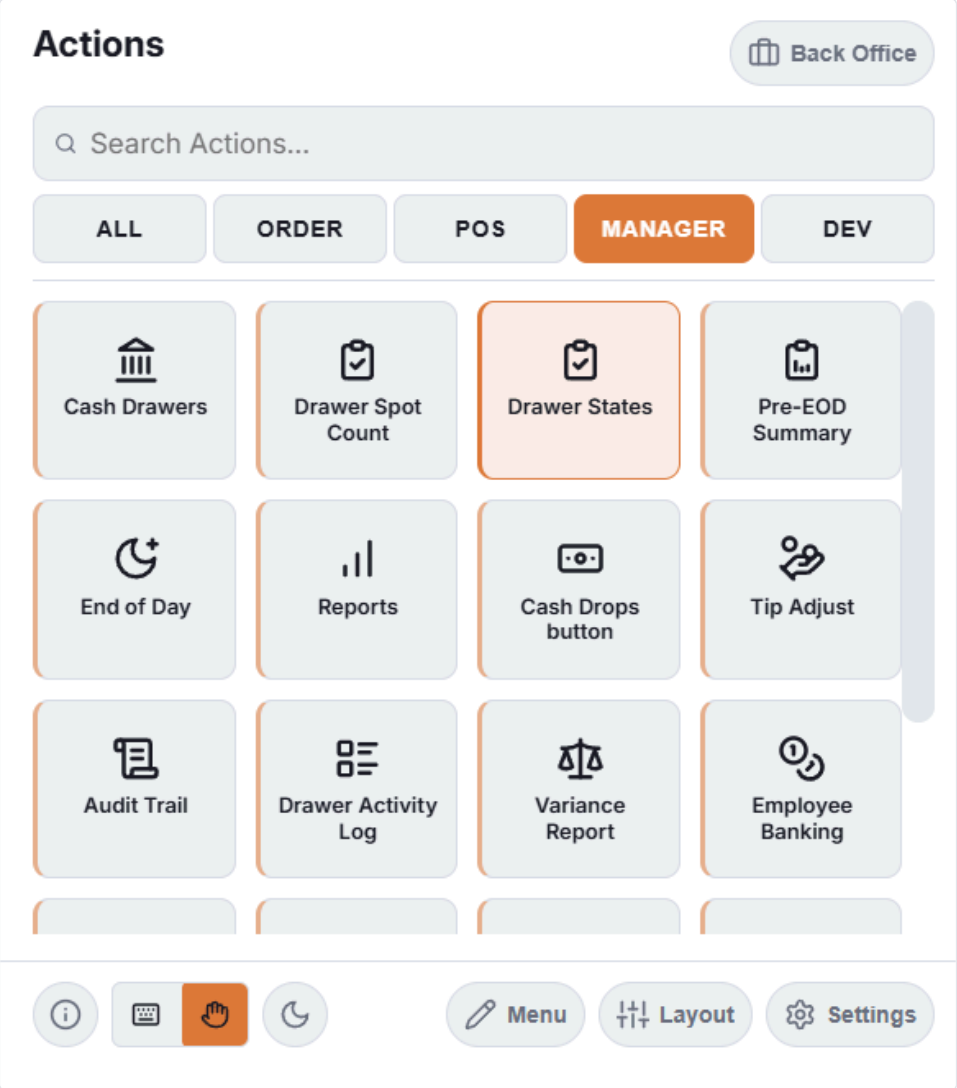
Every register is a little different: a 24-inch terminal at the counter, a 10-inch tablet behind the bar, a left-handed server who wants the check on the other side. **Layout** lets a manager shape the Order Entry screen to fit the station without touching the menu itself. Everything here is a *display* preference - it never changes prices, items, or the order.

What you can change

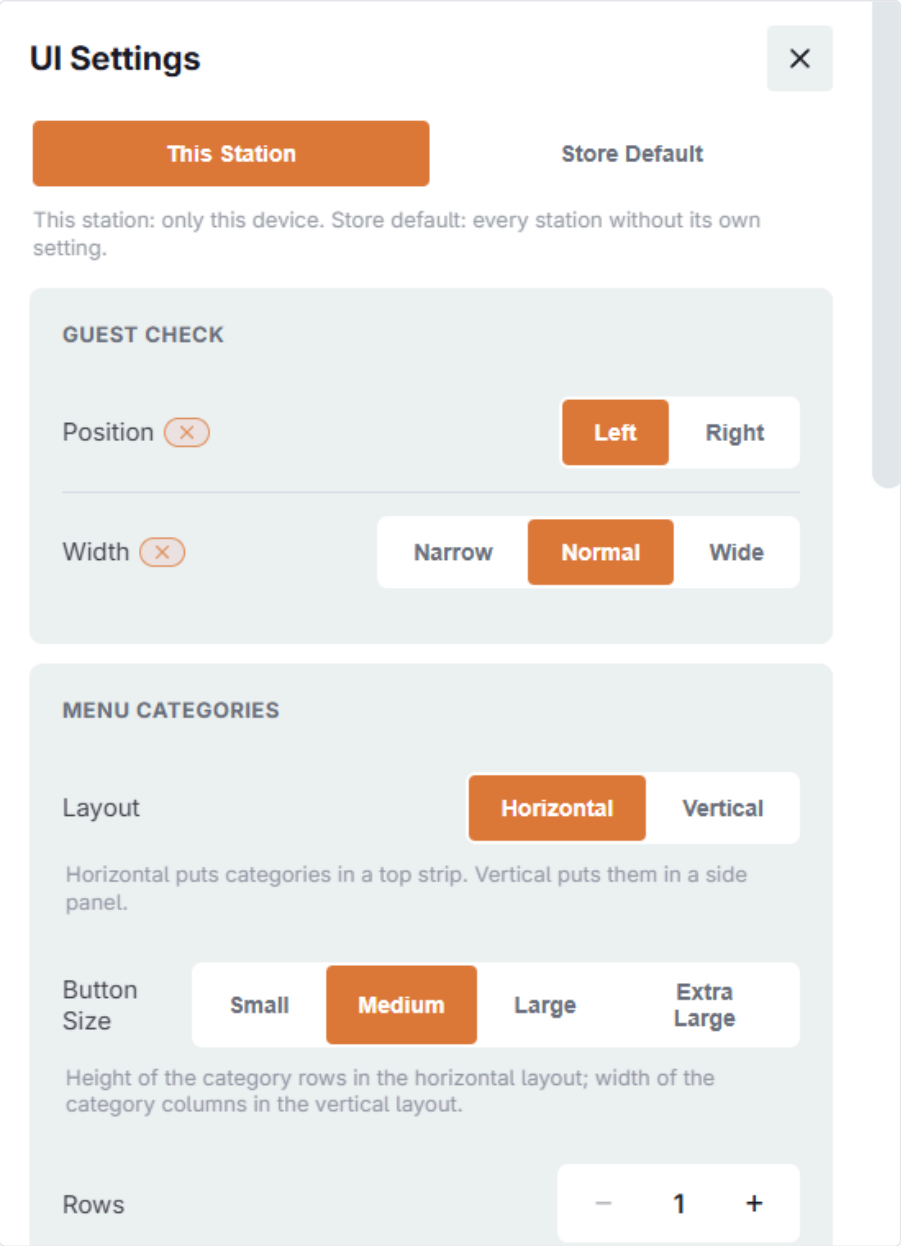
1. **Guest check position** - the check panel on the left (default) or the right of the screen.
2. **Guest check width** - Narrow, Normal, or Wide.
3. **Menu categories** - a strip across the top or a panel down the side, and how many rows and columns of category buttons show before scrolling.
4. **Menu items** - how many rows and columns of item buttons fill the grid. Buttons are sized from the space available, so the same setting looks right at any screen resolution.
5. **Text size** - Small, Medium, Large, or Extra Large for the menu buttons and the lines on the guest check.
6. **Station at bar** - suppresses prep tickets for bar items rung up at this station (unchanged from before; see *Bar modifiers and qualifiers*).

Opening Layout

Tap the **Actions** button (the ≡ icon at the top right of the guest check), then **Layout** in the header row next to **Menu** and **Back Office**. The button only appears for users whose job has the *Manager* permission.



You can also open it while editing the menu: turn on **Menu** (edit mode) and tap the sliders button that appears at the bottom right of the screen.

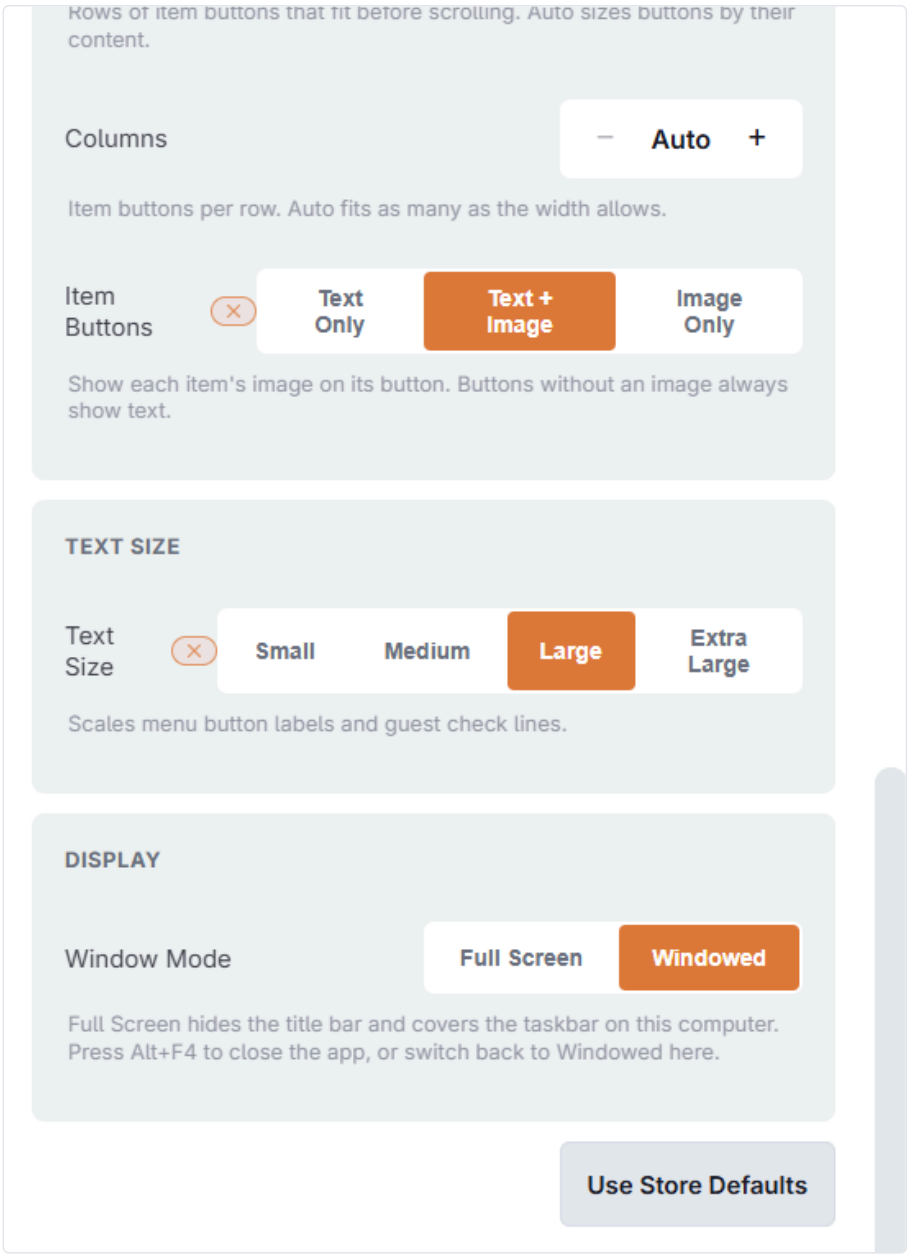


This station or the whole store

Each setting exists on two levels, and the switch at the top of the overlay chooses which one you are editing:

1. **This Station** - applies to this device only. Use it for the tablet that needs bigger buttons or the one register that sits on the other side of the counter.
2. **Store Default** - applies to every station in the store that does not have its own value. Set it once from any register and new or reset stations follow it.

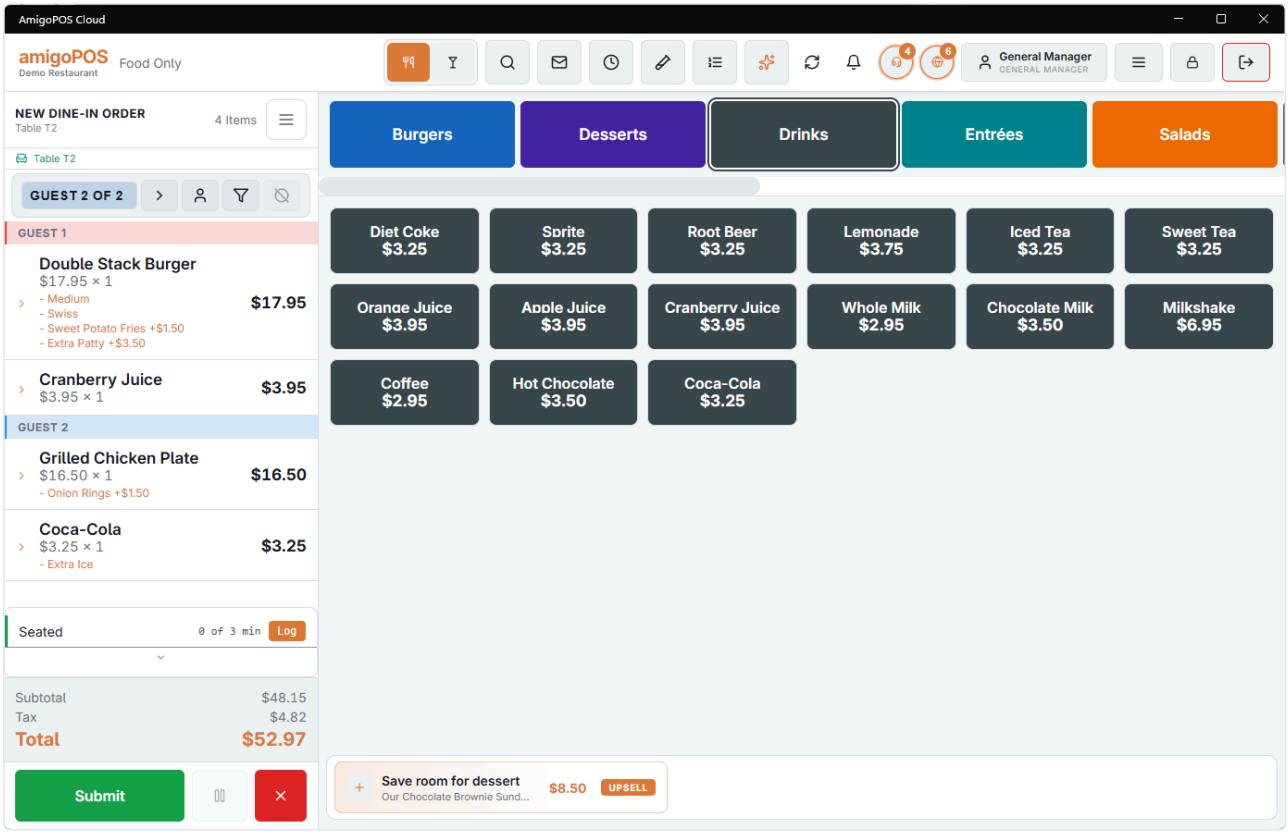
A station value always wins over the store default. When a setting has been changed on this station, a small **×** chip appears next to its label; tap the chip to drop that one override and fall back to the store default, or tap **Use Store Defaults** at the bottom to drop all of them.



Note: Store defaults reach the other registers the next time they refresh their settings (a fresh login, a data refresh from the top bar, or the next sync). The station you are on updates immediately.

Guest check

Position moves the check panel to the left or right edge. **Width** gives the check more or less room; Wide is useful when guest names, modifiers, and notes make the lines long, Narrow gives the menu grid the most space.

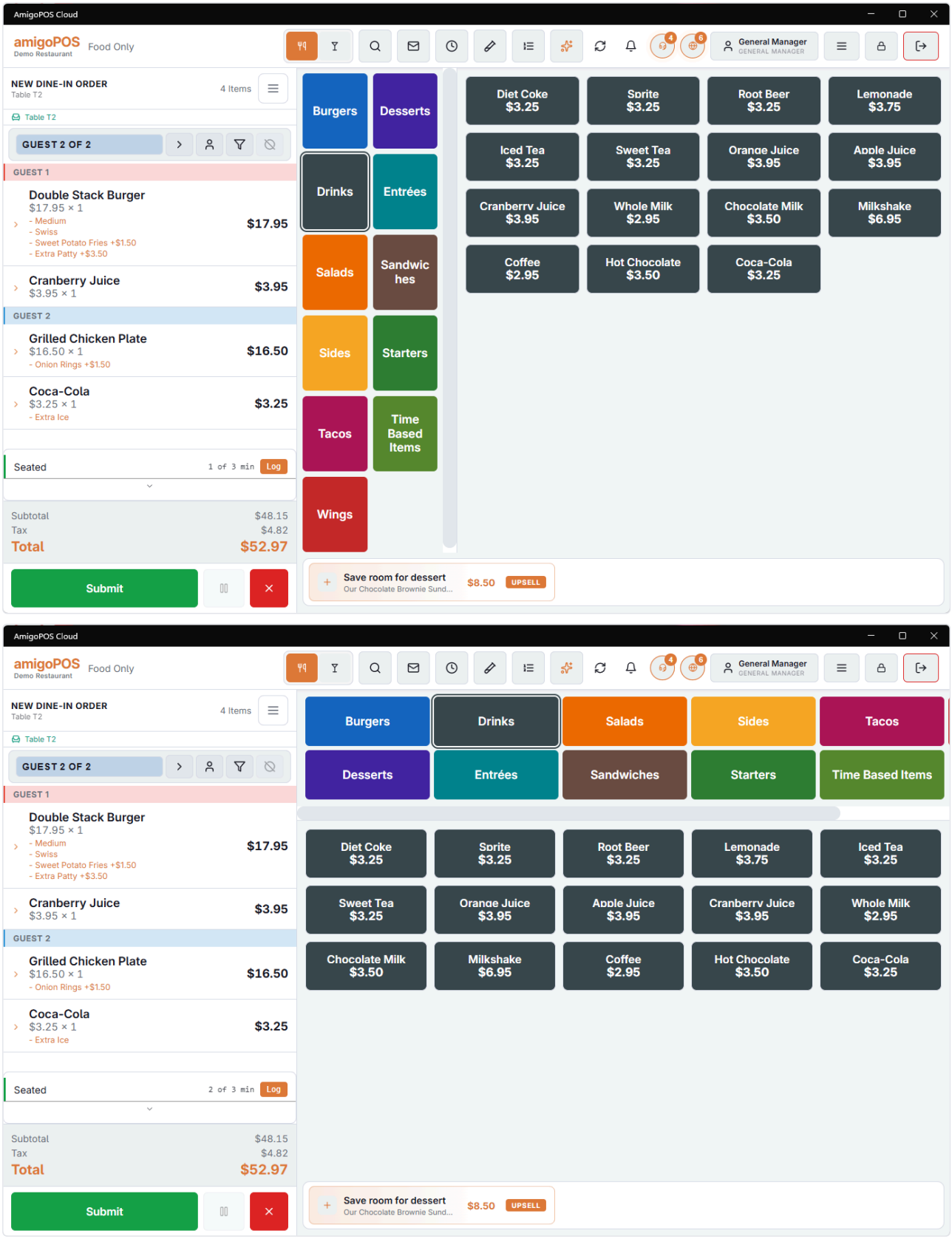


Note: On phones the guest check is a slide-up drawer, so position and width do not apply there and the section is hidden.

Menu categories

Layout puts the category buttons in a strip above the items (Horizontal) or in a panel beside them (Vertical). **Rows** and **Columns** set how many buttons are visible before the strip or panel scrolls; the buttons stretch to fill the space you give them.

Switching the layout resets its rows and columns to sensible starting points - one row for the horizontal strip, six rows by two columns for the vertical panel - so adjust those after choosing the layout.

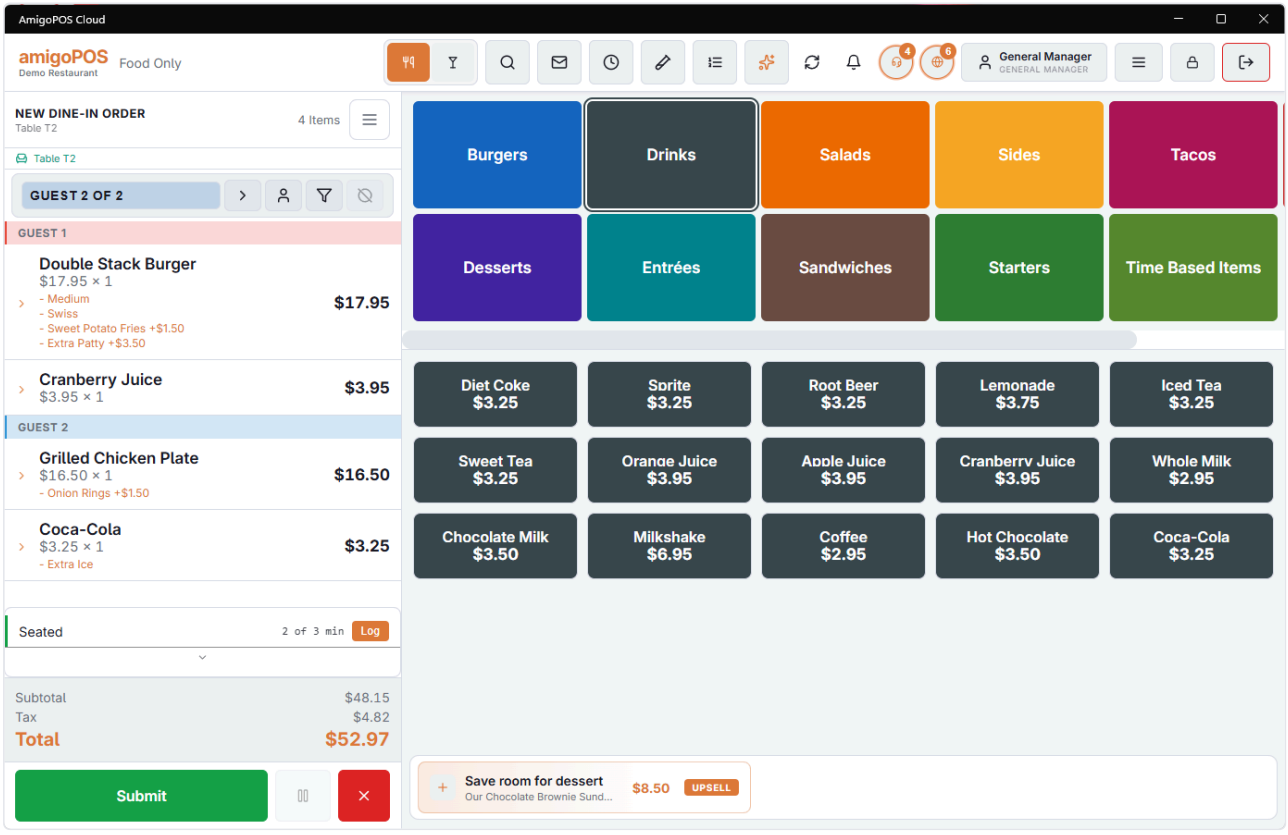


Menu items

Left on **Auto**, item buttons keep their standard size and the grid fits as many across as the width allows - the behaviour every store had before this setting existed. Set **Columns** to fix how many buttons sit across the grid, and **Rows** to fix how many fit top to bottom; the

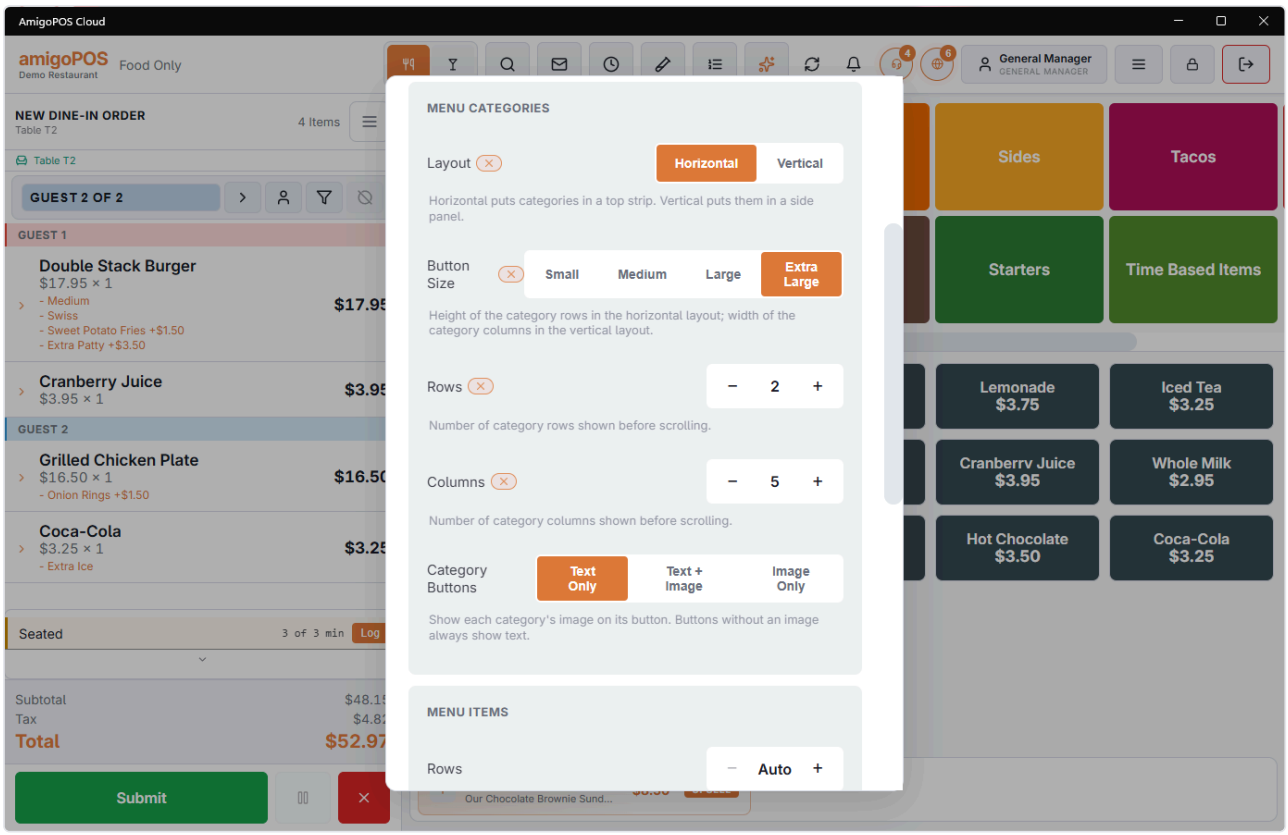
buttons grow or shrink so exactly that many are visible, and any extra items scroll below.

Fewer rows and columns means bigger buttons - good for a busy bar or a small touch screen. More rows and columns suits a large menu on a big terminal.



Text size

Text Size scales the labels and prices on the category and item buttons and the item lines on the guest check. It does not change the top bar, overlays, or Back Office, so a larger size stays readable without pushing other screens out of shape.

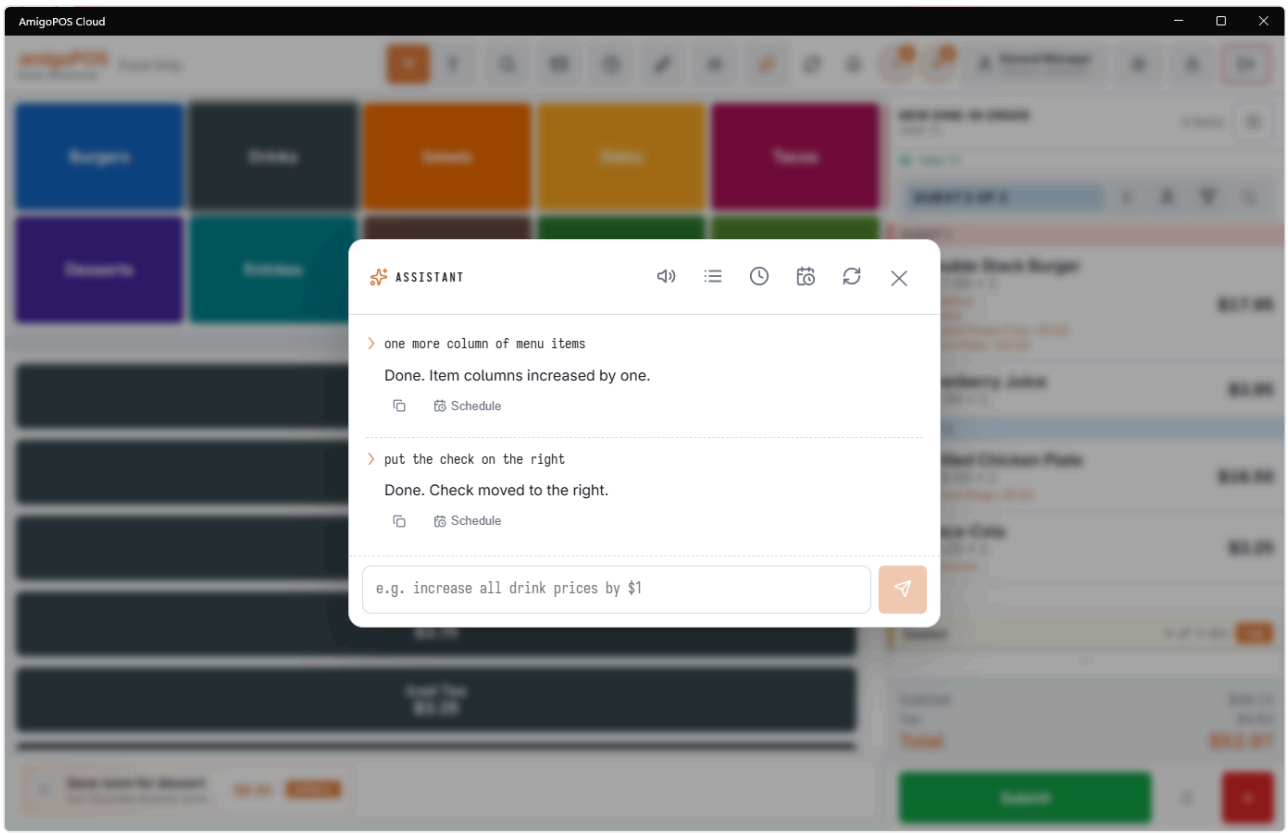


Asking the assistant

A manager can change any of these by talking to the assistant instead of opening the overlay. It knows the station's current layout, so relative requests work:

1. "Put the guest check on the right."
2. "One more column of menu items."
3. "Make the text bigger."
4. "Show the categories down the side."
5. "Set item rows to 4 for every station." - saying *every station*, *all registers*, or *the whole store* writes the store default instead of this station.
6. "Open the layout settings." - opens the overlay.

The assistant applies the change through the same rules as the overlay - values are checked, rows and columns are kept within range - and confirms with the resulting layout.



Note: Layout changes are manager-only, from the overlay and from the assistant. Non-managers can still ask the assistant what the current layout is.

Good to know

1. Retail mode keeps its own category and item grid settings, because its screen is laid out differently; guest check and text size are shared.
2. Category and item colours, names, and order are part of the menu, not the layout - change those under **Menu** (edit mode) or in Back Office.
3. Nothing here is stored on the order, so switching a station's layout in the middle of service is safe.

Building an order

Starting an order

Order Entry › Building an order

View online ↗

Picking the order type, and what that one choice decides about the rest of the order.

Every order starts with an **order type** — dine in, take out, delivery, bar, whatever your store uses. It is the first tap, and it is not cosmetic.

What the order type decides

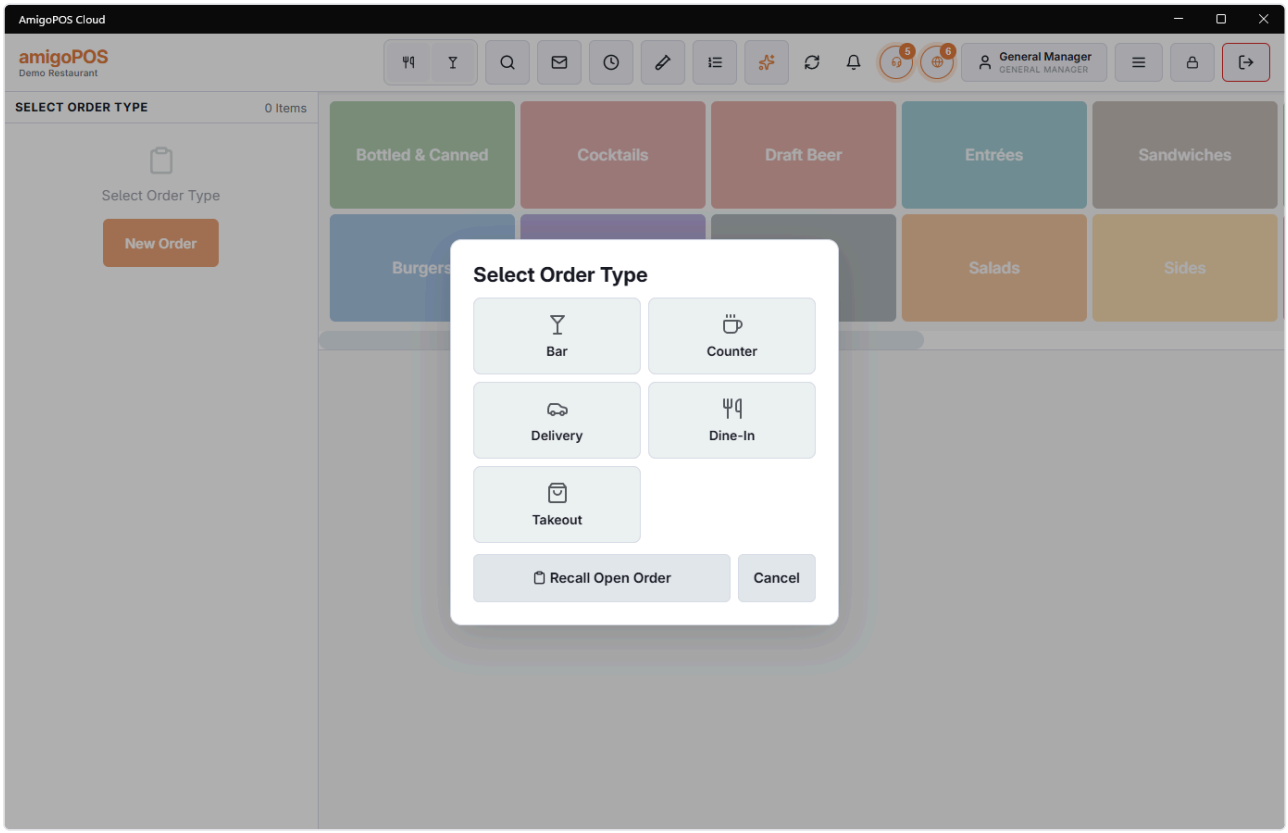
- **What the POS asks you next** — a table, a guest count, a customer and address, or nothing at all.
- **Tax treatment** — take-out exemptions and non-taxable types apply from here.
- **Surcharges, gratuity and cover charges**, where the type is configured to add them.
- **Which menu opens**, and which prices apply where price rules are set by order type.
- **How it reports** — order type is one of the main breakdowns on the end-of-day report.

Then build it

Add items, and **send** when the kitchen should have them. Sending is what fires prep tickets; until then the check exists only on the till and can be changed freely.

> Changing your mind about the order type after items are rung is possible but not free — tax and surcharges recalculate. Get it right at the start where you can.

> Order types are configured in **Back Office › Store Setup › Order Types** (Order types and workflow). If a type asks the wrong questions, that is where it is fixed, not at the register.



What the register asks, and in what order

The questions after the order-type tap — table, guests, customer, loyalty card, a name or pager number — open one after another, in the order the type's workflow lists them. Cancelling one doesn't cancel the order; the next one opens. See Start prompts and their order.

When the order type picker opens by itself

After sign-in and after each order the register opens the order type picker by itself, with **Recall Open Order** for an order already started. A store that prefers to start each order with a tap switches that off: **Back Office › Store Setup › Order Entry Screen**, the **Settings** tab, **Select Order Type › Ask For The Order Type Automatically**. The register then waits for **New Order**, a tap on the menu or **Recall**. See Order-entry screen layout.

Declaring allergies on an order

Order Entry › Building an order

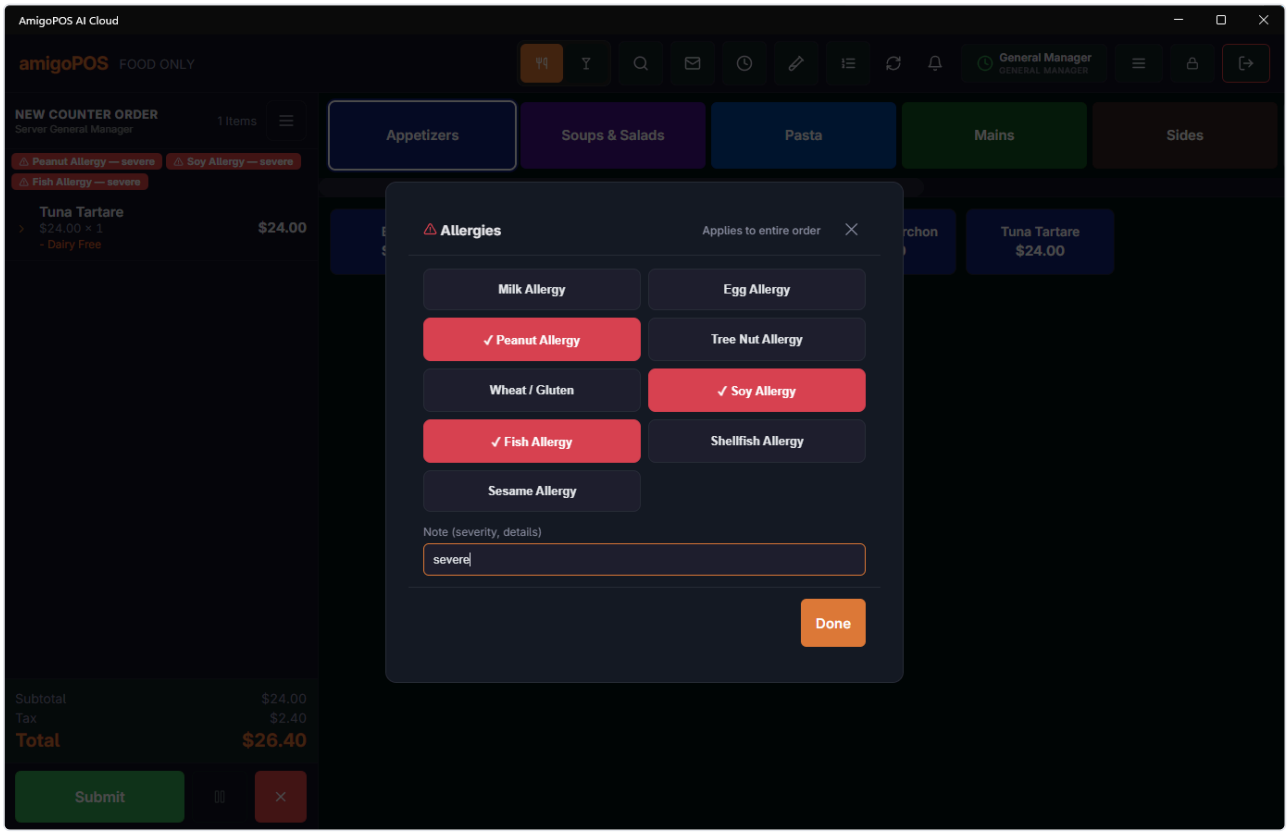
View online ↗

Record a guest's allergies on the order so the kitchen sees the warning — per guest or for the whole order, with an optional note.

When a guest mentions an allergy, declare it on the order so the warning travels with the food. Declarations appear as zero-priced lines on the check — impossible for the kitchen to miss, and part of the order's permanent record.

Declaring an allergy

1. With the order open, tap **More › Allergens**.
2. The panel shows the store's allergen list as buttons. Tap one to declare it — a checkmark appears. Tap again to remove it.
3. Optionally type a **note** ("severe — carries EpiPen", "cross-contact ok"). The note rides along with the declarations at the current scope.
4. Tap **Done**. The declarations are now lines on the order.



Guest vs. whole order — scope is automatic

The panel header shows who the declaration applies to:

- On order types with **guest assignment** (table service with seats), declarations attach to the **currently selected guest** — "Guest 3" in the header. Select the right guest on the guest bar *before* opening the panel. Each guest keeps their own declarations, so seat 2's shellfish allergy doesn't flag seat 4's food.
- On order types without guests (counter, take-out, delivery), declarations apply to the **whole order**.

What happens next

- Declarations are sent with the order like any other line, so the kitchen sees the allergy alongside the guest's items — on the kitchen display grouped with that guest's food.
- They're priced at zero and never affect the total.
- They persist with the order: recall it tomorrow's reorder or re-open the tab, and the declarations are still there.
- To change a declaration after sending, reopen **More › Allergens** — the same toggles add or remove.

Common questions

- **The panel says no allergens are defined.** The store's allergen list is empty — it's maintained in the back office. Add the standard set (gluten, shellfish, peanuts, tree nuts, dairy, egg, soy, fish, sesame) once and it's available at every station.
- **I declared it on the wrong guest.** Select that guest, toggle it off, then select the correct guest and toggle it on.
- **Does declaring an allergy block conflicting items?** No — it's a communication tool, not enforcement. The kitchen and server remain responsible for what's served.

The item panel (editing a line on the check)

View online ↗

Tap any line on the check to open its panel — quantity, course, modifiers, notes, discounts, comps, and every other per-item action in one place.

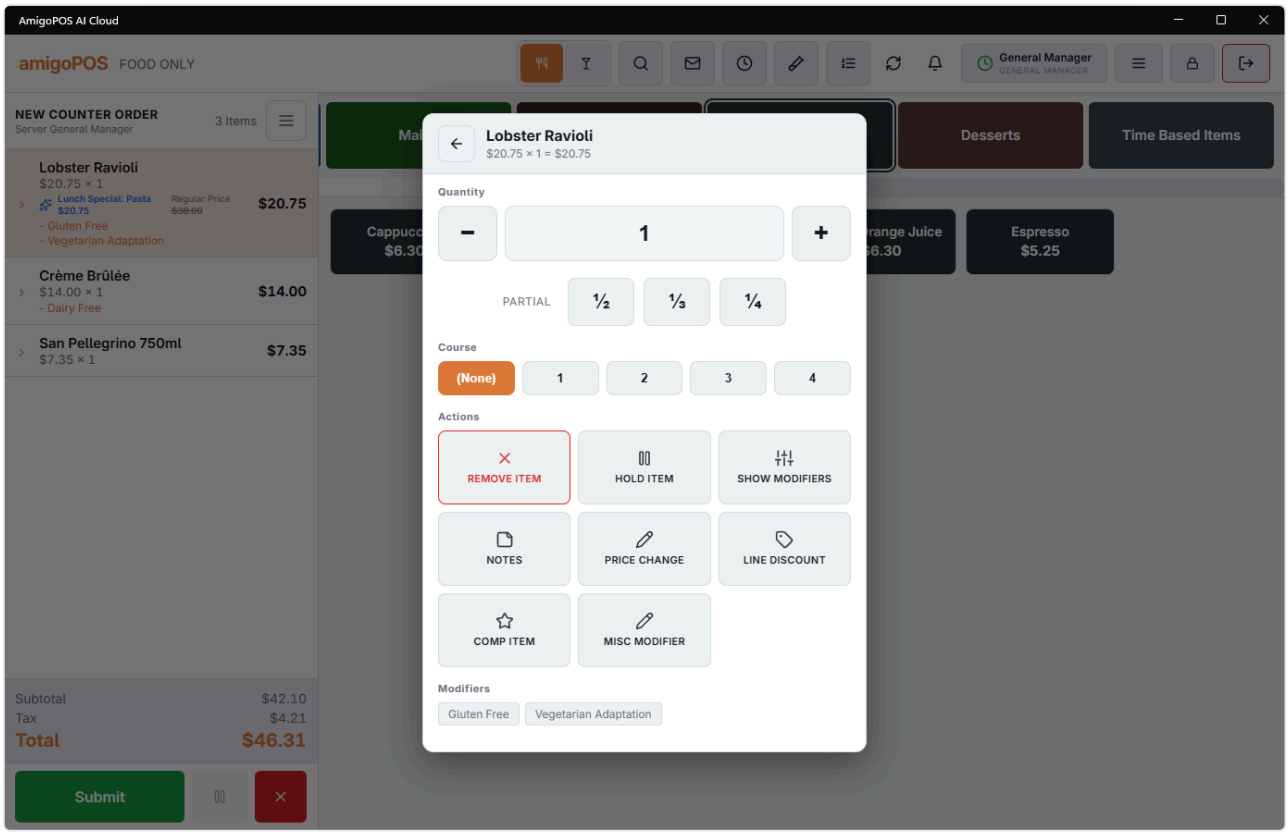
Tap any line on the check to open its **item panel** — the one place for everything you can do to that line. The header shows the item, its unit price, quantity, and line total.

Quantity

Use the **− / +** stepper, tap the number for a numpad, or use the **partial buttons (½ ⅓ ¼)** to reduce by a fraction — useful when guests share an item and one portion comes off. Quantity changes on already-sent items follow the store's permissions.

Course

On new items in table service, tap a course number to assign the item to a course (or leave it on the default). Coursing controls kitchen firing — see *Course management and fire*.



Actions

The action grid adapts to the item — what it is and whether it's been sent:

- **Remove** — deletes a new item instantly; a sent item prompts for a removed-item reason (see *Reason lists*). **Undo remove** restores a just-removed line.
- **Hold / release** — keep the item back when the rest of the order sends.
- **Modifiers** — reopen the item's modifier prompts to change selections.
- **Note** — free-text instructions that print with the item.
- **Guest name** / **Next guest** — label or reassign the line in per-seat service.
- **Price change** — override the price (permission-gated).
- **Line discount** — discount just this line; **Comp** / **Undo comp** — zero the line as a comp.
- **Misc modifier** — add a free-text modifier line.

- On **bar items**: **Upcharge** (switch Double/Premium variants on unsent items) and **Pour guide** (the drink's recipe, when one is defined).
- On **time-based items**: **Stop timer**.
- On **recalled orders**: **Reorder** — add a fresh copy of the item to the current round.

Below the actions, the panel lists the item's modifiers with their prices, plus any note, guest label, or line discount already applied.

Each action has its own topic with details — this page is the map. If a button described here isn't visible, it doesn't apply to that item type or state, or your sign-in lacks the permission.

Time-based items at the register

Order Entry › Building an order

View online ↗

Start, pause, resume and stop timers for pool tables, lanes and rentals; add players; read the live charge; settle a timed order.

When the menu has time-based items, a **timer button** appears in the order-entry top bar (also **More › Time based**). A badge on it shows how many timers run on this order. Games usually start straight from the table — see Starting a game from the floor plan; this page covers what happens on the check.

Starting a timer from the menu

1. Tap the timer button. The menu switches to the **time-based view**: one tile per timed item with its rate.
2. Tap the tile and confirm **Start timer**.
3. The item lands on the check as a live line.

Reading the live line

- A clock with the time played, and the charge so far — both update every second.
- The quantity is the number of intervals billed so far; it never drops below the minimum.
- A label under the line when a price rule or player count applies (*Happy Hour*, *3 Players*).
- ⏸ in front of the clock when the timer is paused.

Pausing and resuming

Tap the line to open the item panel and use **Pause Timer** — for a break, a phone call, a lane being fixed. The clock and the charge stop; the line shows ⏸. **Resume Timer** carries on from where it stopped: paused time is never billed. The table's light, if it has one, stays on.

Players

For items with an extra-player price, the item panel shows a **Players** stepper instead of Quantity. A change counts from the next interval — see Charging by number of players. For other items the quantity cannot be edited while the timer runs: it is set by the clock.

Stopping

Tap the tile again in the time-based view, or use **Stop Timer** in the item panel, and confirm. The quantity freezes and the line becomes a normal line: it can be discounted, comped or split like any other.

Settling

You do not need to stop timers yourself before paying: whenever you settle an order with running timers, the POS asks to stop them first and bills them to that second. See Settling, splitting and combining timed checks. Splitting and combining wait until the timers are stopped.

Common questions

- **Started the wrong item?** Stop the timer, then remove the line as usual.
- **Guests moved tables?** Stop the old table's timer and start the new one; both lines stay on the check.
- **Why two lines for one game?** The rate changed mid-game — happy hour started or ended, or a player was added. That is expected.
- **Does the timer run while the order is parked?** Yes. Recall it and the charge is current.

Adding items from the menu grid

Order Entry › Building an order

View online ↗

Categories and item buttons, and why an item you can see in the back office is not on the screen.

Pick a category, then tap items. Each tap adds one to the check; the line appears on the guest check as you go.

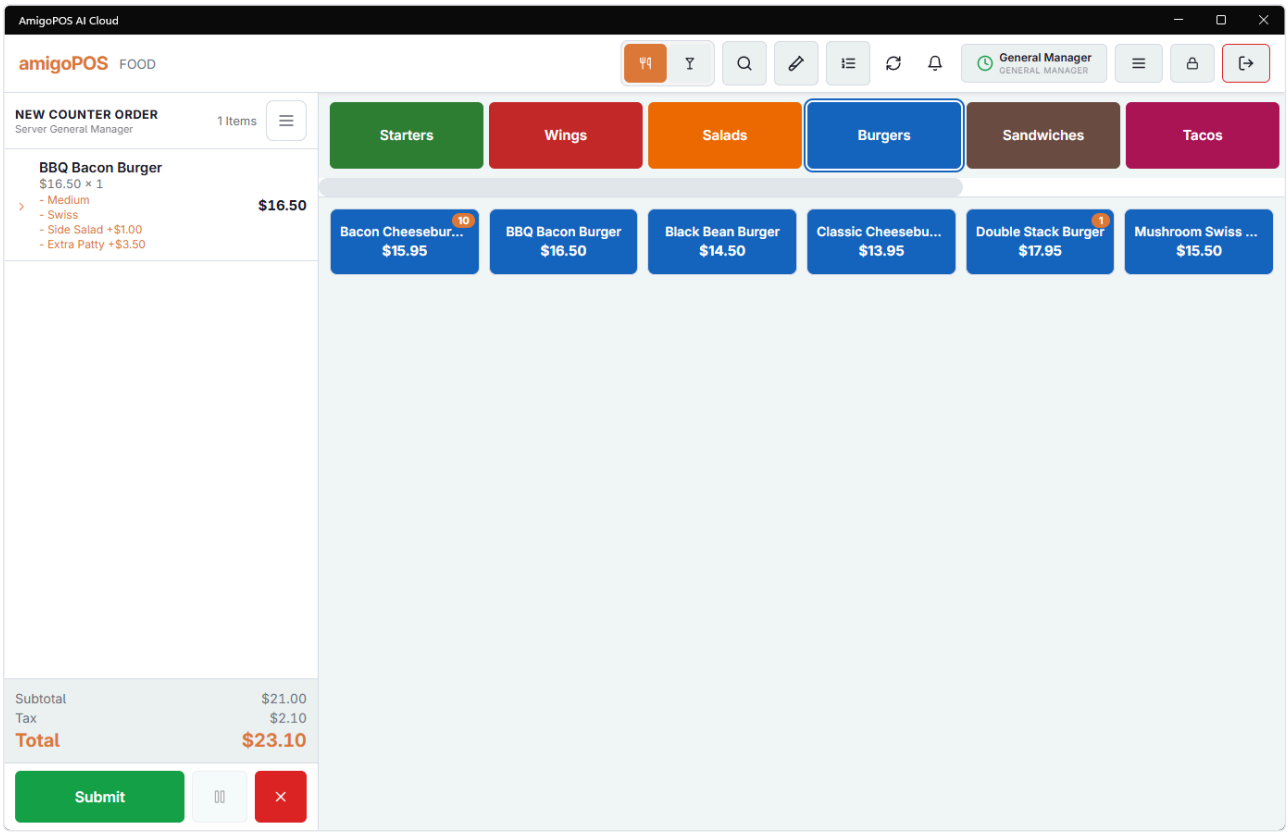
Items that carry modifiers open their modifier prompt instead of dropping straight onto the check — see **Food modifiers and how they prompt**.

When an item is not on the grid

An item can exist in the back office and still not appear here, for reasons that are all deliberate:

- **Time of day** — items can be set to appear only between certain times, which is how a breakfast menu disappears at eleven.
- **Day of week** — regular menu items can be restricted to particular days. Bar items are not day-restricted.
- **Availability** — an item can be limited to particular ordering modes rather than all of them.
- **Counters** — an item counted down to zero stops being sellable. See **Menu item counters**.
- **Button placement** — the item has no button position on this screen. It exists, it is sellable, and nothing is pointing at it.

> Before concluding something is broken, check the time and the day. An item that "vanished at 3pm" almost always has a time window on it.



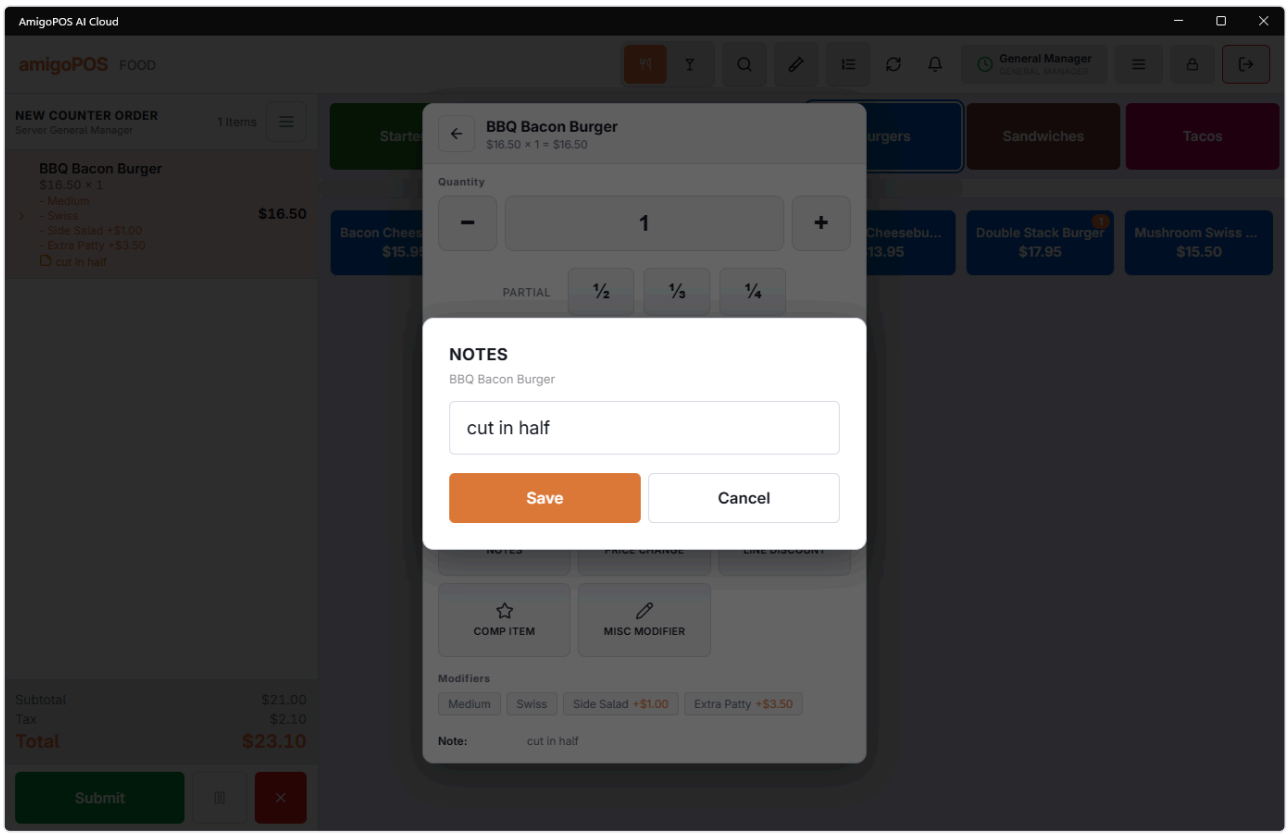
Item notes and special instructions

Order Entry › Building an order

View online ↗

Free-text notes that print on the kitchen ticket.

An **item note** is free text attached to a line — “sauce on the side”, “birthday plate”, “allergy: see declaration” — printed with the item wherever it goes.



Adding a note

Tap the line, then **Note** on the item panel; type and save. Notes print on the prep ticket and KDS directly under their item, and on the receipt. Whole-order notes (for the ticket, not one item) go through **More › Note** instead.

Notes vs. the alternatives

- If the kitchen sees the same request daily, make it a **modifier** — modifiers are tap-speed, consistent, priceable, and reportable; notes are none of those. Notes are for the genuinely one-off.
- Allergies belong in the *allergen declaration*, not a note — declarations are structured, per-guest, and can't be missed. A note can back it up ("severe") but shouldn't replace it.
- **Misc modifiers** (item panel) are notes with a price — use one when the one-off request costs money.

> Notes pass through the store's *word filters* before printing — typed shorthand can be cleaned up automatically on the ticket. Keep notes short: the kitchen reads them at arm's length, mid-rush.

Food modifiers and how they prompt

Order Entry › Building an order

View online ↗

Required groups, pick-one versus pick-many, and the included-modifier rule that decides what gets charged.

An item with modifiers opens its groups when you add it. Each group is a tab; work across them and confirm. With **Display modifiers only if mandatory** on (Store Setup › Order Entry Screen › Settings), an item whose groups are all optional is added straight away with its default modifiers; tap the line to add others.

Required groups

A group marked required will not let you confirm until something in it is chosen. The tab is flagged, and confirming jumps you to the group that is still empty rather than just refusing. That is how "how would you like that cooked" never reaches the kitchen unanswered.

Pick one, pick many, optional

A group either takes a single choice, takes several, or is entirely optional. Groups that take several can also carry a maximum, so a "choose up to three" group stops at three.

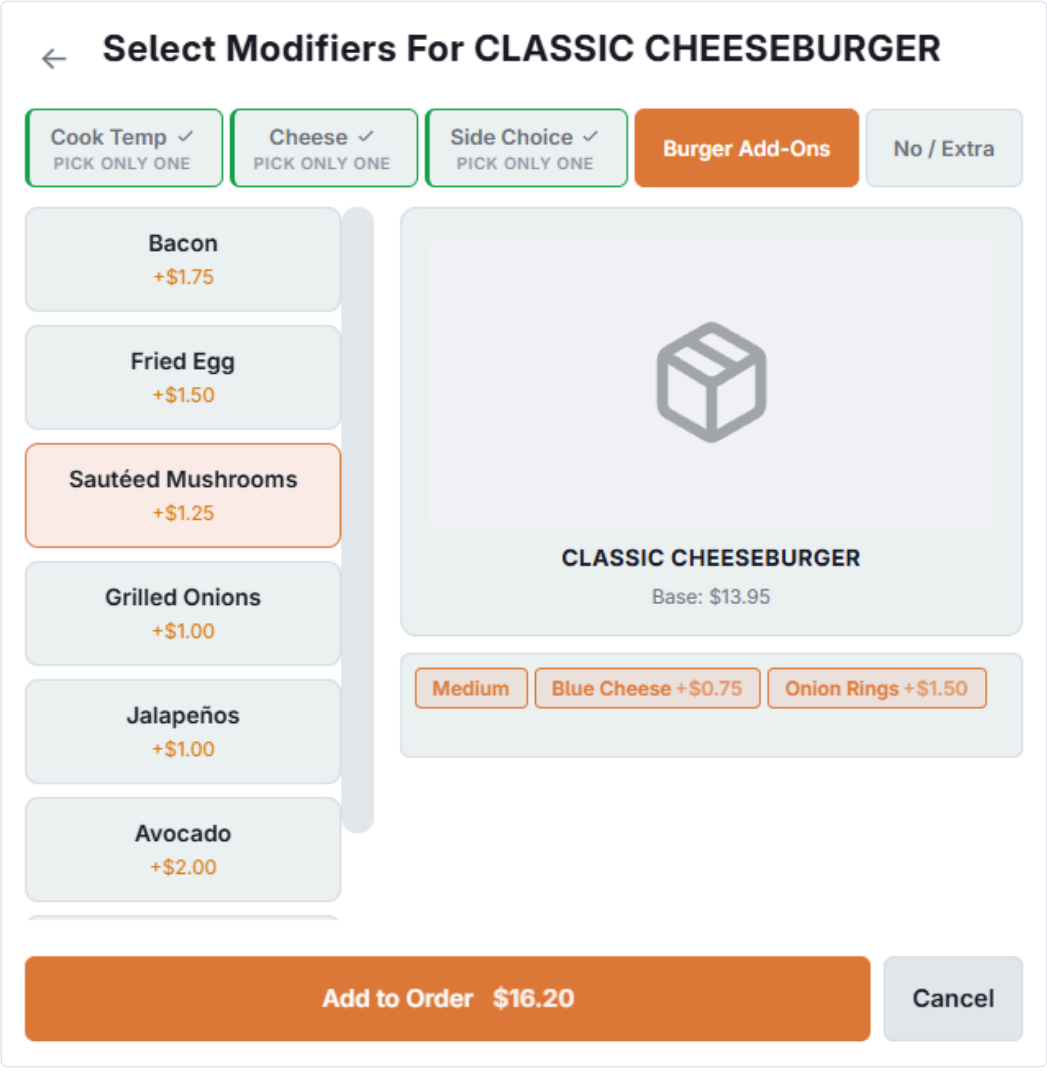
What gets charged

A group can **include** a number of modifiers in the item price — three toppings included, extras charged. The rule is worth knowing because it is not the order you tapped them in:

- The **cheapest** selections take the free slots. The dearest ones get charged. A guest choosing three cheap toppings and one expensive one pays for the expensive one.
- **Removals** — a "No" level, as in no onions — never cost anything and never use up an included slot.

Which groups an item prompts, whether they are required, and how many are included are all set in **Menu Setup › Modifiers**. If the prompts are wrong for one item, that is where it is fixed.

Modifiers print on the prep ticket under their item, so what the kitchen reads is what was tapped here. A missing modifier is a missing tap, not a printing fault.



Bar modifiers and qualifiers

Order Entry › Building an order

View online ↗

Building a drink line out of a qualifier and a modifier, and what the bar ticket ends up saying.

Bar lines are built from two halves. A **qualifier** — Extra, Light, No — and a **modifier** — the thing itself. Tap the qualifier, then the modifier, and the line reads "Extra Lime".

Tapping a modifier with no qualifier staged just adds it on its own.

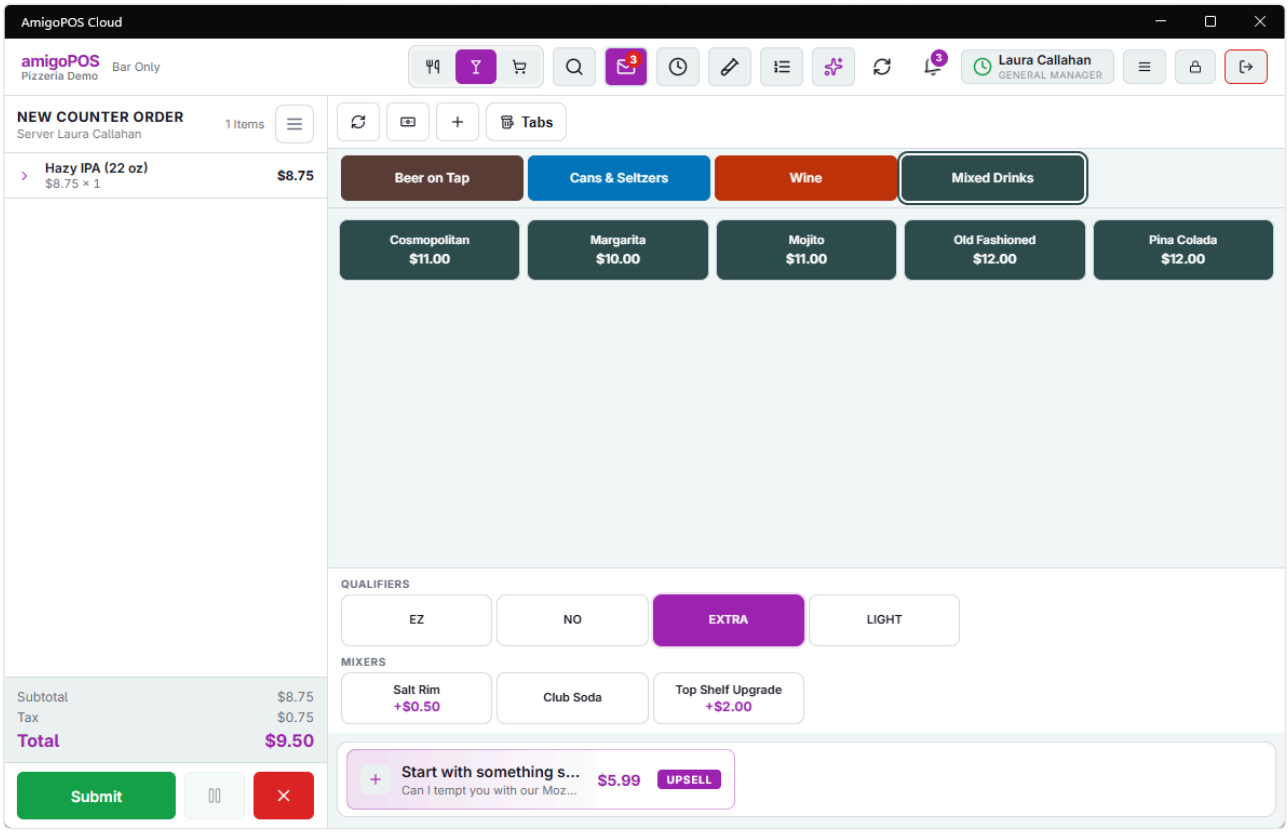
Two texts, one line

Every bar line carries what the guest sees and what the bar sees, and they are not always the same. The check and receipt get the full names; the bar ticket gets each half's prep text where the menu defines one, falling back to the name where it does not. That is how a receipt can read "Extra Lime Wedge" while the ticket reads the abbreviation the bar prints in.

Tapping again removes it

Tapping a modifier that is already on the line takes it off, whichever qualifier it was added with. Only real qualifier names count for that matching, so tapping "Lemon Soda" never removes a "Diet Lemon Soda" line by accident.

> Upcharges — Double, Tall, Premium, Virgin — are a different mechanism from qualifiers. See **Menu Setup › Pricing on the menu › Bar menu upcharges**.



Quantity, repeat and weighed items

Order Entry › Building an order

View online ↗

Ringing several of the same thing, and items sold by weight.

Several of the same item

Tap the item as many times as you need, or set the quantity on the line from the item panel. Two taps and a quantity of two produce the same result — pick whichever is faster for the number.

Where a line has modifiers, watch which you want: three identical drinks are one line at quantity three, but three drinks with different modifiers have to be three lines.

Items sold by weight

An item priced by weight takes a weight rather than a count, and the line total is weight times price. The weight can come from a price-embedded barcode on a pre-weighed package — see **Scanning barcodes and price-embedded labels** — or be entered on the line.

> Whether an item is priced by weight is a property of the item in the back office, not something chosen at the register. If a line asks for a count when it should ask for a weight, the item needs changing.

Miscellaneous and open-price items

View online ↗

Selling something that is not on the menu, and where the name and price you type end up.

A miscellaneous item is a line you type: a name and a price, for something with no menu button. A corkage charge, a lost-key fee, a special order from the chef.

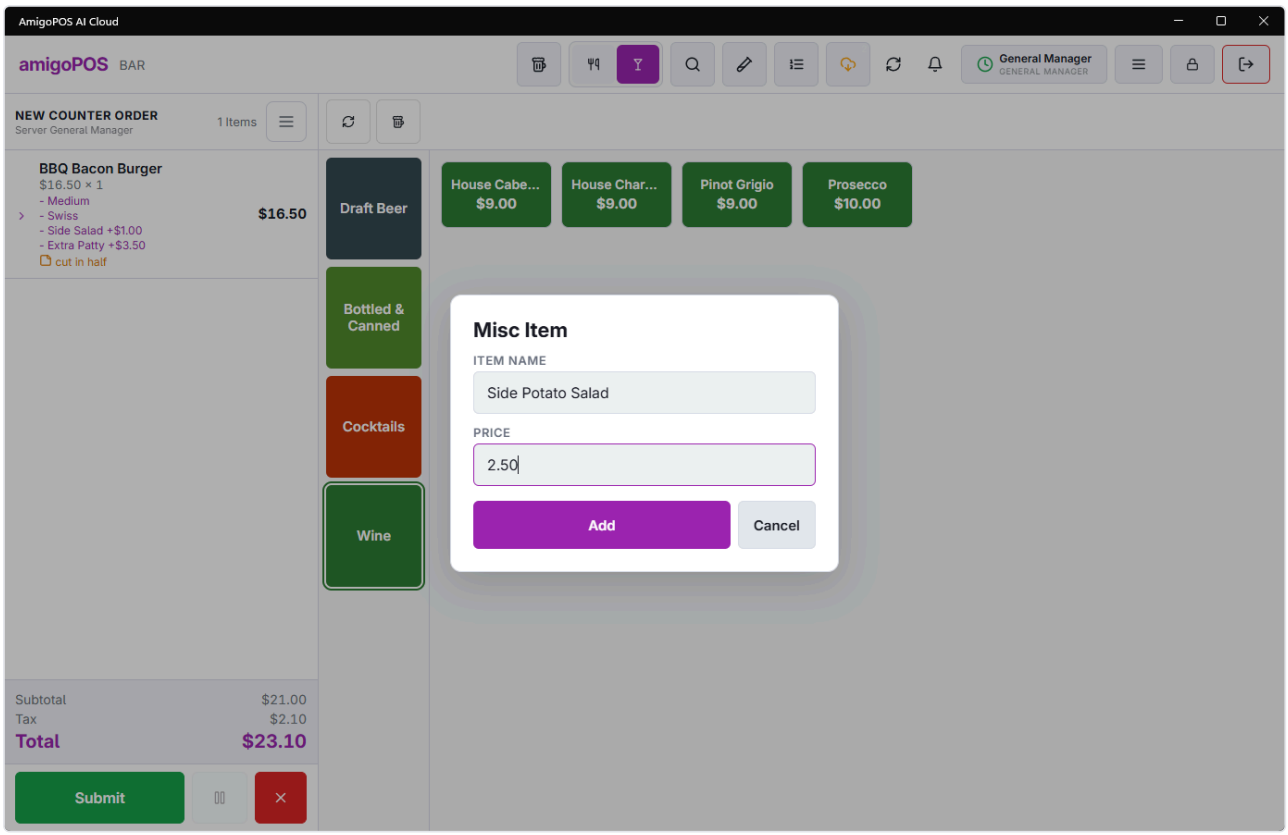
1. Choose **Misc Item** in the More menu.
2. Type the description (the store can have a default name filled in). It appears on the check and the receipt exactly as typed — and on prep printer 1 when the store sends misc items there — so write it for the guest and the kitchen, not for yourself.
3. Enter the price and add it. The line joins the current guest's check like any other.

Misc Item needs the **Miscellaneous Items** permission: without it, a manager approves before the item is typed. While the register is offline, it is not asked.

> Descriptions pass through the store's word filter. If a word is blocked it will not print — see **Store Setup › Order Entry Screen**.

The button, the default name, the tax rate misc items get, and whether they print in the kitchen are set under **Store Setup › Order Entry Screen › Settings › Misc Items**.

> Miscellaneous items report as miscellaneous. They belong to no category, no product mix and no recipe, so anything sold often enough to matter deserves a real menu item instead. A month of "Misc — beer" is a month of missing beer sales.



Pizza builder

Order Entry › Building an order

View online ↗

A picture of the pizza as it is built, showing halves and double portions.

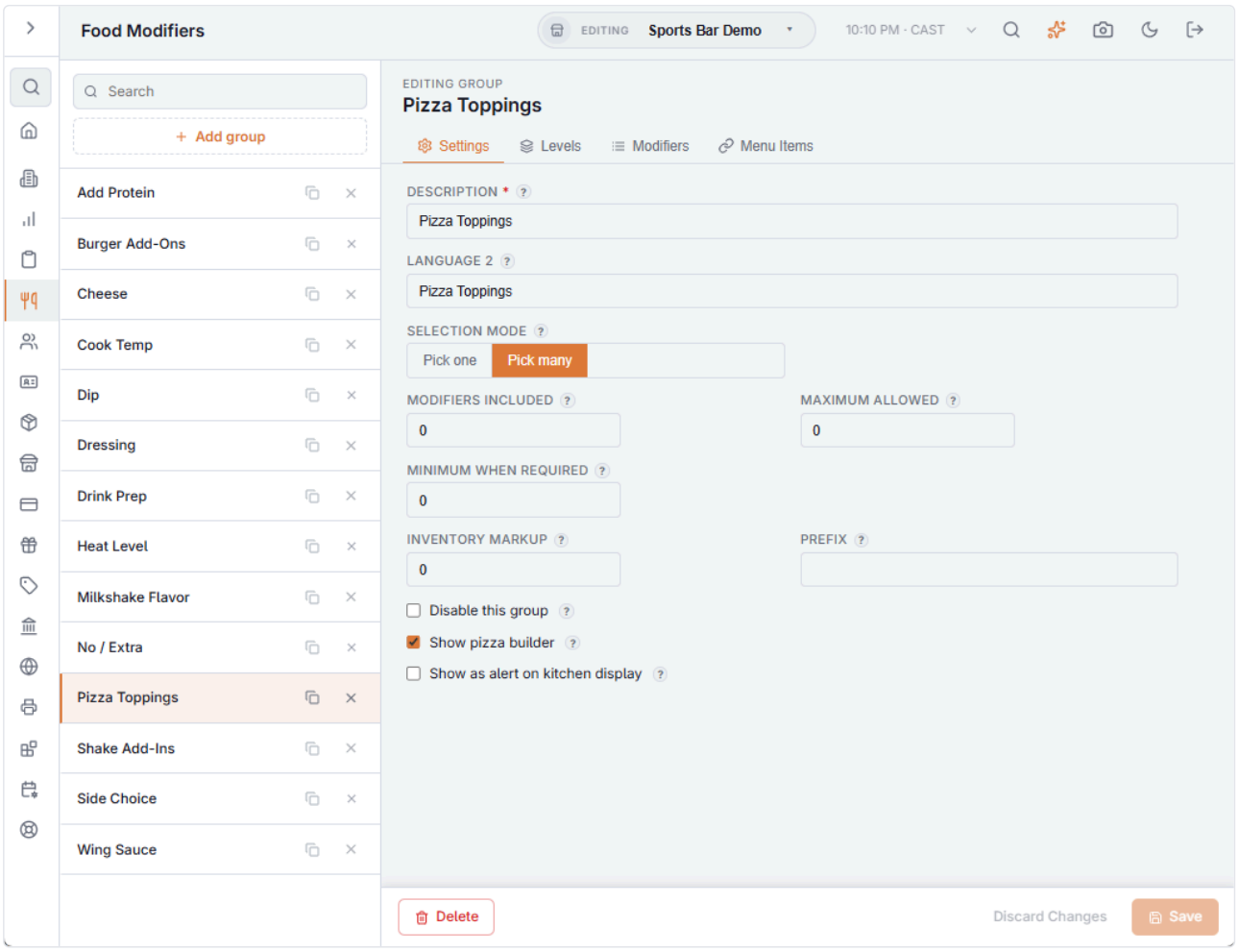
Modifier groups with **Show pizza builder** on draw the pizza while you build it. It is the same modifier selection as any other item, with a picture attached — but the picture is what stops half-and-half orders going wrong.

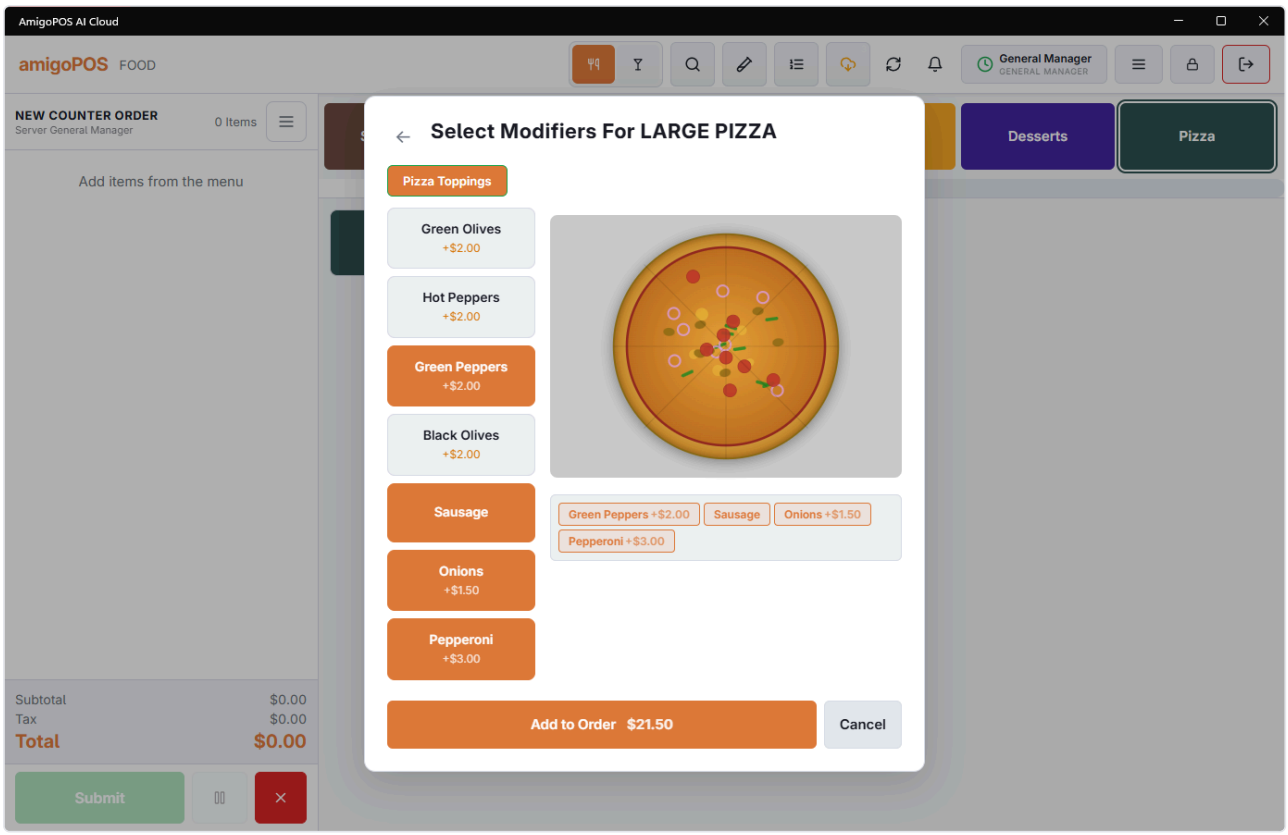
What the picture shows

- Toppings placed on the **whole** pizza cover it.
- A topping set to a **half** is drawn on that half only, so a half-and-half order is visibly two halves rather than a list you have to read carefully.
- **Double and triple** portions are drawn more heavily than a single.
- Removals are not drawn at all — no onions means no onions on the picture.

> Turn the screen to the guest for the confirmation. A picture settles which half is which faster than reading four toppings back.

> To switch the builder on, open the toppings group in **Back Office › Menu › Menu Setup › Food Modifiers** and tick **Show pizza builder** on its **Settings** tab. Any item that uses at least one such group opens the builder; a pizza whose toppings are on an ordinary group prompts as an ordinary item.


Food Modifiers
EDITING Sports Bar Demo
10:10 PM · CAST
Search
+ Add group
Add Protein
Burger Add-Ons
Cheese
Cook Temp
Dip
Dressing
Drink Prep
Heat Level
Milkshake Flavor
No / Extra
Pizza Toppings
Shake Add-Ins
Side Choice
Wing Sauce
EDITING GROUP
Pizza Toppings
Settings
Levels
Modifiers
Menu Items
DESCRIPTION *
Pizza Toppings
LANGUAGE 2
Pizza Toppings
SELECTION MODE
Pick one
Pick many
MODIFIERS INCLUDED
0
MAXIMUM ALLOWED
0
MINIMUM WHEN REQUIRED
0
INVENTORY MARKUP
0
PREFIX
Disable this group
Show pizza builder
Show as alert on kitchen display
Delete
Discard Changes
Save



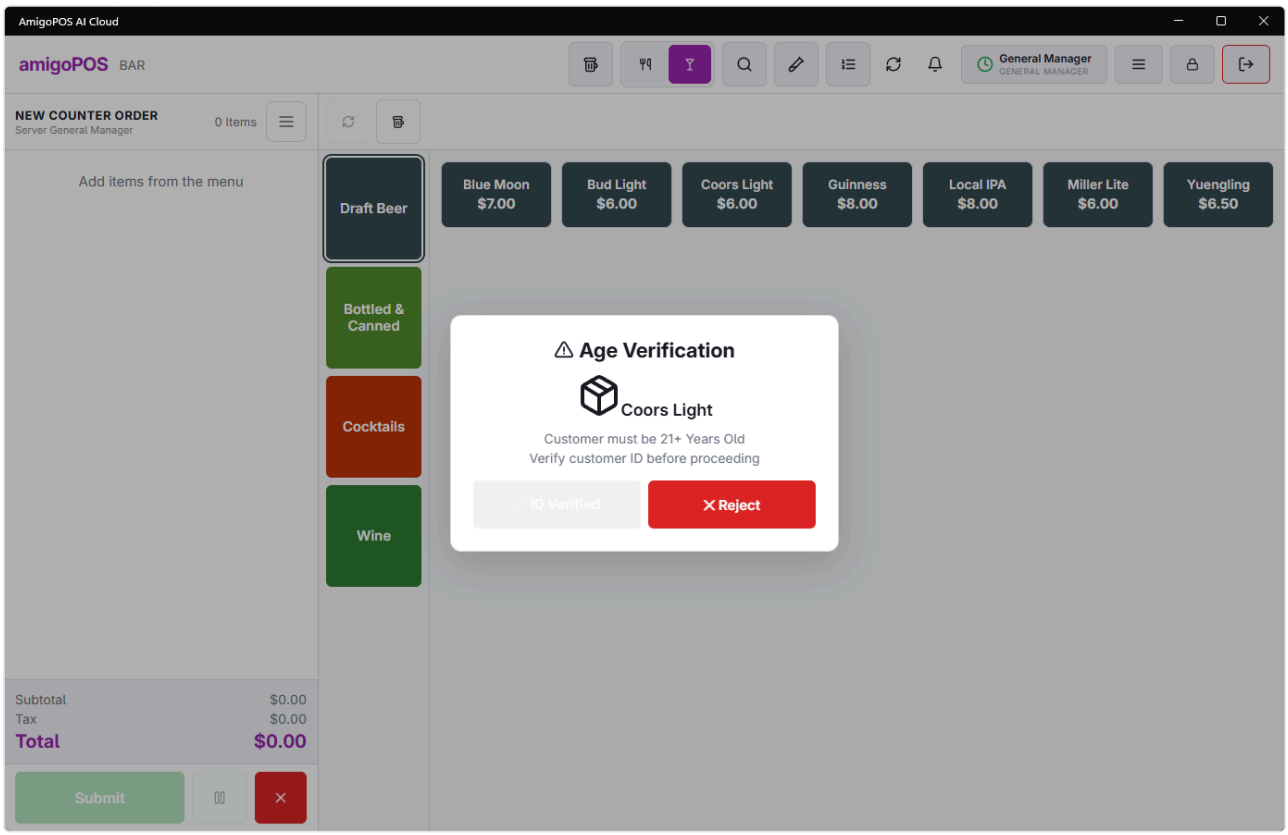
Age verification and ID-required items

Order Entry › Building an order

View online ↗

The ID prompt on alcohol and other restricted items.

A menu category with a **Minimum Age Verification** stops the order until the guest's age is checked — the register's side of responsible service.



What is restricted

The minimum age is set on the category, under **Back Office › Menu › Menu Setup › Menu Categories**: **Not Required**, or an age from 12 to 30. Every item in the category is covered; there is no age setting on a single item.

At the register

Adding an item from a restricted category to an order that has not been verified opens the age check. It shows one button per verification method, in their button order. Once an order is verified, other restricted items on the same order do not ask again.

- A method with **Show keyboard** asks the cashier to type something — its **Keyboard prompt** is shown, or “Enter birthdate”. When a date is typed, the guest’s age is worked out: an underage guest is refused with “Customer must be 21 or older” (the category’s age), and nothing is recorded. Anything else typed, such as an ID number, is stored as it is.
- A method without the keyboard is recorded with one tap.
- With no methods set up, a single **Visual check** button is offered.
- Rejecting the check shows “Sale Rejected — Age Verification Failed” and the item is not added.

Verification methods

The methods are on the **Age Verification** tab of **Back Office › Store Setup › Order Entry Screen**, in an editable grid (an entry saves when you leave the cell). Columns: **Description** (the button text, up to 25 characters), **Button position**, **Show keyboard** (on for a new method) and **Keyboard prompt** (up to 35 characters). Typical methods: *ID checked*, *Date of birth* with the keyboard, *Passport number* with the keyboard.

> The order keeps one verification record: the method used and the date or text typed. When compliance asks how a sale was verified, that record is the store’s answer.

Scanning barcodes and price-embedded (GS1) labels

Order Entry › Building an order

View online ↗

USB scanners, item barcodes, and scale labels with embedded price or weight.

Any HID (keyboard-wedge) USB barcode scanner works out of the box. Scanning at the order-entry screen adds the matching item instantly.

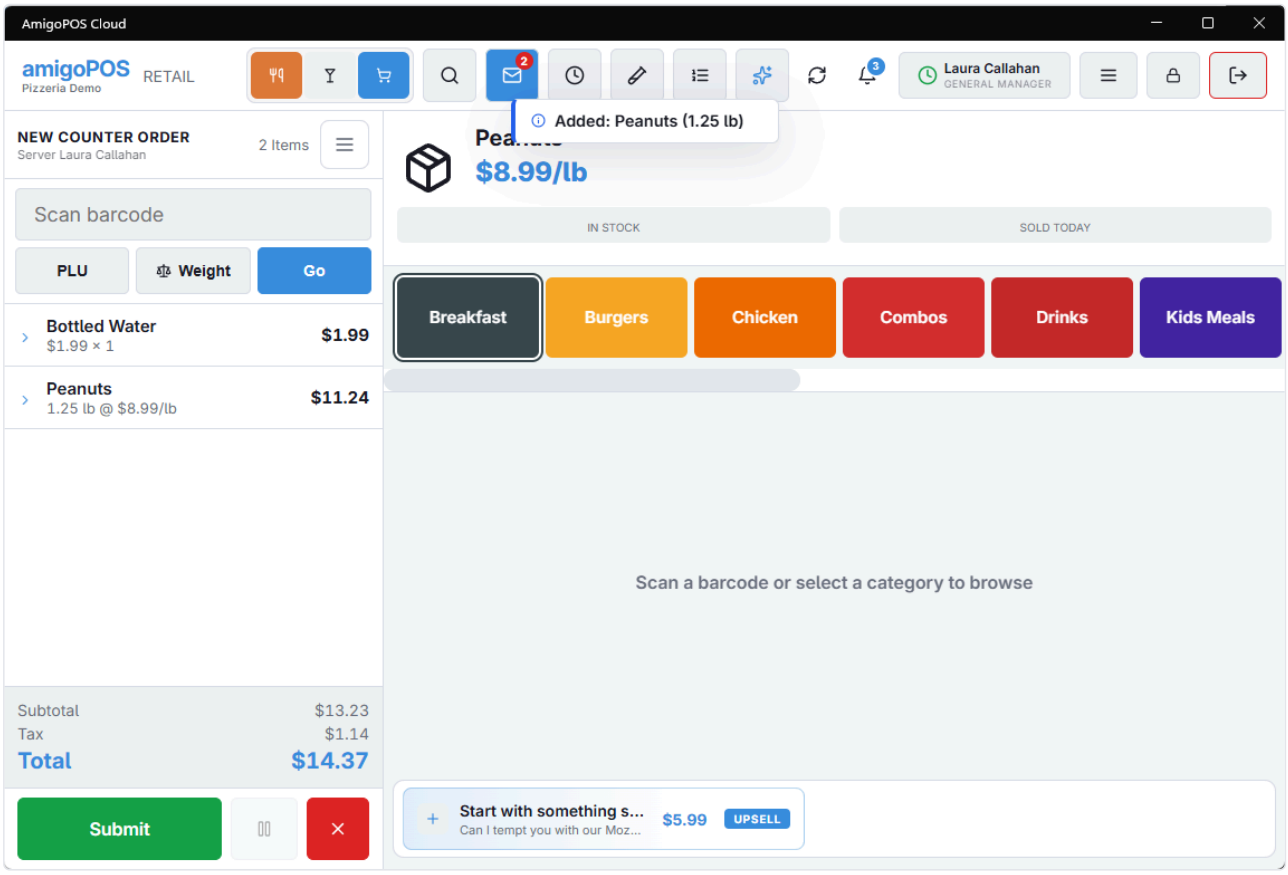
Standard barcodes

1. Assign the barcode/SKU to the menu item in *Menu Setup › Menu items*.
2. At the register, scan anywhere on the order-entry screen — no need to focus a field. The item is added exactly as if its button were tapped (required modifiers still prompt).

Price- and weight-embedded labels (GS1 / type-2)

Deli-scale labels encode the item code plus the **price** or **weight** in the barcode itself. CloudPos parses these automatically:

- **Price-embedded** — the embedded price overrides the menu price for that line.
- **Weight-embedded** — the line is priced as *embedded weight × unit price*.



> The barcode scan overlay (available from the More menu) shows a live scan log — useful for testing a new scanner or diagnosing an unrecognized label.

Guests and seats

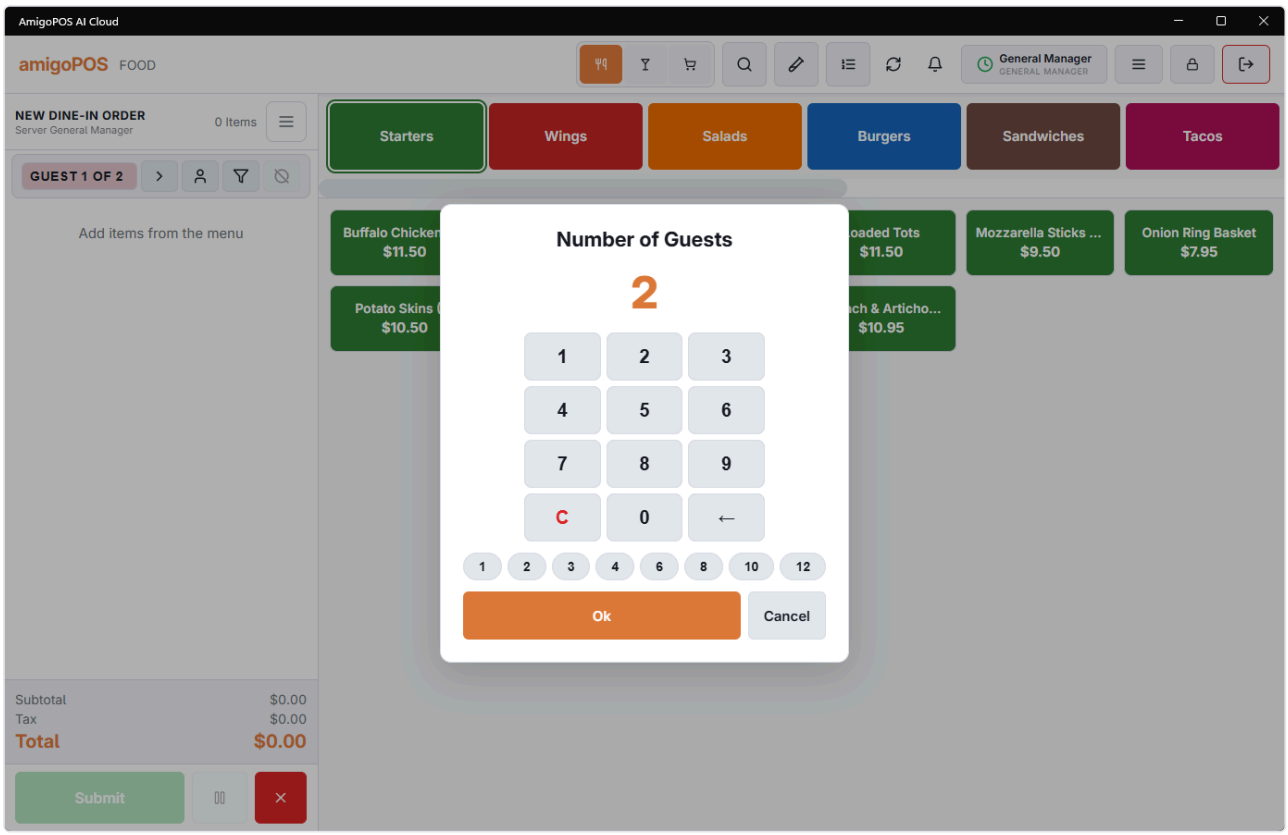
Setting and changing guest count

Order Entry › Guests and seats

View online ↗

Why the guest count matters and how to change it mid-order.

The **guest count** is more than a statistic — it drives seats, covers, gratuity triggers, and the per-guest analytics. Get it right at seating; fix it freely when parties change.



Setting it

Table-service order types prompt for the count when the order starts (part of the type's pipeline). The count creates that many **guest positions** on the order — the seats items get assigned to.

Changing it

Two more joined, one left early: tap the guest area (or the guest bar's change-count action) and set the new number. Growing the count adds empty positions; shrinking is guarded — positions holding items need their items moved or removed first, so food can't silently orphan.

What the count drives

- **Per-seat ordering** — the positions on the guest bar (*Guest names and per-seat ordering*).
- **Cover charges** — per-guest fees multiply by it, with per-guest exclusion available (*Gratuity and cover charges*).
- **Mandatory gratuity** — the order type's minimum-guests trigger reads it: the party of 8 gets auto-gratuity because the count says 8.
- **Analytics** — covers, per-guest averages, and seat utilization all start from this number; a floor that habitually leaves counts at 1 quietly breaks its own reports.

Before or after the table

The count is asked in its place among the order type's start prompts: put **Prompt for guest count** after **Show seating chart** on the Workflow tab to ask once the table is chosen. A recalled order keeps its guest bar (Start prompts and their order).

Guest names and per-seat ordering

Order Entry › Guests and seats

View online ↗

Attaching items to seats so the food reaches the right person and the check splits itself.

Items can be assigned to a guest rather than to the table as a whole. Two things follow from that, and both are worth the extra taps on a busy table.

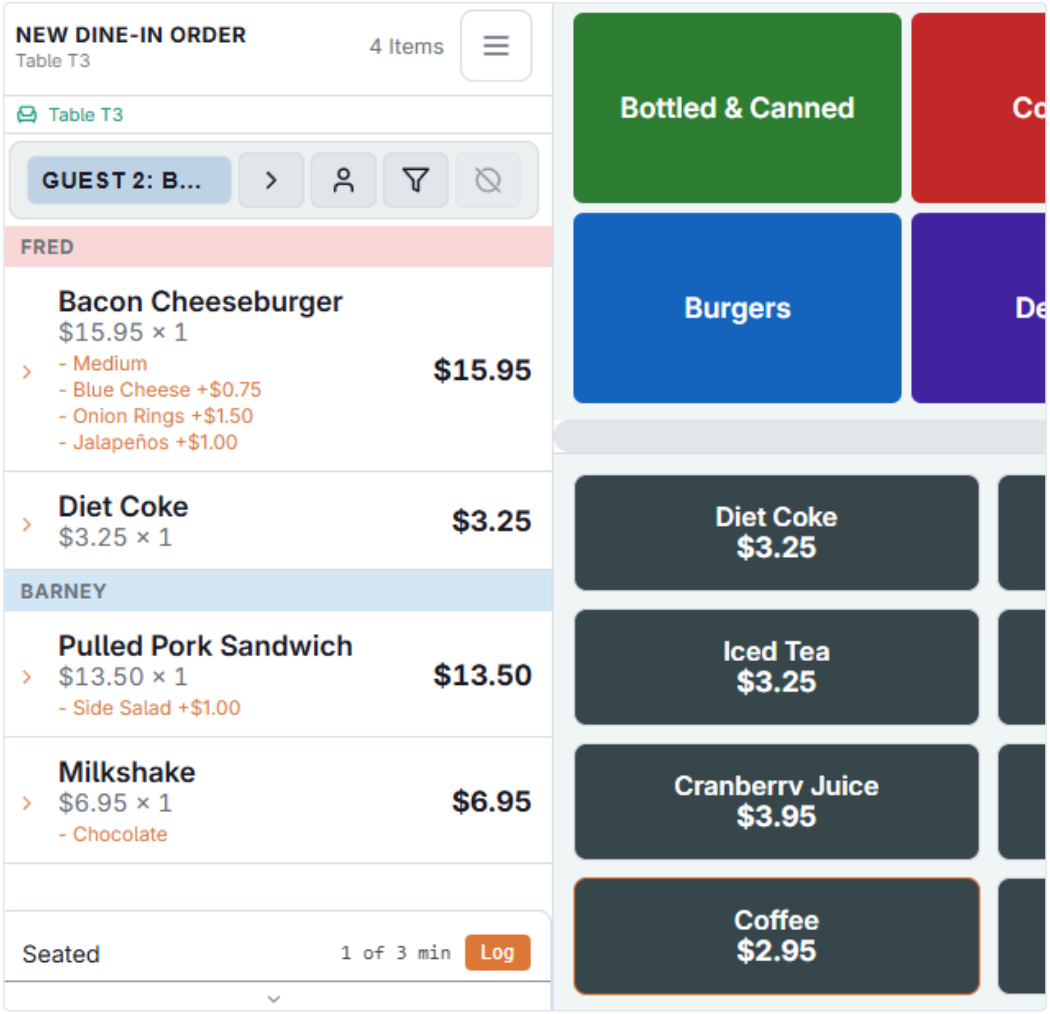
- **The kitchen and the runner know whose is whose.** Seat numbers print on the ticket, so plates arrive in front of the right person without anybody asking "who had the fish?".

- **Splitting is already done.** A check built by guest splits by guest in one tap at the end, with no reconstructing from memory.

Names instead of numbers

A guest can be given a name instead of a number. On a long table, or a regular booking, names read better on the check and on the ticket than "Guest 4".

> Set the guest count before ringing anything. Adding guests halfway through means going back over what has already been rung to place it.



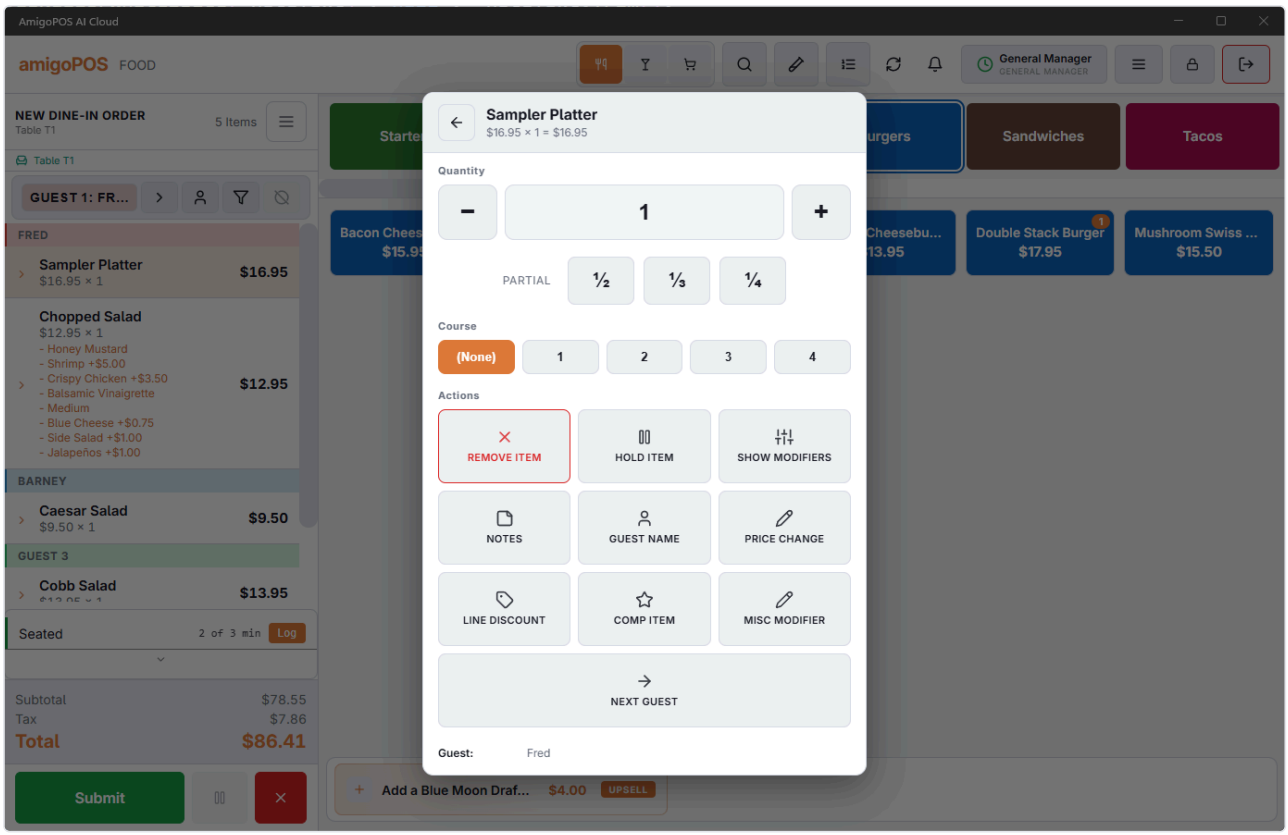
Assigning items to guests

Order Entry › Guests and seats

View online ↗

Moving items to the right guest after they were rung, so the check splits cleanly.

Assigning items to guests turns one check into an organized table: the kitchen plates by seat, and splitting by guest at the end is a single tap.



Assigning while ringing

The **guest bar** shows the positions; the highlighted one is where new items land. The natural rhythm is *select guest, ring their items, next guest* — around the table in order. The **Next guest** action (on the bar, and on the item panel) advances the position; the item panel can also reassign a line rung to the wrong seat after the fact.

Working the view

The check can show **all guests** or **filter to the current guest** — filtering is the sanity view when reading an order back to one person. Guests can carry **names** instead of numbers, and individual guests can be included or excluded from the cover charge from the same bar.

Why bother

- **Kitchen & expo** — tickets and the KDS group items by seat; food finds its person without the auction.
- **Split by guest** — the payoff: separate checks in one tap because the assignment already happened (*Split by guest*).
- **Unassigned items** — shared plates can stay on the table (guest-agnostic) and be dealt with at split time.

Order actions

Holding an item or the whole order

Order Entry › Order actions

View online ↗

Keep items off the kitchen until you release them, one line at a time or the whole check.

A held item stays on the check but does not go to the kitchen when you send. Use it for the starter that should follow the drinks, or the table that has not finished deciding.

One line

Open the line and toggle **hold**. The line shows as held and the time it went on hold is recorded. Toggle it off and the line goes with the next send.

The whole order

Hold all holds every item that has not been sent yet. Items already fired are left alone — sending them to the kitchen cannot be undone by holding them afterwards, so hold all affects only what is still new.

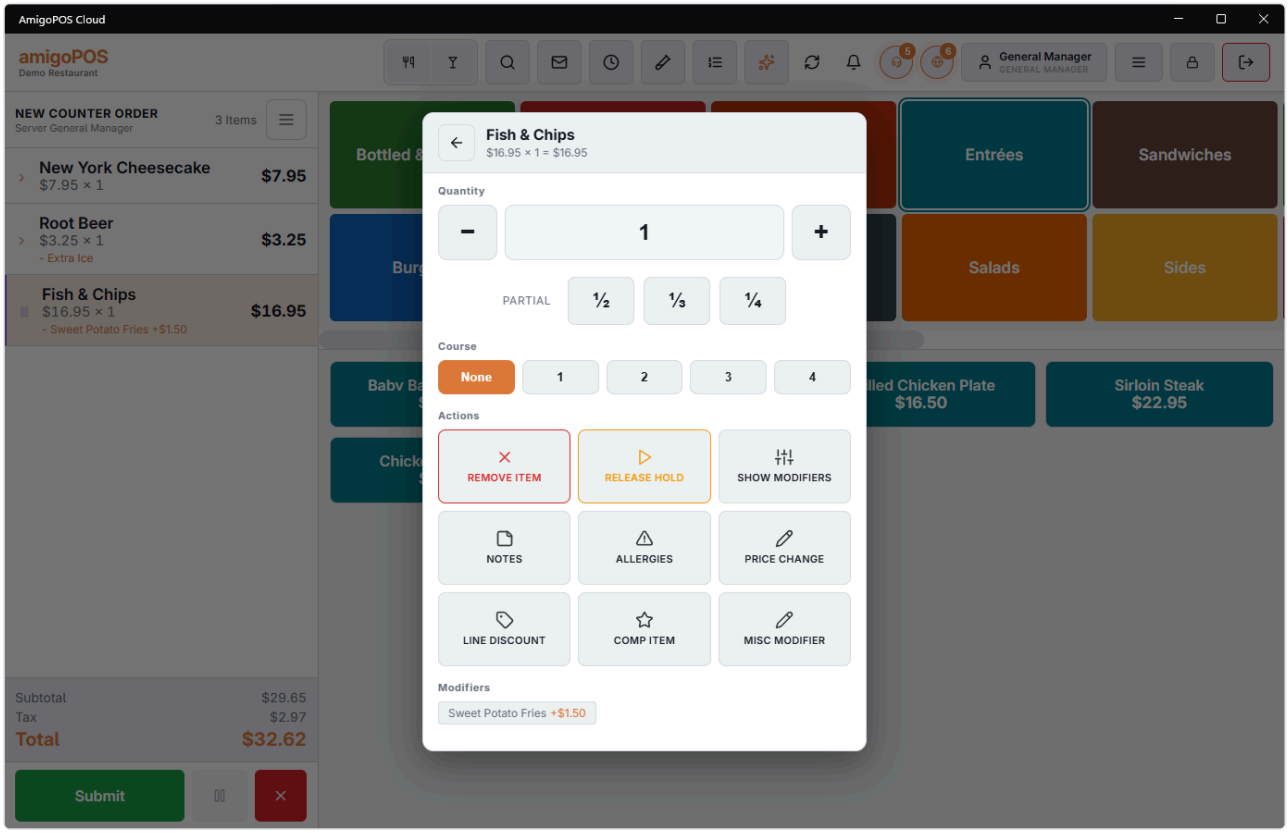
Releasing

Take the hold off and send. There is no separate release step: sending is what fires whatever is no longer held.

Holding needs the **Hold** permission: without it, a manager approves **hold** on a line and **Hold all**. Taking a hold off is not asked. While the register is offline, holding is not asked either.

> Assigning a line to course 2 or higher holds it automatically. Fire it by course rather than by hand — see **Course management and fire**.

> A held item that nobody released is the usual explanation for "the kitchen never got it". Held lines are visible on the check, so a glance at the order answers it.



Delaying and timing an order

Order Entry › Order actions

View online ↗

Taking an order now for later, and where it goes until its time comes.

A delayed order is taken now and wanted later — the 6:30 collection phoned in at two o'clock, tomorrow's catering drop. Build the order as normal, choose **delay**, set the date and time, and send.

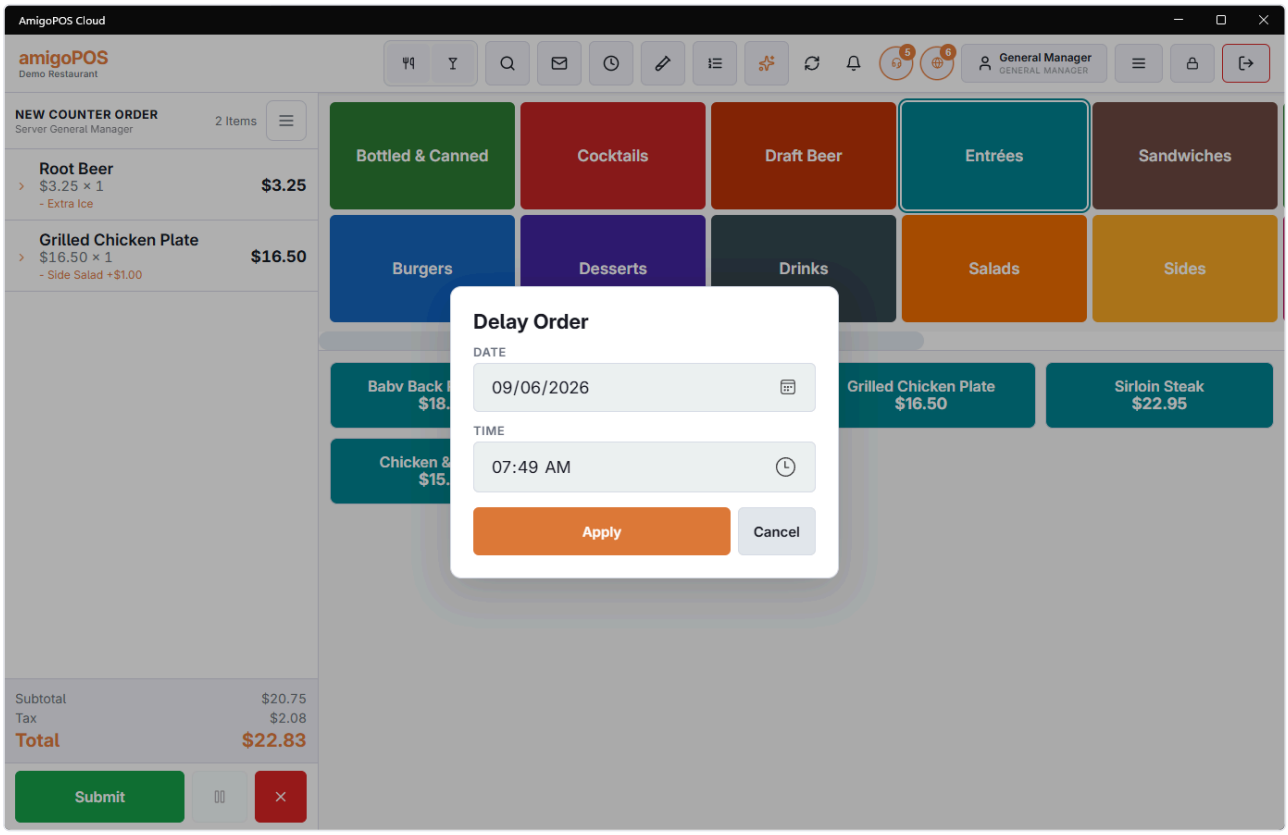
Where it goes

- It **drops out of the working orders list** until its time arrives, so it does not sit in the middle of service being read as a live order. There is a separate view for delayed orders when you want to see them.
- On the **KDS** the ticket is flagged as scheduled and shows the time it is for, so the kitchen can see what is coming without treating it as due now.

- The order shows its target time — a time on its own for today, a date and time for anything further out.

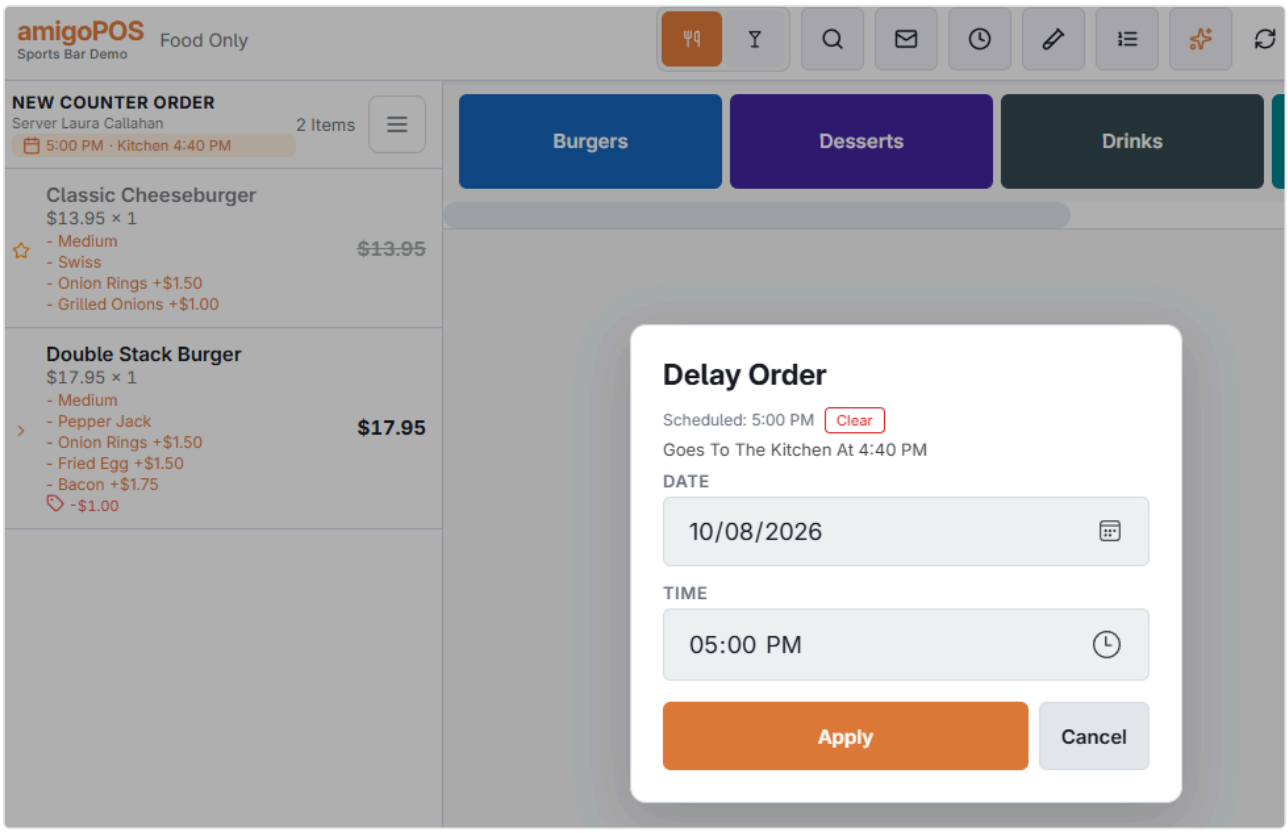
A delayed order that has not been settled is **left out of the end-of-day sales figures**. It counts on the day it is paid for, not the day it was taken — which is why tomorrow's catering order does not inflate tonight's takings.

Recall it from the delayed list to change, fire early or cancel it at any point before it is settled.



When it reaches the kitchen

A delayed order goes to the kitchen at its **kitchen time**: the scheduled time minus the store's lead time. The order chip shows it — *7:00 PM · Kitchen 6:40 PM* — and the Delay Order window shows *Goes To The Kitchen At 6:40 PM* until that time passes. Prep tickets and labels print then, and the KDS card goes live then; a receipt you print for the customer prints at once. See Scheduled orders on the KDS.



From the call-center submit screen

On a call-center station the submit screen has **For Later** chips: Now, +30 Min, +60 Min and At… (today at that time, or tomorrow when it has already passed). They set the same scheduled time as Delay Order, and the screen then shows the scheduled time and the time the kitchen will get the order. Now puts it back to an order for right away.

Course management and fire

Order Entry › Order actions

View online ↗

Assign lines to courses and release them one course at a time as the table is ready.

Courses let one check reach the kitchen in stages. Assign each line a course number, send once, and release the later courses when the table is ready for them.

Assigning

Open a line and set its course. **Course 1 fires immediately** with the send; **course 2 and above are held automatically**, so you do not have to hold them by hand. Clearing the course, or moving a line back to course 1, releases it again.

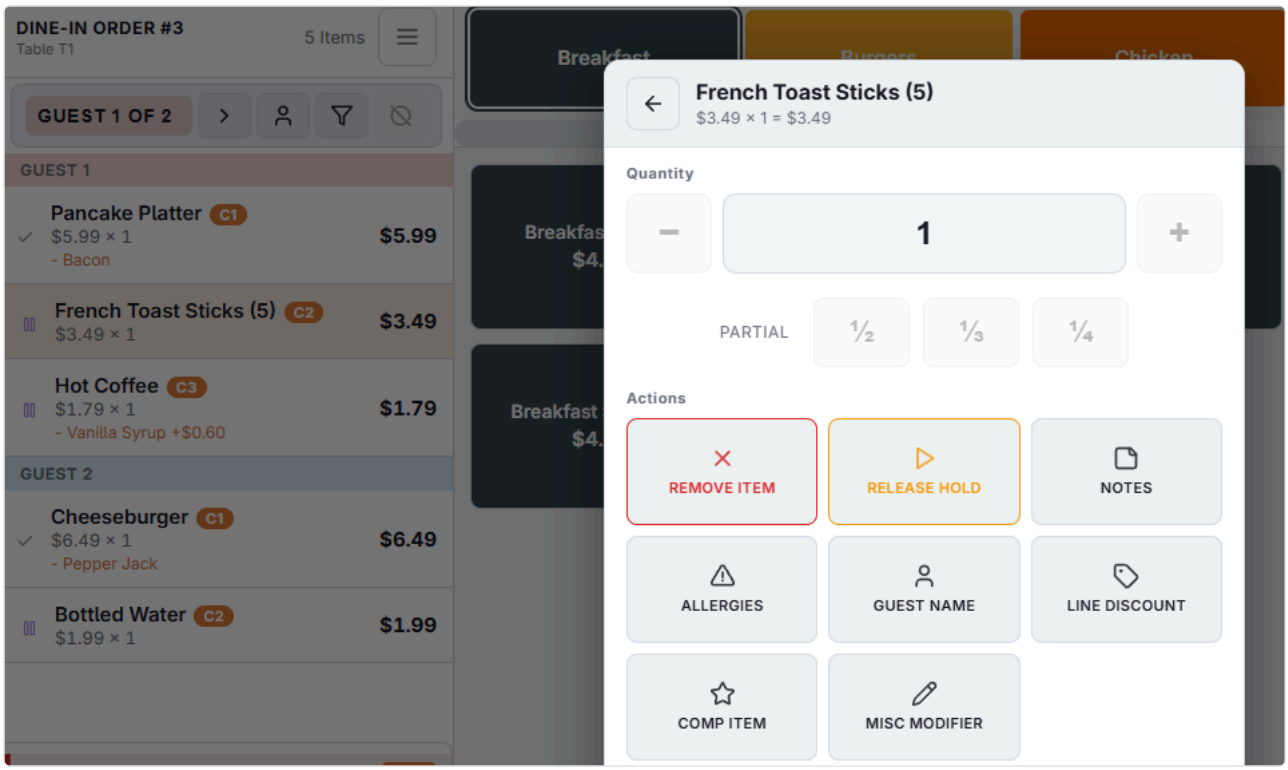
Firing

Fire course releases the lowest course that still has anything held — course 2 first, then 3, then 4. It confirms which course went and how many lines. The items reach the kitchen on the next send.

When there is nothing left waiting, firing tells you so rather than doing nothing silently.

> Coursing is what stops mains landing while the table is still on starters. The kitchen sees each course as it is fired, so their timing follows the table rather than the till.

> Courses and holds are the same mechanism seen from two angles: a coursed line is a held line with a number on it. Either can release it.



With a kitchen display, the server is reminded when it is time to fire the next course — see Course fire reminders.

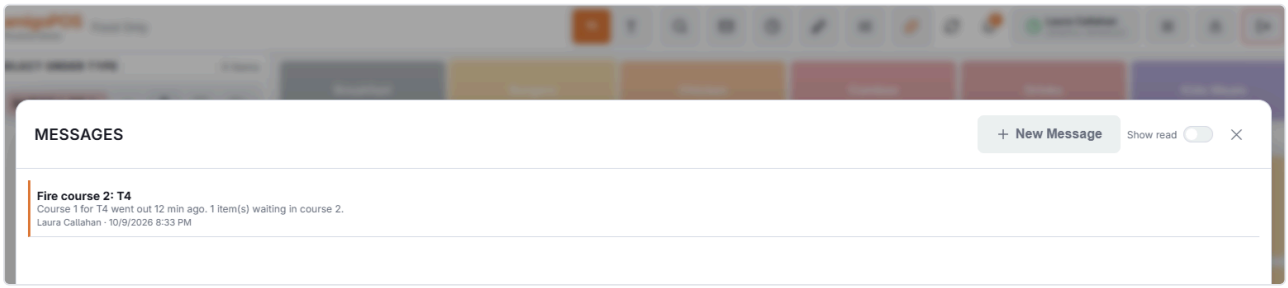
Course fire reminders

Order Entry › Order actions

View online ↗

The server is reminded to fire the next course when the table is ready for it.

For stores that use a kitchen display (KDS) and courses, the server gets a reminder when it is time to fire a table's next course — so a held course is not forgotten.



When the reminder comes

- Everything fired so far on the order has been bumped on the kitchen display — nothing is still cooking.
- The last bump, when the previous course went out, was at least the store's **usual gap** ago.

The usual gap is learned from the store's own coursed orders over the last 60 days — the typical time from one course going out to the next being fired — kept between 4 and 30 minutes, and 10 minutes until there are enough orders to learn from. So it follows the pace of your house.

What the reminder does

It is a quick alert to the order's server (also pushed to their phone if they opted in), once per order and course, in the server's language. Nothing is fired automatically: the server still fires the course as usual — see Course management and fire.

Stores without a kitchen display do not get reminders, because there are no bumps to measure from.

Comps, line discounts and order discounts

Order Entry › Order actions

View online ↗

Three different ways to take money off, what each one records, and how to undo them.

Three tools, three meanings. Choosing the right one is what makes the reports worth reading afterwards.

Comp a line

Comping zeroes the price of a line and every modifier on it, and records **which user comped it**. It is for something given away — a dish sent back, a drink for a regular. The item still shows on the check and still counts as sold; it just is not charged for.

Undo restores the line to what it was, whether it was newly rung or recalled from an existing order.

Comp the order

Comps every line on the check at once, apart from items already removed. Ask before doing this — a comped order is a full check with nothing owed, and it is exactly what an audit looks at.

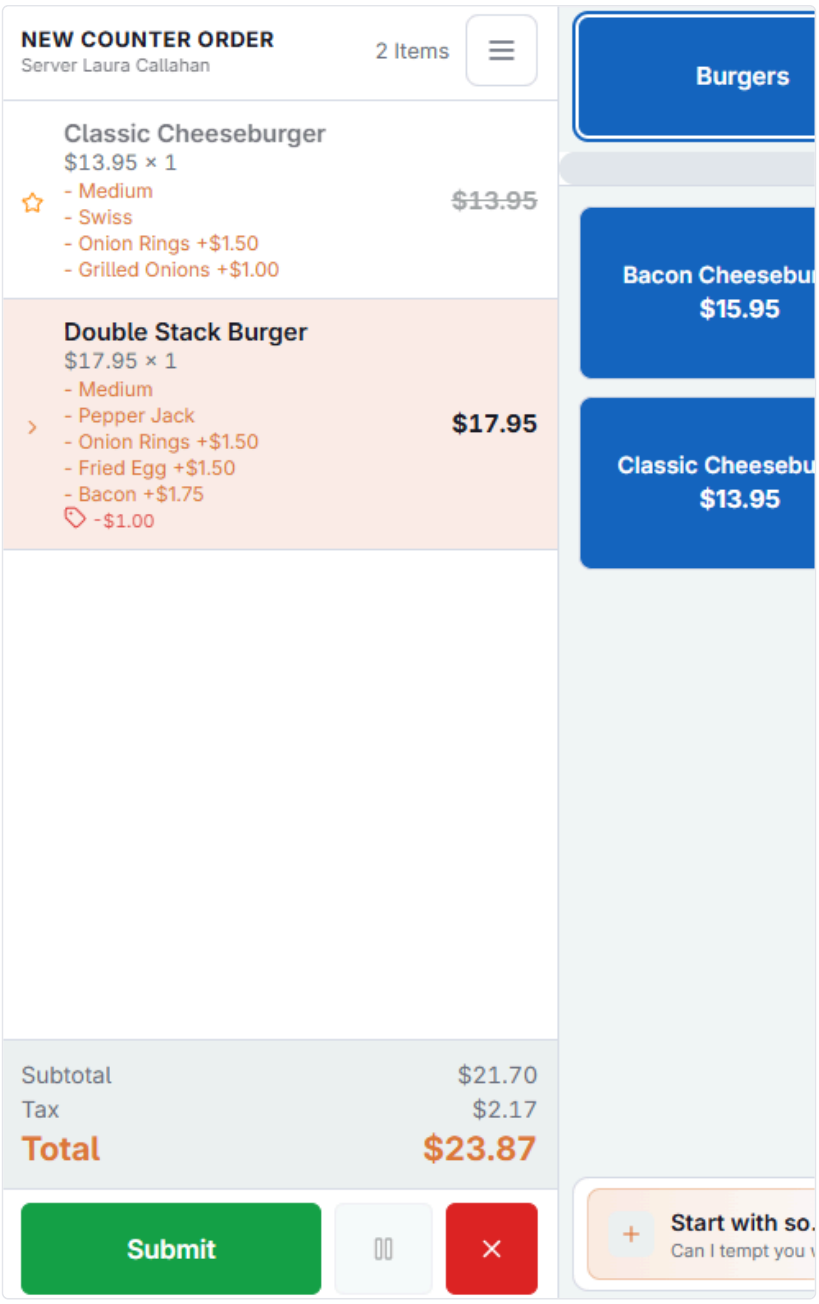
Discount a line

A line discount takes off either a **fixed amount** or a **percentage** of that line, and records who applied it. Clear it to put the line back to full price. Unlike a comp, the line keeps a price — it is simply lower. The store can cap line discounts and require whole percentages (**Store Setup › Order Entry Screen › Settings › Discounts**).

Discount the order

An order discount applies to the whole check and appears as its own line in the totals, above tax. The discounts available are configured for the store, so what you can pick and how far it goes is a setting rather than a decision at the till.

> Every one of these is attributed to the user who did it and shows up in the audit trail and the comps and discounts reports. That is the point of having three of them rather than one.



Applying a coupon

Order Entry › Order actions

View online ↗

Scan or key a coupon onto the check, and what happens when it is refused.

Choose **Coupon**, then scan the barcode or QR on the coupon, or type the code. The discount lands on the check and the coupon shows in the totals.

When a coupon is refused

The rejection says why rather than just failing — expired, already used, outside its valid window, or the order does not qualify. Read the reason before assuming the coupon is bad; a minimum spend that has not been reached is the common one, and adding an item fixes it.

> A coupon used on an order that then gets voided stays marked as redeemed. Release it from the **coupons log** on the manager screen so the guest can use it again.

> The rules — validity dates, minimum order, which items qualify, single use — live in **Discounts & Promotions › Printed and scannable coupons**, not on this screen.

Transferring an order to another server

Order Entry › Order actions

View online ↗

Hand an open order to a different server — from the table panel or the orders list — for shift changes, section changes, and covering breaks.

An open order belongs to the server who started it. When a shift ends, sections change, or someone covers a break, the order can be **transferred** to another server so it appears under their name, on their sales, and in their section from that point on.

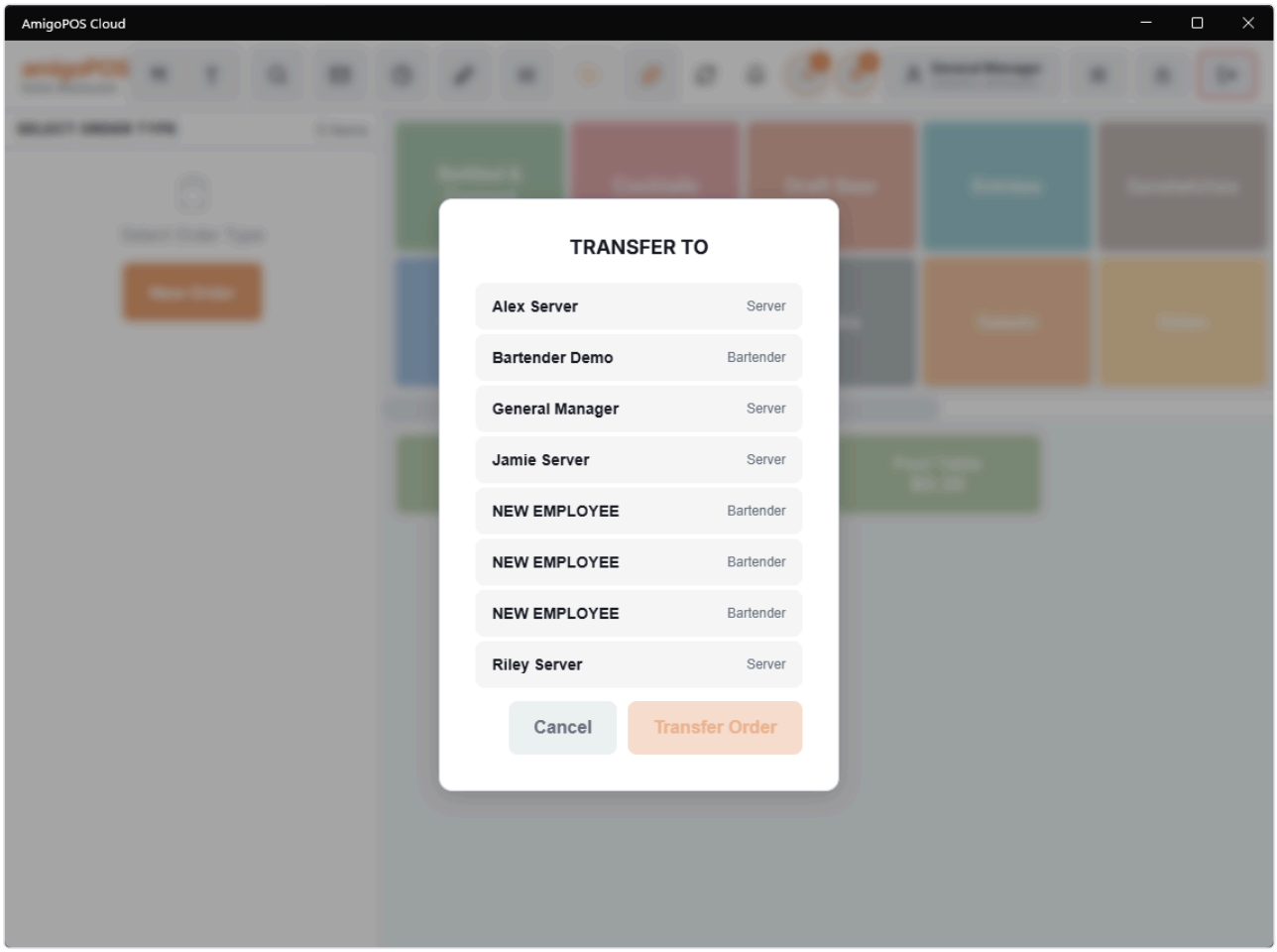
Where to transfer from

- **Seating chart** — tap the table, and in the table action panel tap **Transfer** on the order.
- **Orders list** — select the order and use its **Transfer** action.

Transferring requires the **ticket transfer** permission. If the signed-in user doesn't have it, the manager-override prompt appears and a manager can approve the transfer on the spot; either way the action is recorded under the person who performed it.

Picking the new owner

The transfer panel lists eligible servers with their job title; the current owner isn't listed. A green dot marks servers who are currently clocked in. Select the new owner and tap **Transfer order** — a confirmation toast names the new owner, and you're returned to the screen you came from (the seating chart re-tints the table to the new server; the orders list refreshes).



By default the list can include servers who aren't clocked in. To restrict it to clocked-in staff only, enable the **display only clocked-in servers** setting — most full-service stores want this on so orders can't be handed to someone who has gone home.

What a transfer changes — and what it doesn't

- The order's owner, and everything that follows from ownership: whose open-orders list it appears in, whose name prints, whose sales and tips it counts toward from settlement, and the table's color on the seating chart.
- It does **not** change the order's contents, its table, or anything already sent to the kitchen — nothing reprints, and the guests notice nothing.
- Items rung before the transfer stay on the order; the sale credits whoever owns the order when it settles. For server-banking stores, settle-side accountability follows the new owner.

Common questions

- **The list is empty.** With the clocked-in-only setting enabled, nobody else with an eligible job is clocked in right now.
- **I need to move the order to a different table, not a different server.** That's a table change, not a transfer — use the table actions on the seating chart.
- **Can I transfer several orders at once at shift change?** Transfers are per order — transfer each open order individually before clocking out.

Who is offered

- Only employees whose job has the **Server** switch on ("Employees with this job appear on the order transfer list") — see Jobs, roles, and permissions. Disabled employees and jobs are left out, and so is the order's current owner.
- With **Display only clocked-in servers** on, the job an employee clocked in under is what counts: someone clocked in as a host is not offered, even if they also hold a server job.
- Employees from every store of the business are offered, not only those whose profile names this store.

Other servers' orders on the table panel

Transfer shows on every order at the table. **Recall**, **Settle**, **Split** and **Void Order** show only on your own orders, unless your job has **Cross-Edit** — the same rule the orders list follows.

Gratuity and cover charges

Order Entry › Order actions

View online ↗

Adding a service charge by percent or amount, and excluding a guest from the cover charge.

Gratuity

Gratuity can be added to the check as a **percentage** of the subtotal or as a **fixed amount**. A percentage follows the check: add or remove items and the gratuity is worked out again. The percentage buttons are the store's four **Fixed gratuity** values under **Store Setup › Order Entry Screen › Settings › Gratuities**.

It appears as its own line in the totals and can be cleared. Stores that add gratuity automatically for large parties have that configured on the order type.

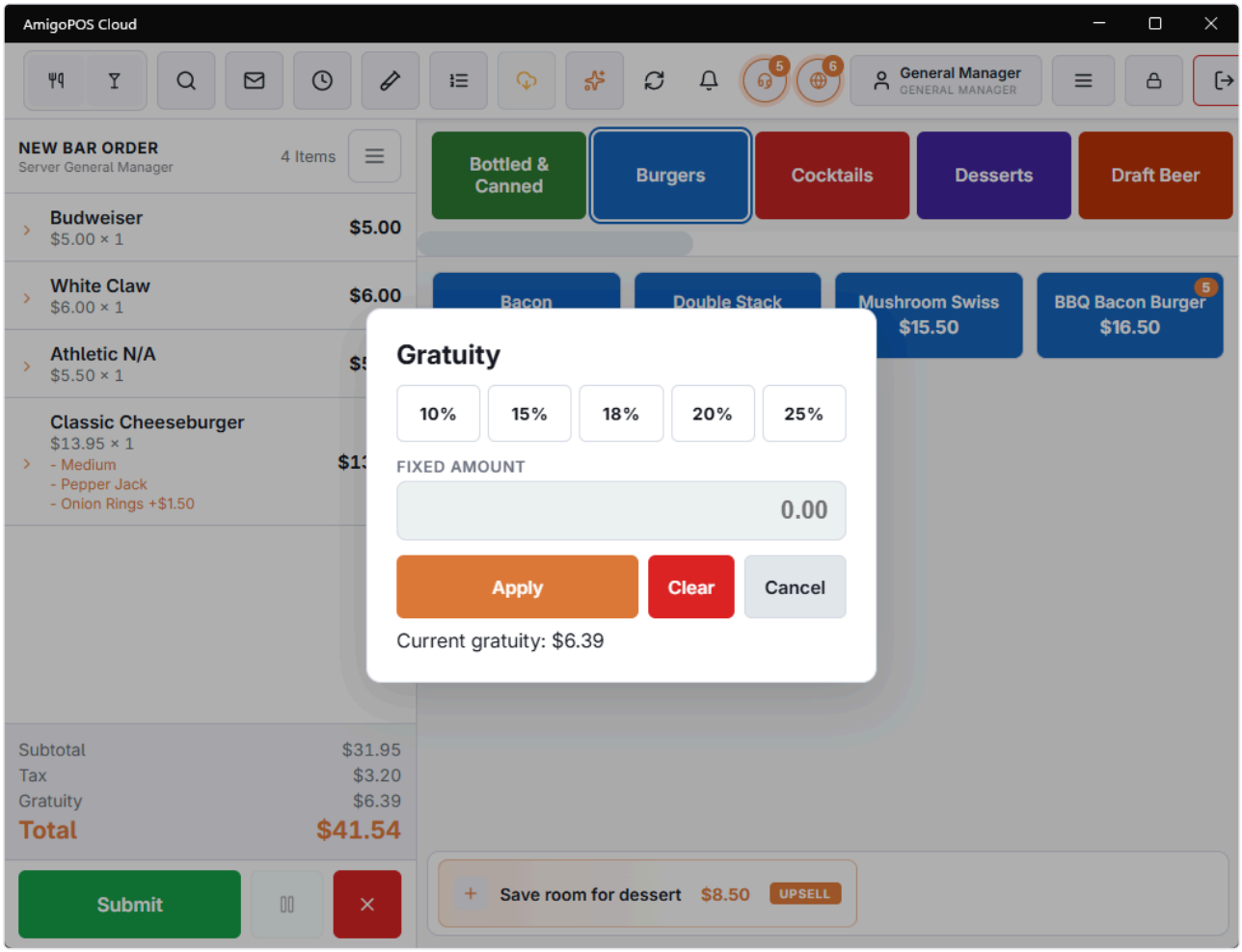
> This is not the same as a tip taken at payment. Card tips — on the customer display or written on a slip and keyed later — are handled on the settle screen and reported separately.

Cover charges

Where a store charges per head, the cover charge comes from the guest count on the order, so setting the guest count correctly is what makes it right.

Individual guests can be **excluded** — a child, a member of staff, someone who is only having coffee. Excluding a guest needs the cover-charge permission; without it the POS asks for a manager override rather than refusing, so a server can still deal with the table in front of them. The whole order can also be marked as not carrying a cover charge.

> Amounts and the times they apply are set in **Discounts & Promotions › Cover charges**.



The orders list: recalling and managing orders

Order Entry › Order actions

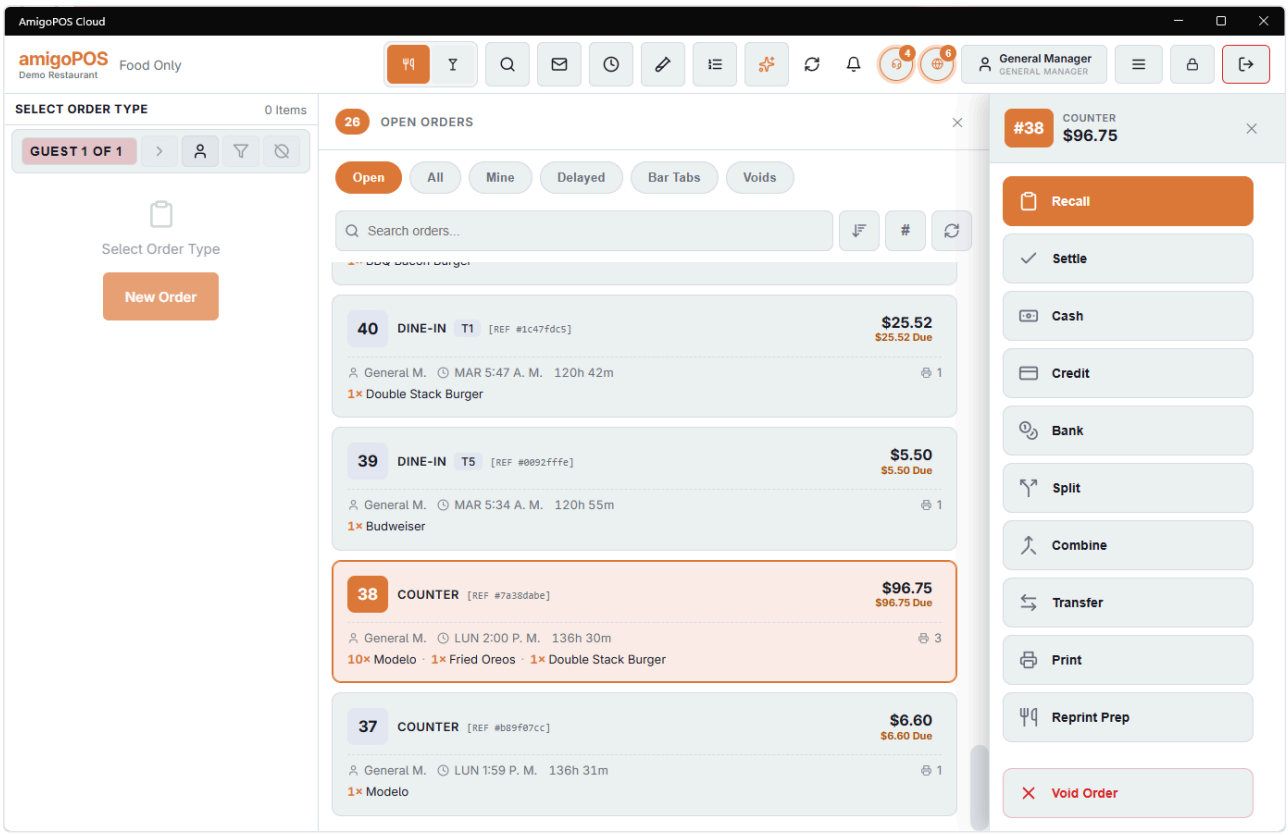
View online ↗

Find any order — open, delayed, web, delivery, or settled — then recall, settle, split, combine, transfer, print, refund, or void it from one screen.

The **orders list** is the register's order hub: every order for the business day, filterable and searchable, with an action rail for whatever needs doing to the selected order. The header shows how current the list is ("as of 14:32").

Filters and search

Filter tabs across the top: **Open**, **All**, **Mine** (your orders), and — when the store uses them — **Delayed** (with a count of scheduled orders), **Bar tabs**, **Web**, **Deliveries**, **Held**, and **Voids**. Beside the filters: free-text search (name, phone, item), a sort toggle, a **#** button for direct lookup by order number, and refresh.



Order cards

Each card shows the order number, type, server, total, and a preview of its items, plus badges where relevant: card-payment indicator, split marker, and the scheduled time on delayed orders.

Recalling an order

Select the order and tap **Recall**. The order opens in order entry exactly as it was — add items, change guests, apply discounts, then send or settle as usual. Only orders in a recallable state show the button (settled and voided orders don't).

In offline mode, orders served from the device's local cache ask for confirmation before recalling, because another station may have changed them since the connection dropped — see *Offline Mode*.

The action rail

Selecting an order shows the actions that apply to *that* order — the rail changes with the order's type and state:

- **Settle** — plus quick **Cash** and **Credit** buttons for one-tap settlement.
- **Bank** / **Driver bank** — server- and driver-banking settlement where those modes are in use.
- **Split** / **Combine** / **Undo split** — see the splitting-and-combining topics; combine mode lets you pick multiple source orders and shows the running new total before you submit.
- **Transfer** — hand the order to another server (see *Transferring an order*).
- **Print** — receipt/record copy. **Email Receipt** — email the guest check (see *Emailing a receipt* below).
- **Add gratuity** — on bar tabs.
- **Web status** — on web orders, view/advance the storefront status.
- **Refund** — on settled orders; shows amounts already refunded and remaining, with the refund-reason prompt. Refund history for the order is listed right on the rail.
- **Void order** — the two-step void: pick a void reason, answer the return-to-inventory question, confirm.

Common questions

- **An order isn't in the list.** Check the filter — *Open* hides settled orders; use *All*, or the **#** lookup with the receipt's order number.
- **Recall is missing on an order.** The order is settled or voided — use Refund or the reports instead.

- **The list looks out of date.** Tap refresh; the “as of” time in the header updates. Persistent staleness is a connectivity symptom — see *Data looks stale*.

Orders with running timers

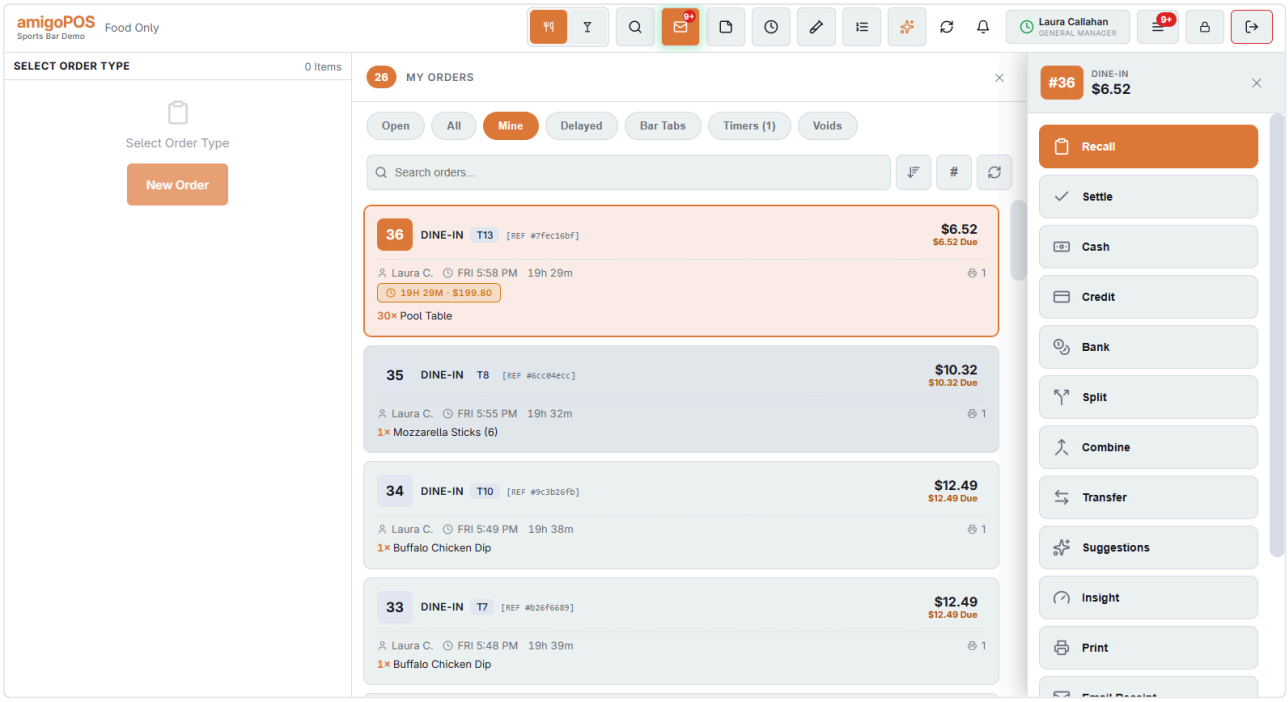
- **Settle**, **Quick Cash** and **Quick Card** on an order with running timers ask *Stop And Settle?* first. The POS opens the order, stops each timer to the second, saves it and then opens payment.
- **Split** and **Combine** are refused while an order involved has a running or paused timer.

See Settling, splitting and combining timed checks.

The Timers filter

When an open order has a timed item running or paused — a pool table, a lane, a room — a **Timers** filter appears with the count, for example **Timers (3)**. It lists just those orders under the header **Running Timers**.

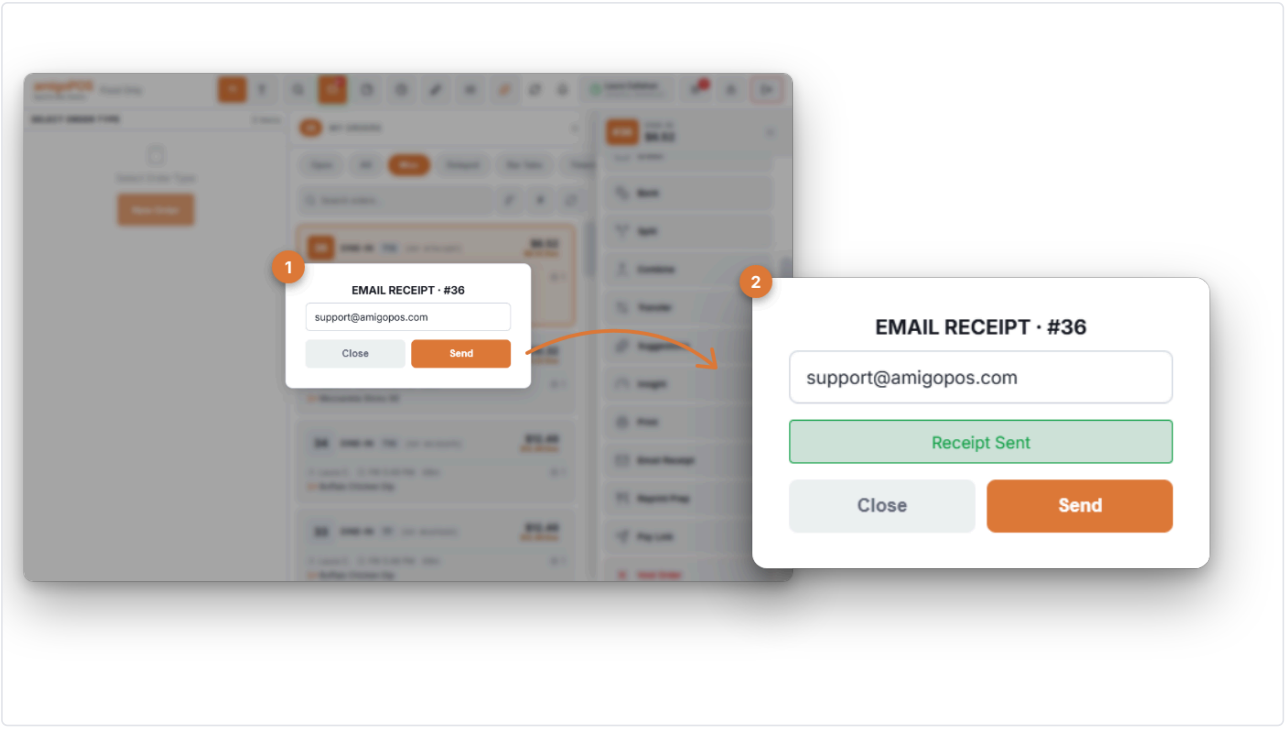
- Each card shows an amber pill with the time played and the charge so far, such as *1h 05m · $12.00*, billed the same way as the pill on the floor plan. A pill starting with **II** means every timer on that order is paused.
- The pills move on each time the list refreshes; refresh for the latest figure.
- The filter disappears when no order has a timer going. Call-center screens never show it.



See Pool tables and timed games: how it fits together.

Emailing a receipt

1. Select the order and tap **Email Receipt**, next to Print. It is there for any order the list loaded from the server — open, settled or voided — but not while working offline.
2. The address is filled in when the order’s customer has an email on file; otherwise type it.
3. Tap **Send**. *Receipt Sent* confirms it; if it fails, check the address and send again — the window stays open.



- The email shows the business name, order number, date, table and server, the items with modifiers and discounts, the totals, the payments (foreign-currency ones with their rate) and change, any balance still due, and gift card and loyalty balances.
- It has its own simple layout: it does not use the receipt template, so there is no logo, address or footer text, and no QR codes.
- For a voided order the email has a red **VOID** banner under the order details, and the subject starts with *VOID* -.
- It is in Spanish when the store's language is Spanish, otherwise in English, and comes from the business name.
- An address typed here is used for this receipt only; it is not saved to the customer.

Paid orders with an open pre-authorization

With **Hide open pre-auths on recall list** on (Back Office › Store Setup › General Settings), an order that is paid in full but still has a card pre-authorization waiting to be captured does not appear in the list. Bar tabs always appear. See General settings.

Cancelling or discarding an order

Order Entry › Order actions

View online ↗

The difference between throwing away an order nobody has seen and voiding one the kitchen already has.

What you do depends entirely on whether the order has been sent.

Not yet sent — discard it

An order that has never been sent can be thrown away. Nothing printed, nothing was owed, nothing is recorded. Confirm the prompt and you are back to a fresh order of the same type, ready to ring the next one.

Because it never existed as far as the system is concerned, a discarded order appears in no report. That is correct: no food was made and no money was involved.

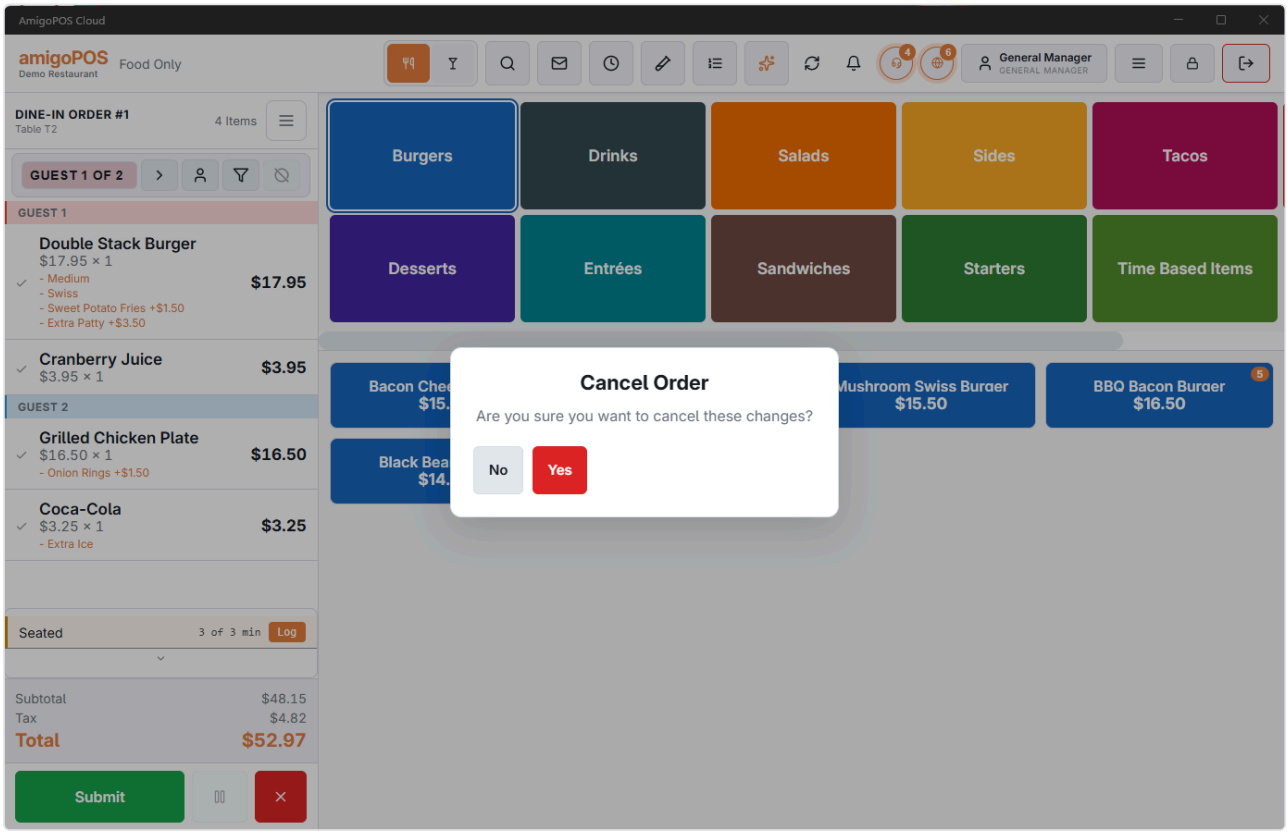
Already sent — void it

Once items have fired, removing them is a **void**, and a void asks for a reason and usually a manager. Remove a single line from the item panel, or void the whole check from the settle screen.

Voids are recorded against the user, with the reason, and appear in the audit trail and the void reports. The kitchen is told, so nobody plates food for a check that no longer exists.

> Do not discard your way out of a mistake the kitchen has already seen. The food was made either way — a void with a reason is what tells you, next month, why your wastage looks like that.

Keep the void reason list short and honest. Reasons nobody recognises get picked at random, and then the reports say nothing.



Calling the bar, and drinks-ready alerts

Order Entry › Order actions

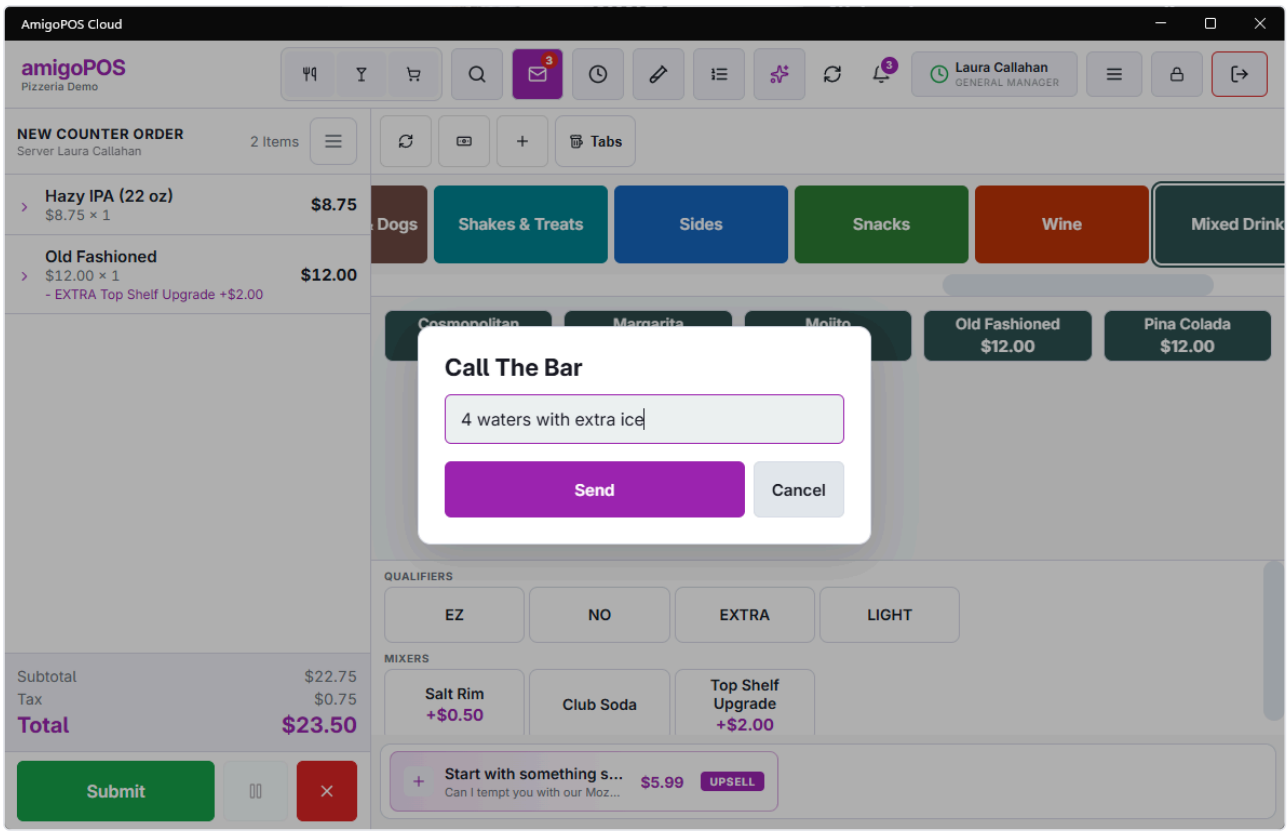
View online ↗

Send a quick message to the bar screen from the POS, and see when the bar has finished your drinks.

Two small tools connect servers and the bar screen. Both need a KDS display at the bar set up as described in Setting up a bar screen.

Call The Bar

From an order, open **More** and tap **Call The Bar**, type a short message — “two waters”, “ice to table 12” — and tap **Send**. The bar screen shows it with the table and your first name, and rings a bell. The table is added once the order has been saved; from a brand-new order the message goes without it.



Drinks ready

When the bar bumps a ticket you rang, and the bar screen has **Tell The Server When Bumped** on, your POS shows a message such as *Table 5 Ready At BAR*. It appears on the order screen of the server who rang the order, not on every station.

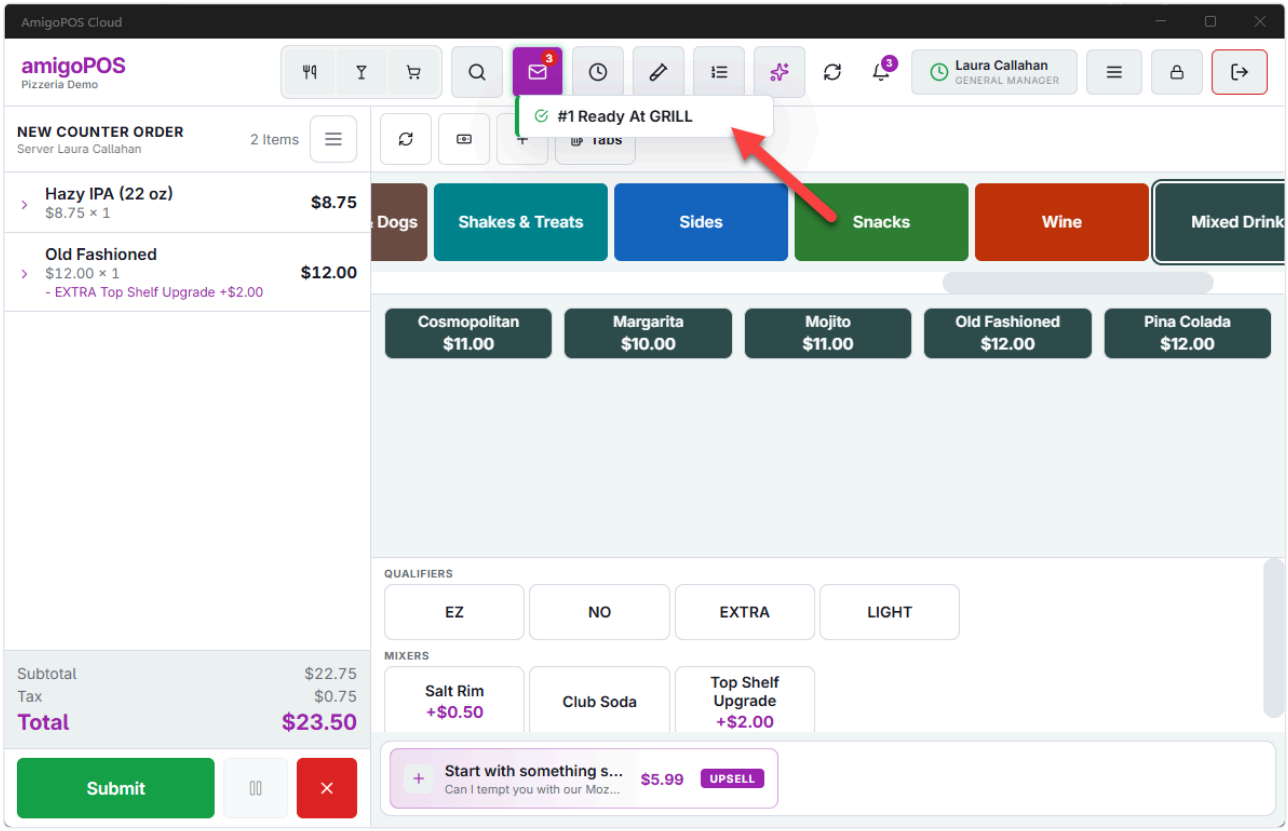


Table and Order Insight

Order Entry › Order actions

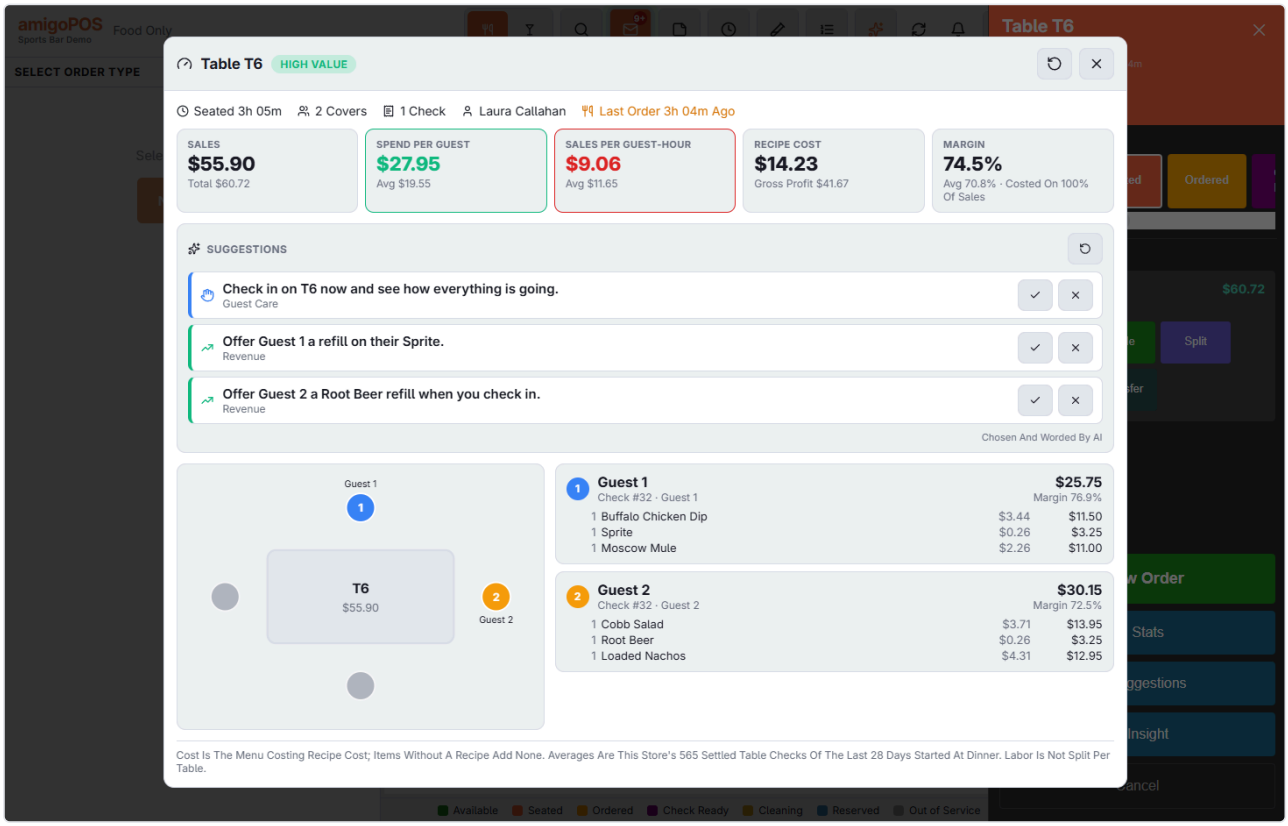
View online ↗

How long a table or order has been open, what it sold, its recipe cost and margin, and each guest, against the store's own average.

Insight shows a manager one table, or one order of any type, in depth: how long it has been open, what it has sold, what the food cost to make and what is left, and every guest with their items and linked customer — set against the store's own average for the same kind of order at the same time of day.

Where to open it

- **Seating chart**: tap a table, then **Insight** on the table panel. It covers every open check on the table.
- **Orders list**: select any order (dine-in, takeout, delivery, bar tab, open or paid), then **Insight** on the button bar on the right.

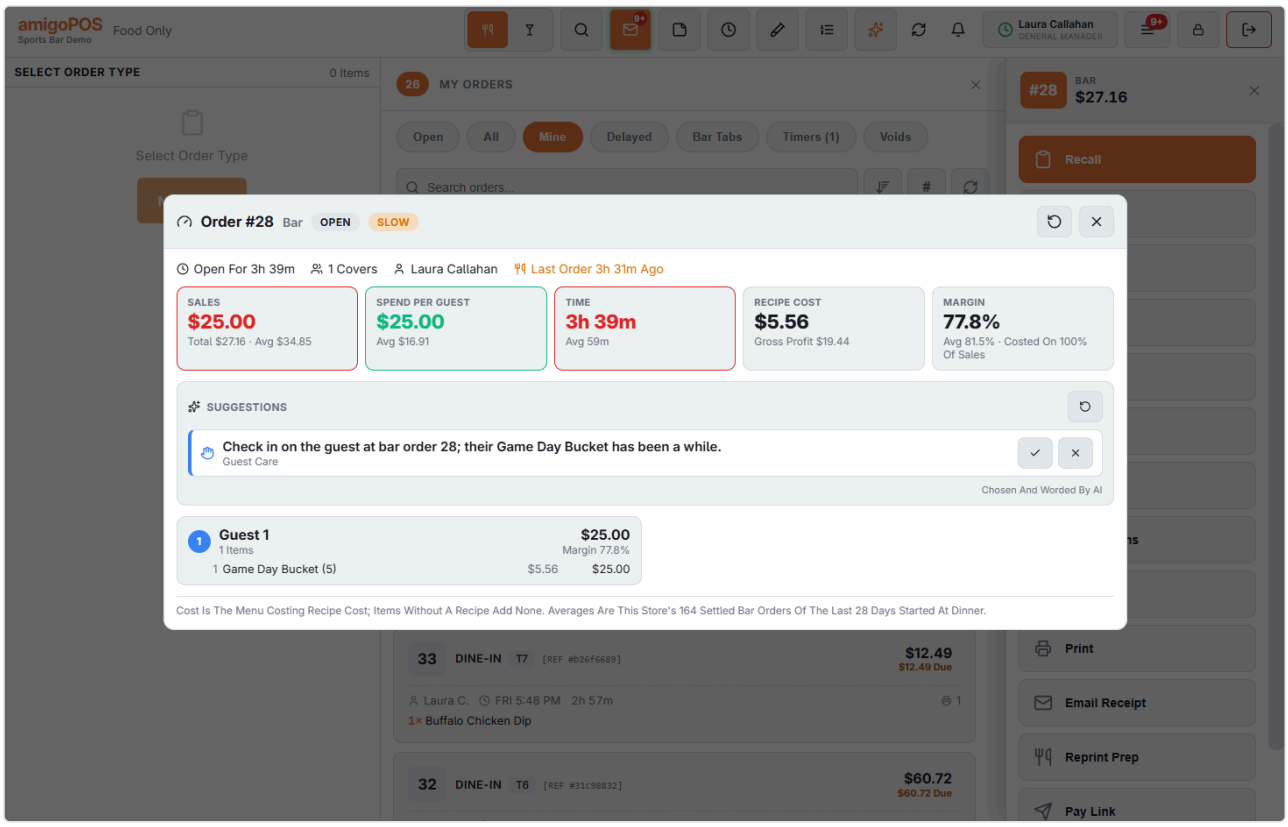


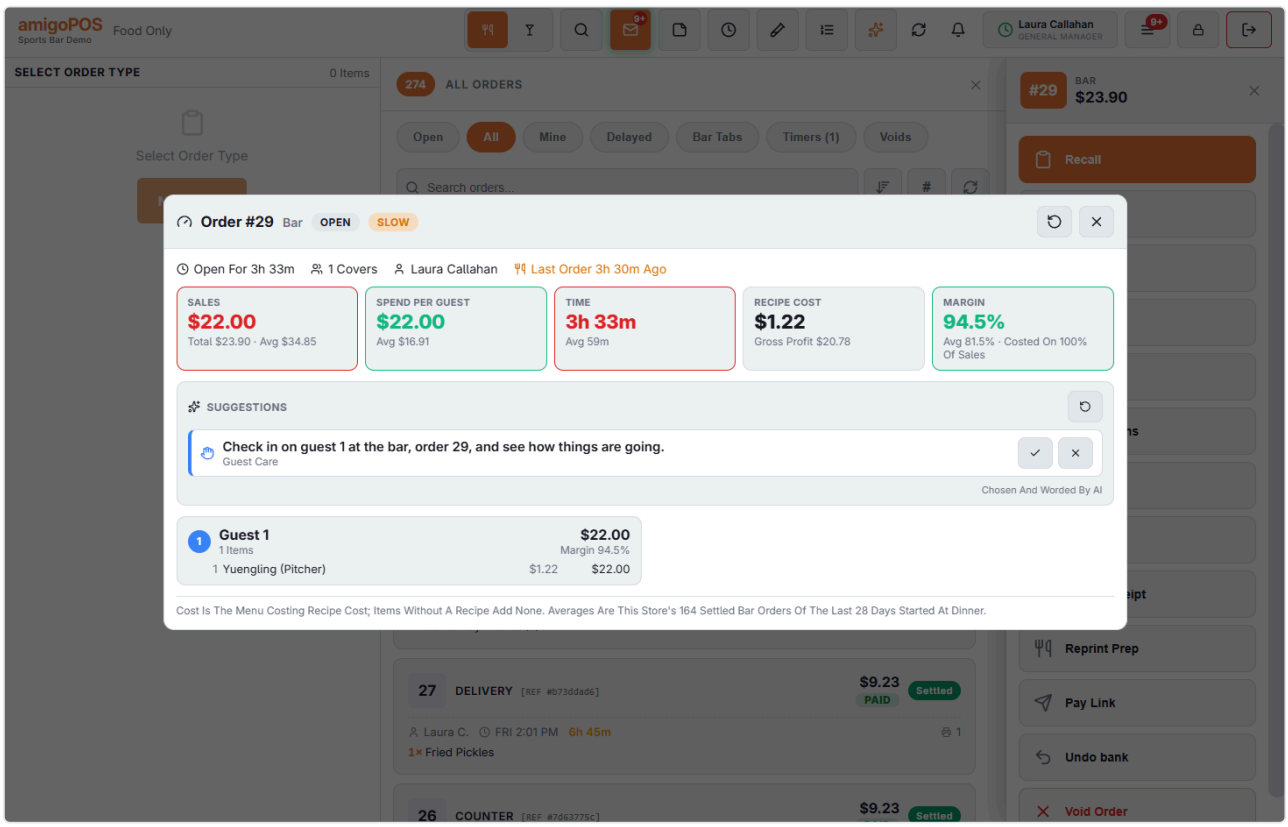
What the figures mean

- **Sales**: what the guests ordered, after discounts and before tax; the total with tax underneath, and the average check for this order type when there is enough history.
- **Spend Per Guest**: sales divided by covers.
- **Sales Per Guest-Hour** (tables and bar tabs) or **Time** (takeout, delivery, counter): how hard the seats are working, or how long the order has taken.
- **Recipe Cost** and **Gross Profit**: the Menu Costing recipe cost of what was sold. Items without a recipe add no cost, so the Margin tile says how much of the sales it was measured on.
- **Margin**: gross profit as a share of the costed sales.

A tile turns green when it is at least 10% above the store's average and red when it is 10% below. Discounts, comps, removed items, gratuity and tips show on the line under the tiles.

> The averages are the store's own paid orders of the last 28 days of the same order type (or, for Table Insight, the table checks) started in the same part of the day. Until there are 20 of them, the panel shows the figures without comparing.





Status

The chip next to the title sums the order up: **High Value** (spending at least a quarter more than usual), **Lingering, Low Spend** (a table seated long and spending slowly) or **Slow** (an order taking much longer than usual), **Ready To Turn** (the check was dropped), **On Pace** or

Just Seated. Order Insight also shows **Open**, **Settled** or **Void**.

Suggestions inside Insight

Under the tiles, Insight shows the same suggestions servers see. See Suggestions: what to offer and how to look after guests.

Who can open it

Insight shows costs and margins, so it needs the job permission **Insight (Costs And Margins)**. Anyone else gets the manager approval prompt. Servers use **Suggestions** instead, which never shows costs. See Setting up Insight and Suggestions.

The whole room

To see every occupied table of a room at once, use Floor View on the seating chart.

Floor View: every table at a glance

Order Entry › Order actions

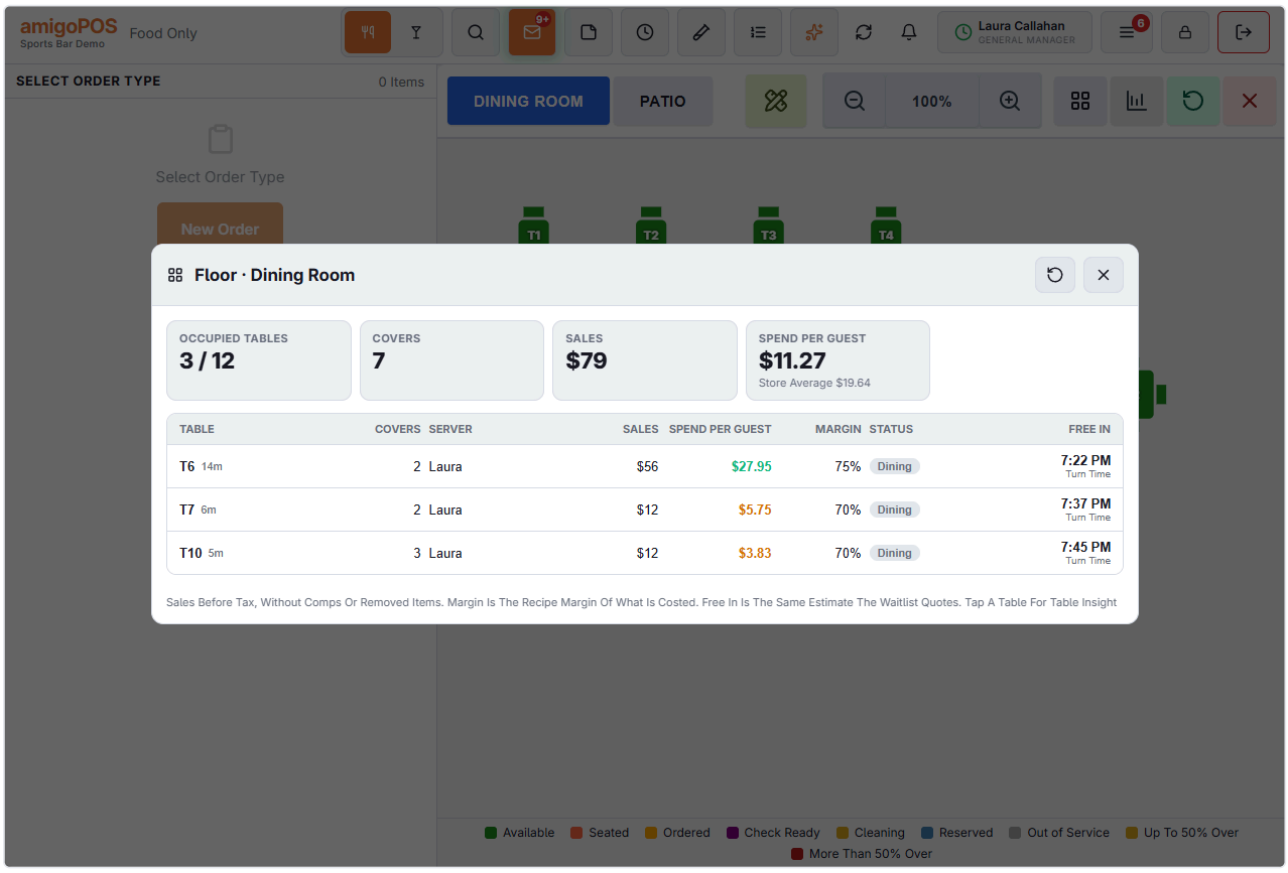
View online ↗

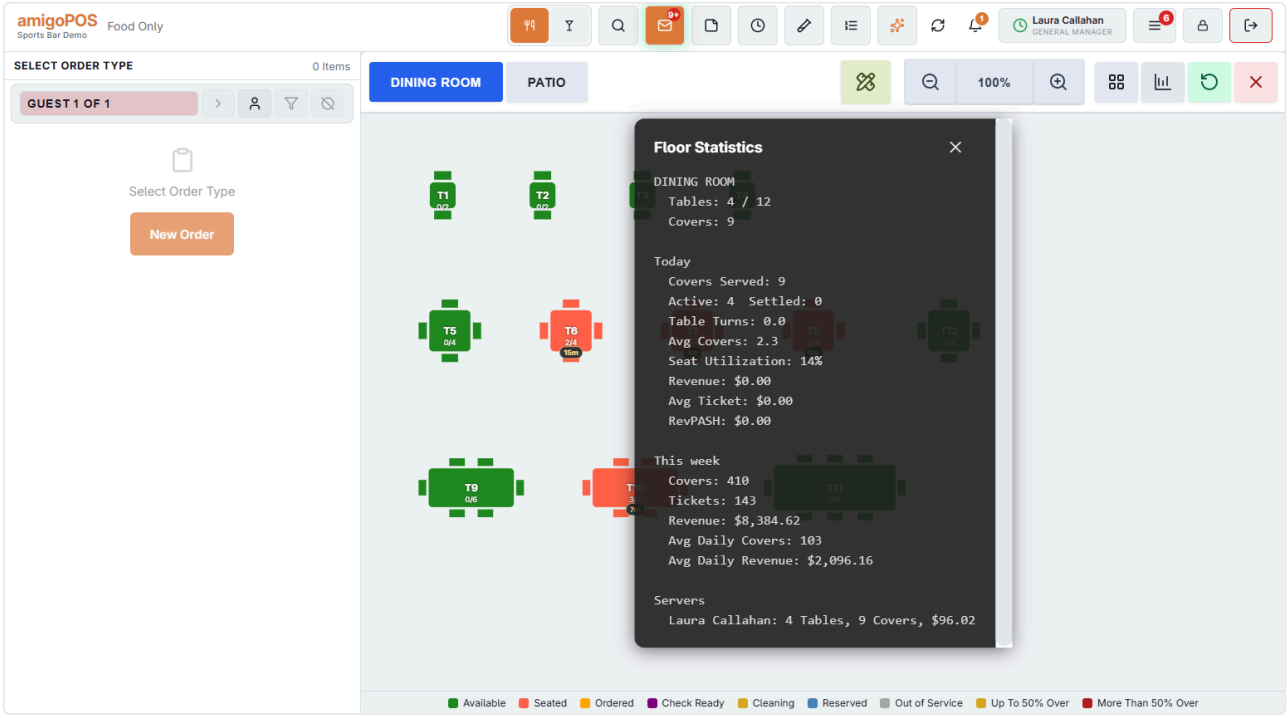
Every occupied table of a room at once: covers, spend per guest, margin, where the meal is, urgent suggestions and when the table frees.

Floor View shows a manager every occupied table of the room at once: how many guests, which server, how long they have been seated, what they have spent, spend per guest against the store's own average, the recipe margin, where the meal is, anything urgent, and when the table should be free.

Opening it

On the seating chart, tap **Floor View** (the grid button next to Stats). It shows the room you are looking at. It needs the job permission **Insight (Costs And Margins)**; anyone else gets the manager approval prompt.





What it shows

- **Tiles**: occupied tables out of the room's tables, covers, sales so far and spend per guest, with the store's average for this time of day when there is enough history.
- **Dot**: the same red or amber dot as the seating chart — a suggestion that cannot wait (see Suggestions).
- **Sales** and **Spend Per Guest**: before tax, without comps or removed items. Spend per guest turns green when it is well above the store's average and amber when it is well below.
- **Margin**: the recipe margin of what is costed in Menu Costing; a dash when nothing on the table has a recipe.
- **Status**: Dining, Dessert (dessert has been ordered) or Check Dropped (every check on the table).
- **Free In**: when the table should be cleared and ready, and what that rests on (below).

The list puts tables with a dot first, then the ones that free soonest. Tap a table to open its Table Insight.

How "Free In" is worked out

- **Paying**: every check was dropped — about 12 minutes after the last one, plus the table's reset time.
- **After Dessert**: dessert was ordered — about 25 minutes after it, plus the reset time.
- **Turn Time**: otherwise, when it was seated plus the table's turn time for a party of that size (the table's own setting, what the table really does, or the store's turn times).
- **Past Turn Time**: the table has stayed longer than usual with no sign of leaving — about 10 minutes from now.

> The waitlist uses the same estimate when it quotes a wait, so the quote shortens as soon as a table orders dessert or its check is dropped.

Suggestions: what to offer and how to look after guests

Order Entry › Order actions

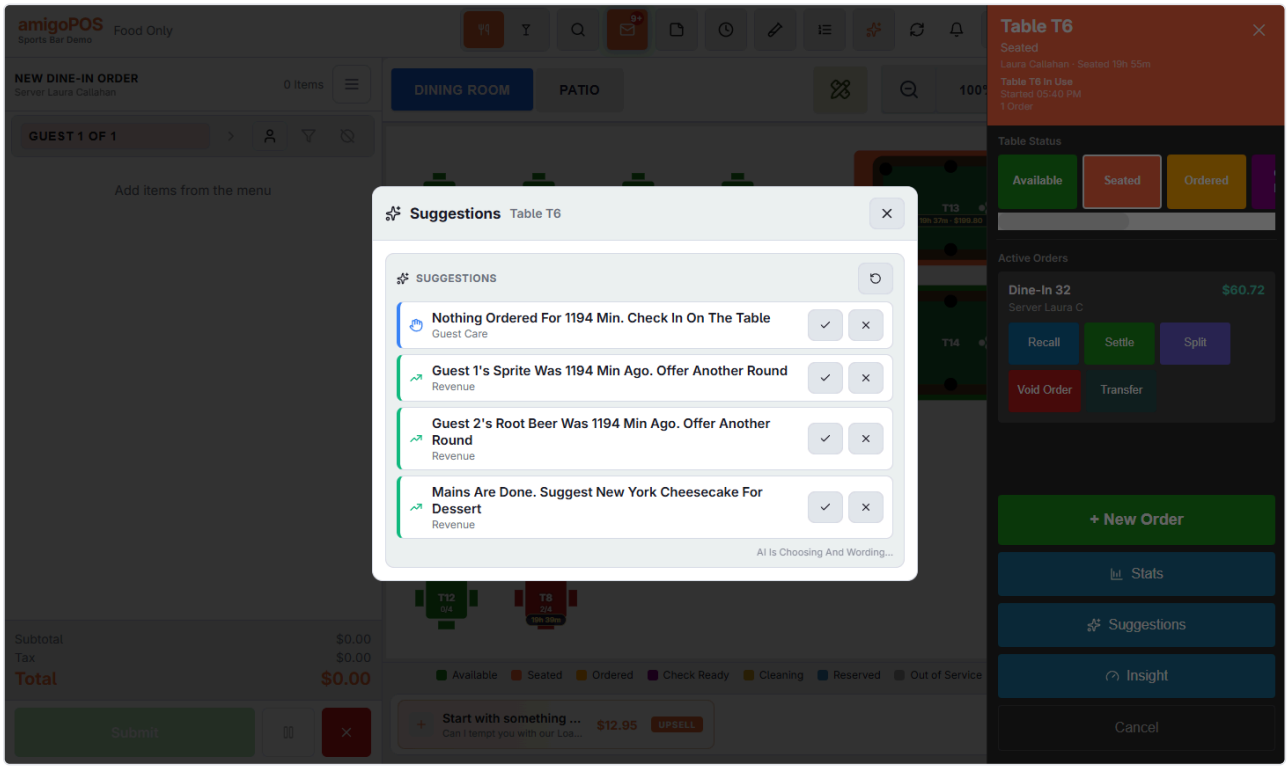
View online ↗

What to offer a table now and how to look after the guests: on the table panel, the orders list, the order screen, the seating chart and your phone.

Suggestions tell the server, right now, what to offer the table and how to look after the guests. They are worked out from the order itself and from what this store's own guests buy, and are worded by AI for the moment, in the register's language. They never show costs or margins.

Opening Suggestions

- **Seating chart**: tap a table, then **Suggestions** on the table panel.
- **Orders list**: select an open order, then **Suggestions** on the button bar.
- Managers also see them inside Table and Order Insight.



Each line has a colour: **green** for revenue (something to sell), **blue** for guest care and **red** for safety. Tap **Done** when you have acted on it or **Not Now** to drop it; either way it is not offered again on that order.

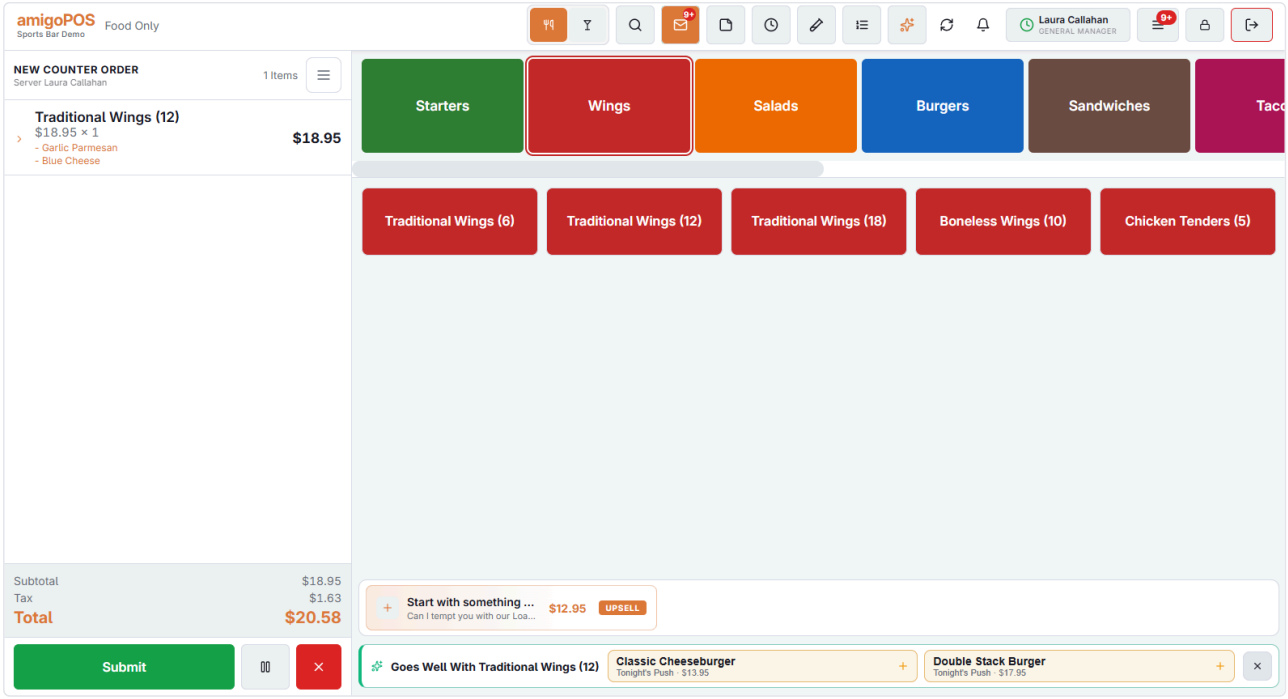
What it can suggest

- **Safety**: a linked guest's allergies (confirm with the kitchen); a blocked customer (tell a manager).
- **Guest care**: food late from the kitchen (from the kitchen display's own pace); nothing ordered for a while; a dropped check not paid yet; a slow takeout order; an item that was comped or removed (a manager visit); a VIP, a regular, a guest back after a long time, a birthday this week.
- **Revenue**: a guest with nothing to drink; another round; a starter early in the meal; dessert once mains are done; what this store's guests usually add to what was ordered; the customer's usual order; tonight's push item; a loyalty sign-up.

It never suggests an item that is not on the menu or is sold out, never offers discounts or free items, and never invents a price.

The instant suggestion on the order screen

When you ring an item, a green strip under the order can show **Goes Well With …**: what this store's guests most often add to it, or tonight's push item. Tap **Add** to ring it exactly as if you had tapped it on the menu (modifiers, age check and sold-out counters still apply), or the cross to close it.

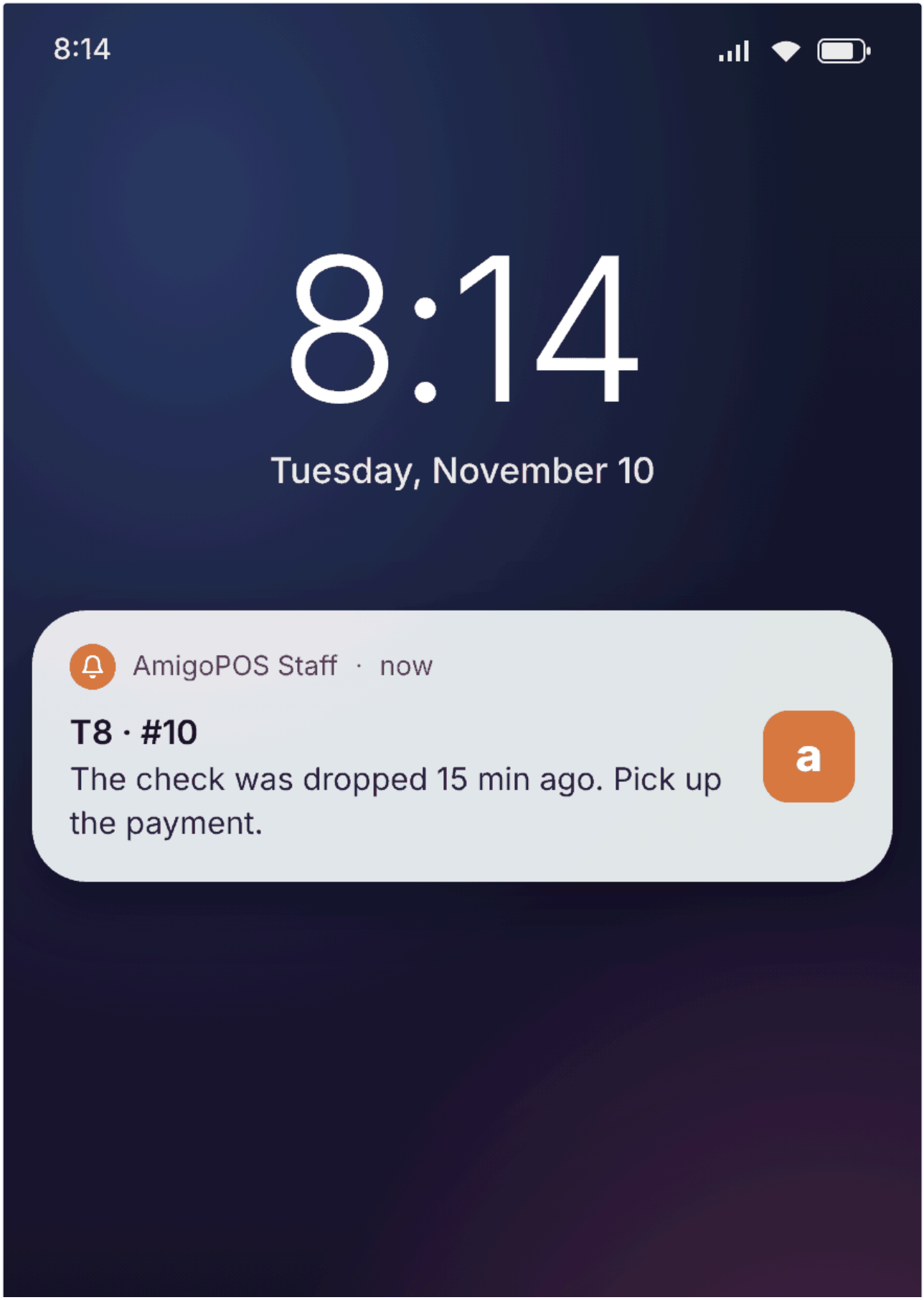


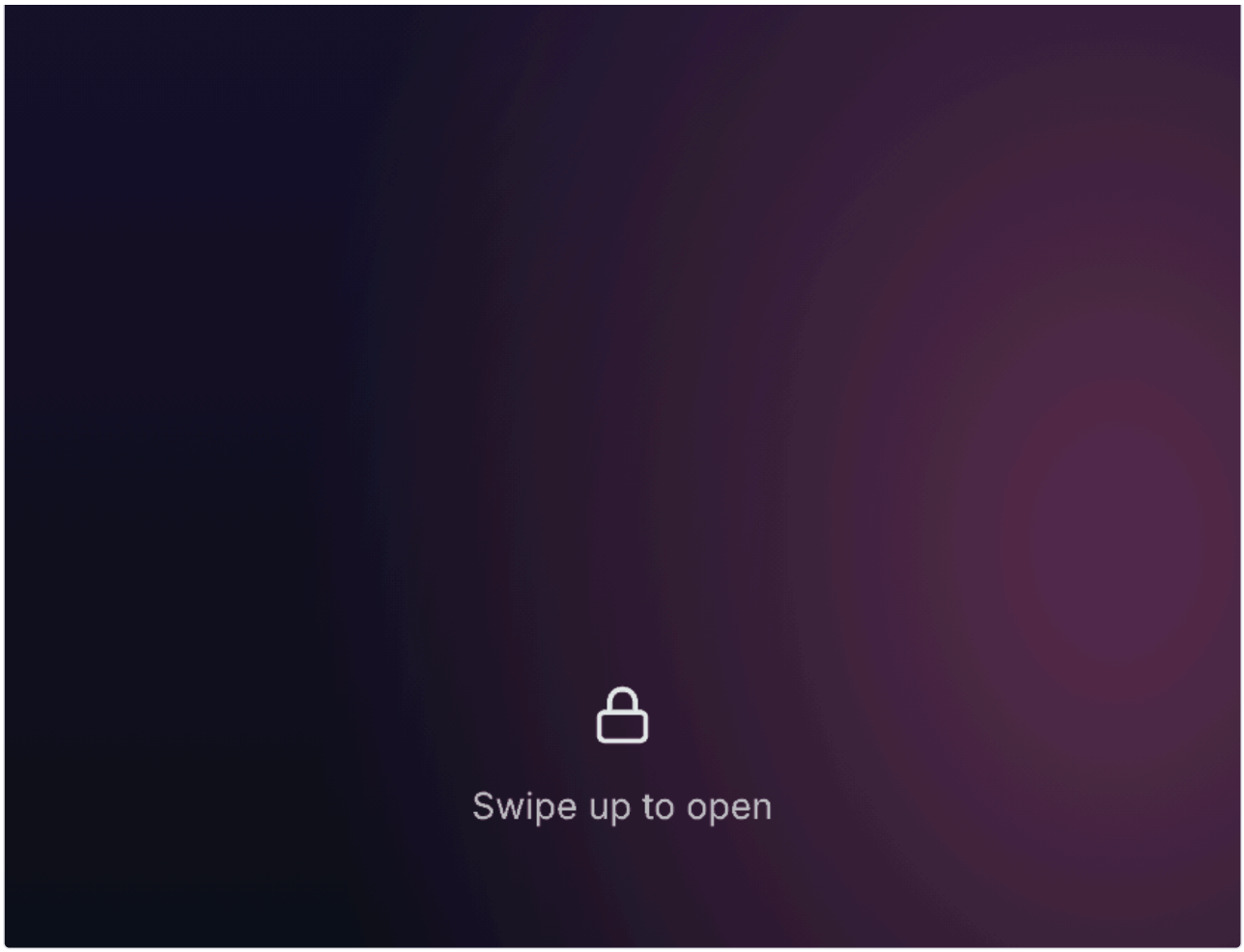
Dots on the seating chart

A table with something that cannot wait shows a dot in its corner: **red** for a guest's allergy, a blocked customer or food very late; **amber** for food late, a check waiting or nothing ordered for a long time. The table panel's Suggestions button carries the same colour. The dot goes when the suggestion is answered or the situation ends.

On your phone

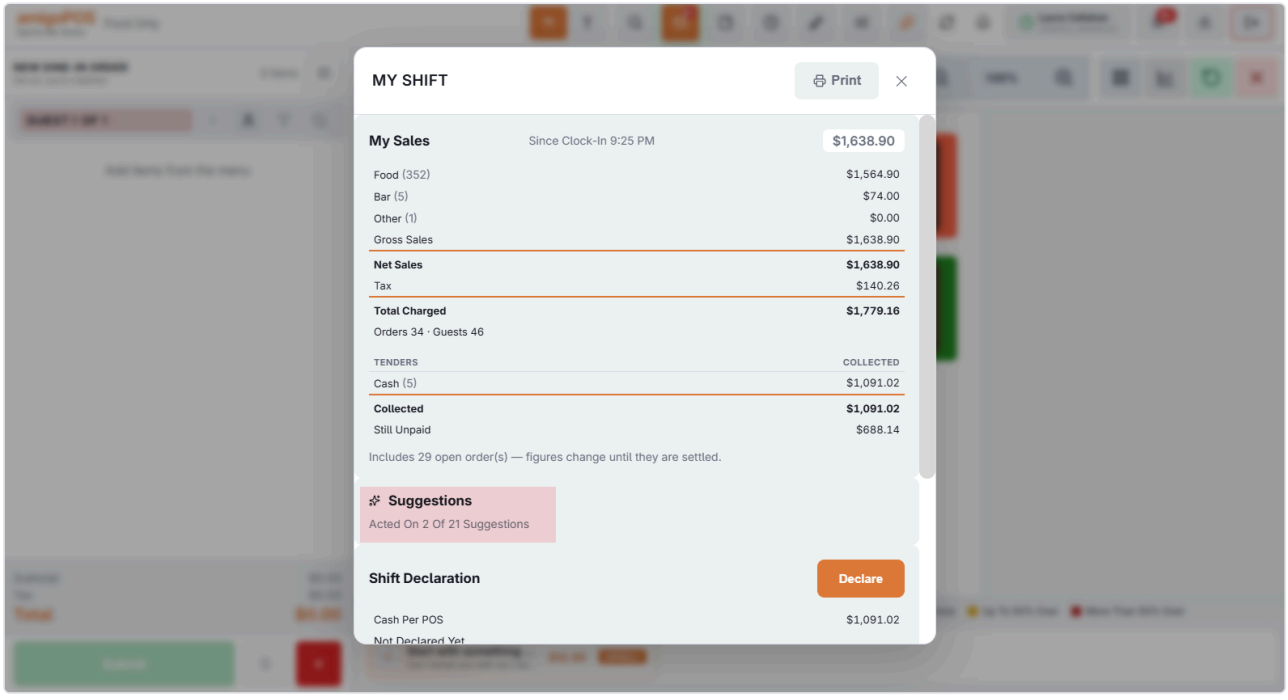
If you use the staff site on your phone with notifications on, the same time-critical suggestions for your own orders arrive as a notification, once per order. Managers on duty also get blocked customers and badly late food.


8:14
8:14
Tuesday, November 10
AmigoPOS Staff · now
T8 · #10
The check was dropped 15 min ago. Pick up the payment.
a



My Shift

My Shift shows how many suggestions on your orders you acted on since you clocked in, and the sales they added.



> A small share of orders (10% by default) never gets suggestions, on purpose: it lets the store measure what the suggestions really add. On those orders the panel simply says there are no suggestions right now.

Two suggestions as you ring

The strip on the order screen now offers **two** items for the item just rung: what this store's guests most often add to it, ranked by what actually sells when offered here, topped up with tonight's push items (marked **Recommended Today**). Tap one to add it; the cross closes both.

Upgrades

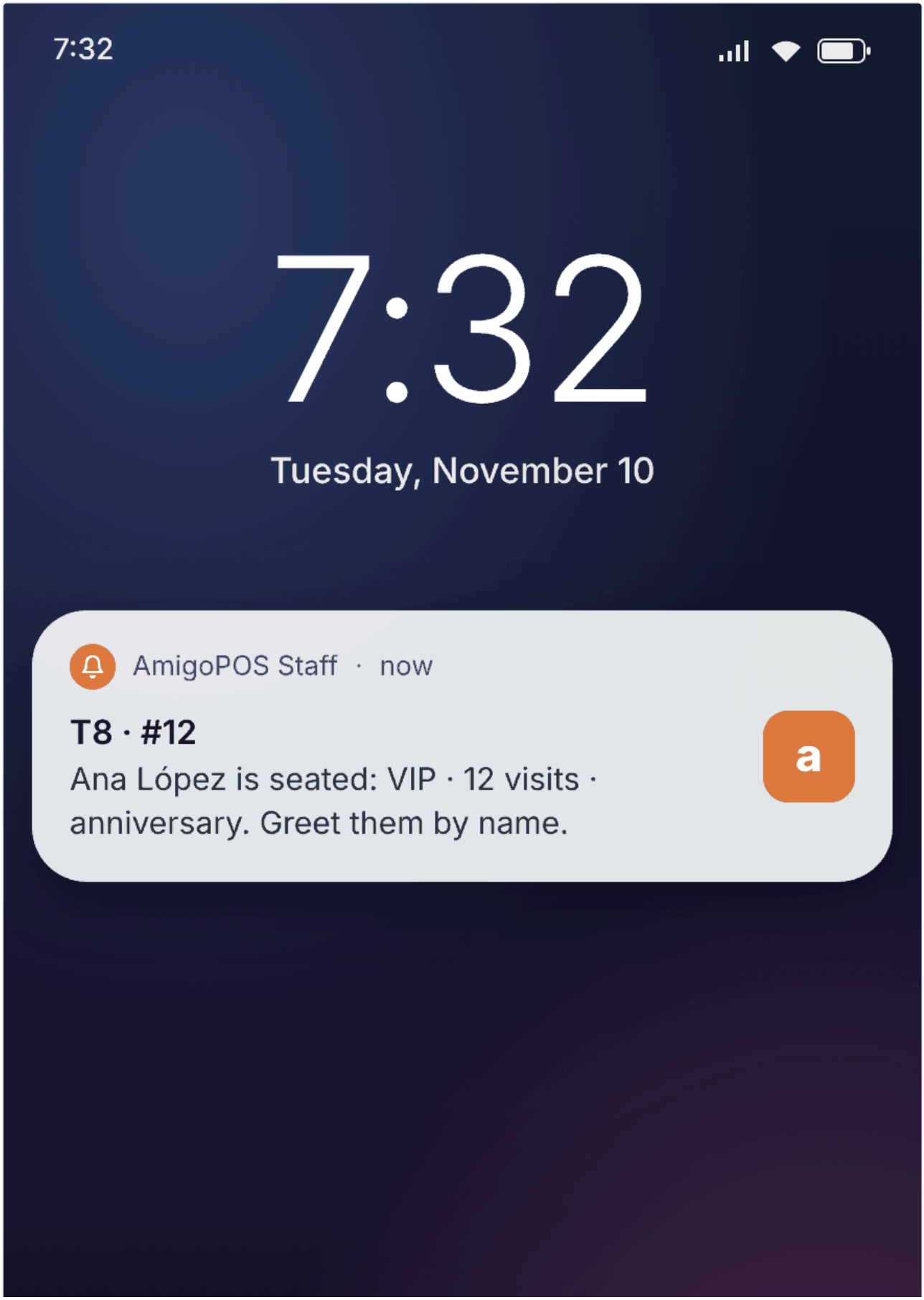
When most guests add a paid option to an item — extra cheese, a larger size, a premium side — Suggestions offers it for an item just rung that has not gone to the kitchen yet. It needs at least 15 sales of the item in the last 60 days, a fifth of them with that option.

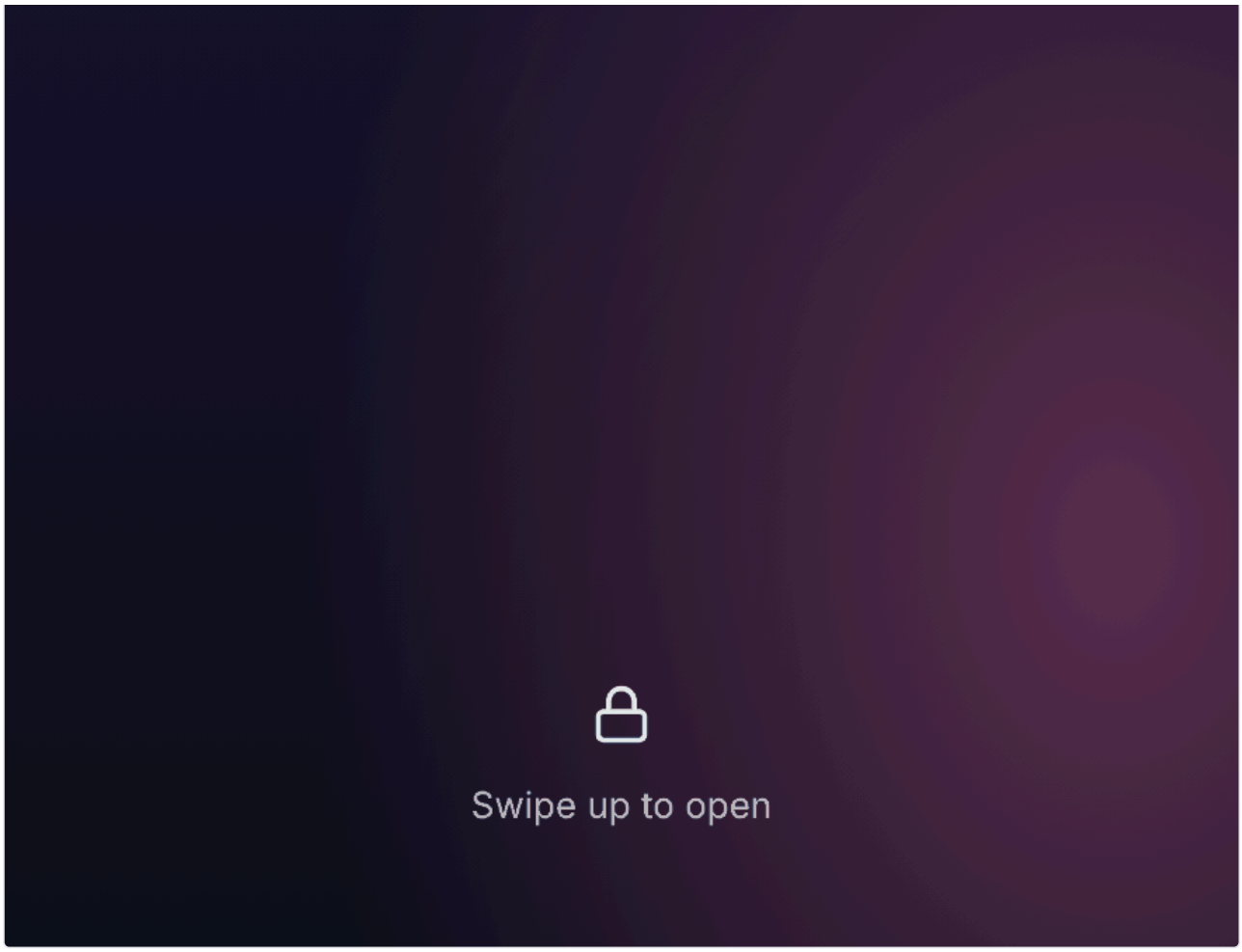
Standard wording first, then AI

Suggestions open at once in standard wording, with **AI Is Choosing And Wording…** underneath. A moment later the AI's choice and wording replace them. If nothing on the order has changed, the AI's version opens straight away.

A known guest is seated

When a VIP, a regular (5 or more visits) or a guest with a birthday this week sits down — from a booking, or as the customer on a new order — the server's phone is told at once, with the booking's occasion and any allergies. With no server on the order yet, the managers on duty get it.


7:32
7:32
Tuesday, November 10
AmigoPOS Staff · now
T8 · #12
Ana López is seated: VIP · 12 visits · anniversary. Greet them by name.
a



Choosing what your phone gets

Each employee chooses on the staff site, in the **Notifications** card: **All**, **Safety Only** (allergies and blocked customers) or **Off**. See Staff notifications.

Learning

Each store tunes its own suggestions: a kind of suggestion staff act on climbs, one they keep dismissing sinks — now also by time of day and by order type, so dessert can work at dinner and not at lunch.

Setting up Insight and Suggestions

Order Entry › Order actions

View online ↗

The settings, the two Insight permissions, tonight's push items and the control group.

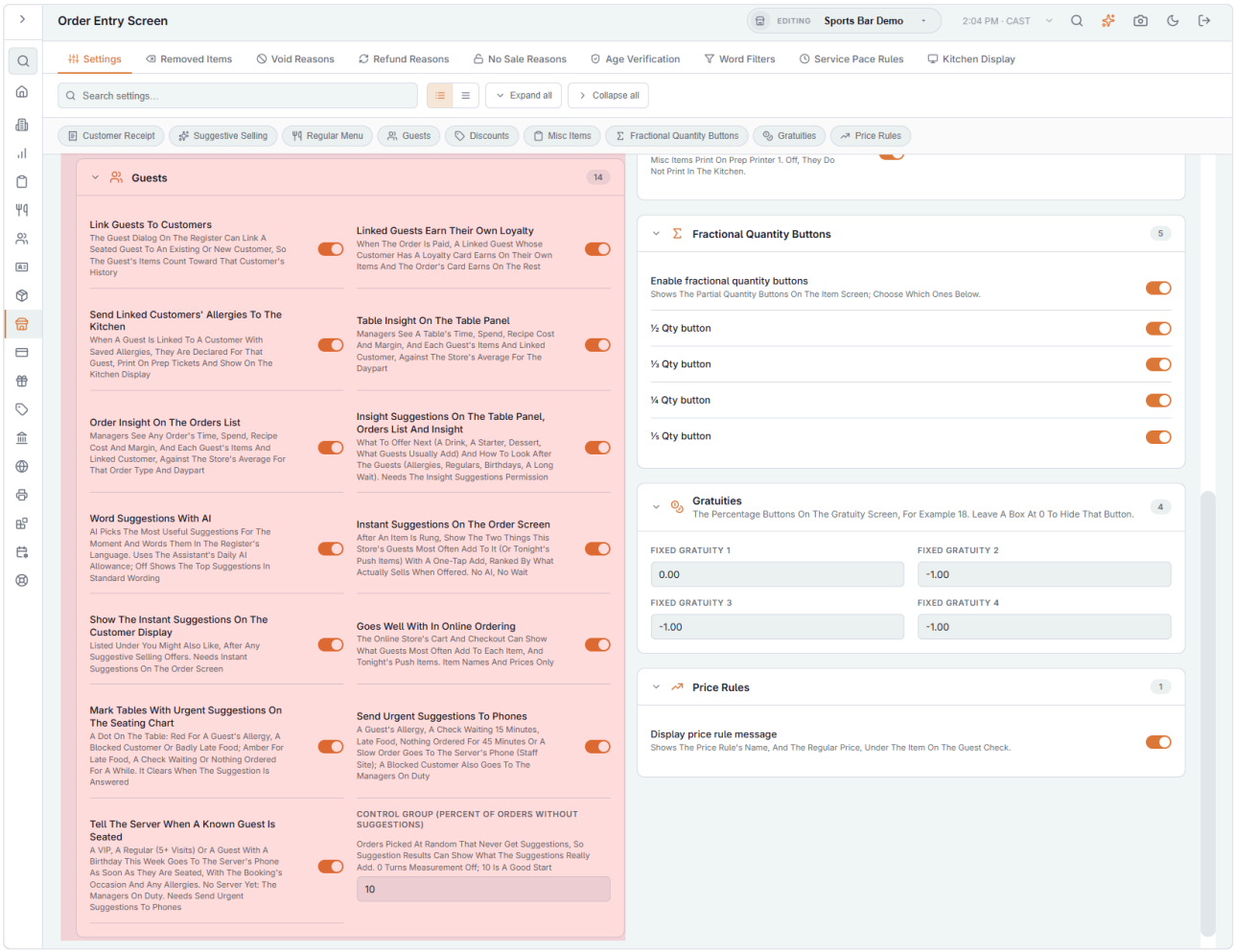
Insight and Suggestions are on for every store from the start. This page lists what you can change and who sees what.

Settings

Back Office › Store Setup › Order Entry Screen, section **Guests**:

- **Table Insight On The Table Panel** and **Order Insight On The Orders List**: the Insight buttons.
- **Insight Suggestions On The Table Panel, Orders List And Insight**: turns suggestions on or off everywhere.
- **Word Suggestions With AI**: AI picks the most useful suggestions for the moment and words them. It uses the assistant's daily AI allowance; the wording is reused until the order changes. Off: the top suggestions in the standard wording.
- **Instant Suggestions On The Order Screen**: the green strip after an item is rung (two items).
- **Mark Tables With Urgent Suggestions On The Seating Chart** (the dots) and **Send Urgent Suggestions To Phones**.

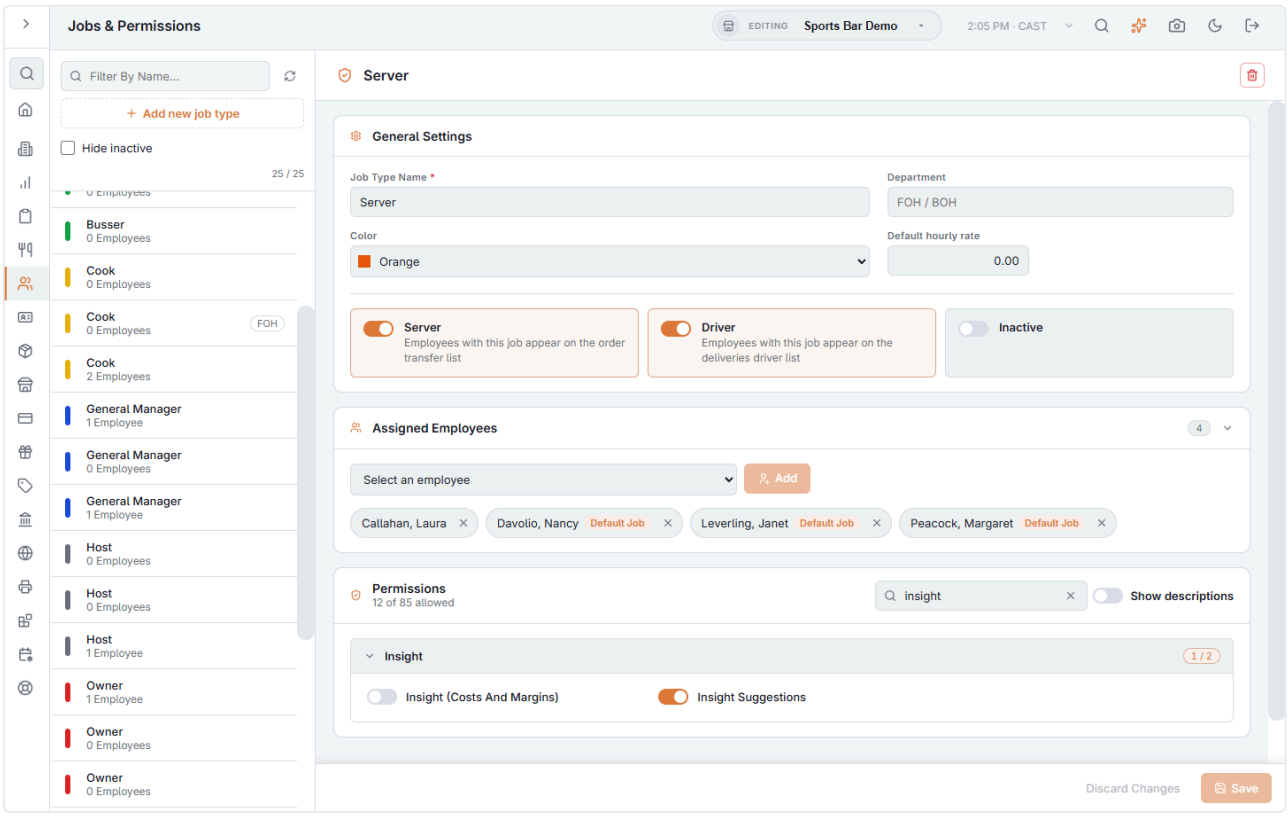
- **Control Group (Percent Of Orders Without Suggestions)**: the percent of orders (0–50, default 10) that never get suggestions, so Suggestion Results can show what the suggestions really add. 0 turns the measurement off.



Permissions

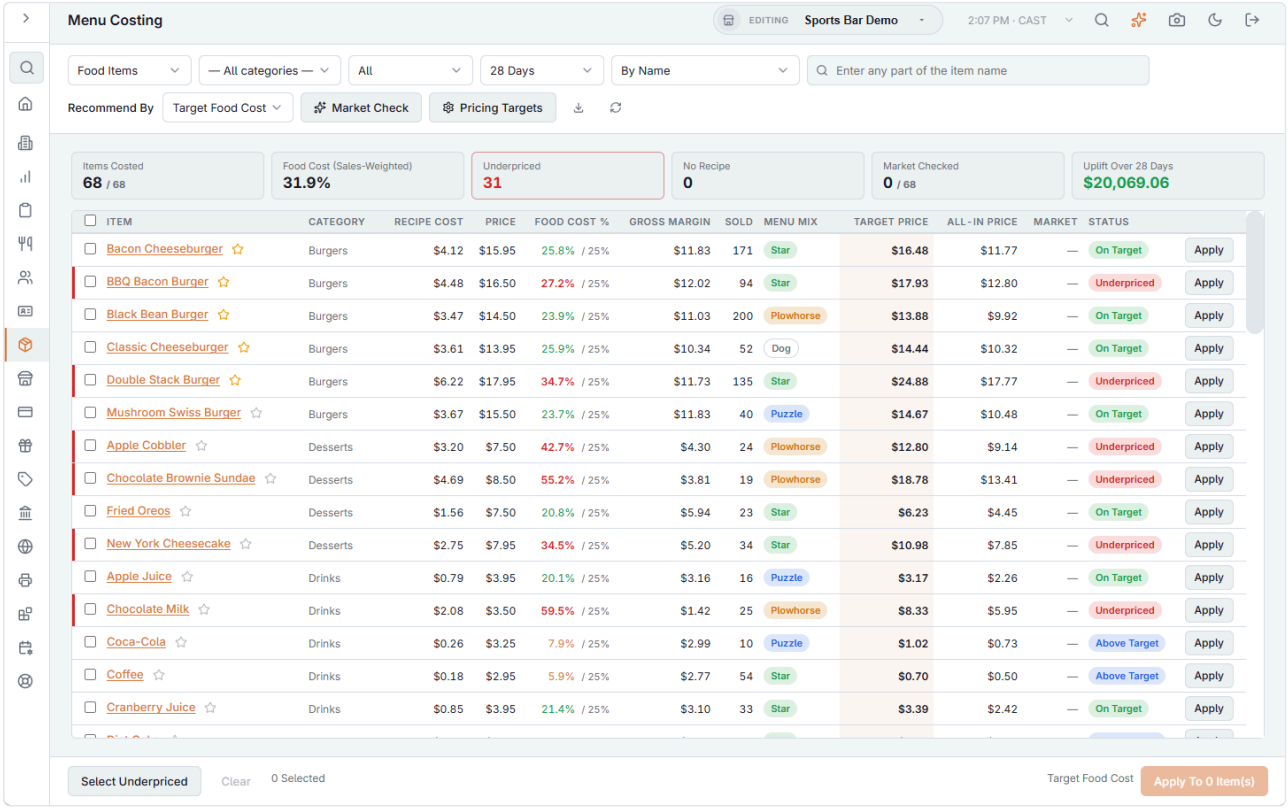
Back Office › Employees › Roles & Permissions, group **Insight**:

- **Insight (Costs And Margins)**: opens Table and Order Insight. Given to every job that had Manager or Back Office Reports when it was introduced.
- **Insight Suggestions**: Suggestions, the order-screen strip, the seating chart dots and the phone notifications, without costs or margins. On for every job that works the floor; off for time-clock-only jobs.



Tonight's push items

In **Back Office › Inventory › Menu Costing**, tap the star next to an item to push it: suggestions offer it first whenever it fits (the starter, dessert or drink to suggest, the order-screen strip) and add a “tonight's push” suggestion. Tap the star again to stop. Margins sit next to the star, so it is easy to push what earns most.



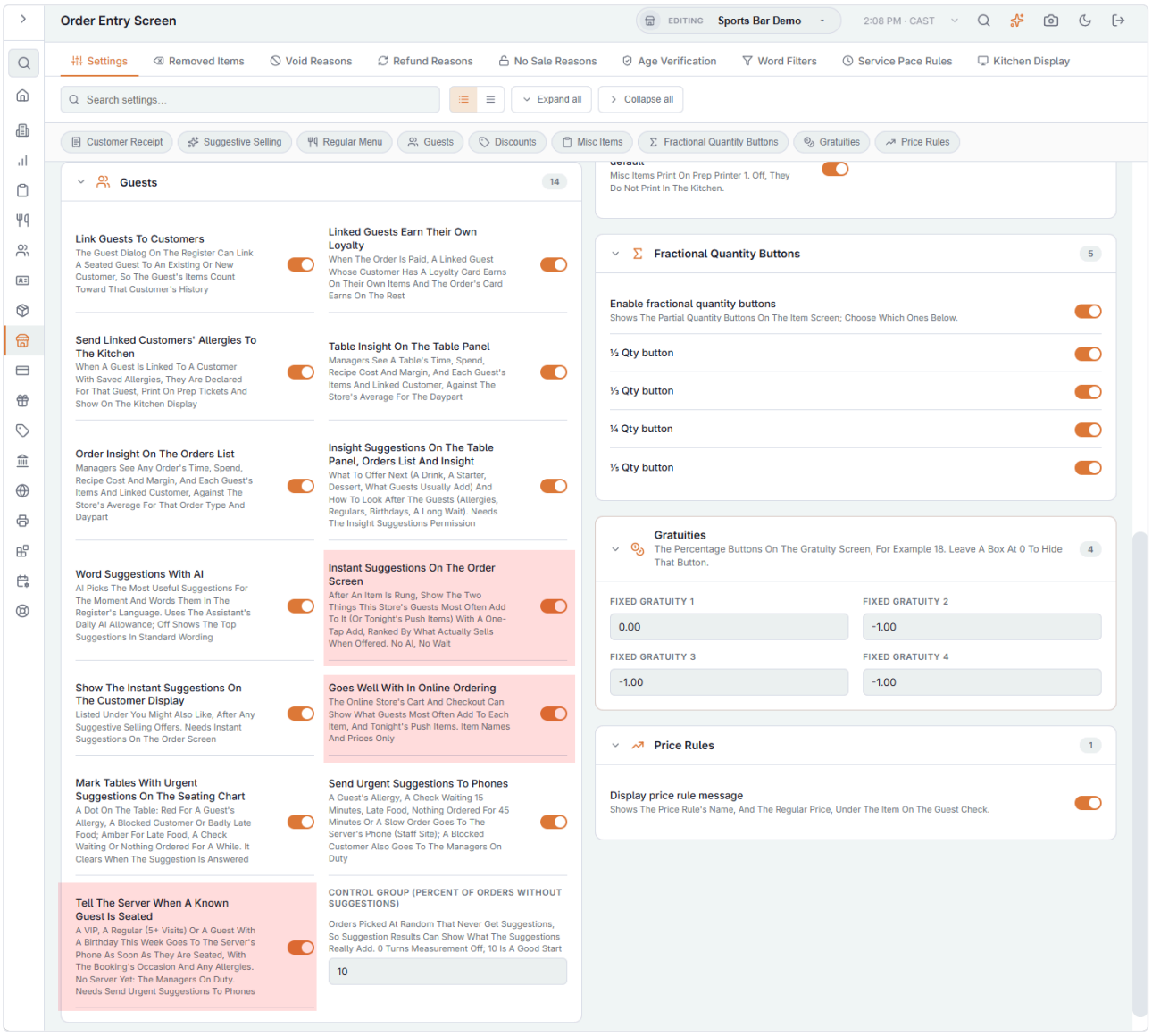
How suggestions improve

Each store tunes itself: a kind of suggestion its staff act on more often than average is shown more, one they keep dismissing less. Safety suggestions are never moved.

More switches

In the same **Guests** section:

- **Show The Instant Suggestions On The Customer Display**: the order-screen strip's items also appear on the customer display, under You Might Also Like.
- **Goes Well With In Online Ordering**: the online ordering site's cart shows what guests most often add to the items in it, and tonight's push items.
- **Tell The Server When A Known Guest Is Seated**: the server's phone is told when a VIP, a regular or a birthday guest sits down. Needs Send Urgent Suggestions To Phones.



Bar tabs

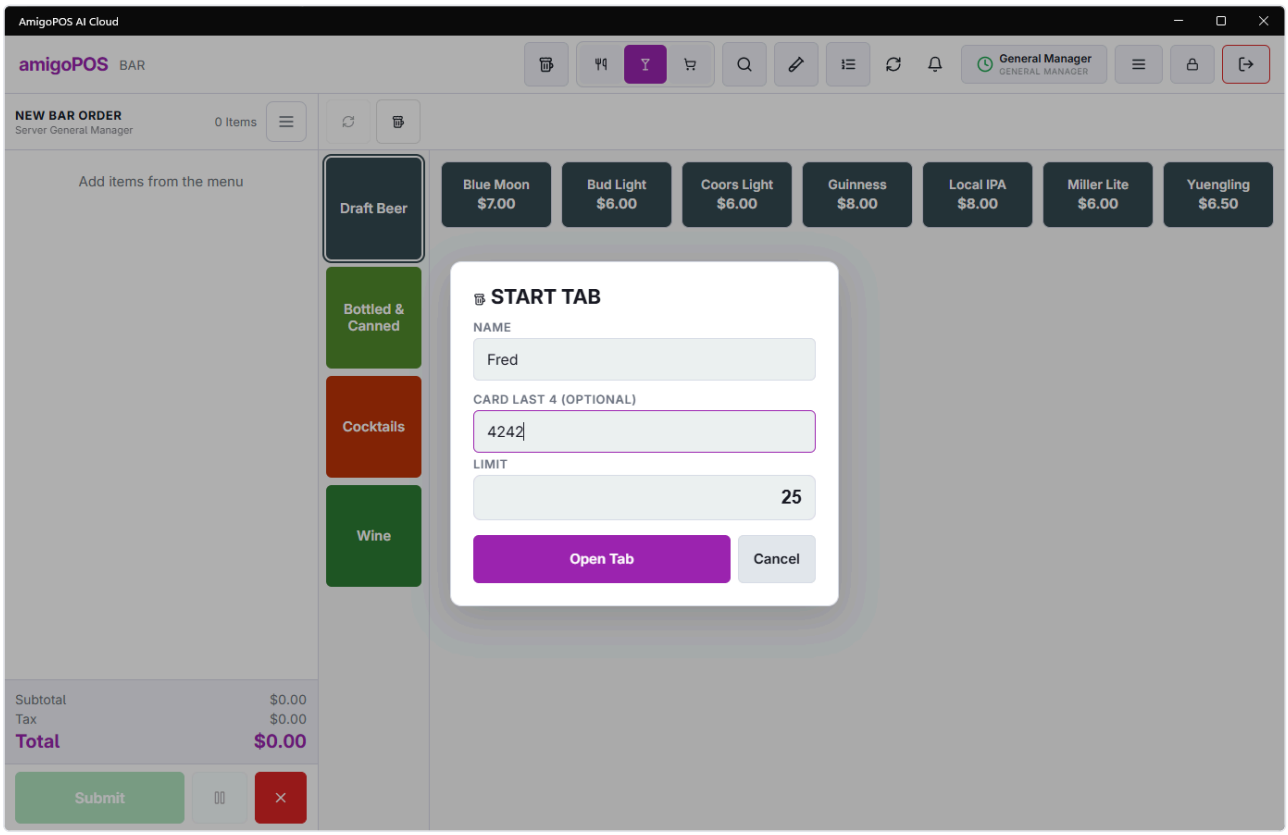
Starting and naming a tab

Order Entry › Bar tabs

View online ↗

Open a bar tab with a name and optional pre-authorized card.

A **bar tab** is an open order that lives at the bar — started in seconds, named so it can be found among twenty others, and settled whenever the guest is done.



Starting one

1. Start an order under the bar order type (the Bar button, per the store's order types).
2. **Name it** when prompted — the guest's name, or the time-honored descriptors ("red jacket, end of bar"). The name is how the tab is found later, so make it findable by whoever's behind the bar at close, not just by you.
3. Ring the first round and send. The tab stays open; ring more rounds by recalling it.

Card on file

Where the store pre-authorizes, swiping the guest's card at open attaches it to the tab — walkaways settle to the card, and the card's name can name the tab in one motion.

Finding tabs

The orders list's **Bar tabs** filter shows every open tab by name. From there: recall to add rounds, **Add gratuity**, transfer to a table (that's a *combine* — see *Combining orders*), or settle. The full close-out flow is *Opening, re-opening, and settling a tab*.

Opening a tab with a card (DC Direct)

With a DC Direct card method and the pre-auth button turned on in the Bar settings, **Start Tab** offers **Open Tab With Card**: the tab opens and the terminal pre-authorizes the guest's card for the tab limit. See **Bar tabs on a card**.

The Start Tab screen

On the bar menu, **Start Tab** (+) opens the tab on the current order: the guest's **name**, optionally the last 4 digits of their card, and the **limit**. The limit starts at the store's default; the preset buttons under it set a different one in one tap. **Tabs** lists the open tabs to pick from. Both buttons, the default and the presets are set in Bar Settings.

Opening, re-opening and settling a tab

Order Entry › Bar tabs

View online ↗

The two kinds of tab, the limit that stops one growing, and why an unsettled tab blocks the day.

Two kinds of tab

- **Name only** — a tab held against a name. Nothing is authorised; you are trusting the guest to come back.
- **Pre-authorised** — a card is authorised for an amount when the tab opens. The money does not move; it is held until the tab settles.

The tab limit

A tab carries an amount, which starts from the store's default. As items are added, a line that would take the tab past its limit is flagged rather than silently allowed — which is the moment to ask for another card or settle what is there.

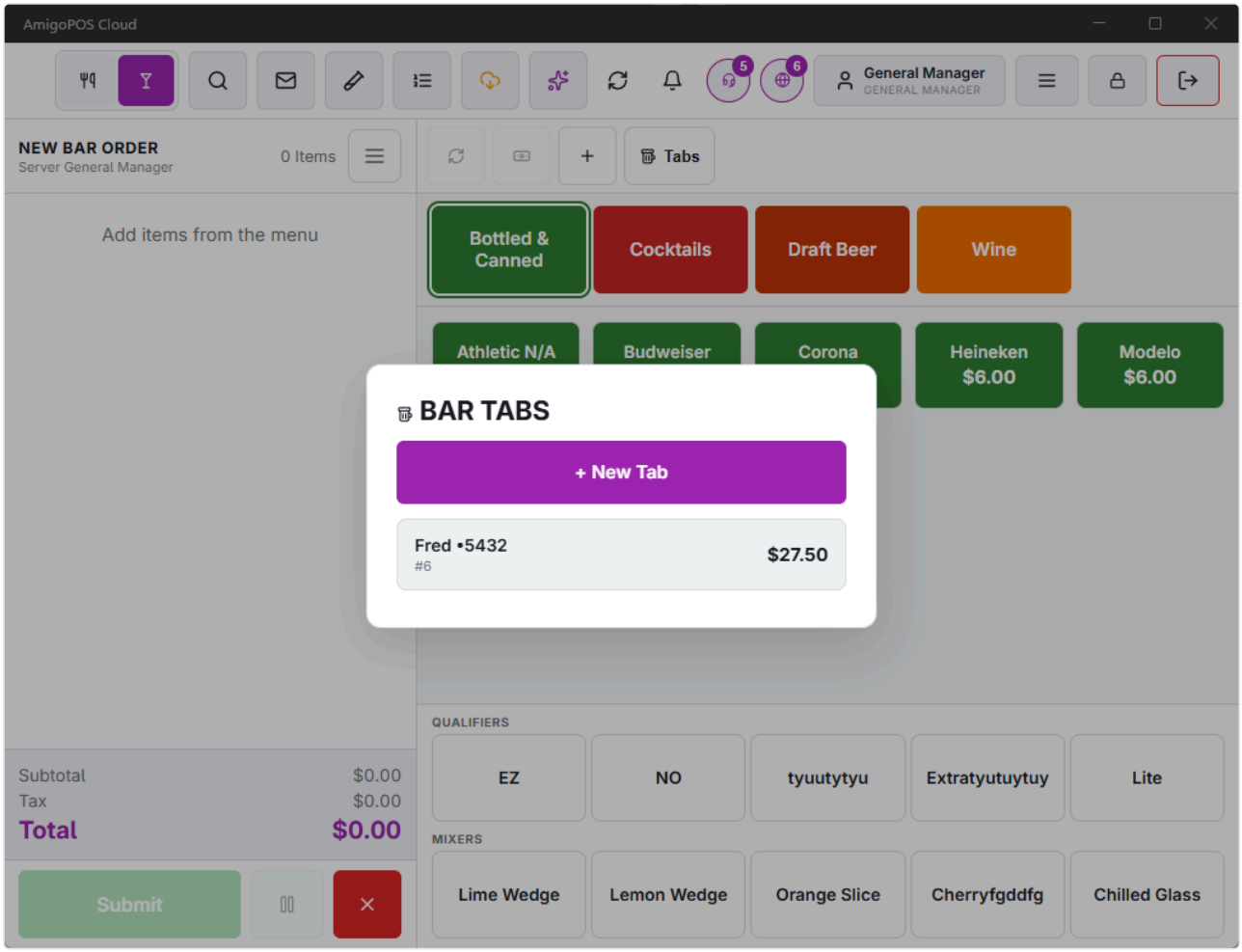
Working a tab

Open tabs are listed for the bar to pick from, so the next round goes onto the right one without hunting for an order number. A tab can be added to all night and settled once.

Settling

Settling a pre-authorised tab **captures** the authorisation — that is when the money actually moves.

> A pre-authorisation that is never captured is money you never receive, and it blocks end of day for exactly that reason. Walked tabs need dealing with before you close, not tomorrow.



Closing a tab held on a DC Direct card

Choosing the DC Direct card method on a tab opened with a card shows **Close Tab On Card** instead of a new card payment: enter the tip and press **Charge Card**. If the total is above what was authorized, the card is asked for the difference first; if it is below, the rest of the hold is released. See **Bar tabs on a card**.

CHAPTER 4

Tables, Seating & Service Pace

Seating chart

Reading the floor plan and table states

View online ↗

What the colours on the floor plan mean and where they come from.

The floor plan is your room drawn to shape, with each table coloured by what is happening at it. It answers "what is free?" and "who is waiting?" in one look.

Where the colours come from

Table statuses are **defined by your store**, not fixed by the software — available, seated, ordered, dessert, awaiting payment, needs cleaning, whatever your service actually has. Each status carries its own colour, and every station shows the same one.

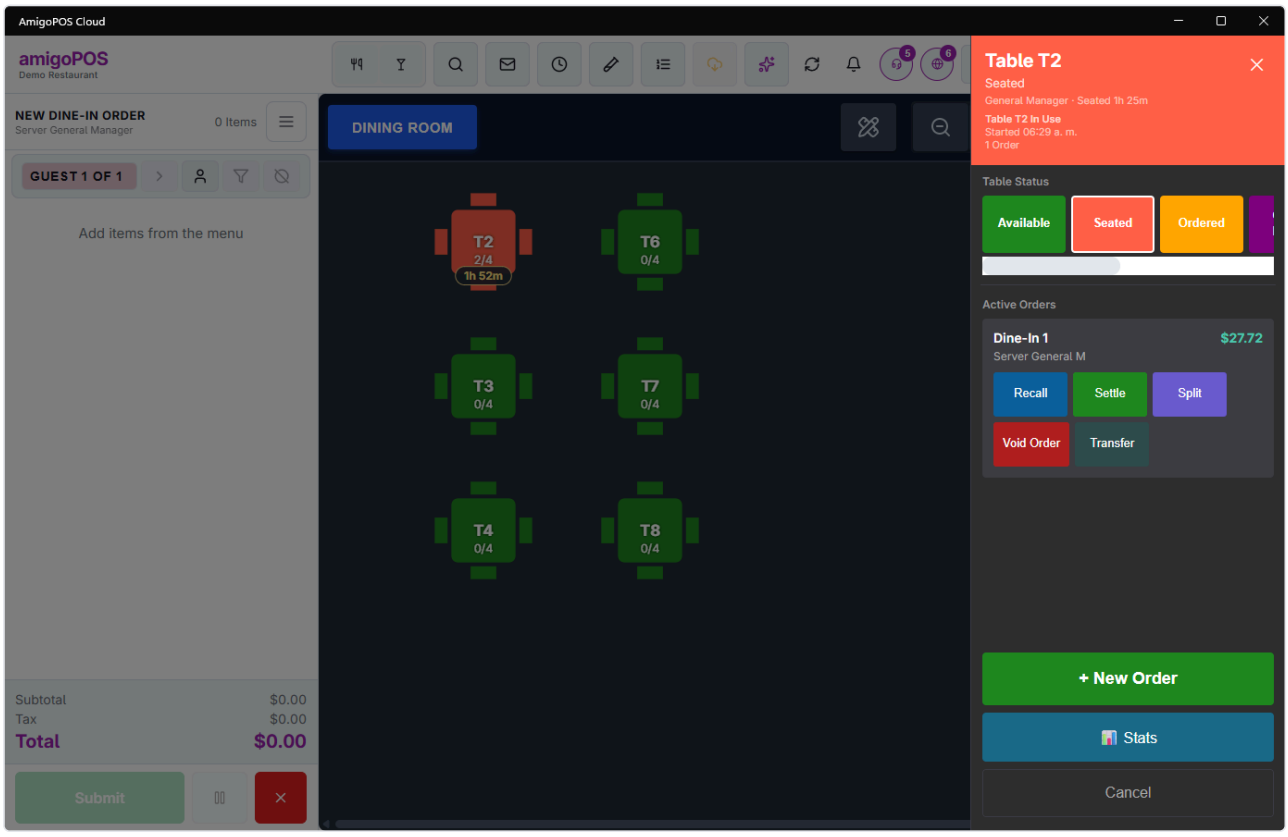
Statuses update live as orders are worked, so a table settled at one station changes colour on every other screen immediately.

Tables with orders on them

A table carrying an open order shows it. Tapping the table opens its action panel with the orders on it — see **The table action panel**.

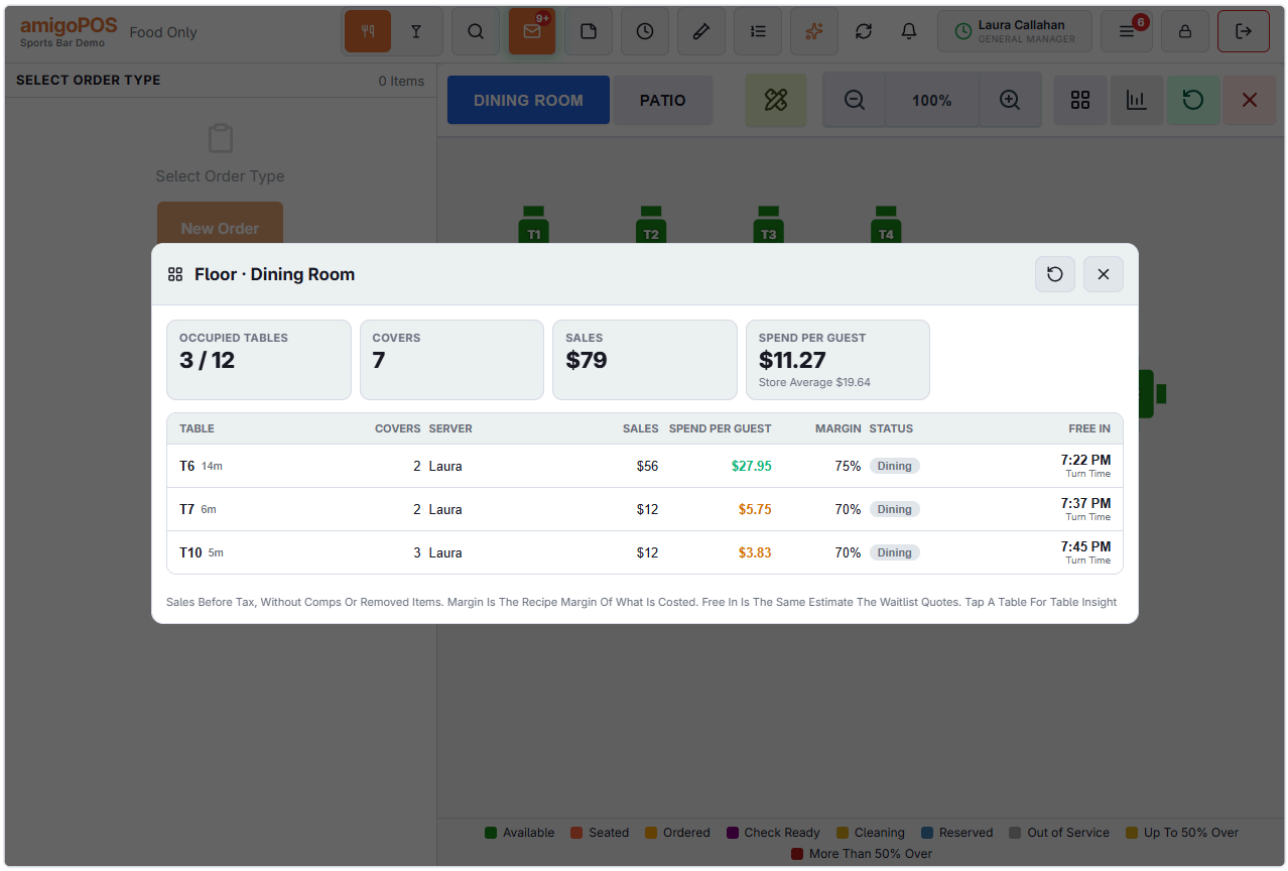
> If tables never change colour, statuses are probably not being set during service. The floor plan is only as good as the events fed into it, and most of those come from ordinary order work rather than extra taps.

> The plan itself — table shapes, positions, rooms — is drawn in the seating designer. See **Designing the floor**.



Timer pills on pool tables and lanes

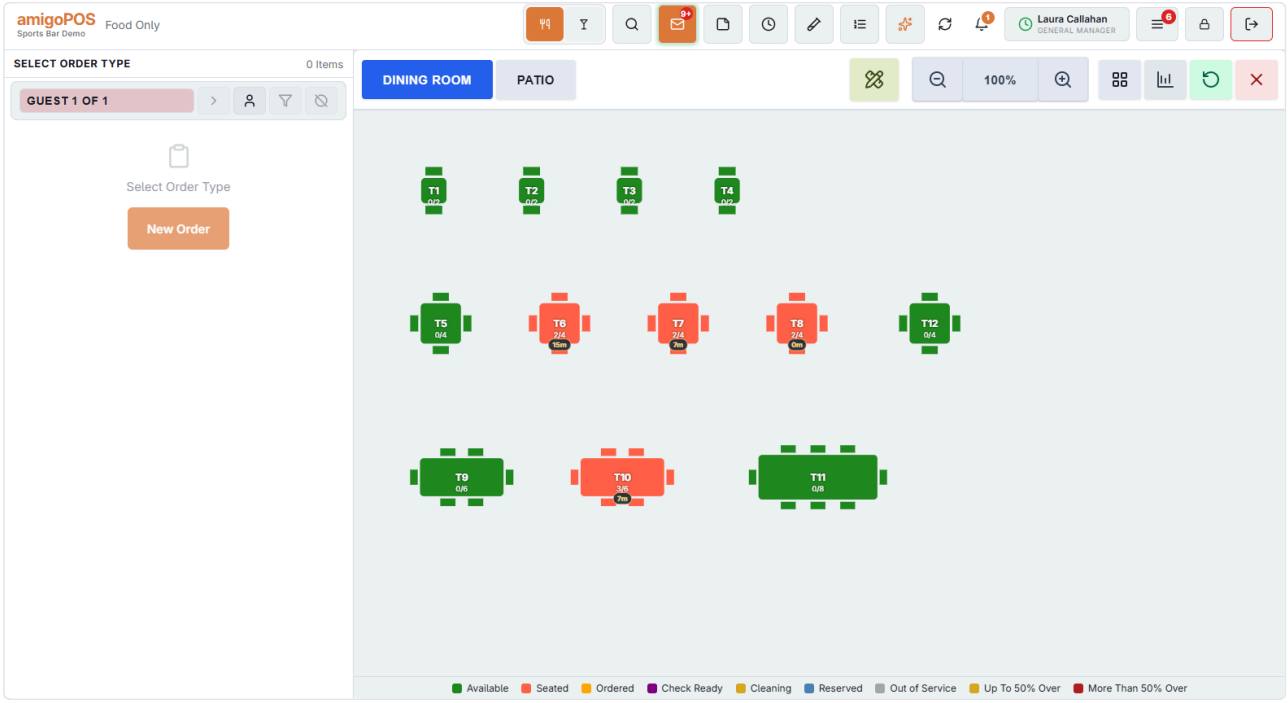
A table with a running timer (pool table, lane, room) shows a small pill with the **time played** and the **charge so far**. It uses the store's clock and refreshes about every 30 seconds. ⏸ in front means the game is paused. A game that ran into happy hour shows the whole game — both rates — in one pill.



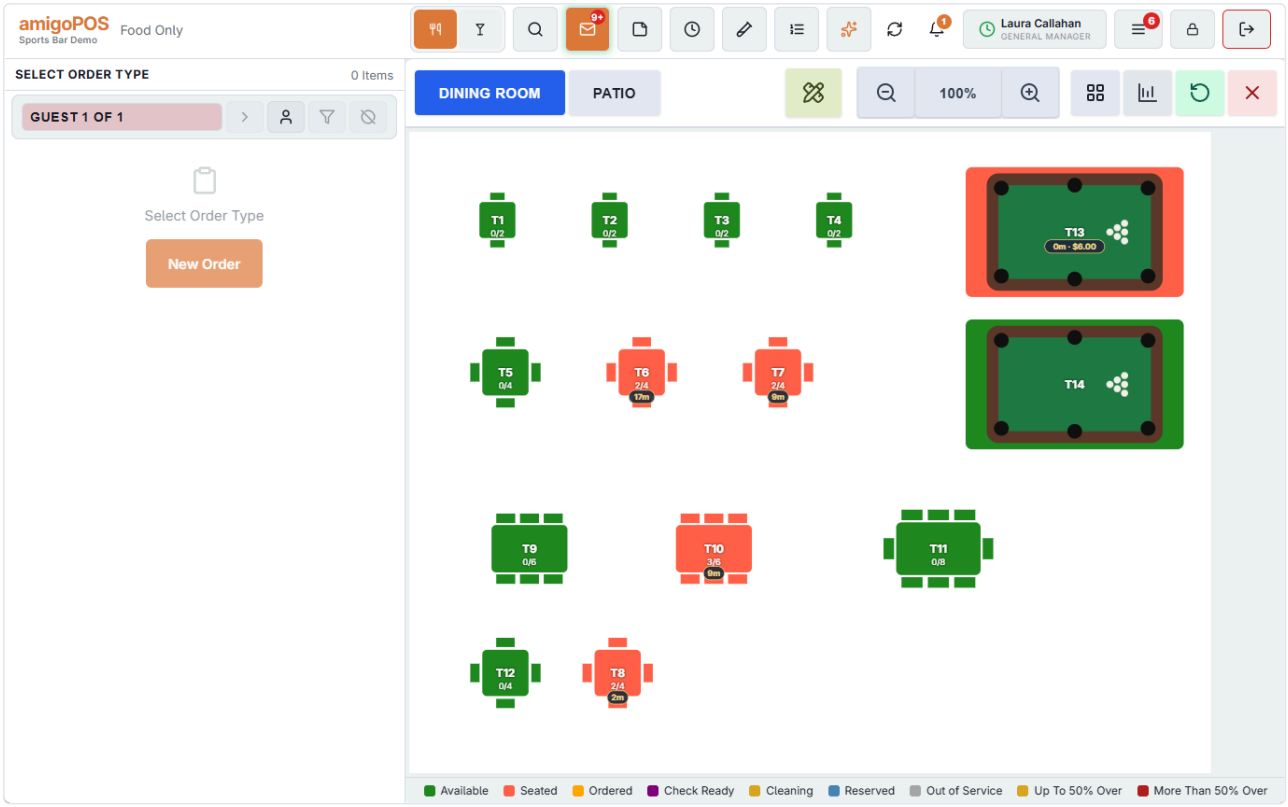
More: Pool tables and timed games.

How the room fits the screen

The room scales to fill the Tables panel on tablets and wide screens, so the whole floor is in view without scrolling; the zoom buttons still zoom in on a corner when you need to. Under the room a **legend** lists the store's statuses with their colours, so a new hire reads the floor without asking.



Timed tables with a colour of their own — pool tables, karaoke rooms, lanes — keep that colour and show a small **status plate** in the corner instead of changing colour, so you can still see at a glance whether they are in play. See Pool tables and timed games.



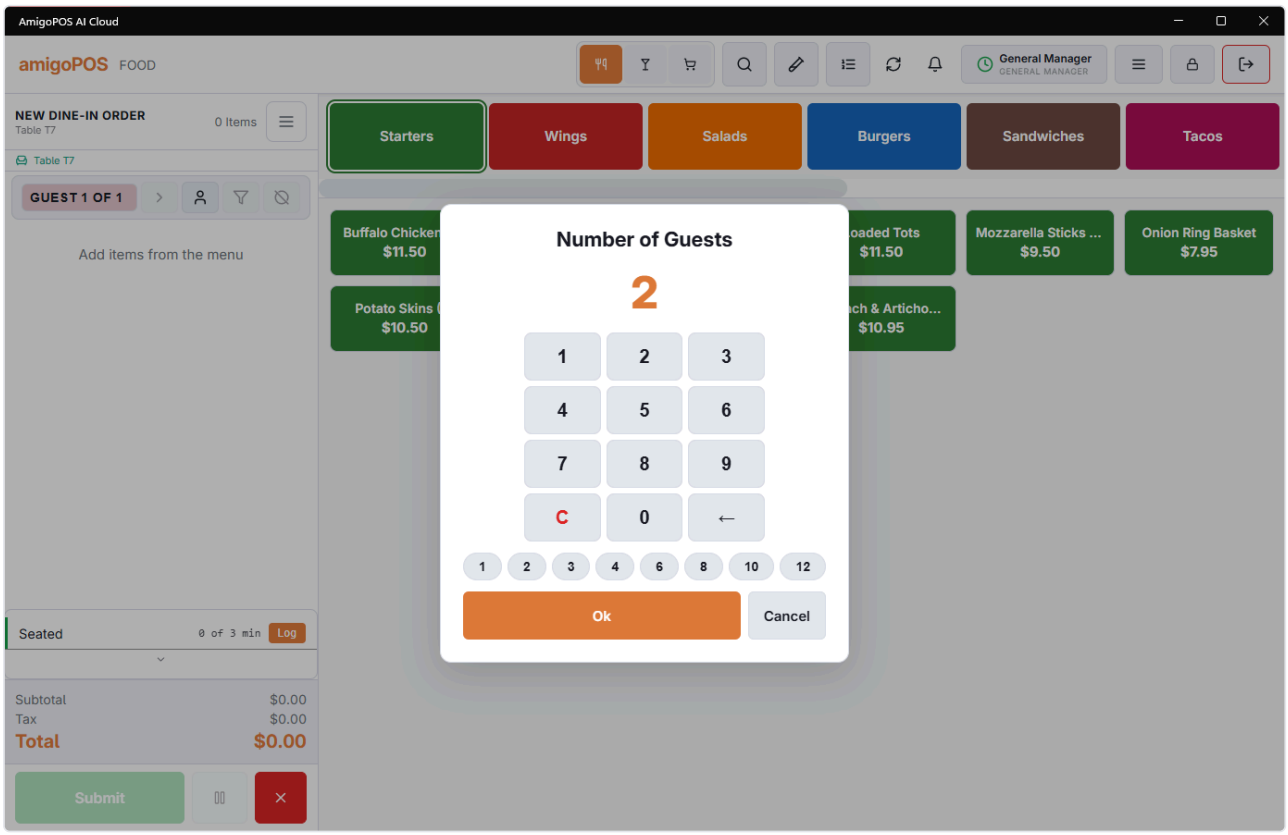
The drawing itself updates live too: when a manager saves a room in the designer — a table added, a room renamed or switched off, a floor image put behind the tables — every register redraws its Tables screen within seconds. Nobody has to sign out. See The seating designer.

Seating a party and opening a table

View online ↗

Seating guests at a table and starting their order from the floor plan.

Seating a party is two taps on the floor plan: pick the table, start the order.



The flow

1. Open the seating chart (a table-service order type opens it as part of its pipeline, or via **More › Tables**).
2. Tap an **available** table. The action panel shows the table's status; tap **New order**.
3. The order opens with the table attached; set the **guest count** when prompted (it drives per-seat ordering, covers, and the pace math). The table tints to *seated* on every station, in the server's color.

Variations

- **Table already in use** — the panel lists its active orders instead: recall one, settle, split, transfer, or add *another* order to the same table (two parties, one table — see *Multiple orders on one table*).
- **Combining tables for a large party** — seat the party on the primary table; the physical push-together doesn't need the chart's permission. If the layout does this often, add a large-party table in the *seating designer*.
- **Moving a seated party** — handled from the table's action panel; the order keeps everything, only the table changes.

> The color language of the chart — what each tint and badge means — is *Reading the floor plan and table states*; the timing tints are *Service-pace panel and color cues*.

Seating at a pool table or lane

When the table is a timed one, the menu switches to the time-based view with only that table's items as soon as the order is seated: tap the item to start the game. If the table has a light, it comes on when the timer starts. See Starting a game from the floor plan.

The table action panel

View online ↗

Everything you can do to a table from the floor plan without opening its order first.

Tapping a table on the floor plan opens its panel: what is happening there now, and what you can do about it.

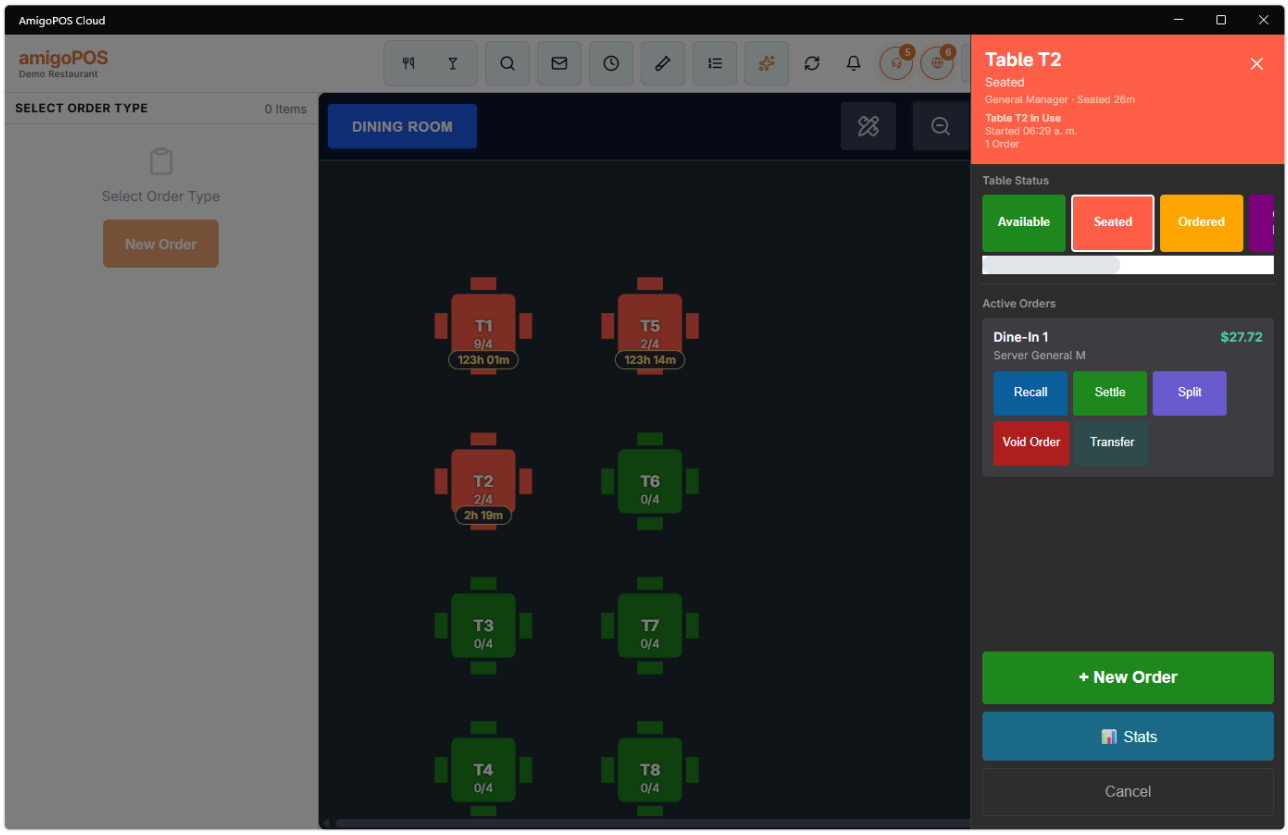
What it shows

- Whether the table is **available** or **in use**, its status, and how long the current session has been running.
- The **active orders** on it, with the server who has them.
- **Waiting** time from the service-pace rules, so a table that has been sitting too long says so here rather than in a separate screen.

What you can do

- **New order** — start one on this table.
- **Recall** — open an existing order to add to it.
- **Settle**, **split**, **transfer** or **void** an order without walking back to the orders list.
- **Stats** — this table's history: how many turns, how long they run, what they are worth.

> Transfer from here when a section changes hands. Doing it table by table on the plan is faster and less error-prone than working from a list of order numbers.



Pool tables, lanes and rooms

- A free timed table tapped **before** starting an order shows a **Start Timer** section: one button per linked item with its rate. One tap opens an order on the table and starts the game. See Starting a game from the floor plan.
- **Settle** on an order with running timers asks to stop them first (*Stop And Settle*). See Settling, splitting and combining timed checks.
- **Split** waits until the order's timers are stopped.

Your orders and other servers' orders

- **Recall**, **Settle**, **Split** and **Void Order** show only on orders you own, unless your job has **Cross-Edit**. **Transfer** shows on every order, so a section can still be handed over (Transferring an order to another server).
- **Split** opens the orders list on that order's split choices. If the order can't be split (a single item, a bar tab, already split), it opens selected instead; one with a payment already on it says why it can't be split.
- **Void Order** asks the same questions as the orders list: the reason, whether the items go back to inventory and, when the order has card payments a void doesn't send back by itself, whether to return the money.
- Split needs the **Split Order** permission and Void the **Void Order** permission; without it, a manager can approve on the spot.
- **Stats** needs the **Seating Chart Statistics** permission; without it, a manager approves before the table's history opens.

Linking seated guests to customers

Tables, Seating & Service Pace › Seating chart

View online ↗

Link Guest 1, Guest 2… on an order to an existing or new customer, so each guest's items count toward their own history, loyalty and reports.

Each guest on an order (Guest 1, Guest 2…) can be linked to a customer record. The guest's items then count toward that customer's history, visits and reports, even when someone else at the table pays or the check carries another loyalty card.

Link a guest

1. On the order, select the guest on the guest bar and tap its **person** button.
2. Type a phone number, name, email or loyalty card number in the search box (**Phone, Name, Email Or Loyalty Card**). On Android you can also scan the card with the camera; a card reader that types the number works too.
3. Tap the customer in the results.
4. Tap **OK**. The guest takes the customer's name if it had none.

Nobody on file? Tap **Add And Link**, enter a first or last name (phone and email are optional) and the new customer is linked at once. If the number belongs to someone already on file, that customer is linked instead of creating a duplicate. A loyalty card that no customer carries yet becomes a new customer the same way, and the card stays on the record.

Under **Linked Customer** the dialog shows the customer's visits, total spend, last visit, loyalty card, allergies and, when the customer is blocked, the reason.

> While a guest is linked, its person button shows an ID card in the accent colour. To unlink, open the dialog, remove the linked customer and tap **OK**.

What a link does

- **Allergies:** the customer's saved allergies are added to that guest's allergen declarations when you link them, so they print on prep tickets and show on the kitchen display. Remove one with the Allergens button if it no longer applies.
- **Loyalty:** when the order is paid, a linked guest whose customer has a loyalty card earns on their own items, and the order's card earns on the rest. The receipt lists the points each guest's car

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Table Insight: one table in depth

Tables, Seating & Service Pace › Seating chart

View online ↗

How long a table has been seated, what it has spent, its recipe cost and margin, and each guest with their items and linked customer, against your own daypart average.

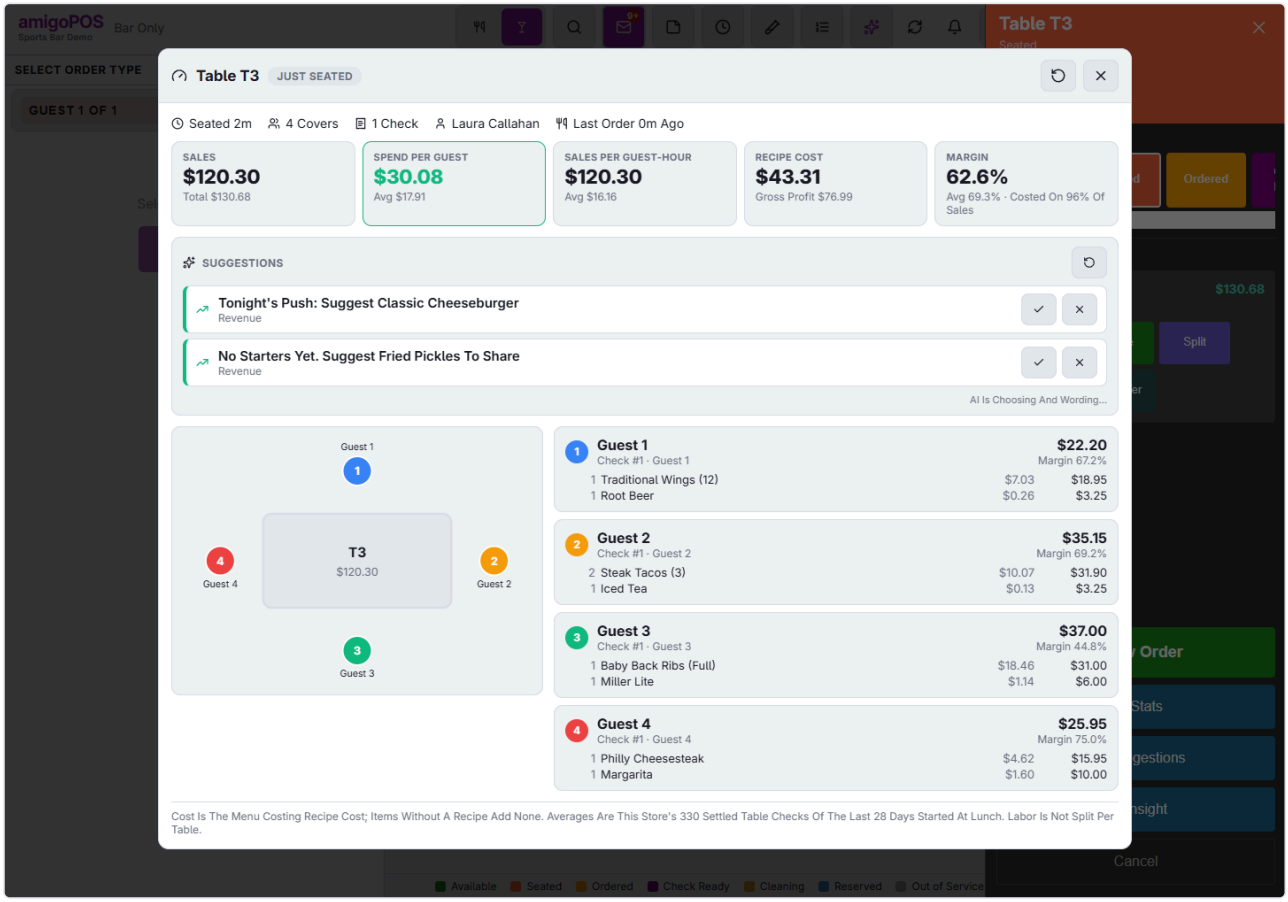
Table Insight shows one table's open checks in depth: time seated, spend, recipe cost and margin, and every guest with their items and linked customer, next to your store's own average for the same daypart. On a busy night it shows which tables are worth the most and which are ready to turn.

Open it

1. On the Tables screen, tap a table with an open check.

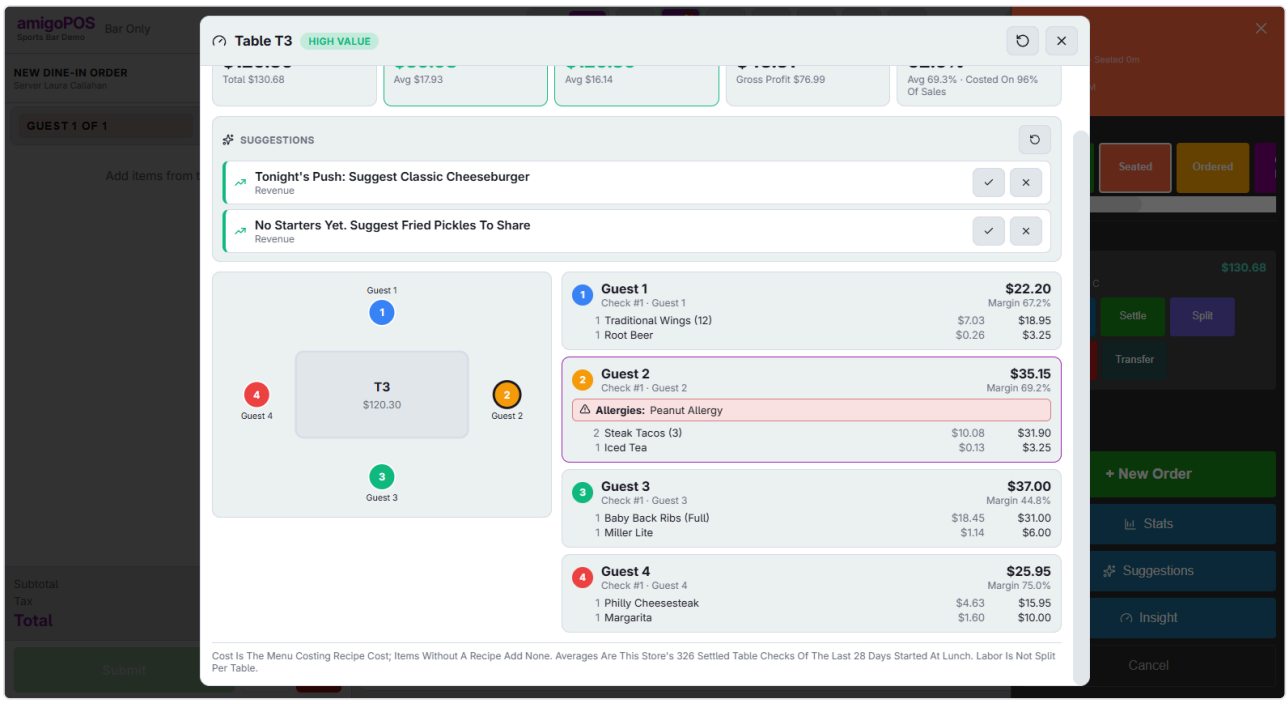
2. In the table panel, tap **Insight**.

Managers and employees with Back Office Reports open it directly; anyone else needs a manager's approval. Tap the refresh button to update it while it is open.



What it shows

- Time seated, covers, checks, servers, and minutes since the last order (highlighted after 30 minutes).
- **Sales** after discounts and before tax, with the check total under it.
- **Spend Per Guest** and **Sales Per Guest-Hour**: green when at least 10% above your average, red when at least 10% below.
- **Recipe Cost** and **Gross Profit**, and the **Margin** on items that have a recipe in Menu Costing. The share of sales with a recipe cost is shown under the margin; items without a recipe add no cost.
- Discounts, comps and removed items, when there are any.
- Each guest, numbered as on the table diagram, with their sales and margin. Tap a guest to ring their seat. A linked customer adds visits, lifetime spend and loyalty card, and an alert for allergies or a blocked customer.



The status badge

- **High Value**: spend per guest at least 25% above the daypart average.
- **Lingering, Low Spend**: seated longer than the average table time (30 minutes at least) and earning under 75% of the average sales per guest-hour.
- **Ready To Turn**: every open check has been dropped.
- **On Pace**: anything else.
- **Just Seated**: seated under 10 minutes, or not enough history yet.

The average comes from your settled table checks of the last 28 days that started in the same daypart. It needs at least 20 of them; until then the averages are hidden.

> Cost is the theoretical recipe cost. Labor is not allocated to tables. For customers over time, see Customer Profitability; to put names on the guests, see Linking seated guests to customers.

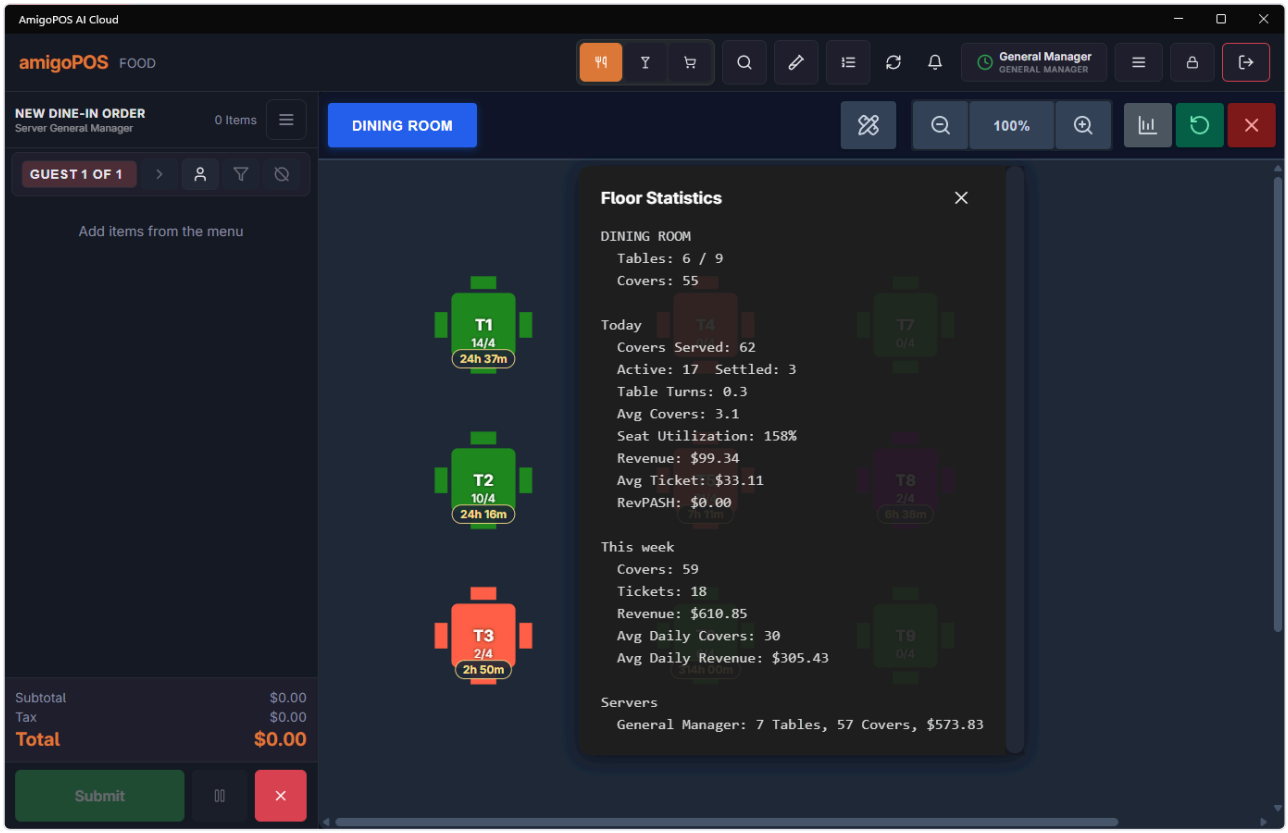
Floor stats overview

Tables, Seating & Service Pace › Seating chart

View online ↗

Table performance stats: turns, covers, revenue, utilization.

Floor stats (the stats action on the seating chart) is the dining room's analytics layer — how the room and each table actually perform.



Room-level

For today and this week: **covers served**, **revenue**, **orders**, **table turns**, **average dwell time**, **average ticket** and **per guest**, **seat utilization**, **peak hour**, and the **30-day trend** — with averages per day and per turn. Dwell time and turns are the capacity levers: a room turning tables in 50 minutes and a room in 80 are different businesses on the same floor plan.

Table-level

Selecting a table shows *its* numbers — covers, revenue, turns, average time and ticket *here*, and its **revenue rank** among tables. The spread is the insight: if table 12 earns half of table 4, the difference is location, drafts, sightlines, or which server's section it sits in — all fixable once visible.

What to do with it

- Seat utilization low at peak hour = a hosting problem (parties of 2 on 4-tops); the fix is in seating discipline or the *designer*'s table mix.
- Dwell time creeping up shows here before revenue shows it — cross-check the stage breakdown in the *service-pace report*.

Service pace

The service-pace panel and its colours

Tables, Seating & Service Pace › Service pace

View online ↗

The milestone timeline for a table, and what green, amber and red are counting.

Service pace tracks a table through the milestones of a meal — seated, drink order taken, drinks served, food order taken, starters served, mains served, and so on to the table being cleared. The panel shows that timeline for the table you are on.

Reading it

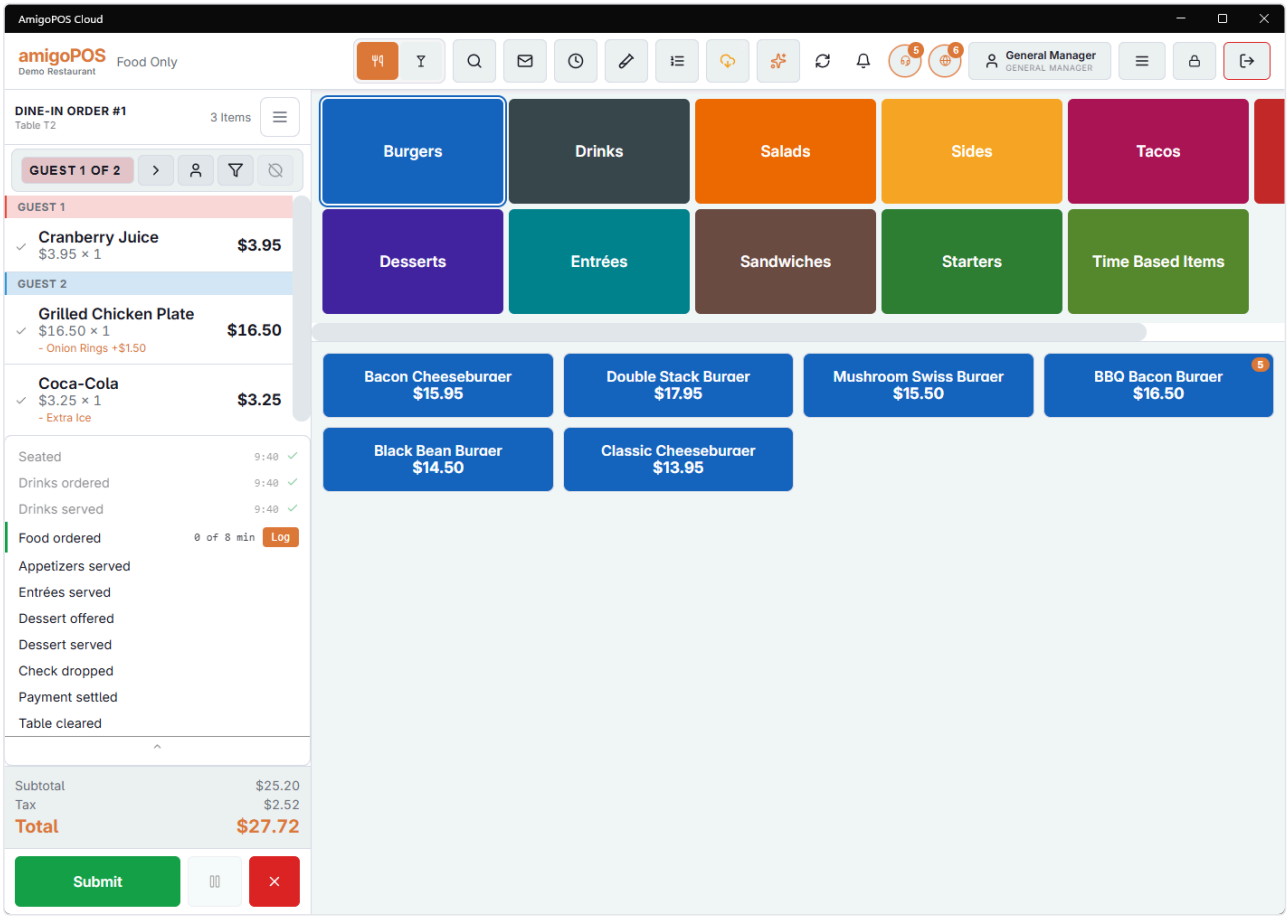
- Milestones already reached show **when** they happened.
- One milestone is the **next expected** one. That is the one being timed, and the one you tap when it happens.
- Later milestones sit below, untimed until their turn comes.

The colours

Each step has a **target** time, and the colour follows the minutes since the previous milestone: on pace, then **near** once the target passes, then **warn**, then **late**. A store that does not set its own warn and late times gets sensible defaults derived from the target — half again for a warning, double for late.

So amber does not mean something is wrong. It means this step has taken longer than you said it should, which is exactly when a manager can still fix it.

> The targets are yours. Rules that do not match how your room actually runs produce a floor of red tables that everybody learns to ignore — see **Service-pace rules**.



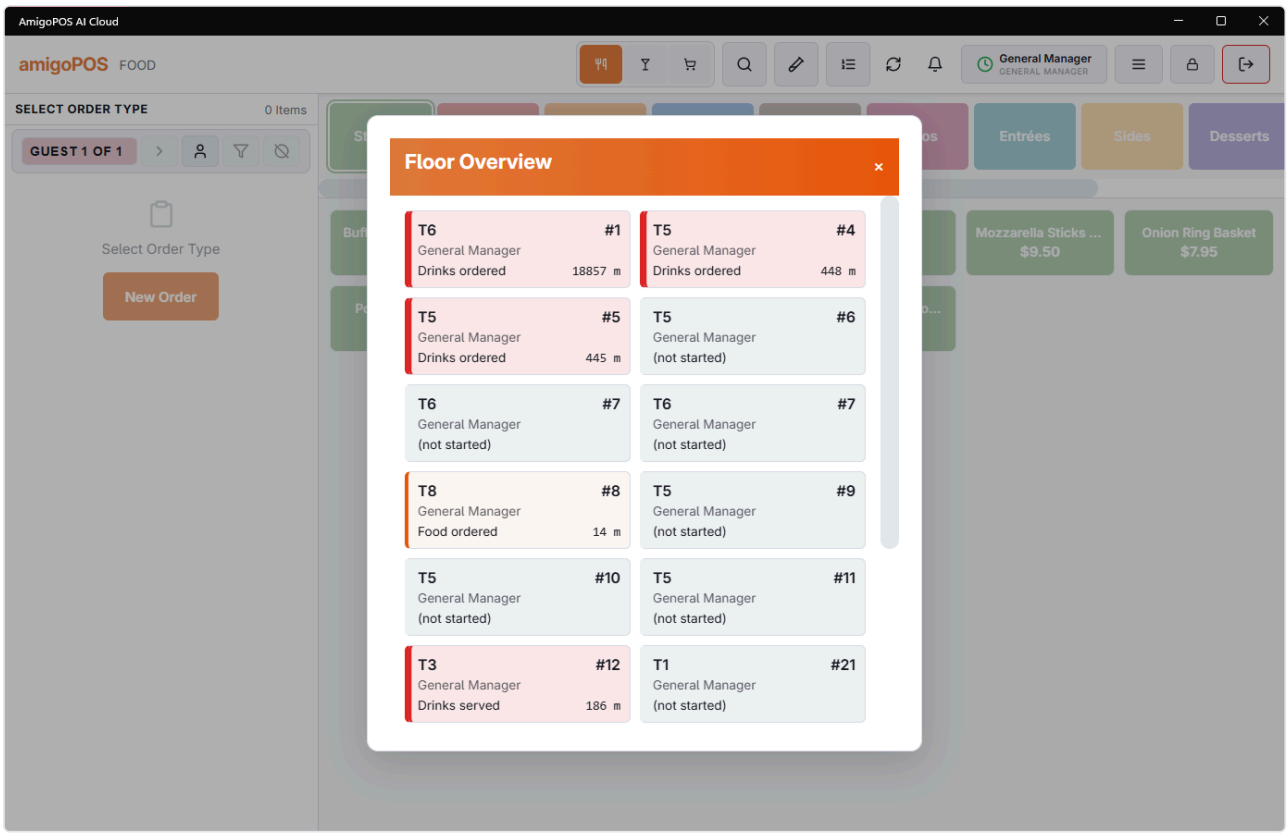
Floor overview overlay

Tables, Seating & Service Pace › Service pace

View online ↗

One card per open table, colored by service pace.

The **floor overview** (More › Floor overview) is the expo-station view of service pace: every open table, its stage, and its timing — the room as a list instead of a map.



What it shows

One row per open table: server, guests, current stage, and how long the party has been in it, tinted with the same pace colors as the chart — green on pace, warning as a stage's target approaches, alert past it. The **event feed** underneath streams the room's recent activity (seated, sent, fired, settled) so the person watching can see the rhythm, not just the state.

Who uses it

- **Expo / kitchen lead** — which tables are waiting on food, ranked by pain.
- **Floor manager** — the touch-table list: the two red rows are where to walk first.
- **Host** — settle-stage tables are the next-available forecast, better than eyeballing the room.

> The overlay reads the same clocks as the map tints and the *service-pace panel*; the thresholds behind the colors are the store's *service-pace rules*. If everything is always red, fix the rules, not the room.

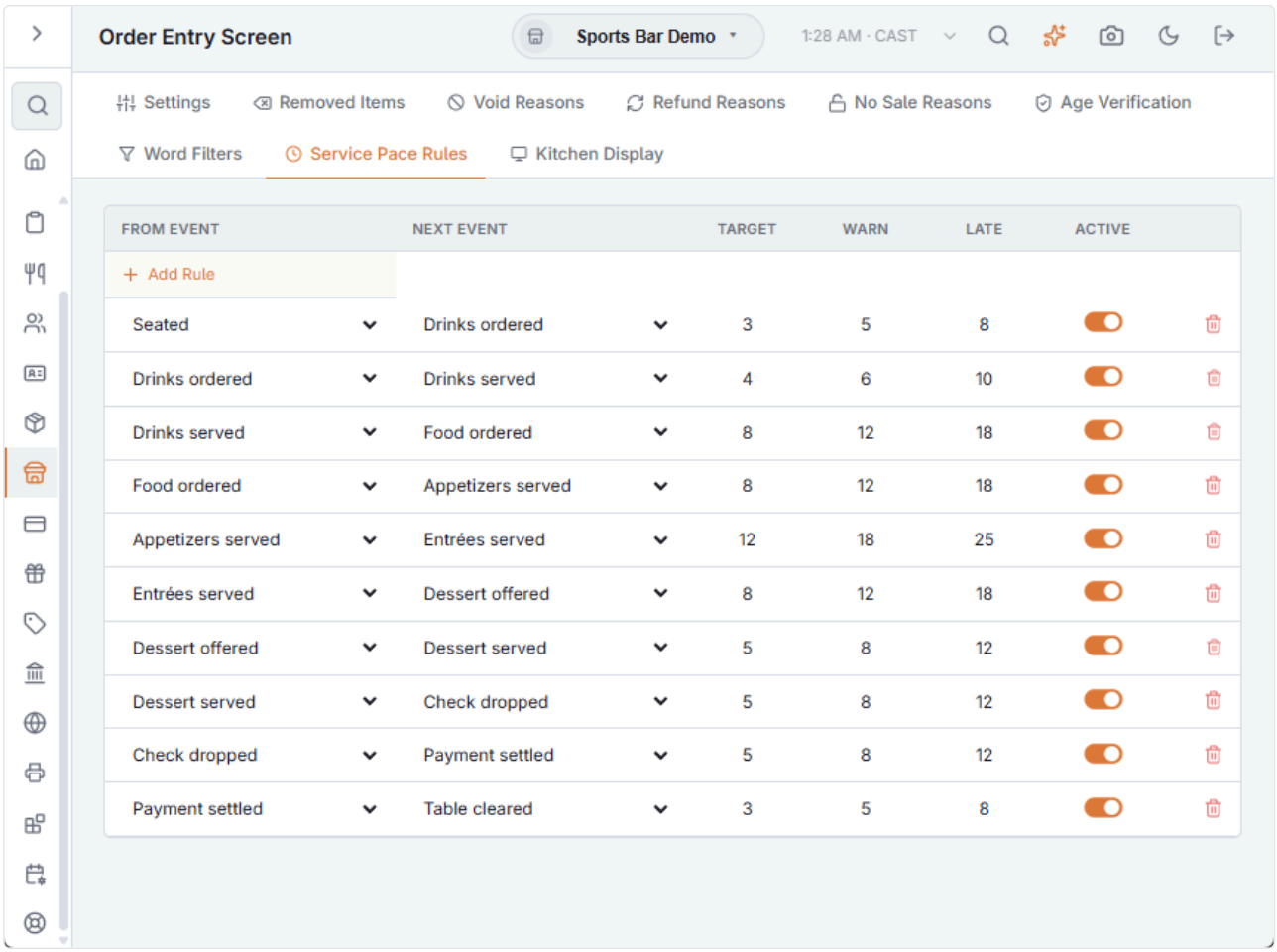
Service-pace rules

Tables, Seating & Service Pace › Service pace

View online ↗

Setting the target, warning and late times behind the service-pace colours.

Service-pace rules (**Back Office › Store Setup › Order Entry Screen › Service Pace Rules**) set how long each step of dine-in service *should* take, so the live views can tint a table that is falling behind. The **Pace Targets** button on the Server Pace Report opens the same tab.



A rule

Each rule times the gap between two service events: **From Event** and **Next Event**, chosen from Seated, Drinks ordered, Drinks served, Food ordered, Appetizers served, Entrées served, Dessert offered, Dessert served, Check dropped, Payment settled and Table cleared. Three times follow, each 1–180 minutes:

- **Target** — how long the step should take; past it, the table shows as over target.
- **Warn** — past this the table turns to warning. Left blank, it is 1.5× the target.
- **Late** — past this the table is late. Left blank, it is 2× the target.

Add Rule adds Seated → Drinks ordered at 5, 7 and 10 minutes, ready to change. Edits save as you make them. The delete button removes a rule at once, without asking. Only one rule is used for each From Event, and the rules apply to dine-in orders every day, at every hour.

Setting numbers that work

- Start from measured reality, not aspiration: run two normal weeks, read the actual step timings in the Service-pace report, and set Warn at “slightly worse than normal”, Late at “a guest is now annoyed”.
- Targets too tight make the floor permanently red and the colors get ignored; too loose and the first warning arrives after the apology should have. The tuning test: on a normal night, a handful of warnings and rare lates.
- Revisit after menu or kitchen changes — pace targets encode the kitchen you had when you set them.

> The rules feed the seating chart’s pace tints, the floor overview and service pace panel, and the Server Pace Report. One set of numbers, three views.

Switching a rule off

Turn **Active** off to stop using a rule without deleting it. It stays in the list, so it can be switched back on later; only active rules tint tables and feed the pace views.

Pool tables and timed games

Pool tables and timed games: how it fits together

View online ↗

What CloudPos does for pool halls, lanes, karaoke rooms and rentals — from the menu item to the floor plan, the check, the lights and the guest's phone.

Pool tables, bowling lanes, karaoke rooms, simulators, rentals — anything you charge **by the time it is used** — run on **time-based items**. A timer starts when the game starts, the charge grows by the interval, and it stops when the guests are done. Everything else in CloudPos — the check, happy hour, the floor plan, reports, even the lights over the table — works around that timer.

The pieces

Piece	What it does	Where
Time-based menu item	The rate, the billing interval, the minimum, grace minutes and player pricing.	Time-based items (setup)
A table on the floor plan	A pool table, lane or room drawn in the designer and linked to its item, so the game starts from the table.	Linking tables to timed items
The timer on the check	Starts, pauses, resumes and stops; shows the time played and the charge so far.	Time-based items at the register
Rates that change	Happy hour or a weekend rate takes over mid-game without anyone doing anything.	Happy hour and rate changes during a game
Player pricing	A table rate that covers two players, plus a charge for each extra player.	Charging by number of players
Table lights	The lamp over the table turns on with the game and off when it ends.	Table lights that follow the timer
The guest page	A QR card on the table shows the guests their time and charge, and calls a server.	The guest table page and QR cards
The Table Time report	Sessions, hours, revenue and how busy each table is.	The Table Time report

A game, start to finish

1. A group walks up to a pool table. The server taps the table on the floor plan and taps **Start Timer** — or seats them the usual way and taps the pool table item that the POS offers straight away.
2. The light over the table comes on. The check shows the table's line with a clock and the charge so far; the floor plan shows the same on the table.
3. Drinks and food go on the same check as normal. At happy hour, the rest of the game is charged at the happy-hour rate by itself.
4. A friend joins: the server adds a player, and the extra-player charge starts with the next interval.
5. They are done. The server settles — the POS stops the timer first, bills it to that second, and the light goes off.

Before you start

- Create one time-based item per rate you charge (for example *Pool Table*, *Pool Table — Premium*). One item can run on as many tables as you have: each table gets its own line on its own check.
- Draw the tables in the seating designer with the matching shapes from **Games & Rentals**.
- Optional: lights (Lighting control), happy-hour price rules, and the guest QR cards.

> Staff who have never used the timers only need two things: start the game from the table, and settle normally. The POS takes care of stopping the timer at the right moment.

Linking tables to timed items

View online ↗

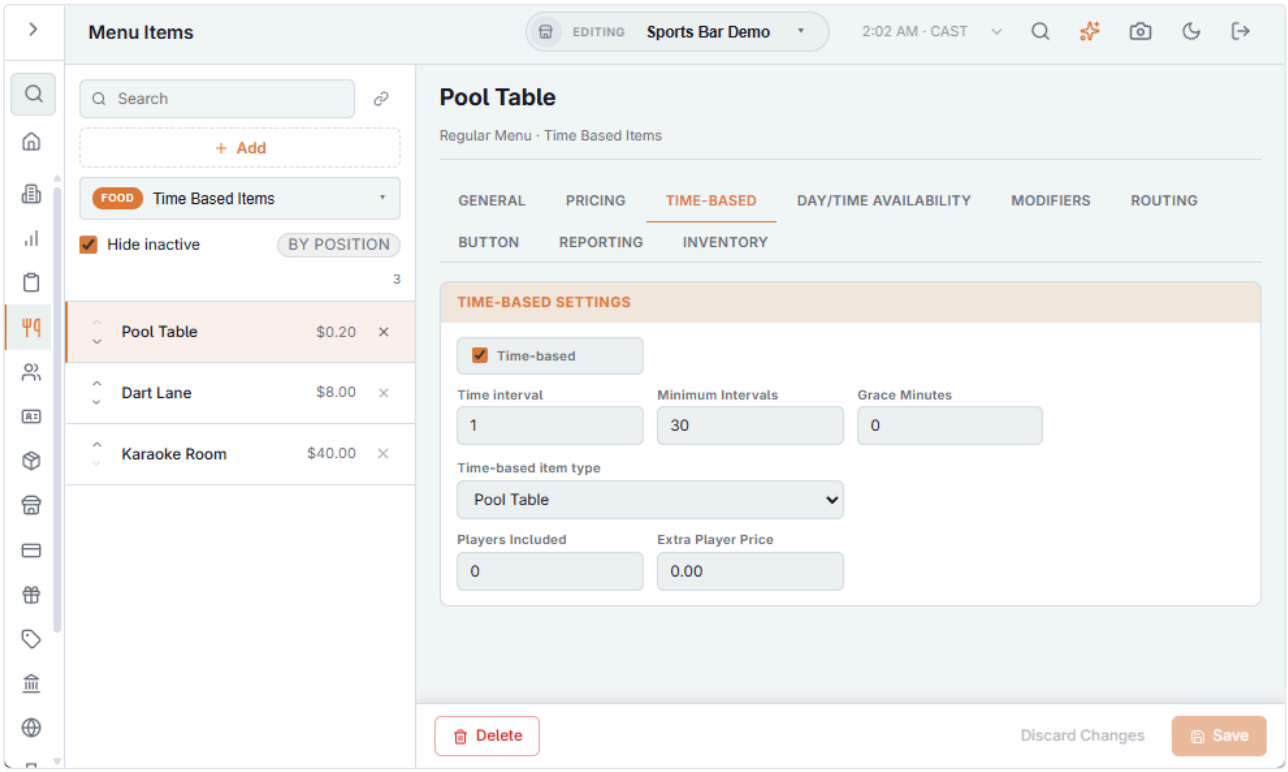
How a pool table on the floor plan knows which menu item to start: by its shape type, a specific item, or none.

A table on the floor plan starts a timer only if CloudPos knows which time-based item belongs to it. There are two ways, and you can mix them.

1. By type (automatic)

Every time-based item has a **Time-based item type** — Pool Table, Bowling Lane, Karaoke Room, Arcade, Darts and so on. Every shape in the designer's **Games & Rentals** and **Beach & Pool** groups has a type too. A table drawn as a Pool Table offers *every* menu item whose type is Pool Table.

1. In **Back Office › Menu › Menu Setup › Menu Items**, open the item, go to the **Time-Based** tab and set **Time-based item type** — for example *Pool Table*. Save.
2. In the seating designer, draw the table with the matching shape from **Games & Rentals** and save the room.



Add a *Pool Table — Premium* item later and every pool table offers both, with no change to the floor plan.

2. A specific item (Timer Item)

Select a timed table in the designer. Its properties include **Timer Item**:

- **By Type** — the default: follow the shape's type, as above.
- **None** — this table never starts a timer, even though it is drawn as a pool table. Use it when a pool table is really used as a dining table.
- **A named item** — only that item, whatever the type. Use it for the one premium table, or for a room drawn as a Meeting Room that you sell as *Party Room*.

> Timer Item only appears on timed shapes. Ordinary tables — round, square, booths, bar stools — never start timers, so the setting would only confuse. A table linked earlier keeps showing it until you clear the link.

Which shapes are timed

Everything in **Games & Rentals** (Pool Table, Bowling Lane, Karaoke Room, Arcade, VR Booth, Meeting Room, Hookah, Parking, Rental, Kids Area, Batting Cage, Ping Pong, Darts, Simulator, Cowork Desk, Internet PC) and the **Beach Chair** in Beach & Pool. Tables imported from the older AmigoPOS as billiards tables count too.

What the link is used for

- **Start Timer** on the table's panel — see Starting a game from the floor plan.
- The POS offering the table's items when an order is seated there.
- The **Light** over the table — see Table lights that follow the timer.
- The **Table Time** report, which lists every timed table even when it had no games.

> A new timed item shows up on the tables straight away — no need to restart the POS. If a table still offers nothing, check that the item's type matches the shape and that the item is visible on the menu today.

Starting a game from the floor plan

View online ↗

Three ways a game starts at the table: Start Timer on the table panel, the prompt after seating, and seating a reservation.

Once a table is linked to its timed item (Linking tables to timed items), the game can start from wherever the party is seated.

From the table: Start Timer

1. On the floor plan, **before starting an order**, tap the free pool table.
2. The table panel shows a **Start Timer** section with one orange button per linked item and its rate.
3. Tap the button. The POS opens an order on that table with the store's default order type and the timer is running.

> If the store has no default order type, the order type picker opens first. After you choose, the order is seated at the table and the time-based menu opens with the table's items — tap one to start.

After seating: the time-based menu opens by itself

Seat a party at a timed table the usual way — order type first and then the table, or a table first. As soon as the order is seated there, the menu switches to the time-based view showing **only that table's items**, with the message *Tap The Item To Start The Timer*. Tap the item and confirm.

- It is an offer, not a pop-up. Ring drinks first if the guests are not ready to play; the item stays one tap away under the timer button.
- It does not appear if the order already has that table's timer running, for example when you move a party back to its own table.
- A guest-count prompt can open at the same moment. Answer it; the time-based view is underneath.

Seating a reservation

Seating a booked party from the reservation book at a timed table works the same way: the order opens at the table and the time-based view offers the table's items.

After the timer starts

- The check shows the timed line with a clock, the time played and the charge so far.
- The floor plan shows a small timer pill on the table with the time and charge.
- If the table has a light, it turns on.
- Running the game from here — pausing, adding players, stopping — is covered in Time-based items at the register.

Happy hour and rate changes during a game

View online ↗

Price rules apply to timed items interval by interval: a game that runs into happy hour is billed at both rates, on two lines.

A pool table might be $12 an hour normally, $8 during happy hour and $15 on Saturday night. You set those rates with **price rules**, the same rules that discount drinks at happy hour. CloudPos applies them to timed items **one interval at a time**: each interval is charged at

the rate in effect when that interval *starts*.

Setting it up

1. Open **Back Office › Menu › Pricing › Price Rules** and add a rule for the timed item (or its category) with the days and times it applies — for example Monday to Friday, 16:00–19:00.
2. Choose a fixed price per interval (*$8.00*) or a percentage off (*20%*).
3. Save. Games already running pick it up at their next interval.

More on rules: Special and event pricing.

What the check shows

When the rate changes mid-game, the line that was running is **frozen** at the intervals played at the old rate, and a new line continues the same game at the new rate:

Line	Price	Qty	Total
Pool Table	$12.00	2	$24.00
Pool Table · *Happy Hour*	$8.00	1 (running)	$8.00

Every line stays an honest price × quantity, so the receipt, reports and accounting all read it correctly. The rule's name shows under the running line.

Details worth knowing

- **The minimum applies to the whole game.** A one-hour minimum is met across both lines; the second line does not charge its own minimum.
- **The clock shows the whole game.** The running line's clock includes the time on the frozen line, and so does the pill on the floor plan.
- **Starting during happy hour** starts at the happy-hour rate, and the game moves back to the regular rate when happy hour ends.
- **Orders nobody has open** are brought up to date when they are next opened, printed, saved or settled — the split happens retroactively at the right interval. Until then the floor plan pill may show the old rate.
- **Quantity bands** in a rule ("2 or more") are ignored for timed items: their quantity is intervals played, not items bought.
- **Players**: a percentage rule also takes its share off the extra-player charge; a fixed-price rule replaces only the table rate. See Charging by number of players.

> Stopping or pausing a timer is never needed at the change-over. Leave the game running; the POS handles the boundary.

Changing an item while its timer runs

A running timer keeps the base rate, interval, grace and player pricing it started with. If the item is changed in Back Office (or by the assistant) during a game, the change applies to timers started afterwards — time already played is never re-priced. Price rules such as happy hour still apply by the clock.

Charging by number of players

View online ↗

A table rate that covers some players plus a charge per extra player — or a pure per-player rate — and changing the players during a game.

Some halls charge the table, some charge per player, most do a bit of both: *$10 an hour for up to two players, $3 for each player after that*. Two fields on the time-based item cover all three.

The fields

Field	Meaning
Players Included	How many players the item's price covers.
Extra Player Price	Charged per interval for each player beyond those included. Leave it at 0 for a plain table rate.

Rate per interval = Price + (players − Players Included) × Extra Player Price, when there are more players than included.

You charge	Price	Players Included	Extra Player Price
$10/hour for the table, any number of players	10.00	0	0.00
$10/hour for up to 2, $3 for each extra	10.00	2	3.00
$4/hour per player	0.00	0	4.00

At the register

1. A game starts with the included number of players (at least 1).
2. Tap the running line on the check. The item panel shows a **Players** stepper instead of Quantity.
3. Tap **+** or **−**.

- **A change counts from the next interval.** The interval in progress was started with the old count and is billed that way. While the change waits, the panel says *Takes Effect From The Next Interval*; pressing + again just moves the waiting count.
- **Corrections:** a change in the first two minutes of a game (or of a new rate segment) corrects the count instead, and reprices from the start.
- When the new count kicks in, the game continues on a new line, just like a happy-hour change; the line's label reads, for example, *3 Players* or *Happy Hour · 3 Players*.

> Items without an Extra Player Price do not show the Players stepper, and their quantity is not editable while the timer runs — it is set by the clock.

Settling, splitting and combining timed checks

View online ↗

The POS stops running timers before any settle, and refuses to split or combine a check while a timer is running or paused.

Settling stops the timers first

A timer must stop before the check is paid, or the guest is charged for time the POS never saw. Wherever you settle from — the Submit screen's Settle or Quick Pay, the orders list's Settle, Quick Cash or Quick Card, or the table panel's Settle — the POS checks for running timers first. If there are any, it asks:

Running Timers — This Order Has 1 Running Timer(s). Stop And Settle?

- **Stop And Settle** — the POS stops every timer, bills each one to that second (with rate changes, grace and minimum), saves the order and opens payment with the right total. A quick cash or card choice is kept.
- **Cancel** — nothing changes; the order stays open and the timers keep running.

Settling from the orders list or the table panel opens the order on the order screen for a moment while the timers stop; that is expected.

> As a safety net, when any check becomes paid while a timer line is still marked as running — an older app, an offline replay — the server marks it stopped at the quantity it was last saved with. The POS stopping timers first is what makes the charge exact.

Splitting and combining are blocked while timers run

Split (evenly, by guest or by item) and Combine are refused while any order involved has a **running or paused** timer:

Timers Running — Order #12 Has A Running Or Paused Timer. Open The Order, Stop The Timers (Not Pause), Then Try Again.

1. Recall the order.
2. Stop each timer (Stop Timer on the line — pausing is not enough).
3. Split or combine as usual. The stopped timer lines are ordinary lines now and split like any item.

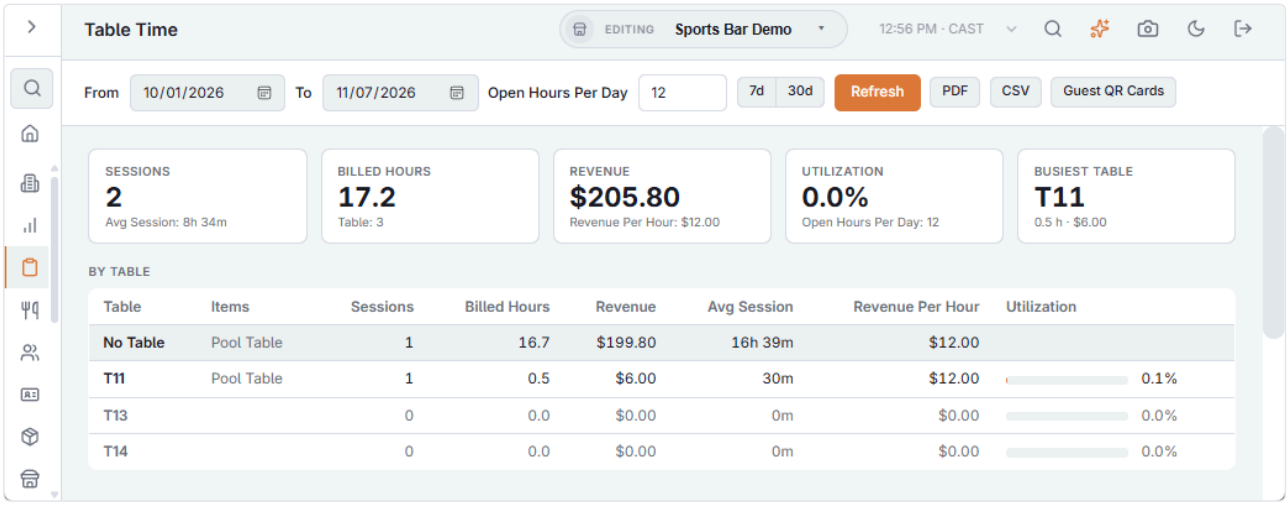
> Splitting a pool table's time between two guests is easiest after the game: stop the timer, then split by item and move part of the time line, or split evenly.

The Table Time report

View online ↗

Back Office › Activity › Table Time: sessions, billed hours, revenue, revenue per hour and utilisation of each timed table, by rate and by start hour, with PDF and CSV export.

Back Office › Activity › Orders › Table Time shows how the timed tables were used and what they earned over a range of business days. The page only appears in stores that sell time-based items.



The filters

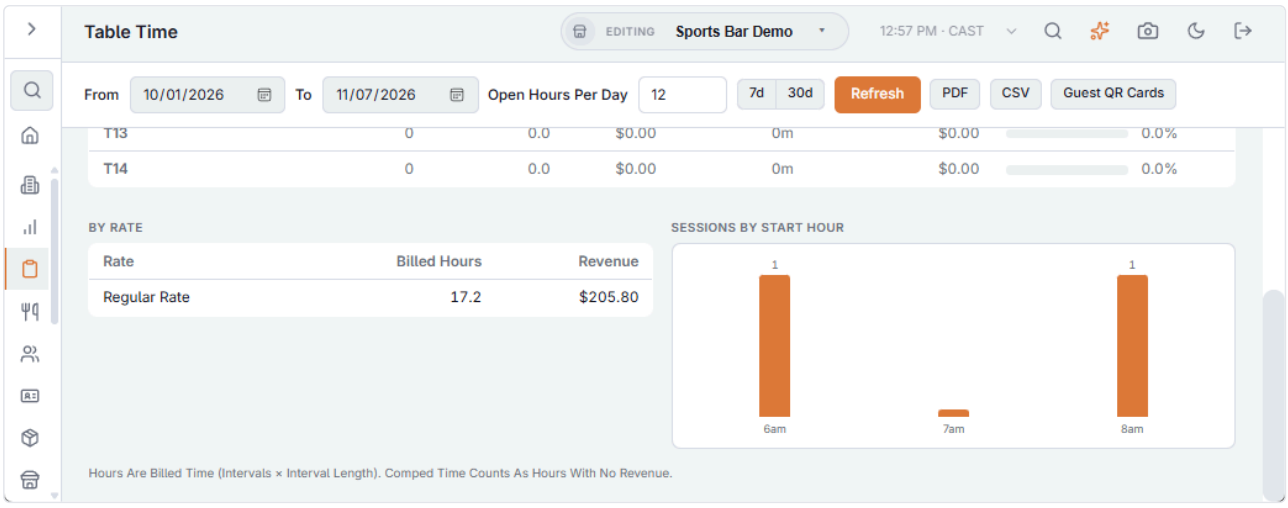
- **From / To** — business days. Changing a date reloads at once.
- **Open Hours Per Day** — used only for utilisation (see below). Default 12.
- **7d / 30d** — quick ranges ending today.
- **Refresh**, **PDF**, **CSV** and **Guest QR Cards** (see The guest table page and QR cards).

The numbers

Card	What it counts
Sessions	Games. A game split by a happy-hour change or a player change counts once. Underneath: the average session length.
Billed Hours	Intervals billed × interval length, summed. Underneath: how many timed tables there are.
Revenue	What the time was sold for, after line discounts. Underneath: revenue per billed hour.
Utilization	Billed hours ÷ (days × open hours per day × tables).
Busiest Table	The table with the most billed hours, with its hours and revenue.

By Table, By Rate, by hour

- **By Table** — one row per timed table: items played on it, sessions, billed hours, revenue, average session, revenue per hour and a utilisation bar. Timed tables with no games are listed at 0%, so idle tables stand out. Games rung without a table appear as **No Table**.
- **By Rate** — hours and revenue per rate label: *Regular Rate*, *Happy Hour*, *3 Players*… One label per price rule and player count.
- **Sessions By Start Hour** — when games start, in store time. Use it to staff the hall and to place happy hour.

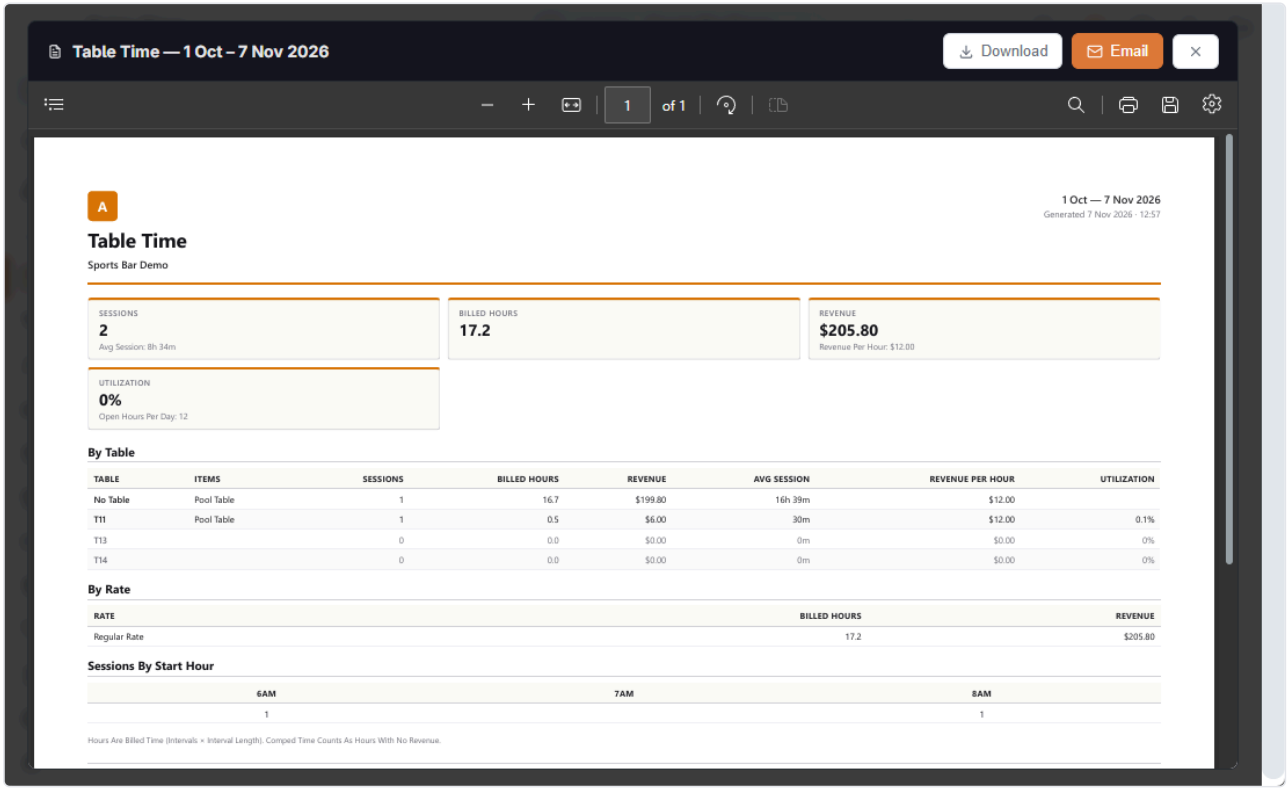


How it counts

- Only **settled** checks, not void. Removed and voided lines are left out.
- **Comped** time counts as hours played but earns nothing.
- Hours are **billed** time — the intervals charged — not the minutes between start and stop. A 61-minute game on an hourly rate counts as 2 hours.

Exporting

- **PDF** opens the usual report preview, where it can be downloaded or emailed. The open hours you entered travel with it, so the PDF's utilisation matches the page.
- **CSV** downloads one file with the summary, By Table, By Rate and sessions by start hour.



The guest table page and QR cards

View online ↗

A QR card on each timed table opens a phone page with the running game, the check so far and a Call Server button.

Put a QR card on each pool table, lane or room. Guests scan it and see, on their own phone, how long they have played, what the game has cost so far and what else is on the check — and they can call their server without walking to the bar.

What the guest sees

- The store name and the table.
- Each running game: a large clock and the charge so far, both ticking every second. A paused game shows ⏸ and stops.
- Food and drinks on the open check, and **Total So Far** with the note that it is before tax and gratuity.
- A big **Call Server** button.
- Nothing can be changed from the page: no stopping, pausing or ordering.

The page refreshes itself every two minutes to pick up stopped timers, new items and new games. It shows in English, Spanish or Arabic from the phone's language, and follows the phone's dark mode. When nothing is running it says so.

Call Server

The button sends a quick alert to the server on the table's check — or to the managers if nobody has the check — naming the table. Staff devices get it straight away. Tapping again within two minutes sends nothing more; the guest is told the server was just called.

Printing the cards

1. Open **Back Office › Activity › Orders › Table Time**.
2. Tap **Guest QR Cards**. The PDF preview opens with one card per timed table, in the same card design as the QR ordering cards, with the line *Scan To See Your Table Time*.
3. Print, cut and put each card on its table.

- Timed tables that have no QR code yet get one when the cards are made. Tables that already have one keep it.
- The code is the table's own: a card only ever opens its own table, and nothing in the address can be guessed or changed to see another.
- Re-print a card when a table is renamed. Revoking a table's code on the QR ordering page also retires its guest card.

> The cards use the public address that the pay-at-table links use. If it is not set, the PDF says so; see Stripe setup for where it is entered.

> A table that also uses QR ordering has two different codes. Label the cards clearly — *Order* and *Your Table Time* — so guests scan the right one.

Timed tables: questions and fixes

View online ↗

Start Timer missing, charges that look wrong, lights that stay on, and other common questions about pool tables and timed games.

The table does not offer Start Timer

- The panel only offers Start Timer on a **free** table **before** an order is started. Once an order is open, seat it at the table and the time-based menu opens with the table's items instead.
- The shape's type must match the item's **Time-based item type**, or the table must name the item in **Timer Item**. A table set to **None** never offers it.
- The item must be visible on the menu at this time of day and marked Time based.

The charge looks wrong

- **10 minutes billed a full hour** — the item's Minimum Intervals.
- **61 minutes billed two hours** — intervals round up. Add Grace Minutes (for example 5) so a few minutes over do not start a new hour, or use a shorter interval.

- **Two lines for one game** — the rate changed during the game (happy hour, a player added). See Happy hour and rate changes during a game.
- **The pill on the floor plan shows the old rate** — nobody has had the order open since the rate changed. Opening it brings it up to date.
- **The charge stopped growing** — the timer is paused (**II**). Resume it from the line.

The quantity cannot be changed

While a timer runs, its quantity is intervals played, set by the clock, so the Quantity control is hidden. Stop the timer to edit the line like any other.

Split or Combine says Timers Running

Recall the order and stop the timers — pausing is not enough — then try again. See Settling, splitting and combining timed checks.

The report shows No Table

Those games were started from the time-based menu on an order with no table. Start games from the table, or seat the order at the table first, so they are counted against it.

The light did not turn off

- A **Table Light Off Delay** may be set: the light waits that long after the last timer stops.
- Another timer on the same order is still running.
- See Lighting troubleshooting for relays that do not answer.

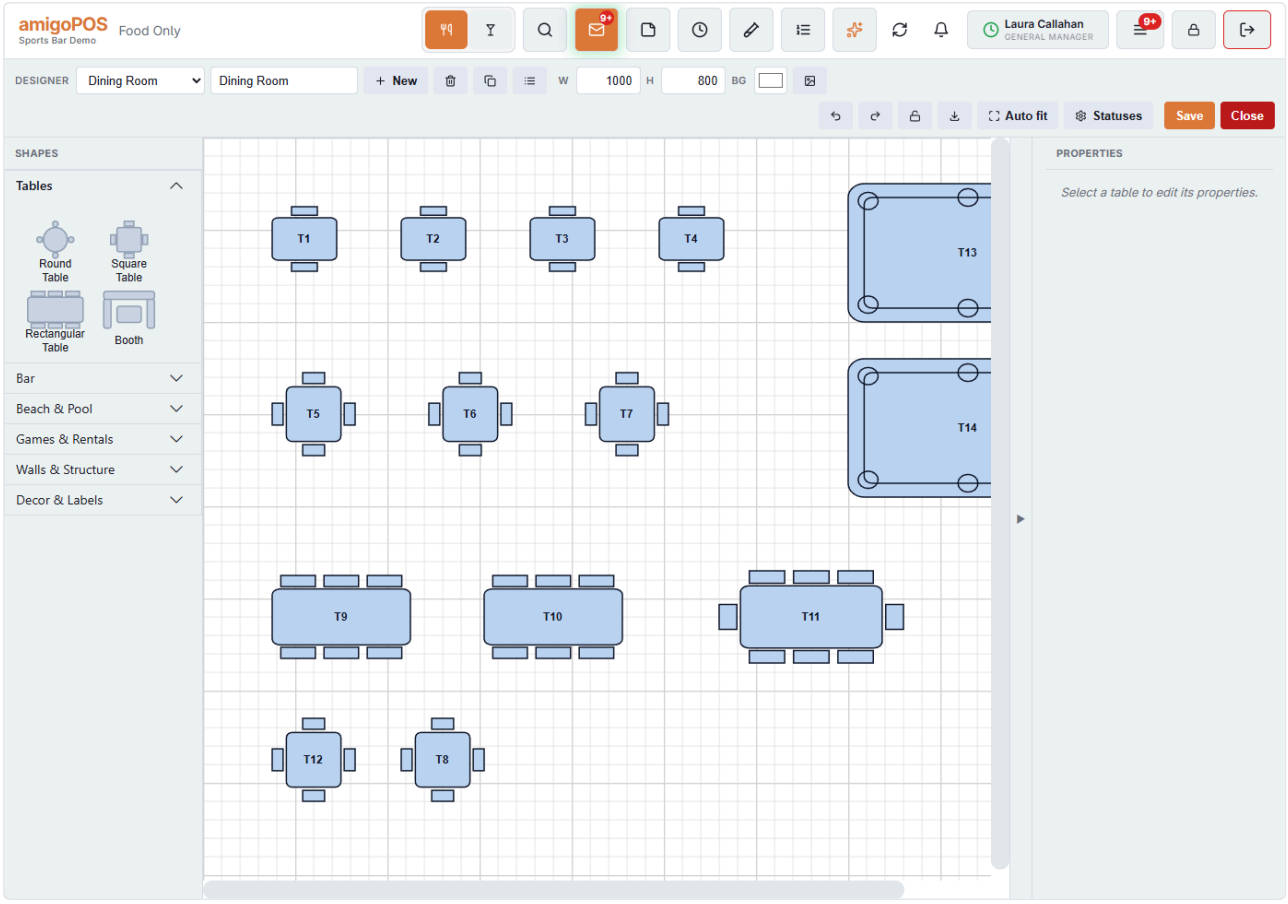
Designing the floor

The seating designer

View online ↗

Drawing and maintaining the floor plan: rooms, the toolbar, the shape palette, placing and copying tables, the properties panel, and saving.

The **seating designer** is where the floor plan is drawn: every room, table, bar, wall and label that staff see on the POS floor plan, and the settings behind each table. Open it from the floor plan’s designer button. It opens on the room the floor plan was showing.



The toolbar

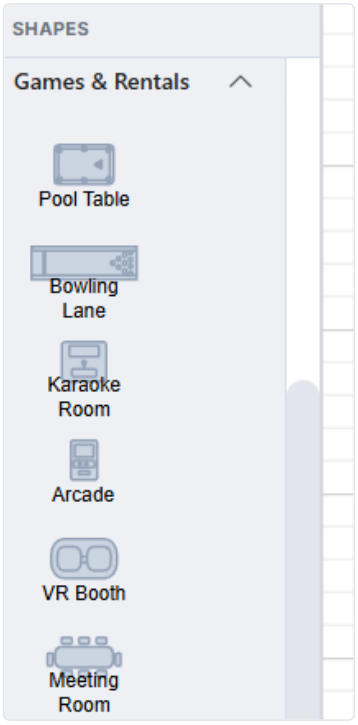
Control	What it does
Room list and name	Pick the room to edit, and rename it. Rooms that are switched off are listed too, marked **(Off)**.
New	Start a new, empty room.
Delete (bin)	Delete the room shown. For a room you only stop using for a season, switch it off instead (see Rooms below).
Duplicate Room	Start a new room as a copy of this one. See The Rooms panel.
Rooms (list)	Open the Rooms panel: the order of the room buttons on the POS, and which rooms are switched off. See The Rooms panel.
W / H	The room's drawing size.
BG and **Floor Image**	The room's background colour, and a photo or drawing to put behind the tables. See Floor plan images and background colour.
Undo / Redo	Step back and forward through changes. See Undo, redo, lock and export.
Lock Layout	Freeze every shape in place so nothing can be dragged by accident. Tap again to unlock.
Export Image	Save the room as a picture (PNG).
Auto fit	Zoom so the whole room fits the screen.
Statuses	Edit the table statuses (Available, Seated, Ordered…) and their colours, used on every floor plan.
Save	Save the room. A dot on it means there are unsaved changes.
Close	Leave the designer. The floor plan reopens on the room you were editing.

On a narrow screen the toolbar wraps onto more lines instead of hiding controls.

The Shapes palette

Shapes are grouped: **Tables** (open when the designer opens), **Bar**, **Beach & Pool**, **Games & Rentals**, **Walls & Structure** and **Decor & Labels**. Tap a group to open or close it. Each shape shows its name underneath. Drag a shape onto the room to add it.

What each shape is for, and which ones guests can book: Designer shapes.



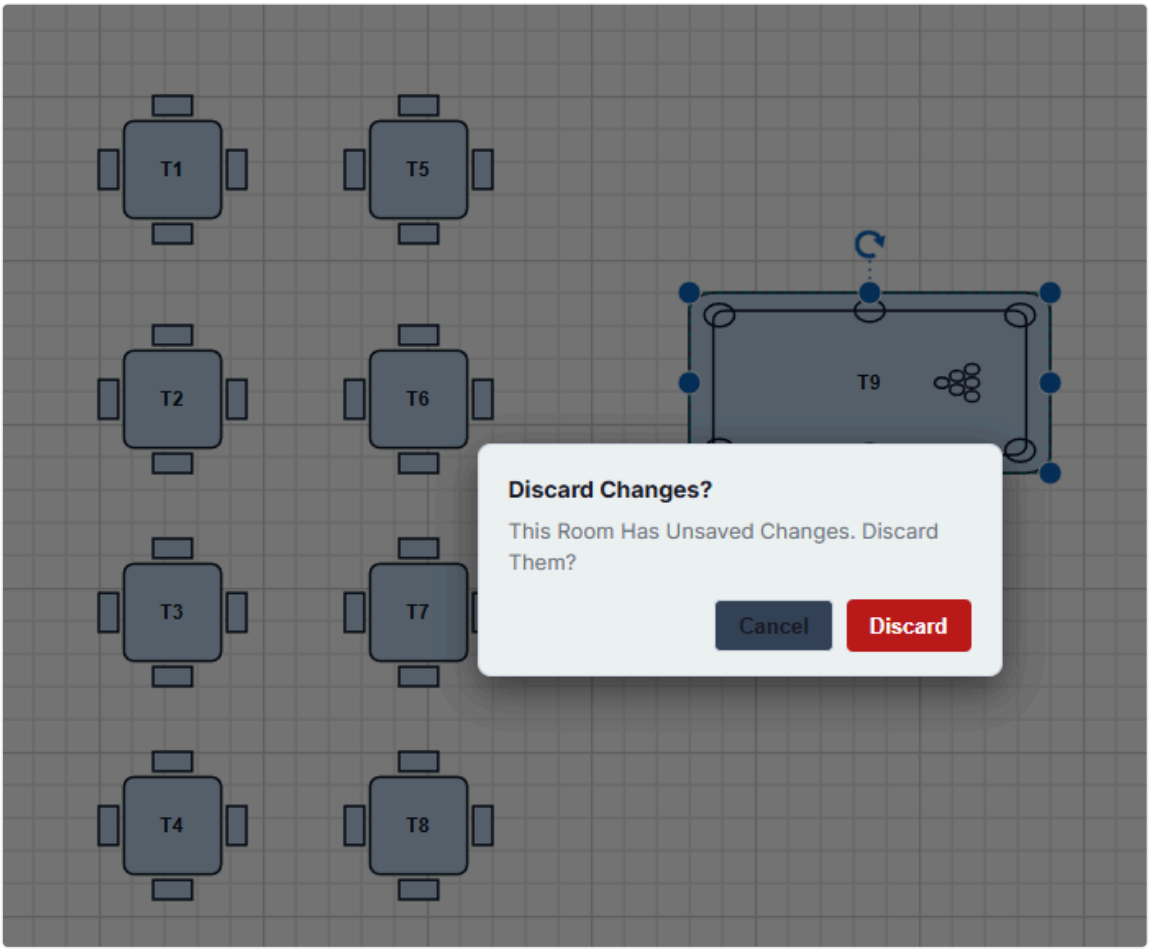
Working with tables

- **Select** a table to show its settings in the Properties panel. Drag it to move it; use the handles to resize and the round arrow to rotate.
- A new table takes the next free name in the room's own style: after **T9** comes **T10**, after **P-12** comes **P-13**, after **Bar 3** comes **Bar 4**. The same goes for **Copy** (at the bottom of the Properties panel), which duplicates the selected table.
- **Delete** removes it. A table with history keeps its history; think twice before deleting tables that are only closed for the season.
- The **×** at the top of the Properties panel deselects, and the panel can be folded away with the arrow on its edge to give the room more space.

Every setting on the panel is explained in Table properties explained.

Saving

- **Save** publishes the room to every register at once: their Tables screens redraw within seconds, without anyone signing out. Design in a quiet hour all the same; the floor does not need the map moving mid-rush.
- Switching room, starting a **New** one or **Close** with unsaved changes asks before throwing them away.
- The designer warns when two tables share a name, in this room or in another room of the store; give each table its own, or the POS and reports cannot tell them apart.
- Before saving, the designer checks whether a table you removed or renamed still has an **open check** on it. It lists them and offers **Save Anyway**; the safer answer is to close those checks first, so no bill is left without its table.



Good habits

- Number tables the way staff already speak (“the 40s are the patio”).
- Keep a seasonal area as its own room and switch it off in the Rooms panel, rather than deleting its tables.
- Draw walls, the bar and a few labels, or put a photo of the room behind the tables: servers find their tables faster in a room that looks like the real one.
- **Lock Layout** while you review a room on a touch screen, so a stray finger cannot move a table.

The Rooms panel: order, switch off, duplicate

View online ↗

Put the room buttons in the order staff expect, hide a room for the season without deleting it, and start a new room from a copy of an existing one.

The **Rooms** panel lists every room of the store, including the ones switched off. Open it with the list button on the designer toolbar, next to **Duplicate Room**. The panel has its own **Save**; what you change in it reaches every register as soon as it is saved.

The order of the room buttons

Drag a room by its grip to move it up or down. The order top to bottom is the order of the room buttons on the register’s Tables screen and in the reservation book’s floor plan. Put the room staff open most on the left.

Switching a room off

Tick **Off** on a room and save. The room disappears from the registers; its tables, names, sizes and history are all kept, and the room still appears in the designer’s room list marked **(Off)**, so you can edit it or switch it back on when the season starts. This is the right way to park a patio for the winter: deleting the room would throw its tables away.

Before switching off the room you offer for online booking, choose another one under **Dining Room Offered Online** on the Reservations settings tab (see Online booking and reminders).

Duplicate Room

Duplicate Room on the toolbar starts a new room as a copy of the one shown: every shape with its size, position, section and settings, the background colour and the floor image. The copy is named **"(room name) (Copy)"** and its tables are renamed so none of them clashes with the original; rename the room and the tables as you like, then **Save**. A second dining room, or an evening layout of the same room, takes a minute instead of an hour.

Keep a room for each real area even when two are laid out alike: the floor overview and the reports count by room.

Floor plan images and background colour

View online ↗

Put a photo or a drawing of the room behind the tables, and choose the colour the room shows on the registers.

Two toolbar controls make a room look like the real one: **BG**, the background colour, and **Floor Image**, a picture placed behind every shape. Both are saved with the room and both show on the registers, not only in the designer.

Background colour

Tap the **BG** swatch and pick a colour. It fills the room on the register's Tables screen and in the reservation floor plan, so a dark bar and a bright patio look different at a glance. Rooms drawn before the colour was added keep the register's own background until they are saved with a colour of their own.

Floor Image

Tap **Floor Image** (the picture button beside BG) and choose a file: a photo, an architect's drawing, a sketch, in JPG or PNG. The picture is fitted to the room's page (**W / H**) and placed behind every shape; the tables sit on top of it. It is stored inside the room, reduced to a sensible size, so a phone photo is fine. **Remove Floor Image** clears it again; the colour stays.

- Set the page size first: the image is fitted to the page, so change **W / H** before choosing the picture, and crop the picture to the room's own proportions.
- A top-down drawing works better than a photo taken from the door; staff read it like a map.
- The image is part of the room: **Duplicate Room** copies it, and **Export Image** includes it.

The guest-facing booking page draws its own simple plan from the table positions; it does not show the floor image.

Undo, redo, lock and export

View online ↗

Step back through changes, freeze the layout against accidental moves on a touch screen, and save the room as a picture for the host stand.

Undo and Redo

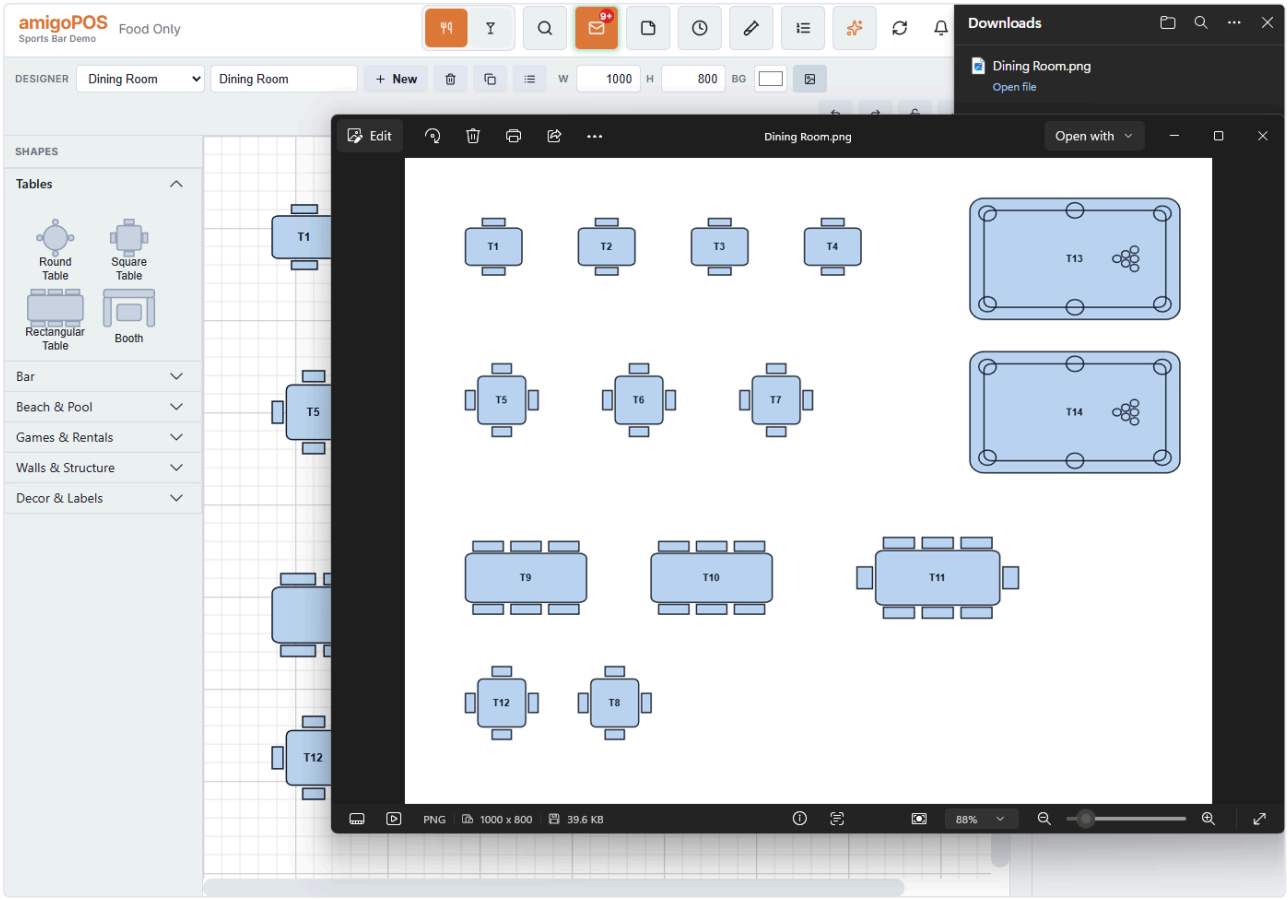
The two arrows on the toolbar step back and forward through what you did to the room: shapes moved, resized, rotated, added or deleted. Tap **Undo** as many times as needed; **Redo** puts a step back. The history belongs to the room while it is open in the designer: switching room, closing the designer or saving starts afresh. There is no undo for a **Save**; to go back after saving, make the change and save again.

Lock Layout

On a touch register the designer is one stray finger away from moving a table. **Lock Layout** (the padlock) fixes every shape in place: nothing can be dragged, resized, rotated or deleted, not even with the Delete key. You can still select a table and change its settings in the Properties panel — a name, the guest counts, a section — which is most of what a quick edit needs. Tap the padlock again to unlock. The lock lasts while the designer is open; it is not saved with the room.

Export Image

Export Image saves the room as a PNG picture named after the room, the whole page as drawn: shapes, captions, background colour and floor image. It is downloaded like any other file from the register (on Windows, the Downloads folder). Print it for the host stand, hand it to a new hire, or mark it up to plan a change. The picture shows the designer's colours, not the live table statuses.



Designer shapes: what each one is for

View online ↗

Every shape in the designer palette by group — tables, bar, beach and pool, games and rentals, walls and structure, decor and labels — and which ones can be seated or booked.

Shapes fall into three kinds:

- **Seating** — tables, booths, bar stools, daybeds and cabanas. They seat guests, open orders and can be offered for reservations.
- **Timed** — pool tables, lanes, rooms and rentals. They open orders and start timers; they are only offered for reservations if you give them a guest capacity and tick Available For Reservations.
- **Decor** — walls, doors, plants, labels. They make the room recognisable; nobody sits at them and they are never offered for booking or selected on the POS.

Tables

Round Table, **Square Table**, **Rectangular Table**, **Booth**. The everyday dining shapes.

Bar

- **Bar** — a straight bar counter.
- **Corner Bar** — an L-shaped counter for bars that turn a corner.
- **Bar Stool** — one seat at the bar; seat and ring each stool on its own if you run the bar by seat.

Beach & Pool

- **Daybed** — seats 1–2; bookable.
- **Cabana** — seats 2–4; bookable.
- **Beach Chair** — timed: for chairs rented by the hour.

Games & Rentals (timed)

Pool Table, **Bowling Lane**, **Karaoke Room**, **Arcade**, **VR Booth**, **Meeting Room**, **Hookah**, **Parking**, **Rental**, **Kids Area**, **Batting Cage**, **Ping Pong**, **Darts**, **Simulator**, **Cowork Desk**, **Internet PC**. Each matches a time-based item type, so the table starts the right timer — see Linking tables to timed items.

Walls & Structure

Wall H and **Wall V** (straight walls), **Wall Corner** (an L), **Window**, **Railing** (for terraces and split levels), **Door**, **Pillar**, **Stairs**.

Decor & Labels

- **Planter**, **Plant**, **Host Stand**, **Restroom**.
- **Area Label** — a text caption such as *PATIO* or *VIP*. Its **Name** is the text shown; it has only a Text Color setting. In the designer it shows as a dashed box; on the POS floor plan only the text shows, underneath the tables, and it can never be tapped or seated.

> Walls and labels are cheap and make a big difference: a new server finds table 23 in seconds when the room on screen has the same corners and doors as the real one.

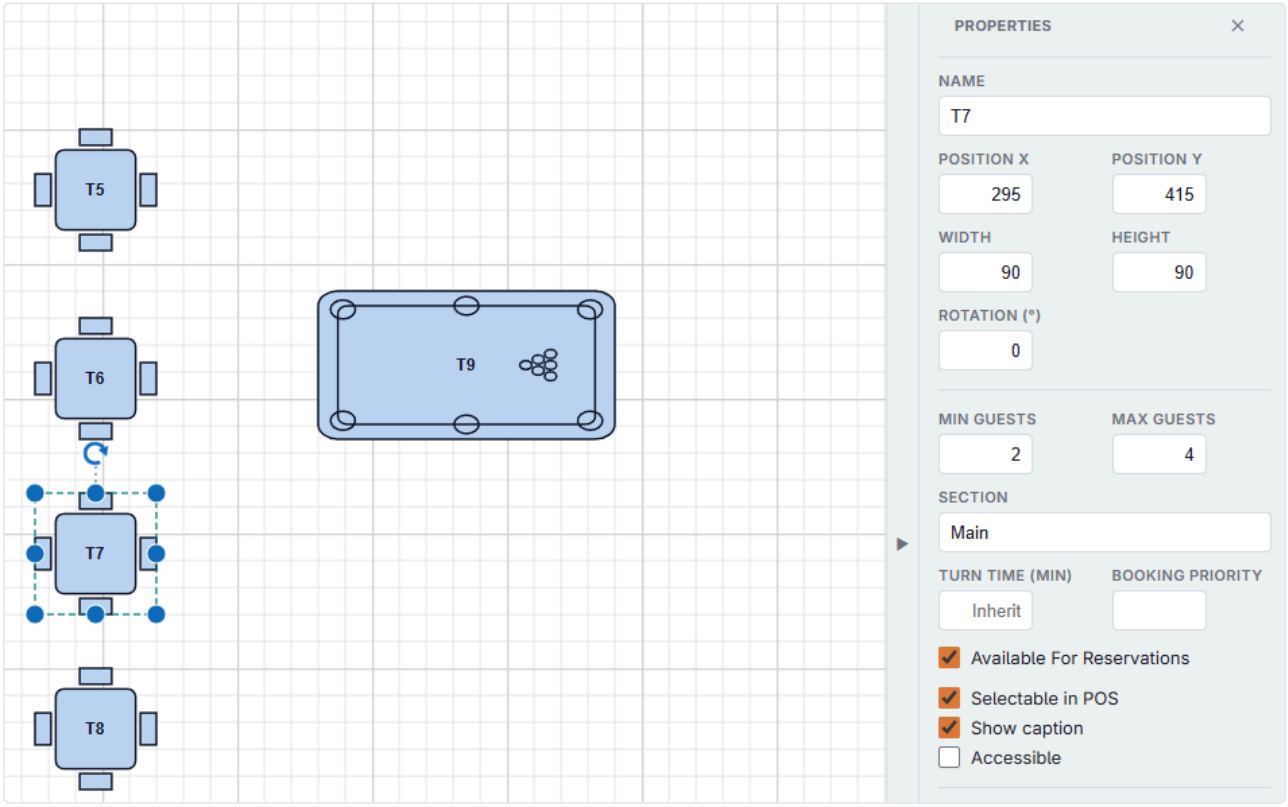
Table properties explained

Tables, Seating & Service Pace › Designing the floor

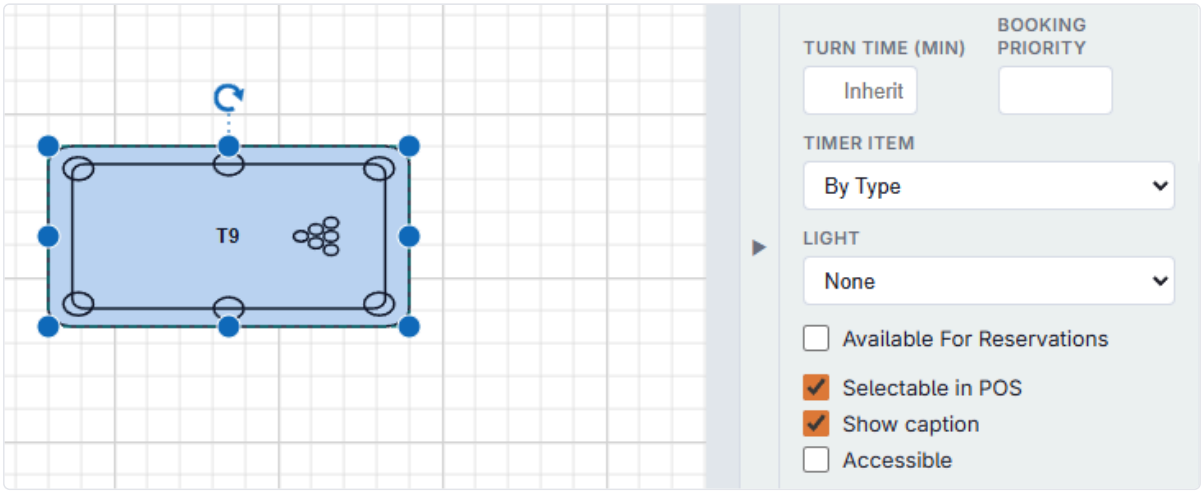
View online ↗

Every setting in the designer's Properties panel: position and size, guests, section, turn time, booking priority, timer item, light, reservations, POS selection, caption, accessibility and colours.

Select a table in the designer to see its properties. The panel scrolls when there are more settings than fit; **Copy** and **Delete** stay pinned at the bottom.



Setting	What it does
Name	What staff and guests see: T12, Bar 3, Pool 2. For an Area Label, the caption text.
Position X / Y, Width / Height, Rotation (°)	Exact placement, for when dragging is not precise enough.
Min Guests / Max Guests	The party sizes the table suits. Reservations only offer the table to parties in this range.
Section	The server section or area the table belongs to.
Turn Time (Min)	How long a party usually stays at this table, for reservation times. Blank = inherit from the service period. When enough history exists, a suggestion from the table's real turns appears with an Apply button.
Booking Priority	When several tables fit a booking, the higher number is offered first — protect your best tables or fill the others first.
Timer Item	Timed shapes only: which timed item the table starts. See Linking tables to timed items.
Light	Timed shapes only: the lamp that follows the table's timer. See Table lights that follow the timer.
Available For Reservations	Offer this table for bookings. Off for tables kept for walk-ins.
Selectable in POS	Off makes a table part of the drawing only: it cannot be tapped or seated.
Show caption	Show the table's name on the floor plan.
Accessible	Mark the table as accessible, for guests who ask for it.
Fill / Stroke	The table's colours in the drawing (live status colours still apply on the POS).



> Decor shapes and Area Labels never seat or book guests, whatever their switches say. Timed shapes start with no guest capacity: give them Min and Max Guests and tick Available For Reservations if you want guests to book them.

Naming tables

New tables and copies take the next free name in the room's own style, keeping any prefix: after **T9** comes **T10**, after **P-12** comes **P-13**, after **Bar 3** comes **Bar 4**. The **Section** field offers the sections already used in the store as a pick-list, so "Patio" is never also "patio" and the floor overview counts them together; type to add a new one. The designer warns when a name is already used by a table in **another room**: every table in the store needs a name of its own, or reports and the reservation book cannot tell them apart.

Revenue centers

View online ↗

Splitting sales by area — bar, restaurant, patio — and the assignment that makes the reports work.

A revenue center splits your sales by part of the business: bar against restaurant, patio against inside, retail against food. End-of-day and analytics can then report each separately.

How a sale gets its revenue center

The revenue center comes from the **menu item**. Every line takes the revenue center of the item that was rung, and modifiers inherit their parent line's.

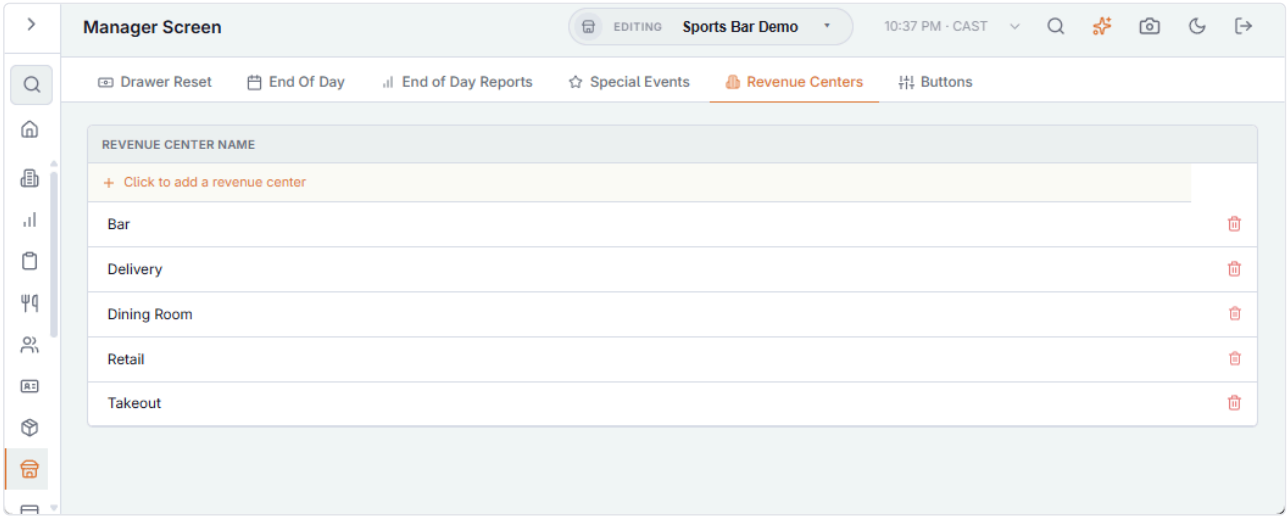
> This is the part that catches people out: a menu item with no revenue center assigned produces lines with no revenue center, and those report as **unassigned**. Setting up the centers is not enough — every item that should count towards one has to be pointed at it.

Setting them up

1. Define the centers you want to report on. Keep the list short — three or four meaningful areas beat a dozen nobody maintains.
2. Assign each menu item to one. Working category by category is far quicker than item by item.
3. Check the end-of-day revenue center summary after a day's trading. Anything landing in unassigned is an item that was missed.

> Assignment applies to lines rung **after** it is set. Orders already taken keep whatever they were stamped with, so a report for a past day will not change retrospectively.

> Revenue centers answer "how did the bar do?". If the question is "how did the patio do?" and patio guests order the same items as everyone else, a revenue center is the wrong tool — that is what order types or seating areas are for.



Reservations

Taking a reservation

Tables, Seating & Service Pace › Reservations

View online ↗

Finding a time, holding it while you take the details, and booking it.

The book opens from **More → Reservations**. The day's bookings are on the left; a new one is taken on the right.

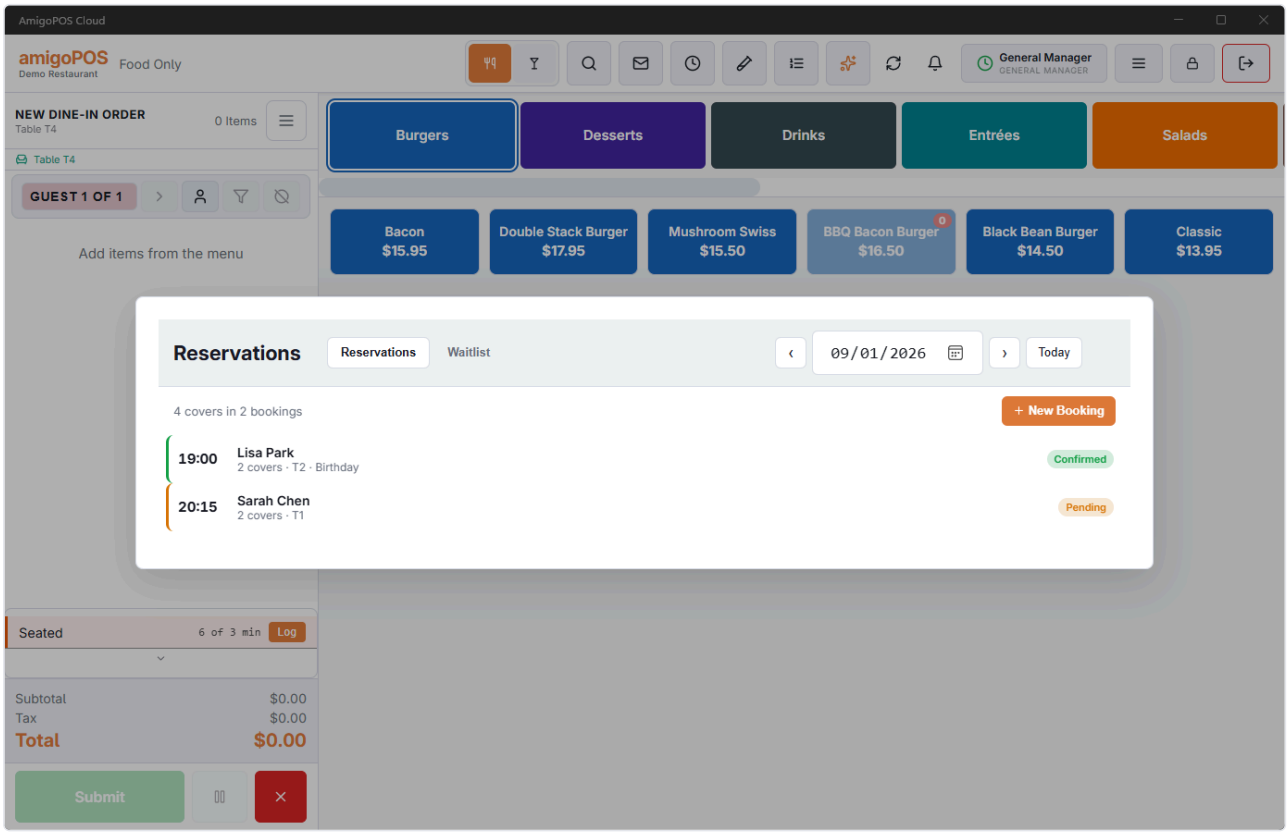
1. **Party size first.** Everything after it depends on how many are coming, because it decides which tables can take them.
2. **Find times.** Only times with a real table free for the whole sitting are offered. See **How times are offered**.
3. **Pick a time.** The tables are held for you while you take the details, so the caller cannot lose the slot mid-sentence.
4. **Take the guest's details** and book it.

If the time goes while you are typing

Somebody at another station can take the last table first. The book says so and re-reads the times rather than leaving a slot on screen that no longer exists. Pick again and carry on.

> Backing out of a new booking, or closing the book, releases the hold immediately. A hold left behind blocks the table for ten minutes, and the person it blocks is usually you.

A phone number is worth taking even when the guest does not offer one: it is what the confirmation and the reminder go to, and it is how the store reaches them when something changes.



The day book and seating a party

Tables, Seating & Service Pace › Reservations

View online ↗

The day list, the four things you can do with a booking, and what lands on the check when you seat one.

The left side of the book is the day: every booking in time order, with its status and what has been paid.

What you can do with one

- **Confirm** — you have spoken to the guest and they are coming.
- **Seat** — starts an order, puts it on the booked table and links the two. From then on it is an ordinary check.
- **No show** — they did not arrive. Where the booking held a card, the charge owed is taken fifteen minutes later, and **Undo no-show** stops it before then.
- **Cancel** — the guest called off. A refundable deposit inside its window goes back on its own.

Seating a party that prepaid

Two things happen when you seat them. Anything they paid for at booking — a set menu, a bottle on the table — is added to the check at the price they were quoted, and the kitchen sees those items like any other. And the deposit itself is put on the check as a payment, so the balance already has it taken off. The book says so: *"25.00 deposit applied to the check"*.

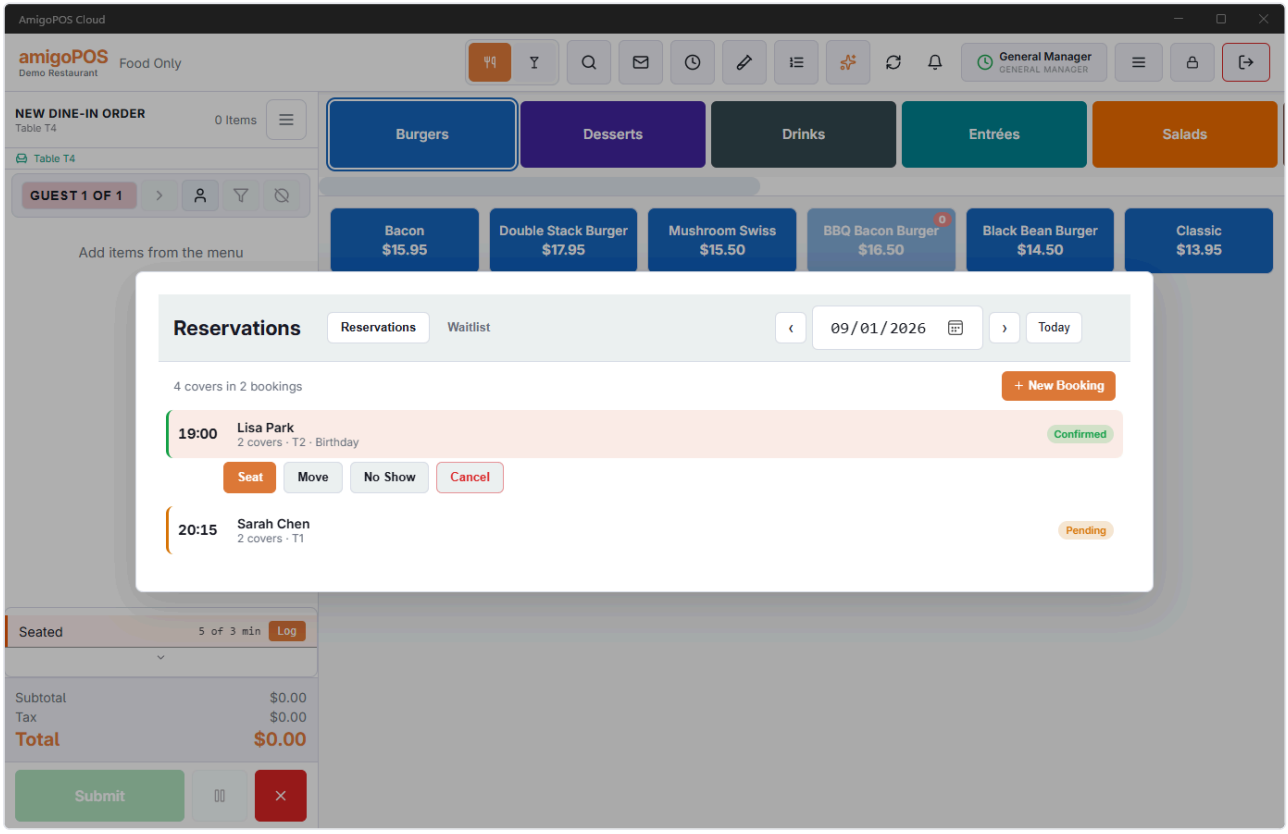
Because the deposit lands as a payment, it appears in the day's tender totals with everything else. Nobody has to remember to discount it, and nobody can forget.

Minimum spend

Where the booking carried a minimum, moving to settle checks the check against it. If the party is short, you are asked whether to add the difference — and you can say no. A table that underspent because the kitchen ran out of half the menu is a judgement for the

manager, not a rule.

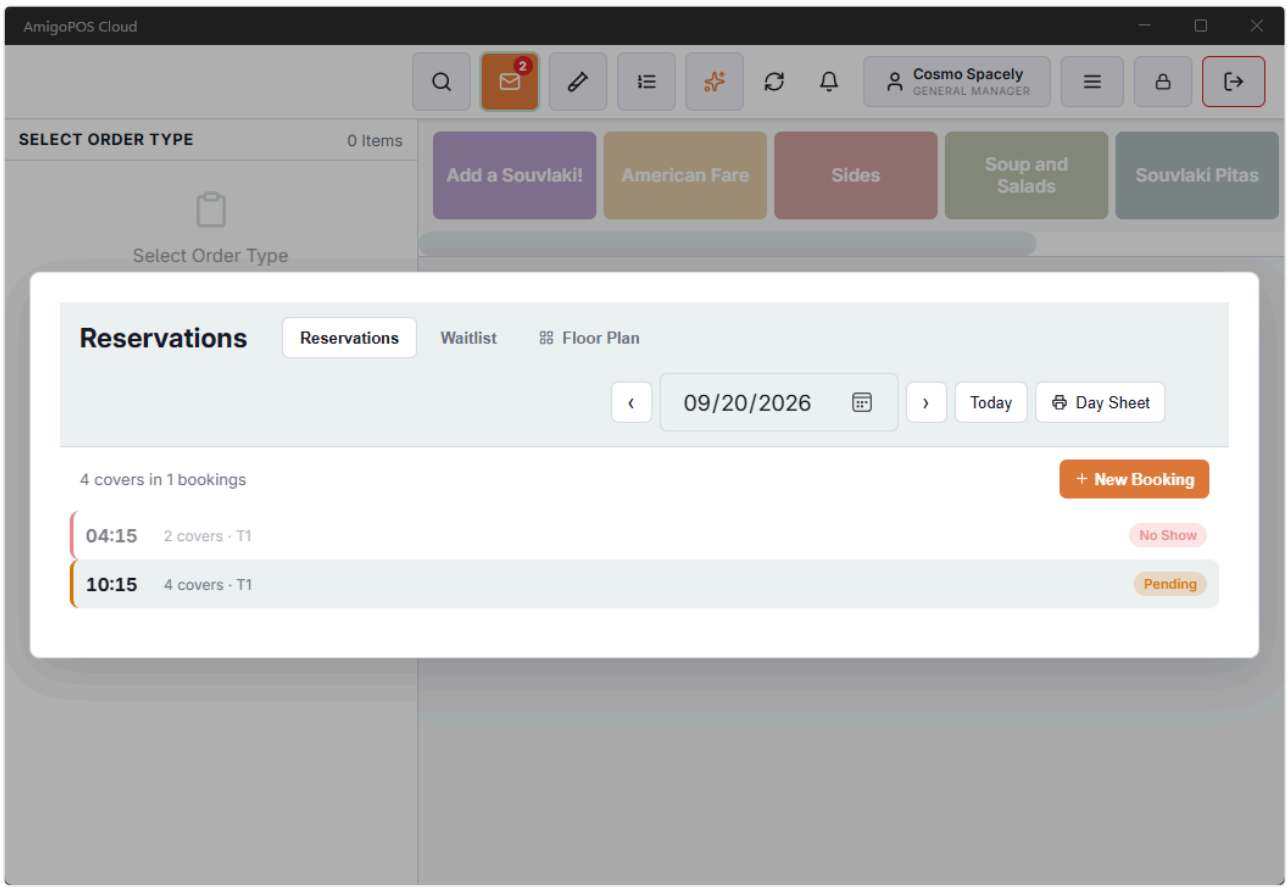
> Seating needs an order that is not already half rung. Finish or park what you are holding first, or the party will be seated onto somebody else's items.



Before a no-show or a cancellation goes through

Both ask first, and the question states what happens to the money: *250.00 will be charged to the card on file in 15 minutes*, *the 50.00 deposit will be kept*, or *the deposit is refunded if inside the policy window, otherwise kept*. No-show and Cancel are offered only on Pending and Confirmed rows.

Chips on a row say where the money stands: a paid deposit shows its amount, **Card on file** means a card is held and nothing charged, and **Fee settled** on a no-show means the fee has been taken or the deposit recorded as retained — the booking's event trail has the figure. Until Fee settled appears, **Undo no-show** is on the row.



Putting a booking on a table

Pending and confirmed bookings also offer **Assign Table**: tap it, then tap the table on the floor plan, and the booking moves there with the same checks as Move. The **Floor Plan** button in the header shows the room beside the list with each table's bookings on it — see *Floor plan and assigning tables*.

Seating a booking at a pool table

Seating a reservation at a timed table (pool table, lane, room) opens the order at the table and offers the table's timed items, the same as seating a walk-in there. Timed tables are only offered for booking if they have a guest capacity and Available For Reservations is ticked in the designer.

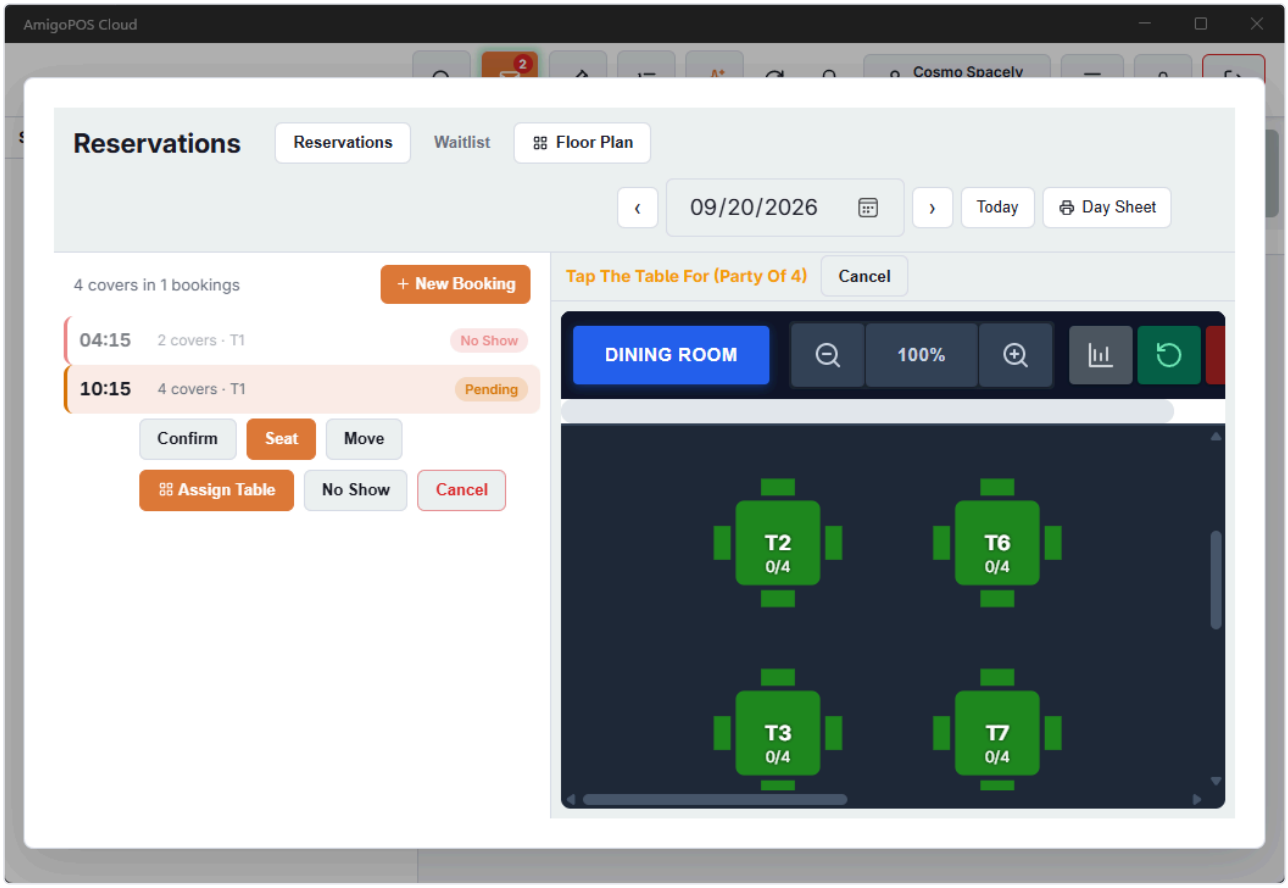
Floor plan and assigning tables

Tables, Seating & Service Pace › Reservations

View online ↗

Seeing the day's bookings on the room, and putting a booking on a specific table before the party arrives.

The **Floor Plan** button in the reservation book's header puts the room beside the day's bookings, so the host works from one screen: who is coming, and where they are sitting.

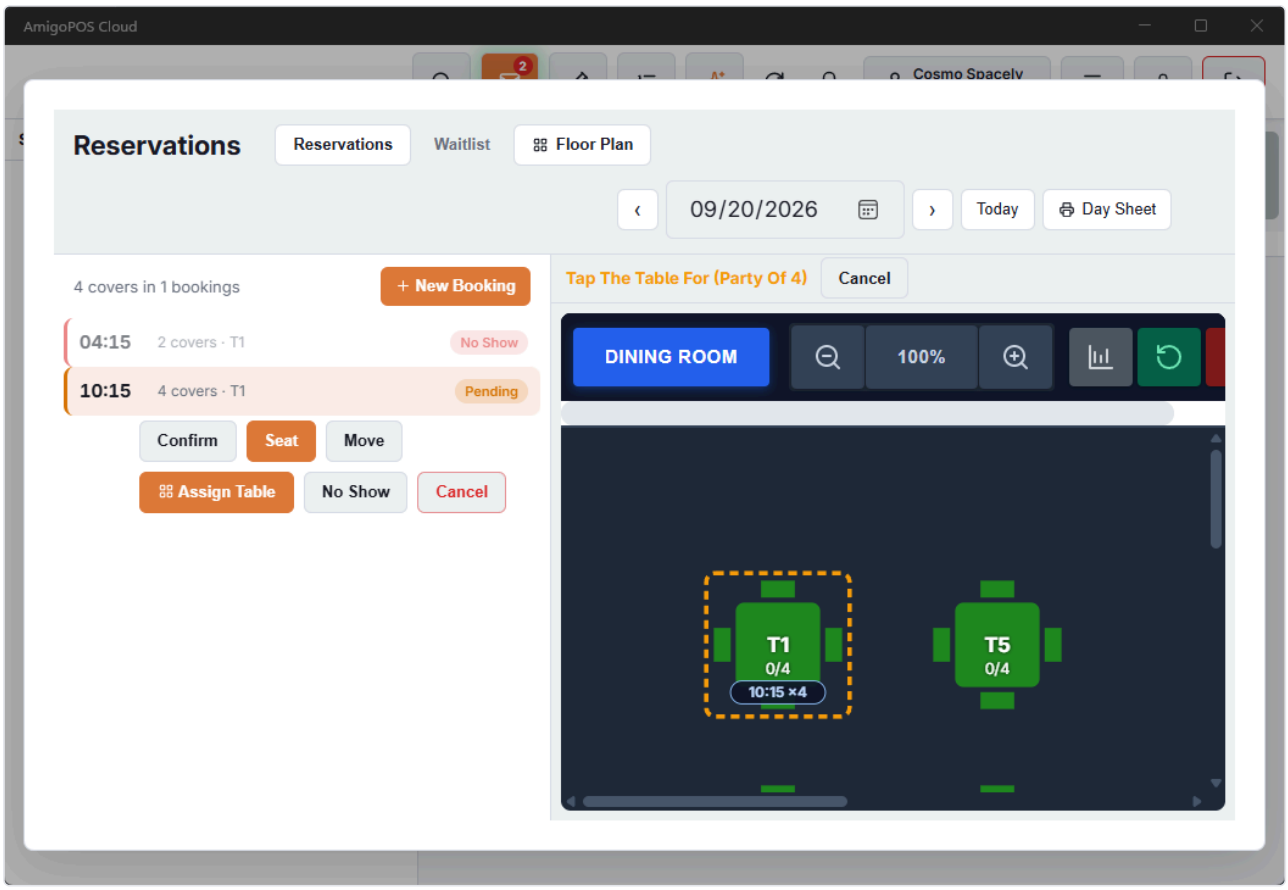


What the floor shows

- **Booking pills** — a table holding a pending or confirmed booking today shows it, for example *19:30 Smith ×4*. When a table has more than one, the earliest is shown with *+1*.
- **Live table status** — colors, guest counts and timers still come from the orders on the tables, exactly as on the register's floor, so a booked table that already has a party on it is obvious.
- **The selected booking** — its table gets a dashed ring. Tapping a table that holds a booking selects that booking in the list.
- **Rooms** — the room buttons on the floor switch the booking list to that room as well.

Assigning a table

1. Select the booking and tap **Assign Table** (offered on pending and confirmed bookings).
2. The floor opens with *Tap The Table For …* above it.
3. Tap the table. The booking moves there, the floor closes, and the book shows the booking on its new table.



The move goes through the same checks as **Move**: if another booking, or a guest in the middle of booking online, already has that table at that time, the book says so and nothing changes. **Cancel** in the hint backs out without moving anything.

> Assigning doesn't check how many seats the table has — the floor shows each table's seats, so pick one that fits the party. When the party arrives, **Seat** starts the order on the assigned table.

Tables guests chose online

When guests pick their table online, their booking arrives with the table already assigned and shows on the floor like any other assignment. The host can move it the same way; the guest is not told, so a move away from the table they asked for is worth a word when they arrive.

The waitlist

Tables, Seating & Service Pace › Reservations

View online ↗

The queue at the door: quoting a wait honestly, keeping people informed, and seating them when a table frees.

The **Waitlist** tab of the book is the queue: parties with no booking, waiting for a table. It answers the question a booking cannot — the phone rang, or somebody walked in, and the room is full.

Adding a party

Party size first, then a name and a mobile number. Before you commit, the panel shows the likely wait and how many parties ahead are competing for the same tables. That number already counts the queue: three couples waiting on one two-top are told twenty, fifty and eighty minutes, not twenty each.

The estimate fills in the quote box, and you can beat it. What is stored is what you actually told the guest, which is what the list then measures against.

While they wait

- The row shows minutes waited, and turns red once the party is past the time they were given.

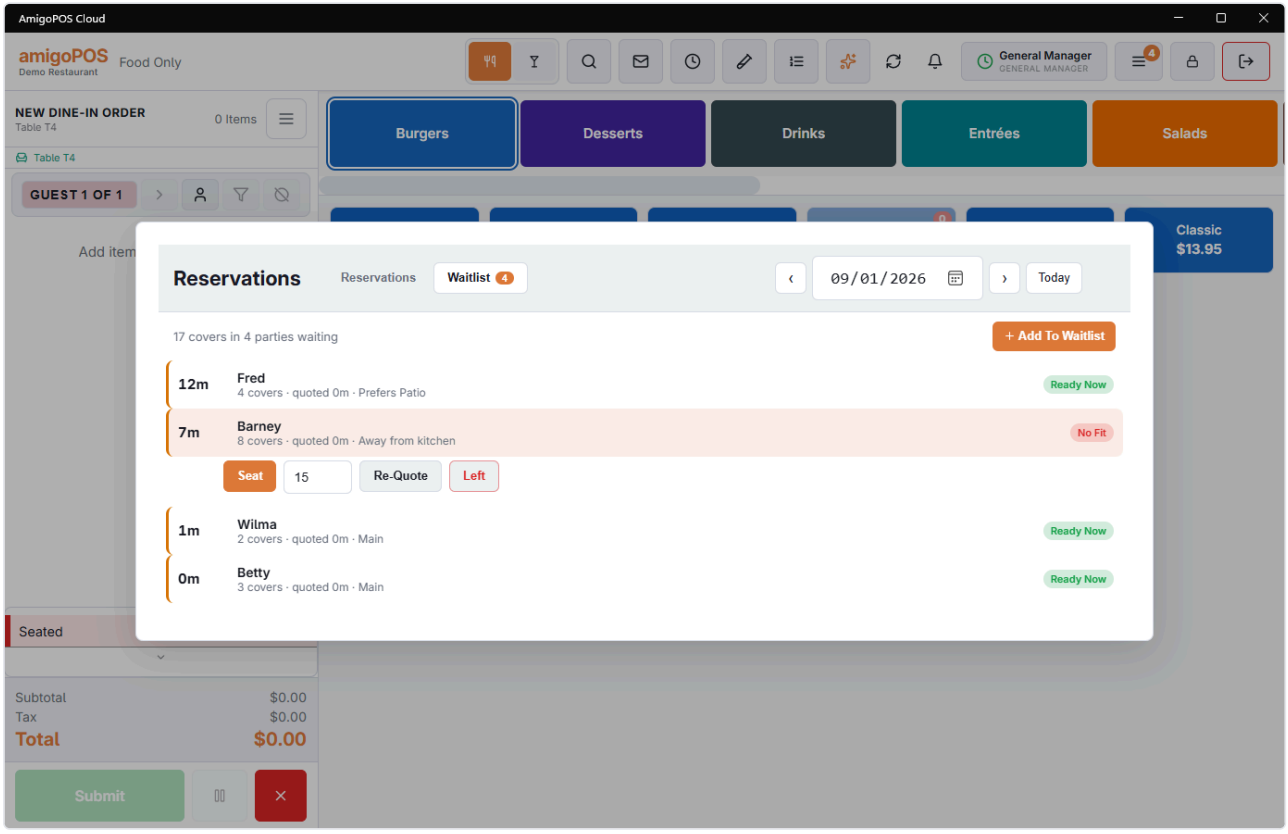
- **Re-quote** when the room runs late. Honest re-quoting is what stops people walking out.
- **Table ready** texts them. The message goes out there and then, not on a timer, and the list shows that they were told.
- **Left** when they give up, which is recorded as a no-show so the reports can say what the wait cost.

Seating them

A waiting party has no table until one frees, so the table is chosen when you seat them, not when they arrived. The book suggests one: free now, fits the party, in the section they asked for, least wasted seats first — and it skips a table with a booking due before this party would finish. You can put them anywhere else on the floor plan.

> A guest asking for the terrace at the door is worth recording. The section they asked for narrows both the estimate and the suggestion.

> Parties left over from an earlier service close themselves out after twelve hours, so the queue is always tonight's.



How times are offered

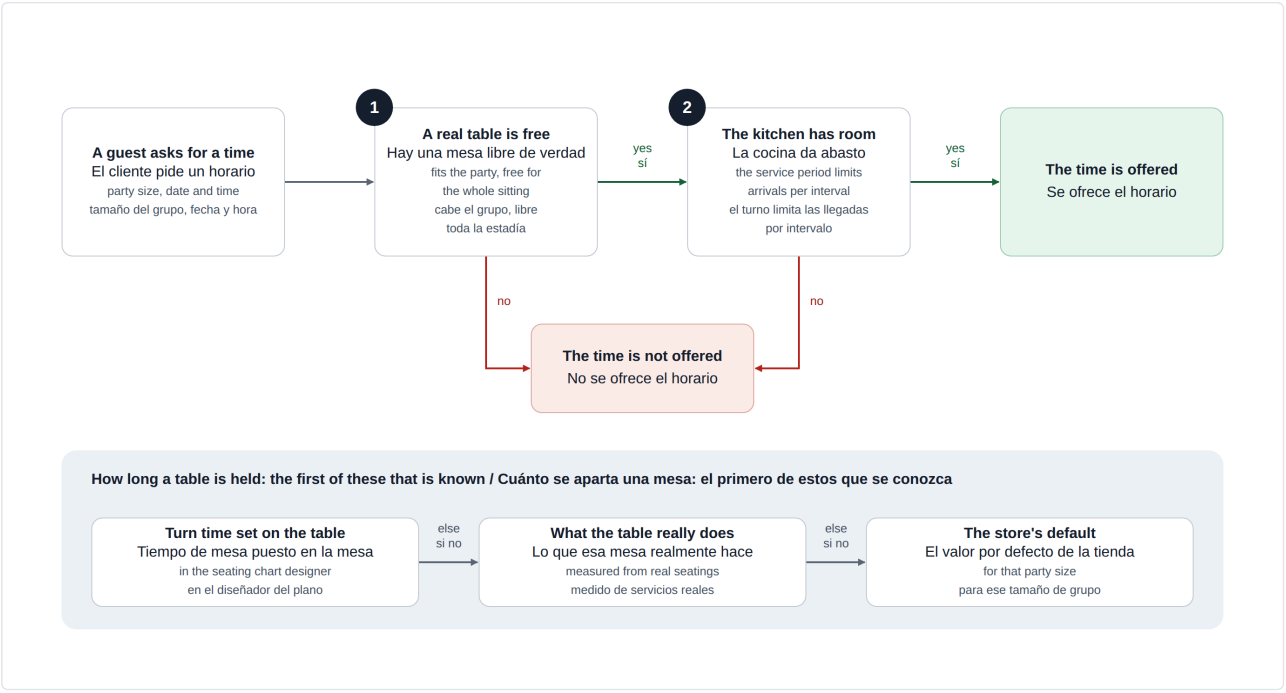
Tables, Seating & Service Pace › Reservations

View online ↗

Why a time appears or does not: a free table, kitchen pacing, and how long a table is held.

A time appears only when two separate things allow it, and knowing which one refused explains almost every "why can I not book that?".

In one picture: the two checks a time has to pass, and how the length of a sitting is decided.



1. A real table has to be free

Availability is worked out against the actual tables in the seating chart, not an abstract count of seats. The party has to fit the table's minimum and maximum, and the table has to be free for the whole sitting — not just at the start of it. Where no single table fits, tables in the same section can be put together.

2. The kitchen has to have room

On top of that, a service period can cap how many guests or parties may arrive in the same interval. Ten free tables at eight o'clock is not the same as a kitchen that can send ten tables at eight o'clock.

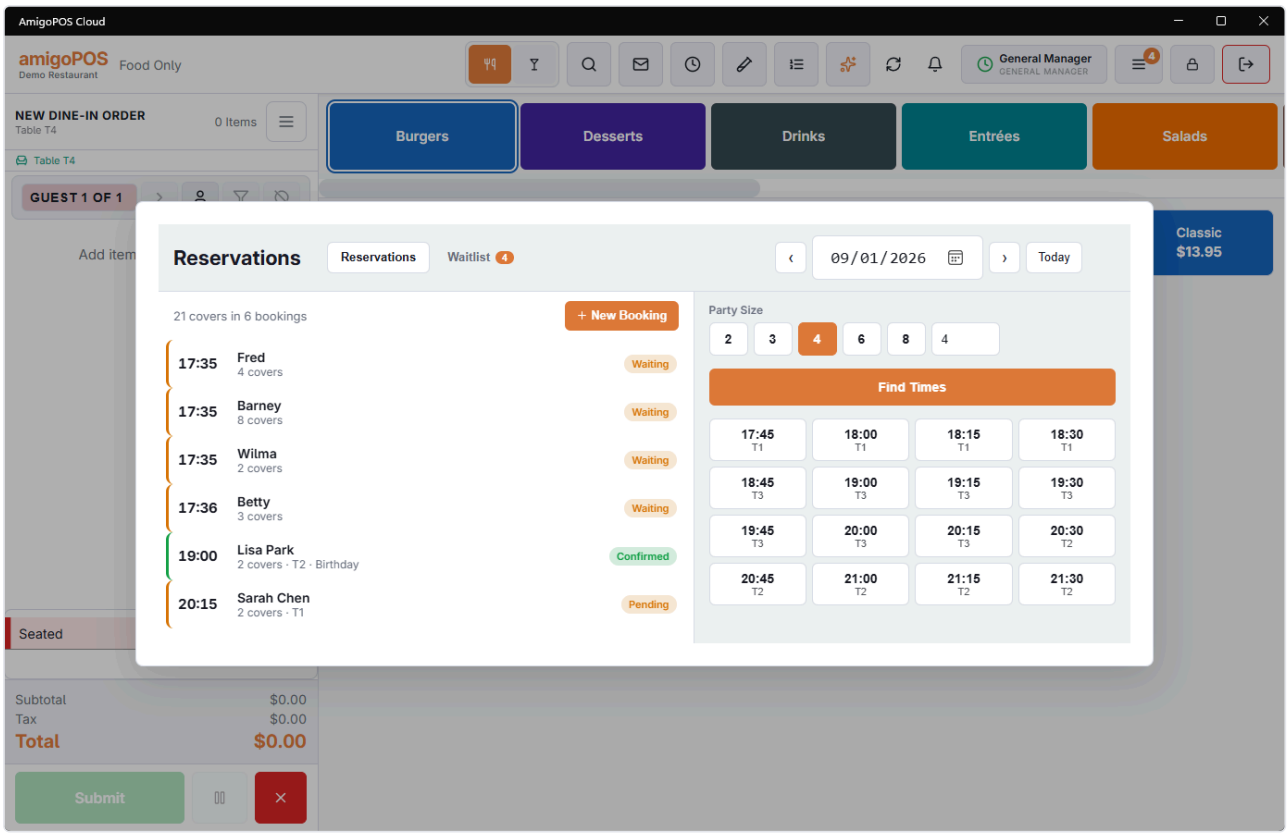
How long a table is held

The sitting length comes from the first of these that is known:

- the turn time set on that table in the seating chart designer;
- what that table has actually done, measured from real seatings;
- the store's default for that party size.

Observed figures are worked out from the tickets that ran on each table — how long from the first item to the last payment — and use the slower end of the range rather than the average. Booking on the average makes half the bookings late by definition.

Tables can be taken out of the book without hiding them from the POS: untick **Available for reservations** on the table in the designer. Staff booths and the service bar belong that way.



When the guest chose the table

A guest who picked a table on the booking page holds that table and no other: the book does not substitute a different one if it is taken in the meantime, it asks the guest to pick again. The pacing rule above still applies before any table is offered.

Service periods and turn times

Tables, Seating & Service Pace › Reservations

View online ↗

The setup a store needs before it can take a single booking.

Back Office › Store Setup › Reservations, on the **Service Periods** tab. Until a service period exists the store takes no bookings at all, and the book simply shows nothing — which looks like a fault and is really an empty setup.

A service period

Days of the week, when the first booking may be taken, when service ends, and how far apart the offered times sit. **Stop booking before end** keeps the last sitting from starting as the kitchen closes.

Pacing

Max covers per slot and **max parties per slot** cap arrivals in the same interval. They apply after a table has already been found, so they are a kitchen limit rather than a seating one. Leave them blank for no cap.

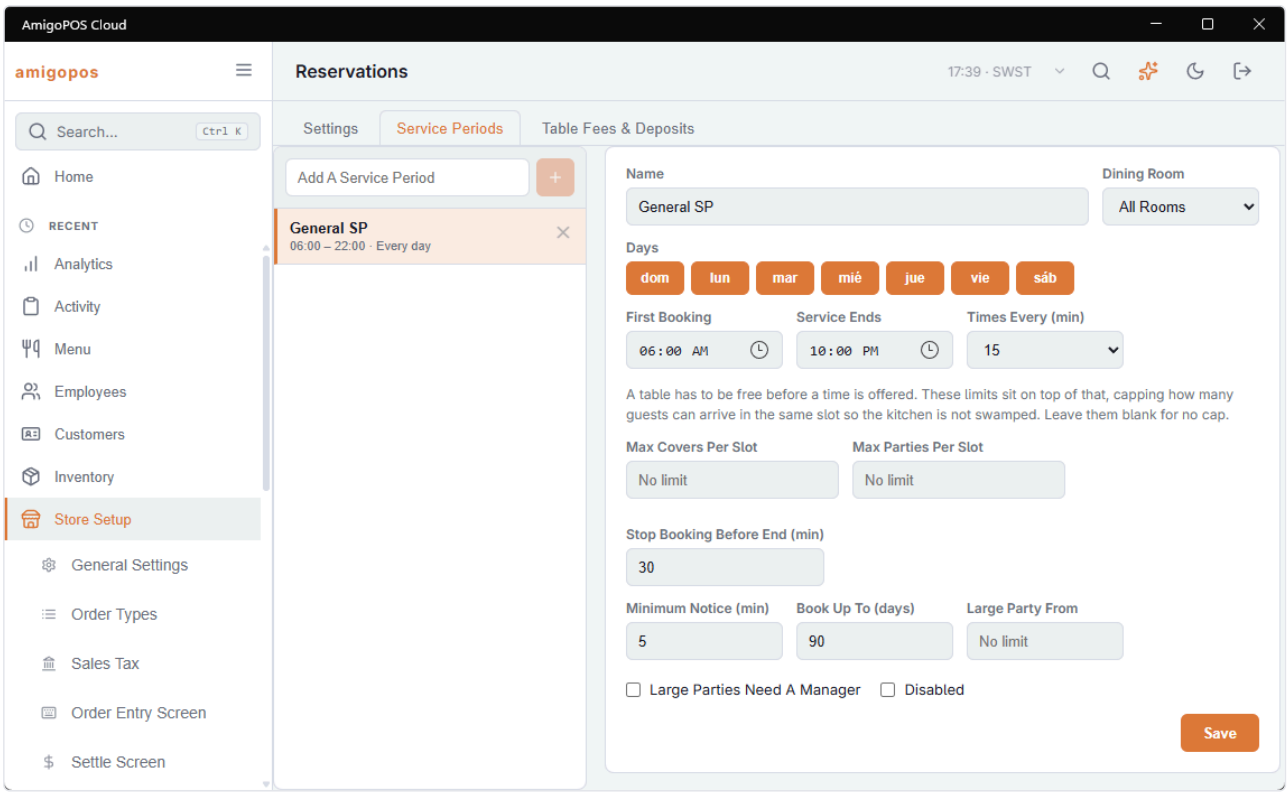
Notice and horizon

Minimum notice keeps a booking from appearing twenty minutes before it starts — that is a phone call to the host, not a slot on a screen. **Book up to** decides how far ahead the diary opens.

Turn times

Turn times are set once for the whole store, on the **Settings** tab: a fallback matrix by party size, with a clearing time added to each. It is the answer used when a table has nothing more specific to say, and it is not tied to any one period — a table does not turn faster because it is lunch.

> Deleting a period stops new bookings under it. Bookings already taken keep their own times and are untouched.



Adding and editing a period

Type a name in **Add A Service Period** and press **+** or Enter. A new period starts as every day, 17:00 to 22:00, a time every 15 minutes, stopping 30 minutes before the end, 60 minutes' notice and 90 days ahead. Change the fields and press **Save**; nothing is kept until you do.

Field	What it does
Name, **Dining Room**	The period's name, and **All Rooms** or one dining room.
Days, **First Booking**, **Service Ends**	When the period runs. Service has to end after it starts, so a period cannot run past midnight.
Times Every (min)	15, 30 or 60 minutes between the times offered.
Max Covers Per Slot, **Max Parties Per Slot**	The pacing caps. Blank or 0 means no cap.
Stop Booking Before End (min)	0–240.
Minimum Notice (min), **Book Up To (days)**	0–1440 minutes; 1–365 days.
Large Party From, **Large Parties Need A Manager**	From this party size up, a booking needs a manager's approval when the box is ticked. Blank means no large-party rule.
Disabled	Stops the period from offering times without deleting it.

The turn-time grid

On the Settings tab, **Turn Times** has a row for parties of 1–2, 3–4, 5–6 and 7+, each with **Minutes At Table** (15–600) and **Clearing Time** (0–120). The grid saves when you leave a box. A table with its own turn time in the seating chart wins, and a figure observed from real seatings beats both.

Deposits, table fees and extras

View online ↗

Charging for the tables people want, and what the guest gets back.

Back Office › Store Setup › Reservations, on the **Table Fees & Deposits** tab. A rule says where it applies — the store, a section, or named tables — narrowed by service period, days, times and party size. The narrowest rule that matches a booking wins, and Priority breaks a tie.

Deposit or fee: they are not the same

Both take money at booking. A **deposit** is credited to the check when the party is seated, so the guest gets it back as food — that happens by itself, as a payment on the check. A **table fee** never comes back: it is revenue for holding a table people want, and it is usually taxed differently. The difference is the **Credit It To The Check** tick.

Minimum spend

Takes nothing at booking. It is a floor the party commits to, shown to the host when they are seated and checked when the check is settled, where the shortfall can be added as a line.

No-show charge

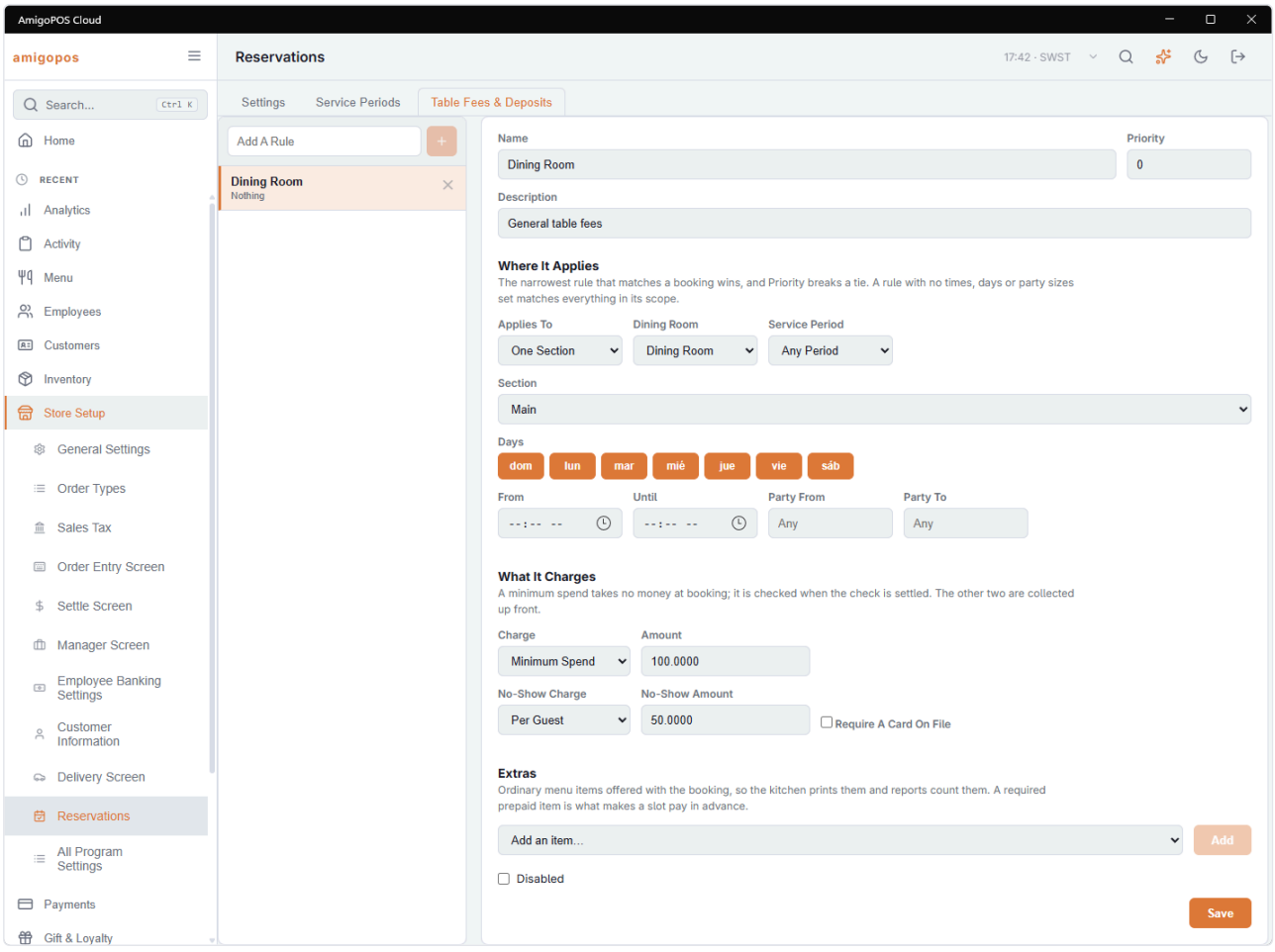
A retained deposit *is* the penalty for not turning up, so the no-show charge only collects what is still owed above it. A booking with a 20 deposit and a 50 no-show charge is billed 30; one with a 50 deposit and a 50 charge is billed nothing more.

> If the deposit should be the whole penalty, leave the no-show charge at zero. That is what most stores want. The charge earns its keep on bookings where a card was held but no money taken.

Extras

Ordinary menu items offered with the booking — a bottle on the table, a cake, a set menu at a price per guest. They are normal items, so the kitchen prints them and reports count them. An item marked required and prepaid is what makes a time pay in advance.

> A rule that names a charge but leaves the amount at zero is refused. A rule that reads as priced and collects nothing is worse than no rule at all.



A card on file: what the guest sees

A rule that requires a card without taking a deposit sends the guest to a card page after their details. It charges nothing; the guest is told before they type anything, again above the Save button, and again on their booking page: *a card is held; a no-show fee of 250.00 applies only if you do not turn up*. The amount is the rule's no-show charge for that party — a per-guest charge is already multiplied out. In the day book the booking shows a **Card on file** chip once the card is saved, and moves from Pending to Confirmed on its own.

Charging the no-show fee

Nobody charges it by hand. Marking a booking **No show** in the day book starts a fifteen-minute clock; when it runs out the fee is taken from the card off-session, less any deposit already held, and the booking records *No-show fee charged* with the amount, or the decline. Inside the fifteen minutes **Undo no-show** takes the mark back and nothing is charged. After it, the row shows **Fee settled**, and a refund is the ordinary deposit-refund path.

Before Stripe is set up

A rule can ask for money before the store has entered its Stripe keys and public web address. Online bookings are still taken: the guest is not shown a deposit, the booking is written without one, and a note on it says what the rule would have collected so the host can settle it at the door. The Table Fees & Deposits tab shows a warning while an enabled rule asks for money and this is the case.

In the accounts

With QuickBooks Online or Xero connected, deposits are sent on the day they are paid, as money owed to the guest (**Customer Deposits**). Seating the party puts the deposit on the check and draws that balance down; a refund takes it back out; a deposit forfeited on a no-show, and a no-show fee charged to a card on file, are posted as income (**No-Show Fees**). Map both accounts once on the integration's Mappings tab.

Rule fields

Type a name in **Add A Rule** and press **+**. A new rule charges Nothing, applies every day, and has Credit It To The Check and Refundable ticked with 24 hours to refund. Change the fields and press **Save**.

- **Name**, **Priority** (0–100, breaks a tie between equally narrow rules), **Description**.
- **Where It Applies** — **Applies To**: The Whole Store, One Section or Chosen Tables. Pick the **Dining Room** first; Section and Tables list that room's bookable tables. Then **Service Period** (or Any Period), **Days**, **From** / **Until**, and **Party From** / **Party To** (blank means any).
- **What It Charges** — **Charge**: Nothing, Fixed Per Booking, Per Guest or Minimum Spend, with its **Amount**. For a fixed or per-guest charge: **Credit It To The Check**, **Refundable** and **Refund Until (hours before)** (0–336). Then **No-Show Charge** (Nothing, Fixed or Per Guest) with its **No-Show Amount**, and **Require A Card On File**.
- **Extras** — pick an item in **Add an item…** and press Add. Each row has **Required**, **Per Guest**, **Prepaid** (ticked for a new extra) and **Max** (1–99).
- **Disabled** — keeps the rule without applying it.

Save refuses a rule with no name, a charge with no amount (set one, or change the charge to Nothing), One Section with no section chosen, or Chosen Tables with no table. Deleting a rule (×) does not change amounts already quoted on bookings.

Online booking and reminders

Tables, Seating & Service Pace › Reservations

View online ↗

The guest-facing booking page, deposits taken online, and the confirmation and reminder messages.

Guests can book from a page of your own, without an app and without a marketplace taking a cut of the cover. Switch it on in **Back Office › Store Setup › Reservations**, on the **Settings** tab: **Take Bookings Online**, the **Dining Room Offered Online** (left at None, the first dining room is offered), and the **Largest Party** the page takes by itself (8 to start, up to 40; bigger parties are asked to phone). The same tab holds the booking link and its QR code under **Guest Links**, ready to hand to the restaurant for their website or the front door.

What the guest sees

A day, a party size, the free times, then their details. Times that carry a deposit show the amount before they commit. They land on a page of their own with a confirmation code, where they can say they are coming or cancel.

Deposits

A booking that owes money is written but stays unpaid and unconfirmed until the payment goes through — a table people want is not held on the strength of a form. If the guest closes the payment page, their booking page offers it again, and a booking that is never paid releases itself after three quarters of an hour.

When nothing is free

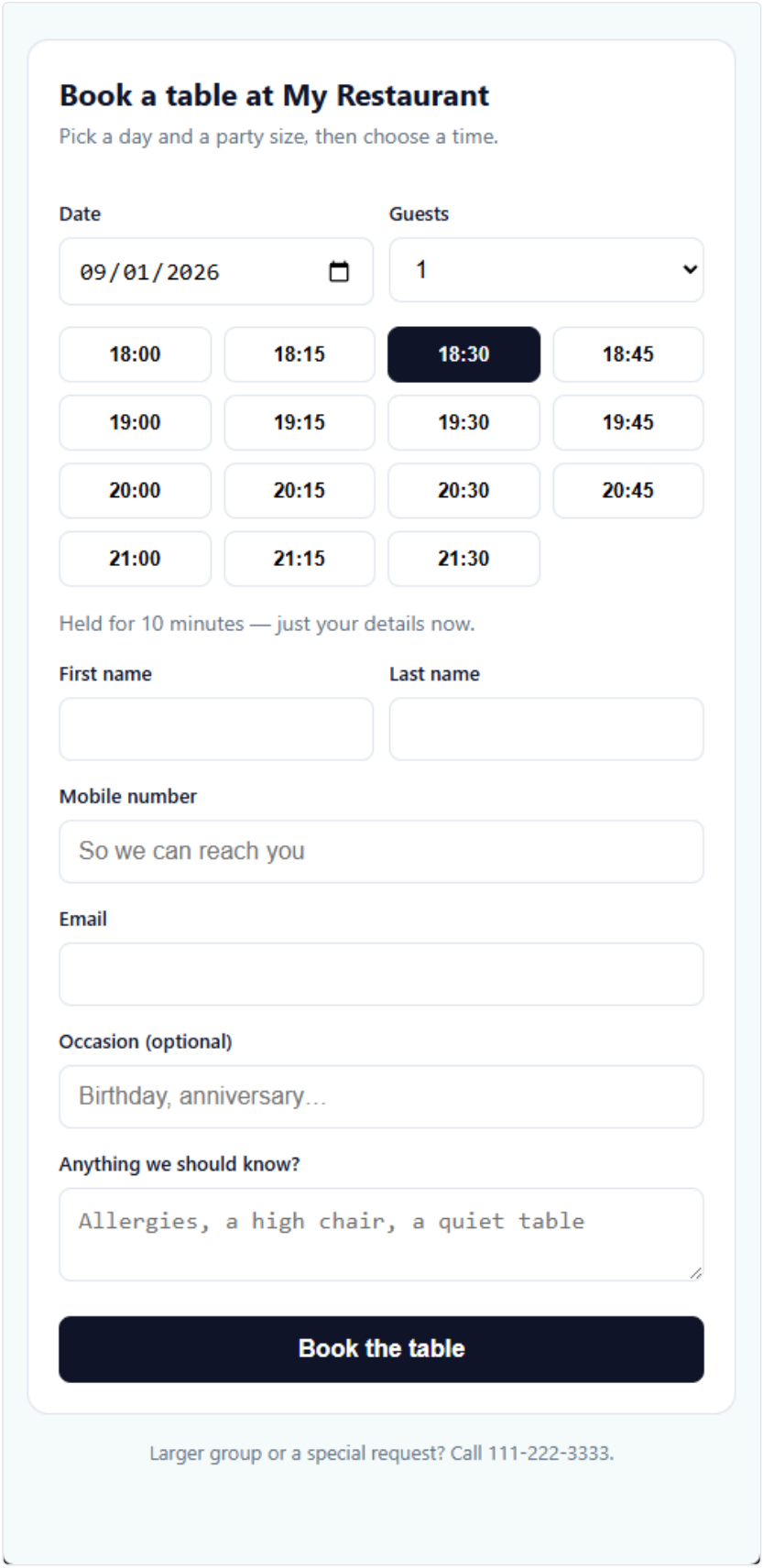
With **Let Guests Join The Queue Online** switched on, a guest who finds no times can join the queue instead. They see the likely wait before they commit, get a page showing their place in it, and are texted when the table is ready. They appear on the host stand's waitlist beside the walk-ins.

Confirmations and reminders

A confirmation goes out shortly after the booking: it is the store's text-message action **Reservation Confirmation**, switched on to start with, on **Back Office › Integrations › SMS** and on the WhatsApp page. A reminder goes out before the sitting when **Send Reminders** is on under **Booking Messages** on the Settings tab (off to start); **Remind Hours Before** sets how long before (24 to start, 1–168). Each message links to the guest's own page, so confirming or cancelling is one tap and reaches the book immediately. Guests who left an email get one as well as, or instead of, the text.

> Messages can go by WhatsApp instead of SMS, through the store's own WhatsApp account (**Back Office › Integrations › WhatsApp**). It usually costs a fraction of a text and is the channel many guests actually read. Each kind of message needs a template Meta has approved; anything WhatsApp can't send still goes out as a text, so switching it on never leaves a guest unheard. On the Settings tab, **Send By WhatsApp Instead Of SMS** in the **WhatsApp Templates** section switches booking messages to WhatsApp, and the **WhatsApp Templates** button opens the templates.

> The page and every message follow the language the guest booked in.


Book a table at My Restaurant
Pick a day and a party size, then choose a time.
Date
09/01/2026
Guests
1
18:00
18:15
18:30
18:45
19:00
19:15
19:30
19:45
20:00
20:15
20:30
20:45
21:00
21:15
21:30
Held for 10 minutes — just your details now.
First name
Last name
Mobile number
So we can reach you
Email
Occasion (optional)
Birthday, anniversary…
Anything we should know?
Allergies, a high chair, a quiet table
Book the table
Larger group or a special request? Call 111-222-3333.

The public web address

Every link a guest receives — the booking page, the QR code, the links in confirmation messages, the return from the payment page — is built on the store's public web address: the **Base URL** under Integrations › Stripe, also listed in All Program Settings. Until it is set the Settings tab says so and none of those links work.

Getting the link onto Google

The restaurant can put a *Reserve a table* link on its own Google Business Profile, no partner programme required. The steps are in Putting the booking link on Google.

The host stand

Warn This Many Minutes Ahead (Host Stand section) sets how soon a booking counts as due on the POS reservations badge: 15 minutes to start, 5–720. Parties already past their time always count.

Guest Links and QR codes

The **Booking Page** and **Waitlist Page** each have a **QR Code** button. It shows the code with **Copy link** and **Open in browser**, for printing or for the restaurant's website.

Saving

The Settings tab saves each setting as you change it, with a tick to confirm; there is no Save button. The other two tabs have their own **Save** button.

Who pays for the messages

Texts go through AmigoPOS's text service and are charged per message, billed monthly, outside the subscription. WhatsApp messages go through the store's own WhatsApp account and Meta bills the store directly. The **SMS Log** shows every message, texts and WhatsApp alike.

Birthdays and anniversaries

Guests can choose Birthday or Anniversary under **Occasion (optional)**, with the date when it isn't the day they book. The occasion is kept for the guest, and the celebration email can invite them back next year. See Celebrations and first visit anniversaries.

Letting the guest pick the table

Let Guests Pick Their Table, in the same **Online Booking** section (off to start), shows the online dining room as a floor plan after the guest chooses a time: the free tables that fit the party are outlined, the guest taps one — or **Any Table** — and the booking arrives at the host stand with that table assigned. How it works, what is held and which tables are offered: Letting guests pick their table online.

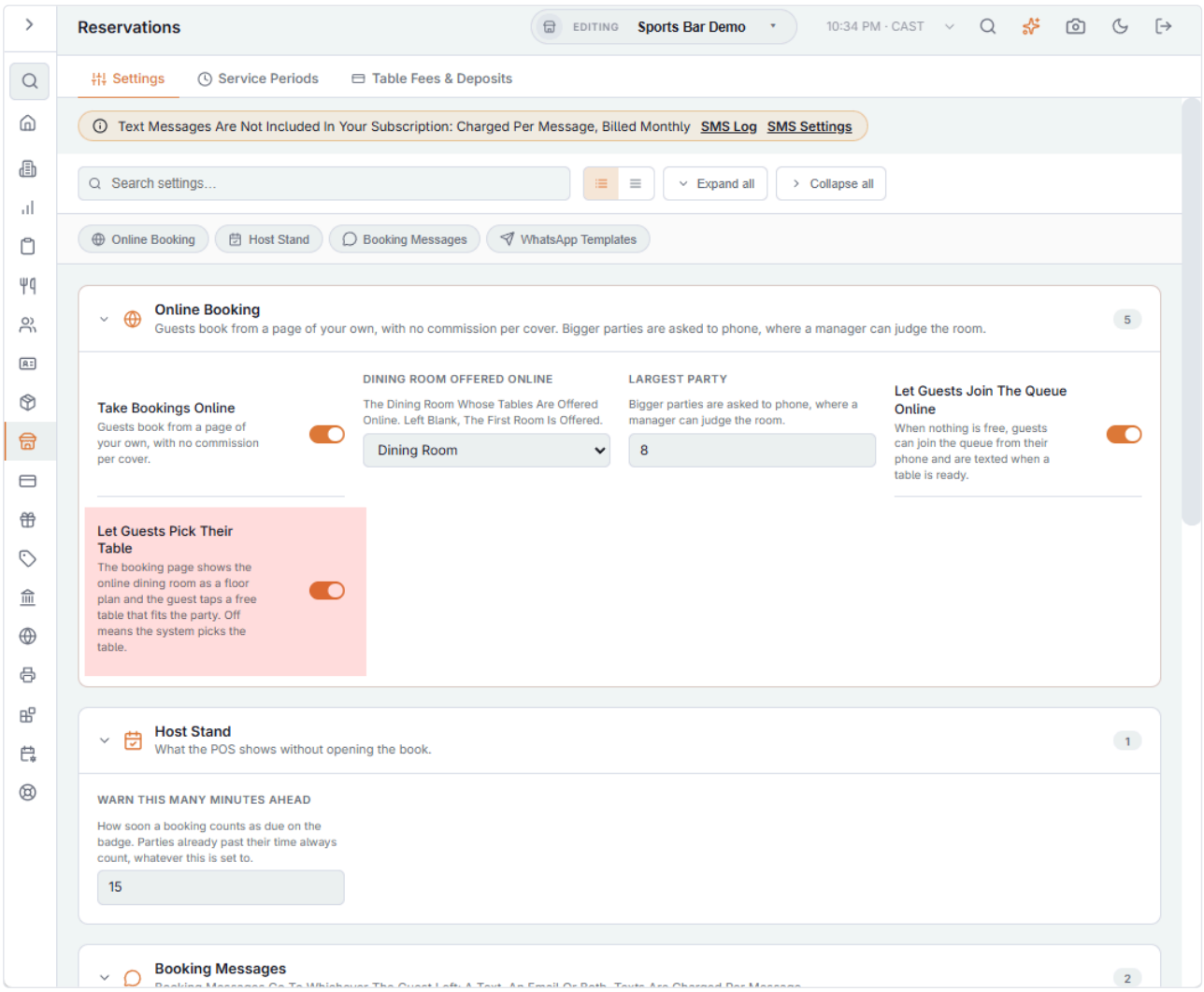
Letting guests pick their table online

Tables, Seating & Service Pace › Reservations

View online ↗

Show the online dining room as a floor plan on the booking page so the guest taps the table they want, what is held, and what the host sees.

With **Let Guests Pick Their Table** switched on, the booking page shows the dining room as a floor plan once the guest has chosen a time, and the guest taps the table they want. It is off to start. Switch it on in **Back Office › Store Setup › Reservations**, on the **Settings** tab under **Online Booking**; it needs a **Dining Room Offered Online** to be chosen, since that is the room the page draws.



What the guest sees

A day, a party size and the free times, as before. After tapping a time the page draws the room: every table that fits the party, where it stands in the room, with its name, its seats and ♿ when it is marked accessible. Tables that are free at that time are outlined and can be tapped; tables already taken for that turn are faded. The guest taps a table, or **Any Table** to let the restaurant choose, and then fills in their details. Walls and decor are not drawn: the plan is a sketch, enough to tell the window from the kitchen door.

What is held

The table is held for the guest from the moment they tap it, for as long as the ordinary booking hold (see How times are offered). It is that table and nothing else: no substitute is chosen behind the guest's back. If somebody took it between the time being shown and the tap, the page says the table was just taken and shows the times again. **Any Table** holds the table the system would pick on its own, as it does when the switch is off.

Which tables are offered

- Tables of the online dining room with **Available For Reservations** on and **Min / Max Guests** that fit the party (see Table properties explained).
- Only single tables. Parties that fit nowhere on their own are seated by pushing tables together, which the system still does; for them the page shows no plan and behaves as before.
- A time that is already full under the shift's pacing offers no tables, whatever is free on the floor.

On the host stand

The booking arrives with its table already assigned, shown in the day book and on the reservation floor plan exactly like a table the host assigned by hand, and the host can still move it (see Floor plan and assigning tables). Nothing changes on the day: **Seat** opens the order

on that table.

> Guests pick by name, so name the tables the way the room reads to them — “Window 2” or “Patio 5” says more than “T12”. Section names appear when the guest holds a finger on a table.

Putting the booking link on Google

Tables, Seating & Service Pace › Reservations

View online ↗

Add a Reserve a table link to the restaurant’s Google Business Profile in five minutes.

Google lets a restaurant add its own *Reserve a table* link to its Business Profile, so guests searching on Google or Maps can book straight into the POS. No partner programme, no commission per cover, and it takes about five minutes.

Before you start

You need two things: the store’s booking page link, and access to the Business Profile.

- The booking link is in **Back Office › Store Setup › Reservations**, Settings tab, under **Guest Links**. If that panel says no public web address is set, that has to be fixed first — see Online booking and reminders.
- The Business Profile must be owned by someone at the restaurant. If nobody has claimed it yet, claim it at business.google.com first; Google verifies ownership by postcard, phone or video, which can take a few days.

Adding the link

1. Sign in at **business.google.com** with the account that owns the listing.
2. **Edit profile › Business category**: the primary category must be a restaurant type — “Bar & grill”, “Seafood restaurant” — not something generic like “Business” or “Venue”. Google hides the reservation feature from non-restaurant categories.
3. **Edit profile › Bookings** (on some profiles it is under *Links* or *Reservations URL*) › **Add link**, paste the booking page link, **Save**. If Google offers a star to mark a preferred link, star it.
4. Allow up to two days. Then search for the restaurant on Google Maps in a private browser window and confirm the link shows.

What guests get

The link opens the store’s own booking page, so every rule set in the POS applies unchanged — deposits, no-show terms, confirmations, reminders, the online waitlist. The restaurant pays nothing per booking.

> This is a link on the profile, not the blue one-tap “Reserve a table” button some listings show. That button only appears through a reservation provider Google has approved as a booking partner. Should that become available later, it is switched on centrally; nothing the restaurant set up here has to change.

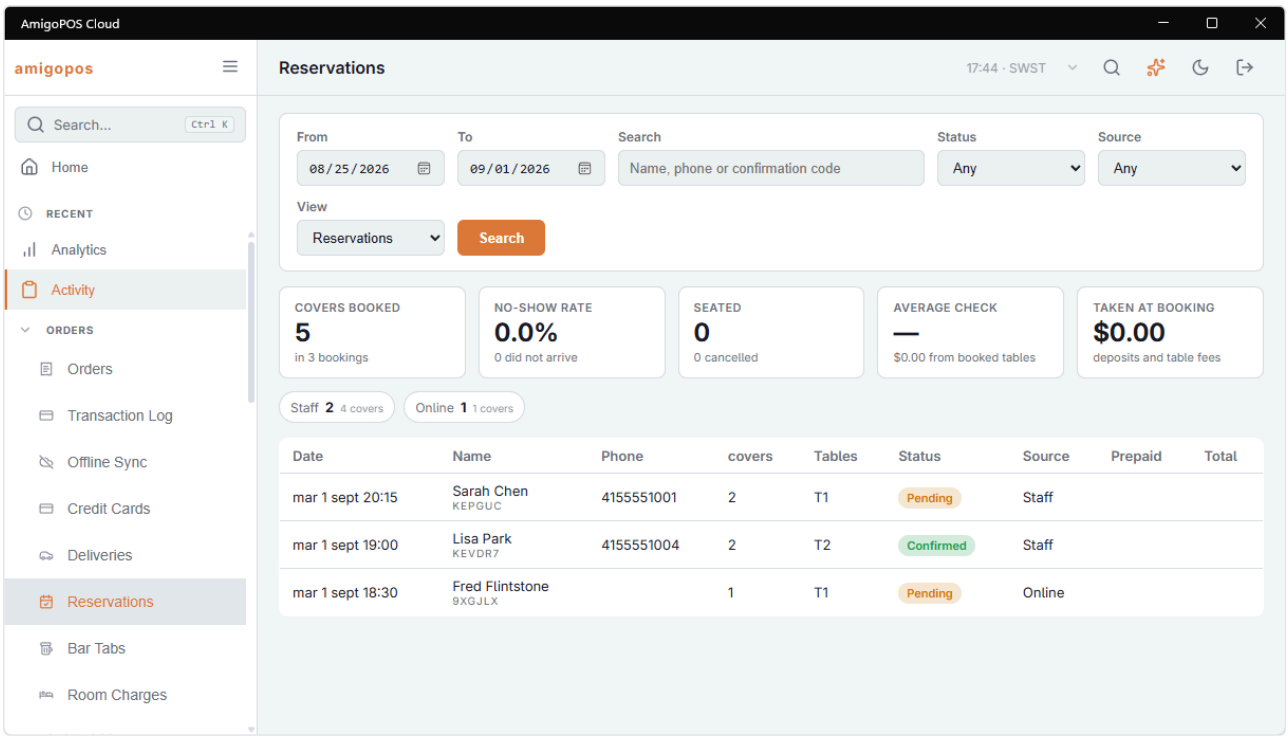
Reservation reports

Tables, Seating & Service Pace › Reservations

View online ↗

Finding a booking across days, and the numbers that say what the book is worth.

Back Office › Activity › Orders › Reservations is the log of the reservation book: what the book did over a period, and where a particular booking went. It shows the bookings, or the waitlist, for a range of days, with the numbers for that range at the top and the list underneath.



The filters

- **From** and **To** — the days to cover, by the reservation date. The page opens on the last 7 days up to today.
- **Search** — one box for a name, a phone number, an email or a confirmation code. A manager holding one of those should not have to say which it is. Press Enter or the **Search** button to run it.
- **Status** — **Any**, or one of **Pending**, **Confirmed**, **Seated**, **Finished**, **Cancelled** and **No Show**. The **Reservations** view also offers **Expired**, and the **Waitlist** view offers **Waiting**. Switching the view clears a status the new view does not offer.
- **Source** — **Any**, or one of **Staff**, **Online**, **Partner**, **Walk-In** and **Call Center**.
- **View** — **Reservations** for the bookings, or **Waitlist** for the parties that joined the queue. Each has its own numbers, because a walk-in who waited is not a booking that failed.

Changing a date, the status, the source or the view reloads the page at once.

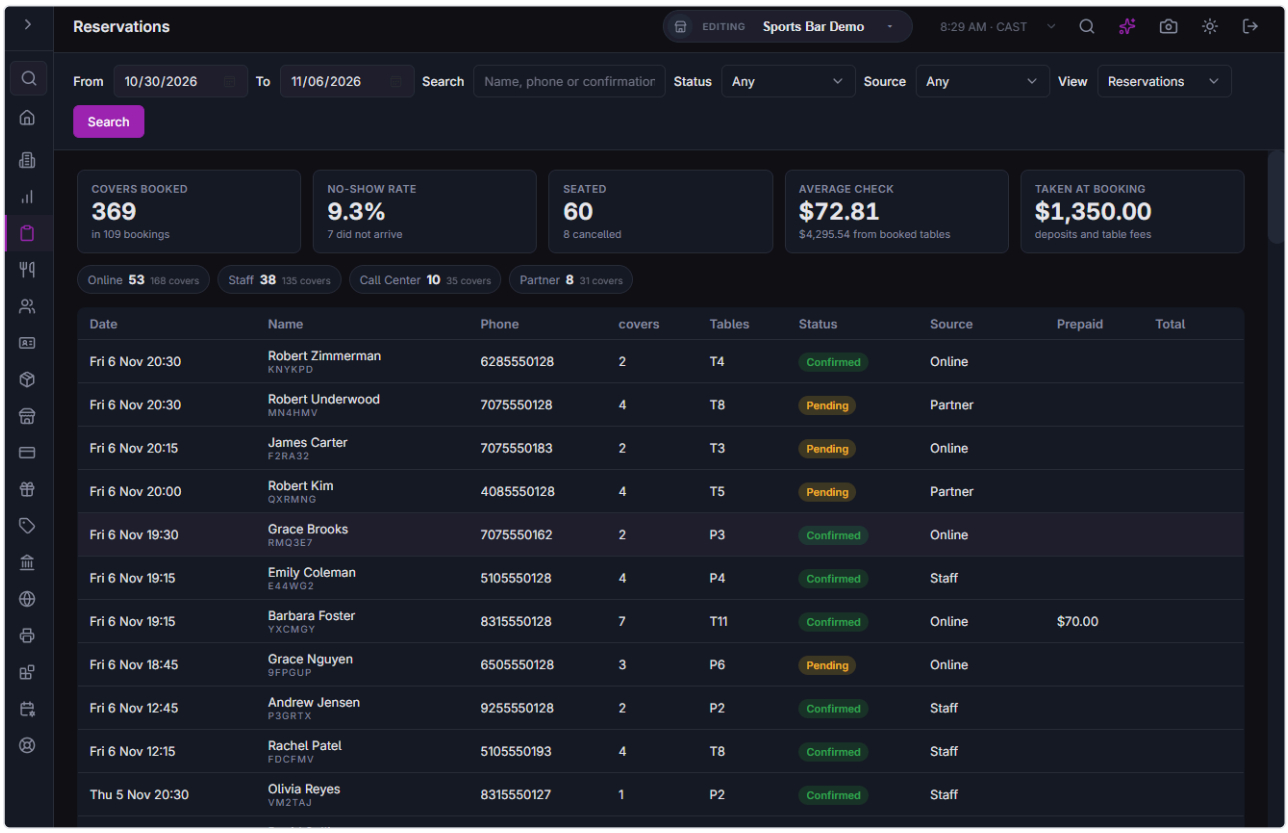
> The numbers follow the dates only. The search, the status and the source filter the list underneath but leave the totals alone — a no-show rate for bookings matching one surname is not a figure anybody wants, and it would read as the real one.

The numbers for bookings

- **Covers Booked** — the guests across the period, and in how many bookings. The waitlist is left out.
- **No-Show Rate** — no-shows out of the bookings that have reached an outcome: seated, finished, cancelled or no show. Pending and confirmed bookings are left out, so tomorrow's diary does not flatter today. The figure turns red at 10% or more.
- **Seated** — seated and finished bookings, with the number cancelled underneath.
- **Average Check** — the average order total of the seated bookings that have an order, and underneath what those tables took in total. Voided orders are left out. Shown as a dash rather than zero when nothing was seated, because an average of no checks is unknown, not zero.
- **Taken At Booking** — deposits and table fees collected.

Underneath, the mix by source: each source with its number of bookings and covers. That is the number that says whether the online page is earning its keep.

The numbers for the waitlist



- **Covers Waiting** — the guests who joined the waitlist, and in how many parties.
- **Walk-Out Rate** — the parties that gave up waiting, out of those that were either seated or gave up. It turns red at 15% or more.
- **Seated** — the parties seated from the waitlist.
- **Average Wait** — from joining the list to being seated, with the average quoted wait underneath.
- **Longest Wait** — the longest of those waits.

When parties wait more than five minutes longer than they are quoted on average, a banner says so: **Quotes are running short**, with both figures.

The list

Column	What it shows
Date	The day and time of the reservation, or when the party joined the waitlist.
Name	The guest's name, with the confirmation code underneath.
Phone	The guest's phone number.
covers	The party size.
Tables or **Tell Them (minutes)**	The table assigned to a booking; in the waitlist view, the wait the party was quoted.
Status	Where the booking ended up, such as **Finished**, **No Show** or **Expired**; **Waiting** for a party still on the waitlist.
Source	Staff, Online, Partner, Walk-In or Call Center.
Prepaid	What the booking paid in advance.
Total	The total of the table's order, when the booking has one that was not voided.

The newest bookings come first. The list stops at 500 rows; when it does, a line says **Showing the first 500. Narrow the dates or the search to see the rest.**

The list shows what each booking prepaid next to what the table actually spent. Those two columns together answer whether taking deposits is worth the friction.

This page is deliberately read-only. Changing a booking belongs at the host stand, where the person doing it can see the floor.

Related: The day book and seating a party, The waitlist, Deposits, table fees and extras, Reservation Analytics: no-shows, cancellations and deposits.

CHAPTER 5

Payments & Settling

Taking payment

The settle screen explained

View online ↗

What every panel on the settle screen is for, including split-evenly and closing a zero-balance order.

The settle screen is one screen with three parts: what is owed on the left, how you are taking it on the right, and what has already been taken underneath.

The order panel

Order number, order type, server and when it started, plus the money: subtotal, gratuity, discounts, surcharge, delivery, tax, total, received so far, and the **balance due**. Balance due is the number that matters — everything you do here reduces it to zero.

Taking payment

Choose a payment method to move to the amount step. Methods are configured per store, so a store takes cash, cards, gift cards, house accounts, vouchers and whatever else it has set up. Once a payment completes you can take **another payment** against the remaining balance, print a receipt, or finish.

Split evenly

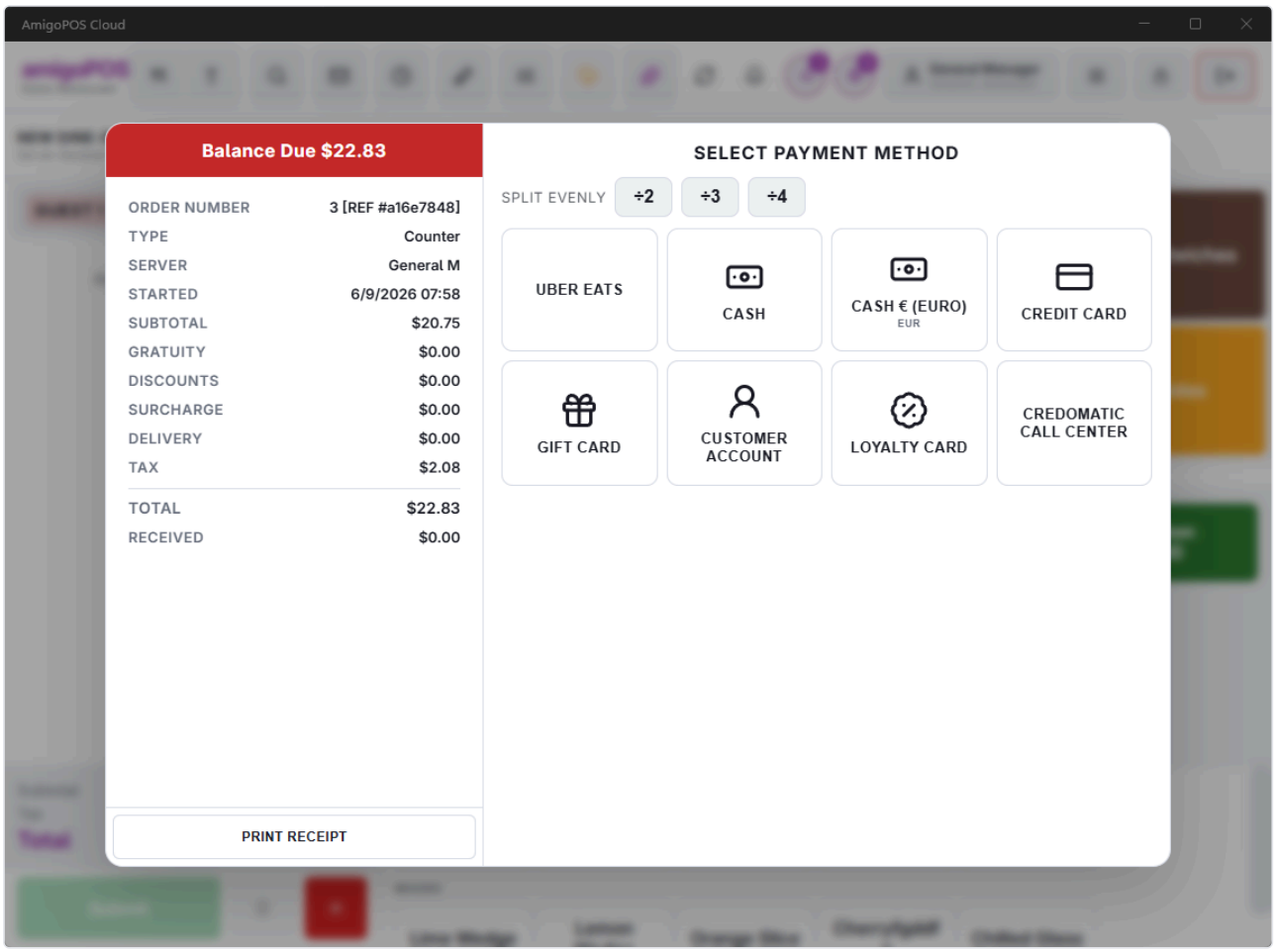
The **÷2 / ÷3 / ÷4** buttons split the balance into equal shares and walk you through them one at a time. Each share can be paid by a different method. The last share always pays the exact remaining balance, so the pennies from an odd split never go missing. The ✕ clears the split.

Transactions

Transactions lists what has been taken on this order and lets you remove a payment that was entered wrongly, before the order is finished.

An order that already owes nothing

An order comped or discounted to zero has nothing to tender, so the settle screen offers **Close order** instead of payment methods. That closes it cleanly with no payment recorded, which is what keeps it out of your cash figures.



Cash payments and change due

Payments & Settling › Taking payment

View online ↗

The keypad, the denomination shortcuts, exact change and next dollar, and giving change in another currency.

Choose the cash method and enter what the guest handed over. The screen shows amount tendered and **change due** as you go.

Faster than typing

- **Denomination buttons** — the store's **Currency Presets** (Store Setup › Settle Screen), 1, 5, 10, 20, 50 and 100 unless set otherwise. Tap 20 twice for two twenties. As soon as the tendered amount covers the balance, the payment goes through.
- **Exact change** — tenders the balance exactly, no change.
- **Next dollar** — rounds up to the next whole unit, which is the common case for a note handed over for a cash total.
- The **keypad** for anything else. Entering a digit replaces the prefilled amount rather than adding to it, so you never have to clear first.

Change due

Change due is shown large after the payment. If the guest hands over exactly the balance, the screen says there is no change rather than showing zero — a small thing that stops a busy cashier opening the drawer out of habit.

Change in another currency

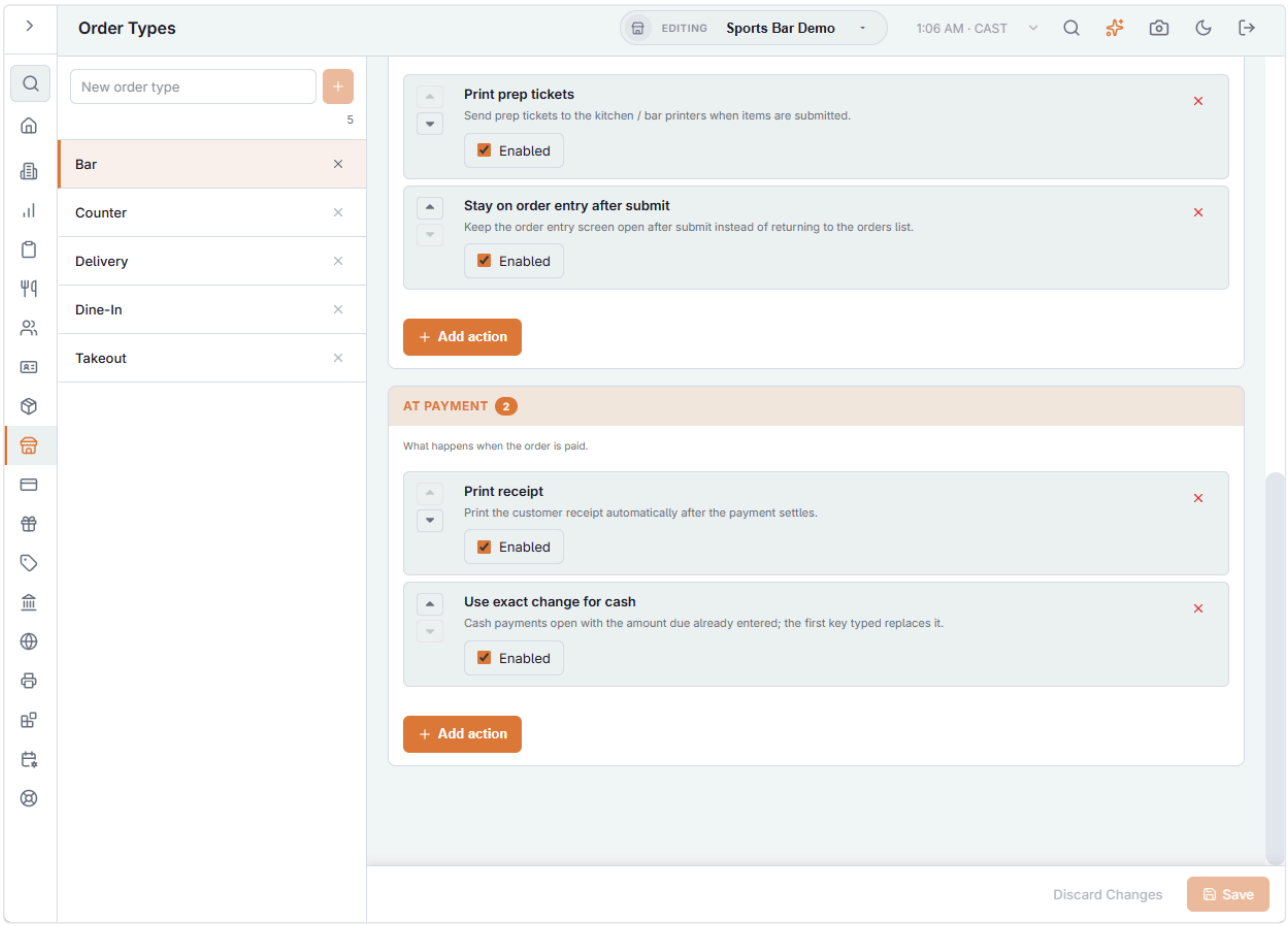
Stores that accept more than one currency get a **Pay change in** row: choose the currency and the amount converts at the configured rate. Take euros, give change in dollars, in one step. The rate used is the one set for that currency, and it is shown while you tender.

> Foreign currency is set up per payment method — see **Payments & Settling › Payment setup › Accepting Foreign Currency** for the rates, rounding and how it reports.

> Opening the drawer without a sale is a separate, logged action — see **Cash Management › No-sale / opening the drawer**.

Amount due already entered

On order types with the **Use exact change for cash** workflow step (typical for counters), choosing Cash opens the amount box with the amount due already in it. Press the tender button to take exact cash, or just start typing — the first key replaces the amount.



Card payments through the terminal

Payments & Settling › Taking payment

View online ↗

What happens between tapping the card method and the approval, including the tip prompt and split shares.

Choose the card method. The POS sends the amount to the terminal and waits — the guest presents the card there, not on the POS.

The sequence

1. If a customer display is open and the method takes tips, the guest is asked for a tip first. The POS shows that it is waiting; **Skip tip** moves on if the guest waves it away.
2. The charge goes to the terminal — the full balance, or the current share if you are splitting evenly.
3. Approval returns to the POS, the balance drops, and the transaction joins the list on the settle screen.

When it does not approve

A decline or a timeout leaves the balance untouched — nothing is recorded, so you can try the same card again, try another, or switch to cash without unwinding anything. Cancel the attempt from the POS before starting a different one.

> A terminal that never responds at all is a hardware problem rather than a payment one — see **Troubleshooting › The card terminal is not responding**.

Pre-authorisations

A card held against a bar tab is authorised, not charged. The money only moves when the tab is settled and the authorisation is captured. An uncaptured pre-authorisation blocks end of day for exactly this reason.

With DC Direct terminals

With Datacap DC Direct, the POS may first ask which terminal to use, and the terminal can ask for a tip, a signature and whether the guest wants a receipt. If a payment is interrupted, reopening it picks up the same payment instead of charging again. See **Taking a card payment** in Integrations › DC Direct.

Manual credit card entry

Payments & Settling › Taking payment

View online ↗

Keying a card in when it cannot be read or the guest is not there, and why it is a separate method.

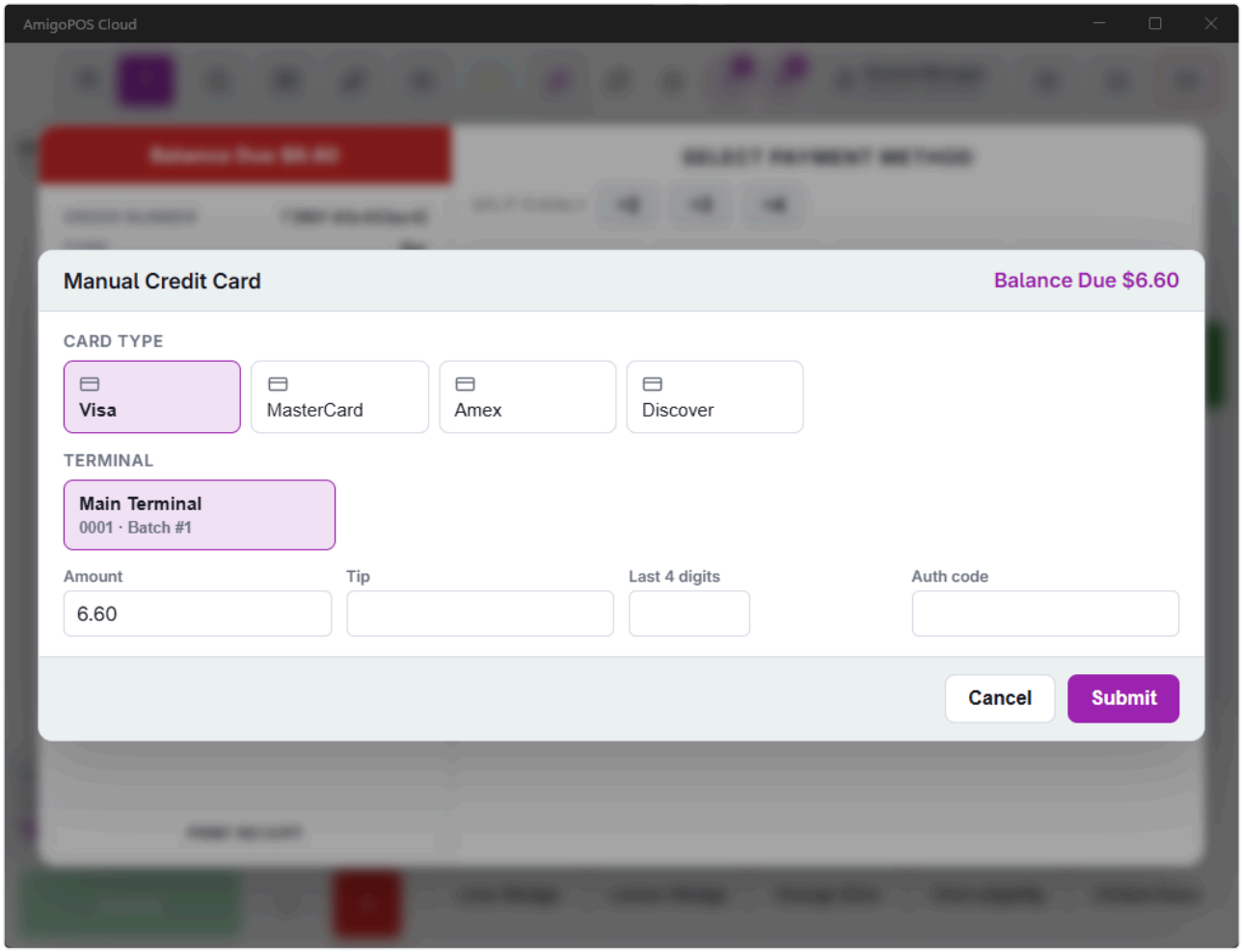
Manual entry is for the card that will not read and the card that is not in the room — a phone order, a damaged stripe, a chip the terminal keeps rejecting. It is a separate payment method, so it appears in the method list only if your store has configured one.

Taking one

1. Choose the manual entry method on the settle screen.
2. Enter the card details in the overlay and submit.
3. The result comes back like any other card payment, and the transaction appears on the settle screen the same way.

> Keyed transactions carry more risk than a card the terminal read, and processors usually price them accordingly. Most stores restrict the method to supervisors rather than putting it on every till.

> If a card will not read but the guest is standing there, try the terminal once more before keying — a second attempt reads more often than not, and it settles at the better rate.



Splitting payment across methods

Payments & Settling › Taking payment

View online ↗

Several tenders against one balance, and the even-split shortcut that handles the rounding for you.

One balance can be paid by as many tenders as it takes. Take a payment for less than the balance and the settle screen simply asks for the next one.

Part cash, part card

1. Choose the first method and enter the amount that method is covering — not the full balance.
2. The payment completes and the balance drops by that amount.
3. Choose **Additional payment** and take the rest however the guest wants.

Splitting evenly between people

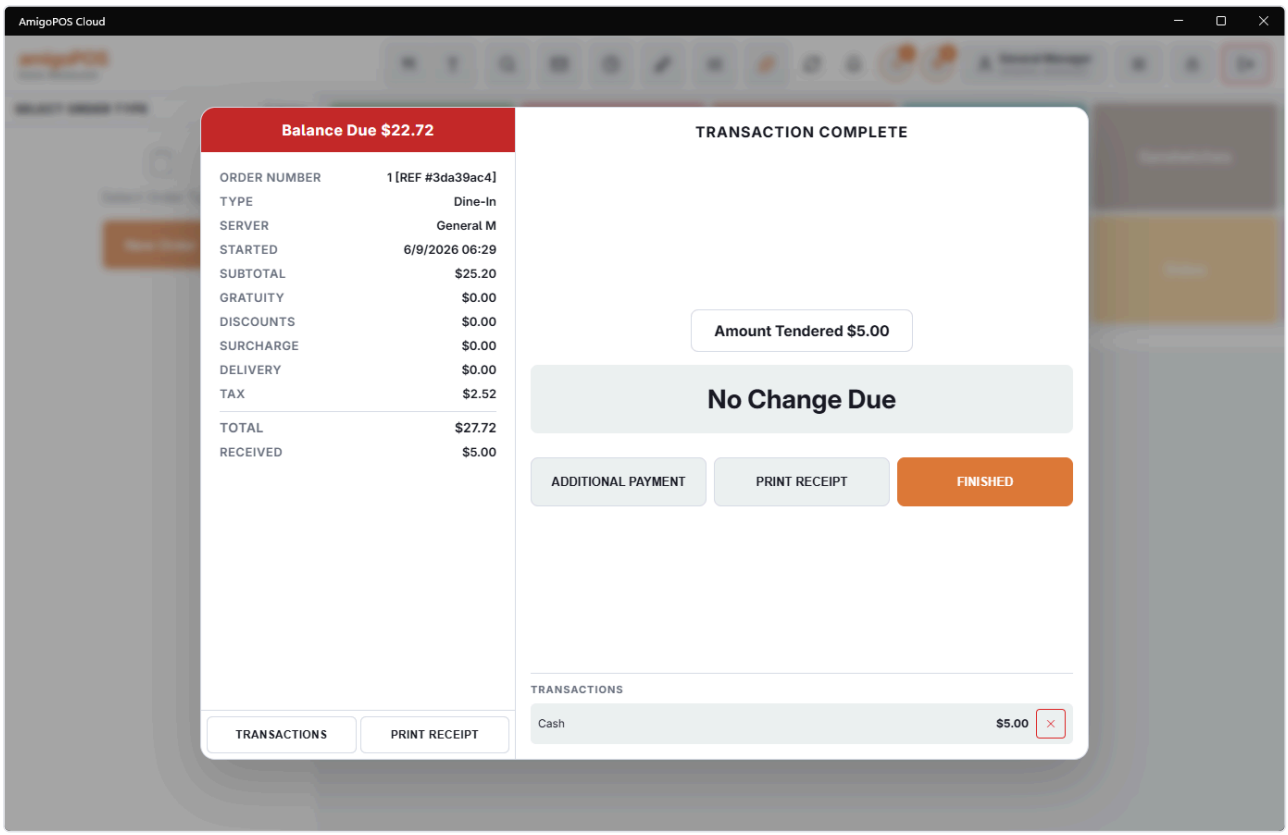
Use **÷2 / ÷3 / ÷4** on the settle screen. Each share is presented in turn and can be paid by a different method, so three people paying by three cards is three taps and three presentations.

The last share is always the exact remaining balance rather than the calculated share. That is deliberate: a bill that does not divide into round numbers would otherwise leave a penny behind, and the last person absorbs it instead.

Fixing a mistake

Open **Transactions** and remove the payment that was entered wrongly, then take it again. Do this before finishing the order.

> Splitting the *payment* and splitting the *check* are different things. This screen splits one check between tenders; to give each guest their own printed check, use **Splitting and combining checks**.



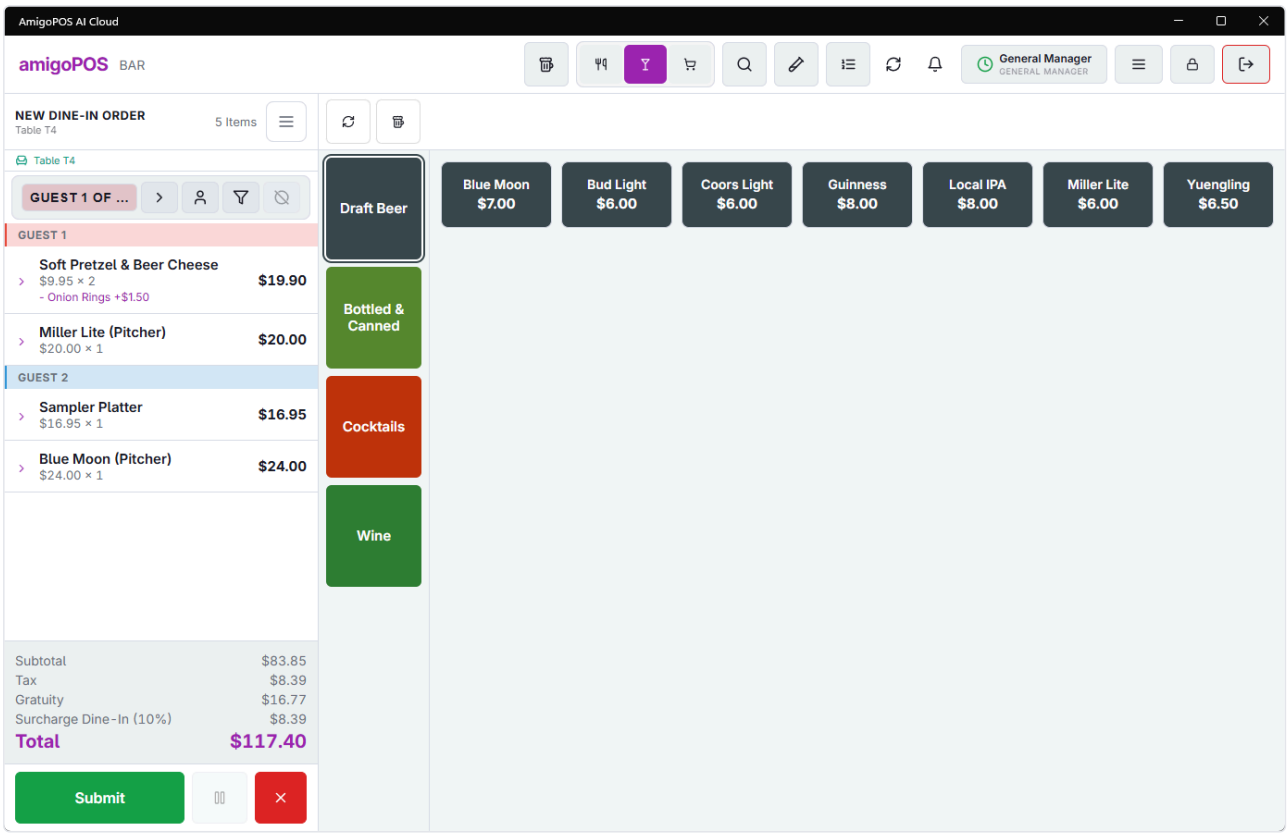
Surcharges and tax on the settle screen

Payments & Settling › Taking payment

View online ↗

How the tax and surcharge lines are computed and displayed.

The settle screen shows the money story between subtotal and total — this is what each line is and where it comes from.



The lines

- **Subtotal** — items and modifiers, after item-level discounts and comps.
- **Discounts** — order-level discounts, shown as their own reduction.
- **Surcharge** — the order type's fixed or percentage surcharge, when configured (*Order types and workflow*).
- **Cover charge / gratuity** — per-guest covers and mandatory gratuity, when the type and party trigger them.
- **Tax** — computed per item at its assigned rate; take-out exemptions and non-taxable order types apply here automatically. In VAT-inclusive stores the tax line shows the extracted portion of prices that already contain it.

When a guest questions a line

Every line traces to configuration: surcharge and gratuity to the order type, covers to the cover-charge windows, tax to the item's rate. The receipt prints the same lines — the answer to "what's this charge?" is always one of those pages, not a mystery.

Printing a receipt

Payments & Settling › Taking payment

View online ↗

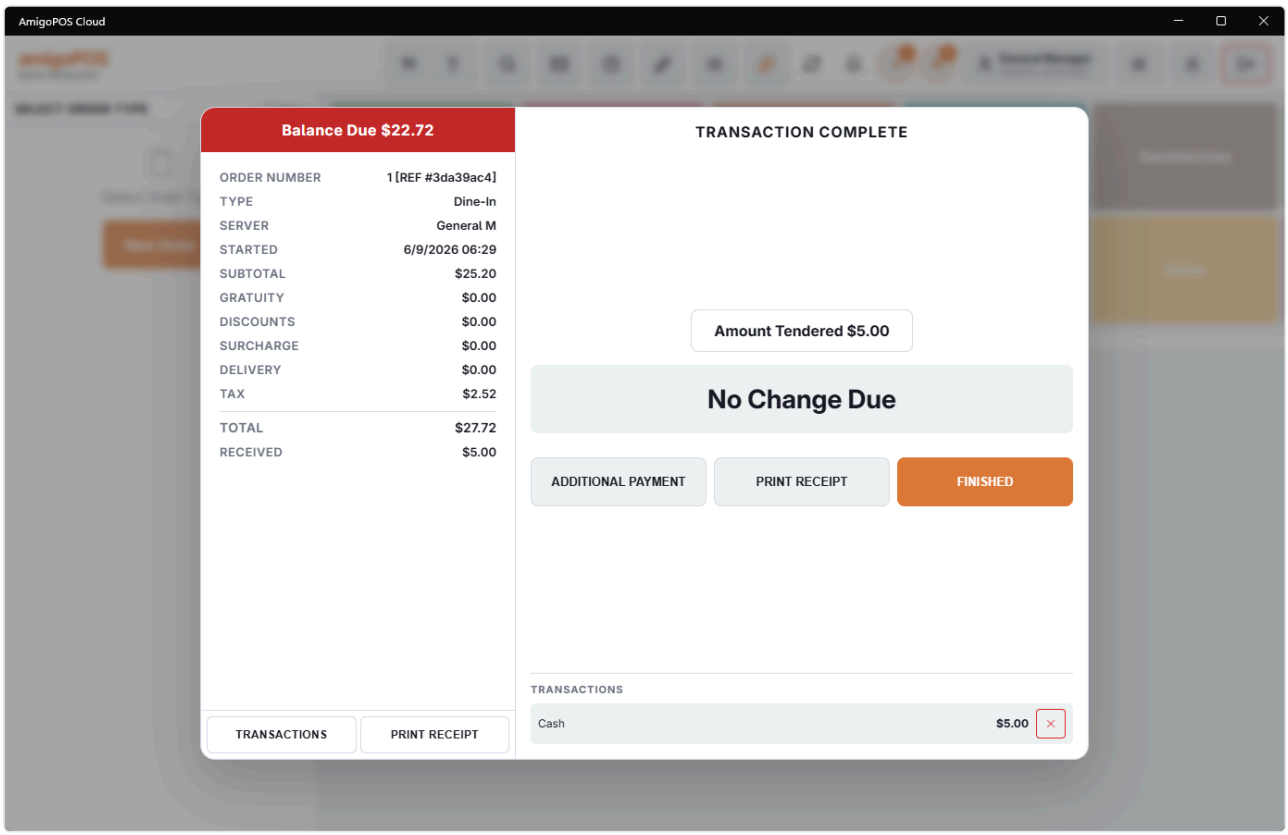
Printing before, during and after payment, and reprinting one later.

Print receipt is available on the settle screen throughout — before you take anything, between tenders, and on the result once payment completes.

- **Before payment** — prints what is owed, for the guest who wants to see the bill before deciding how to pay.
- **After payment** — prints the settled receipt with the tenders on it.
- **Later** — reprint from the orders list; see **Refunds and corrections › Reprinting a receipt**.

Receipts go to the receipt printer bound to the station you are on. What appears on them — logo, header, footer, the tip line, gratuity suggestions — comes from the receipt template, not from this screen.

> If nothing prints, the printer is the first suspect rather than the order. See **Troubleshooting › Nothing printed, or it printed in the wrong place**.



Emailing a receipt

To send the guest check by email instead, select the order in the orders list and tap **Email Receipt** — see The orders list: recalling and managing orders.

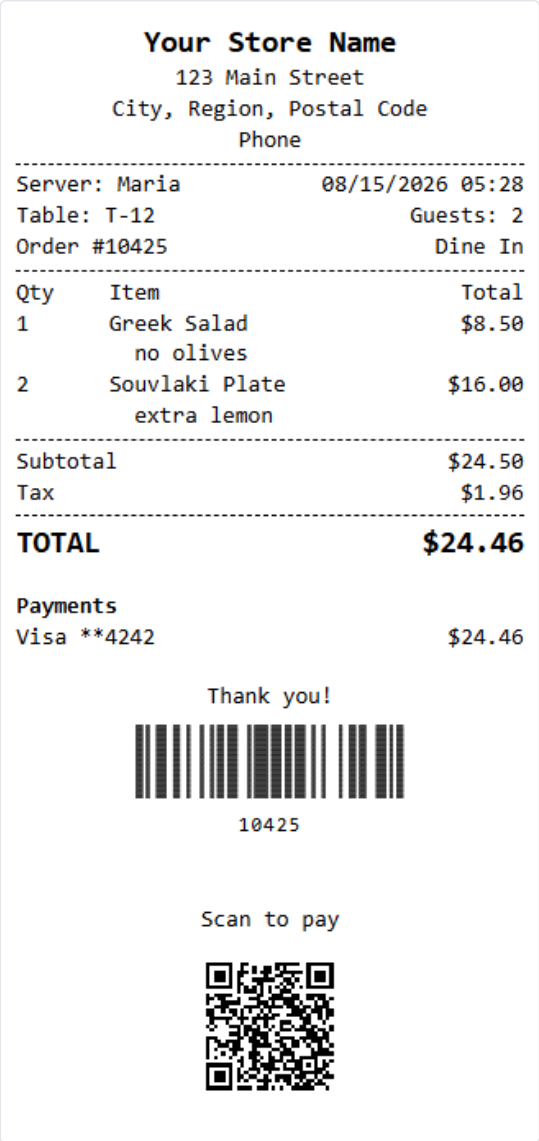
QR pay at table

Payments & Settling › Taking payment

View online ↗

Let dine-in guests scan a receipt QR code, tip, and pay through Stripe — setup through settlement.

QR pay-at-table lets a dine-in guest settle their own check: the printed receipt carries a QR code, the guest scans it with their phone, reviews the check, adds a tip, and pays on a secure Stripe checkout page. The payment lands on the ticket automatically — no card ever changes hands and the server never returns to the table with a terminal.



One-time setup

1. Stripe account and API keys

In Back Office, open **Integrations › Stripe**.

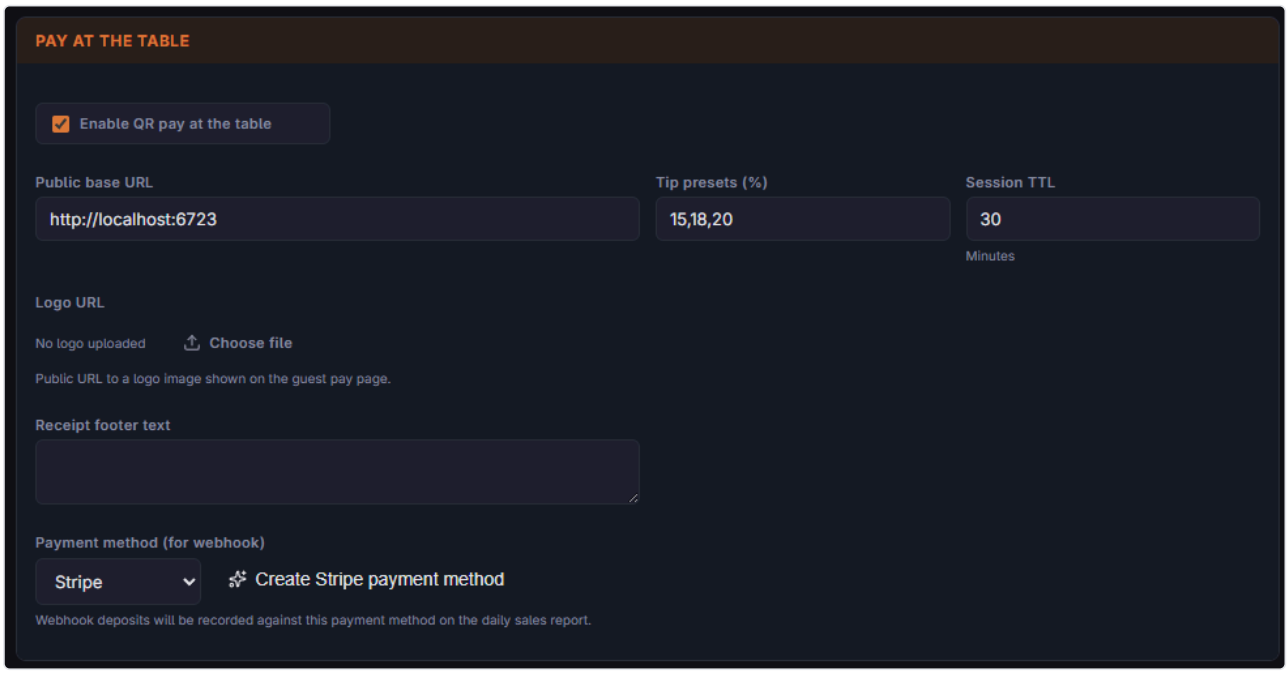
- **Enabled** — master switch for the Stripe integration.
- **Mode** — Test or Live. Each mode keeps its own set of keys, so you can trial the flow with Stripe test cards and flip to Live without re-entering anything.
- **Publishable key / Secret key** — copy these from the Stripe Dashboard under *Developers → API keys*.
- **Webhook signing secret** — created in the next step.
- **Connect account** — optional; only fill this if your payments run through a Stripe Connect platform account.

2. Register the webhook

Stripe confirms payments by calling your cloud endpoint. In the Stripe Dashboard under *Developers → Webhooks*, add an endpoint pointing to your API address followed by `/webhooks/stripe`, subscribed to at least `checkout.session.completed`, `checkout.session.expired`, and `charge.refunded`. Copy the endpoint's signing secret into the **Webhook signing secret** field for the matching mode. Every incoming event is signature-checked and logged, and each event is processed exactly once even if Stripe retries it.

> Without the webhook, guests can pay but the ticket is never marked paid. If payments show in the Stripe Dashboard and not on tickets, check the webhook first.

3. Pay-at-table options

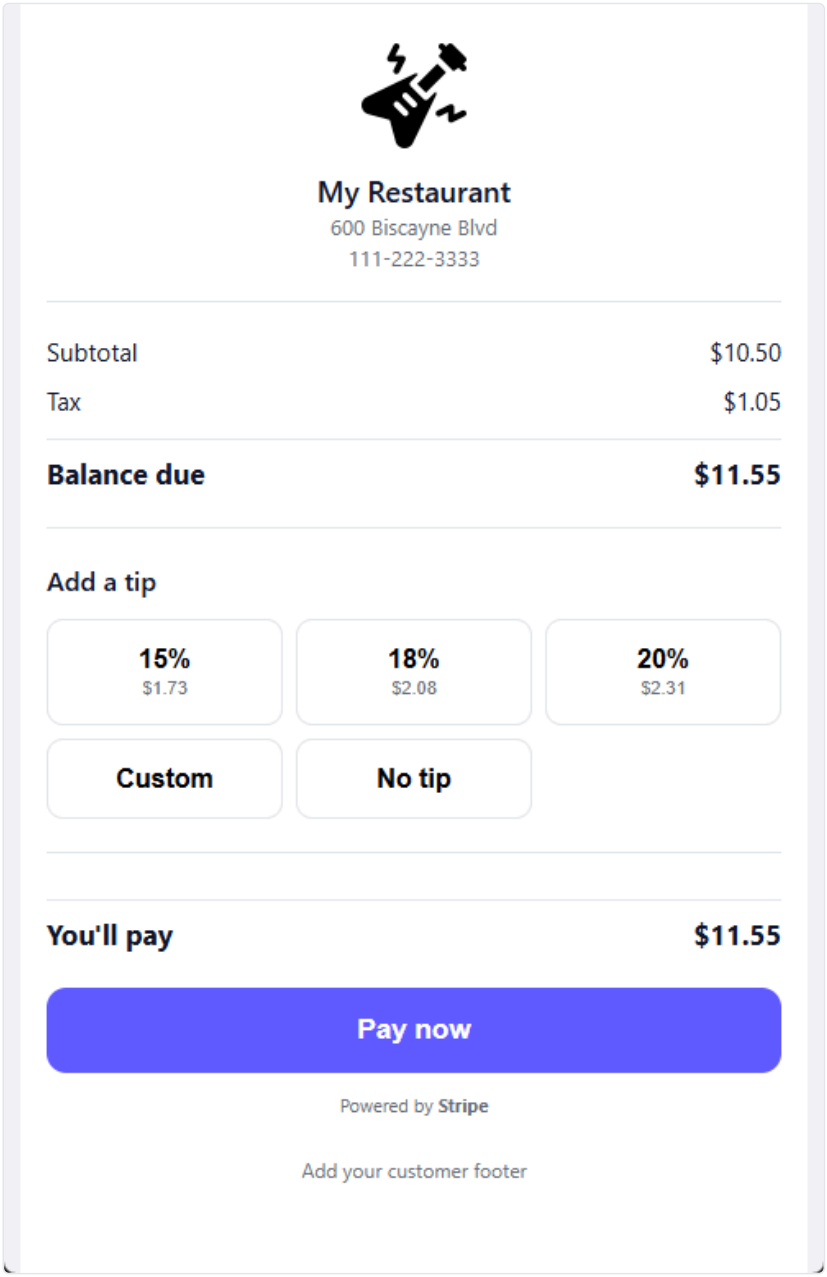


- **Pay at table enabled** — turns QR printing on receipts on or off independently of the rest of the Stripe integration.
- **Base URL** — the public address the QR code points to (your cloud API address). The receipt QR resolves to `<base>/pay/<merchant>/<store>/<order>`.
- **Tip presets** — comma-separated percentages (default 15,18,20) offered as one-tap buttons on the guest page; the guest can also enter a custom amount or skip the tip.
- **Session lifetime (minutes)** — how long a started checkout stays valid. If the guest abandons the page, the session expires and the check remains open for any other payment path.
- **Logo and footer** — optional branding shown on the guest payment page.

4. Payment method mapping

Successful payments are recorded under a dedicated **Stripe** payment method so they appear correctly in end-of-day totals and reports. This method is created and linked automatically the first time the integration is saved — no drawer is involved, since the money settles to your Stripe balance rather than a cash drawer.

What the guest sees



1. The server prints the customer receipt as usual; the QR is added automatically to every receipt for an unpaid check while pay-at-table is enabled.
2. The guest scans the code and lands on a mobile page showing the business name, itemized check, subtotal, tax, and the live **balance due** — partial payments already made at the register are reflected.
3. The guest picks a tip and taps pay. A payment session is reserved for the check and the guest is redirected to a Stripe-hosted checkout page (card, Apple Pay, Google Pay — whatever your Stripe account offers).

On a successful payment

1. Stripe calls the webhook; the signature is verified and the payment session is marked paid, storing the Stripe payment reference for reconciliation.
2. A payment transaction is written to the ticket for the paid amount, with the tip recorded as gratuity. It is attributed to the ticket's original cashier and station, with no cash drawer.

3. If the payment covers the remaining balance, the ticket is settled and closed automatically; a partial payment simply reduces the balance due.
4. The guest sees a branded success page; the payment shows on the ticket at the POS just like any other tender.

> Refunds issued from the Stripe Dashboard flow back through the webhook and flag the payment session as refunded for reconciliation; adjust the ticket at the POS as your policy requires. An expired checkout releases the reserved session without touching the check.

> To test end to end without charging a card: switch Mode to Test, scan a QR from a test check, and pay with Stripe's test card number 4242 4242 4242 4242 with any future expiry and any CVC.

Tip prompt on the customer display

View online ↗

The tip screen guests see on the customer-facing display during an integrated card payment.

When a customer-facing display is open, an integrated card payment asks the guest for a tip on that display before the card is charged.

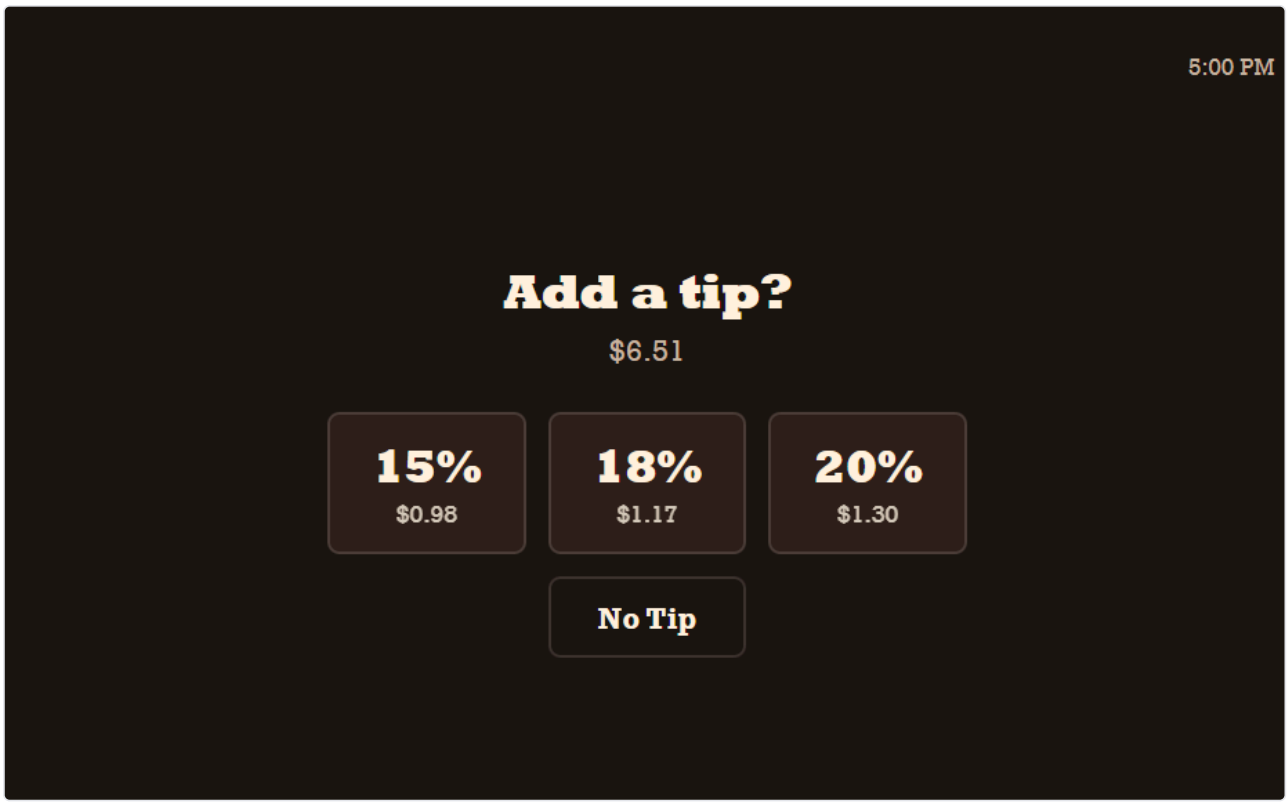
The flow

1. The cashier starts a card payment on a method that allows tips.
2. The customer display shows the amount, tip buttons at **15%**, **18%** and **20%** with the money each one works out to, and a **No tip** button. The POS shows that it is waiting for the guest.
3. The guest taps a choice. The tip is added to the charge as gratuity and the card sale runs.

If the guest walks off or waves it away, the cashier taps **Skip tip** on the POS and the sale continues with no tip.

> The prompt only appears when a customer display window is open on that station and the payment method is an integrated (cloud) card processor that allows tips. Cash, manual card entry and non-tipping methods go straight through.

Tips taken this way land on the payment as gratuity and show up in tip reports the same as a tip written on a printed slip.



Adjusting tips after settlement

Payments & Settling › Taking payment

View online ↗

Entering the tips written on card slips, before the batch closes.

Where guests write a tip on a printed card slip, the amount has to be entered afterwards. The tip adjust screen lists every card transaction from the current business day that can still take one.

Entering them

1. Open tip adjust from the manager section of **More**.
2. Each row shows the order, the server, the payment method and the amount charged. Type the tip against the row.
3. Save the row, or work down the list and **save all** at the end. A running tip total is shown as you go.

Saving needs the **Adjust Credit Card Tip** permission. Without it, a manager approves — once for **save all**. The same permission covers **Adjust Tip**, **Tip / Capture** and **Enter Tips** on **More › Credit Cards**.

> Do this before the card batch closes. Once the batch settles with the processor, the charge is fixed and a tip added afterwards has to be handled as a separate transaction.

> The list covers the current business day, which is why a late bar still sees last night's slips at 2am rather than an empty screen.

> Tips taken on the customer display are already on the charge and need no adjustment — they never appear here.

DC Direct card payments

A tip entered here on a DC Direct card payment is also adjusted at Datacap, together with the payment. Enter it before the day's card batch settles; after that the payment can only be refunded. See **Voids, refunds and tip adjustments** in Integrations › DC Direct.

DC Direct in pre-auth mode

When the store's DC Direct method authorizes cards instead of charging them (Card Payment Type **Pre-Auth**), the first tip entered here on a payment captures the authorization for the check plus the tip. To capture one with no tip, use **Tip / Capture** or **Enter Tips** on **More ›**

Credit Cards. See **Table service: authorize, then capture with the tip** in Integrations › DC Direct.

Splitting and combining checks

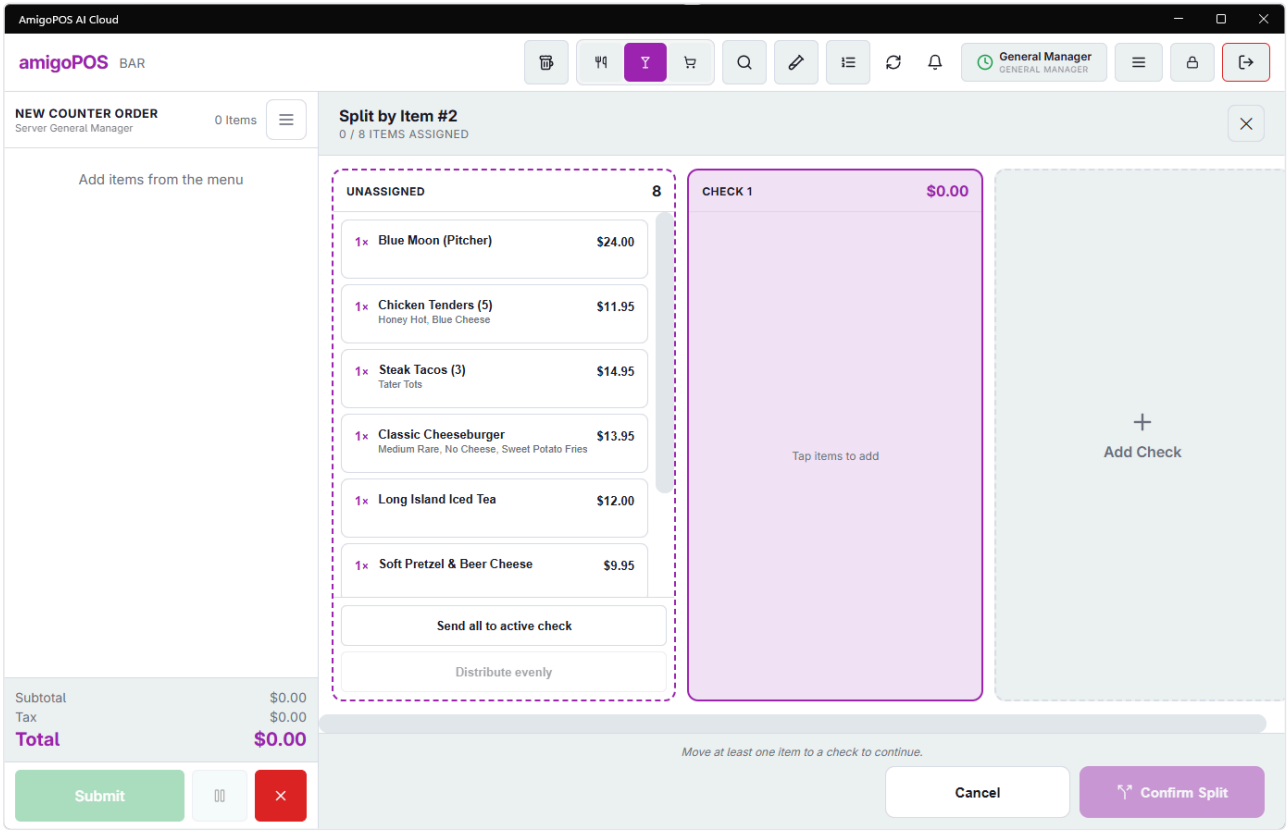
Split by item

Payments & Settling › Splitting and combining checks

View online ↗

Move individual items onto separate checks.

Split by item divides a check by picking which lines go to which new check — the tool for tables where seat assignment didn't happen or the desired split doesn't follow seats.



The flow

1. Select the order, tap **Split**, choose by item.
2. Move lines between checks — tap items into the target check; create as many checks as needed. Quantities can divide (two of the four beers to each side).
3. Confirm. Each check settles on its own.

Where it shines

- "We'll take the wine, they'll take the food" — splits that ignore seating entirely.
- Fixing an unassigned table at settle time — slower than split-by-guest, but it gets there.
- Separating a business portion from a personal one on the same visit.

> Shared items are the judgment calls: split the quantity where it divides cleanly, or park the shared plate on one check and let the table sort the difference — the register handles either, the ambiguity is the table's.

Kitchen tickets

Splitting does not re-fire anything. Lines that already went to the kitchen carry their sent stamp onto the new checks, so the cooks see nothing new — only items added after the split print, as they would on any order.

Not while timers are running

An order with a **running or paused** timer (pool table, lane, rental) cannot be split or combined. The POS says *Order #12 Has A Running Or Paused Timer. Open The Order, Stop The Timers (Not Pause), Then Try Again.*

Recall the order, stop each timer, then split or combine: the stopped time lines split like any other item. See Settling, splitting and combining timed checks.

Permission

Splitting needs the **Split Order** permission on the job. Without it, tapping **Split** asks for a manager, who can approve on the spot; the approval is recorded. The order is checked first, so a manager is only called over for a split that can actually go ahead.

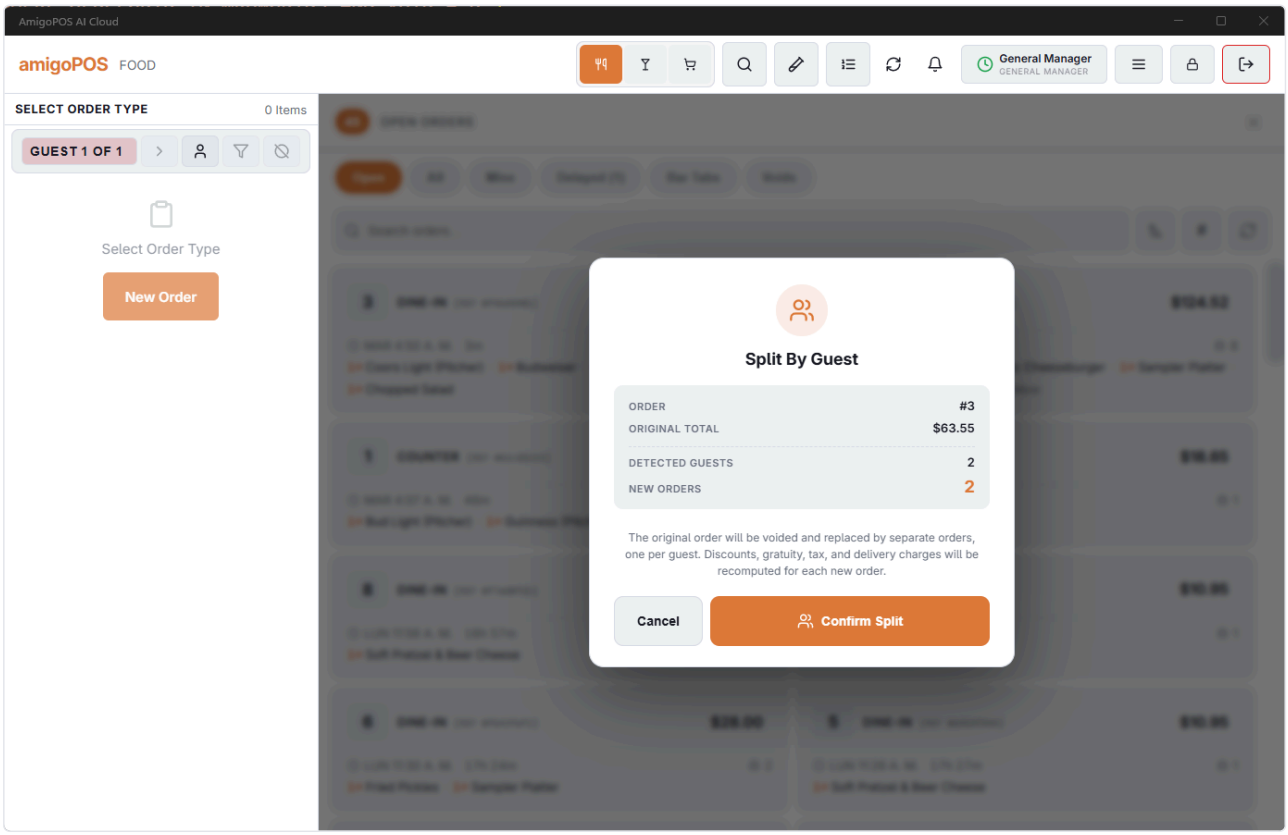
Split by guest

Payments & Settling › Splitting and combining checks

View online ↗

One tap per guest when items were seated correctly.

Split by guest turns one table's order into one check per guest — the one-tap payoff for assigning items to seats while ringing.



The flow

1. From the orders list, select the order and tap **Split**, then choose by guest.
2. Each guest's assigned items become their own check; shared or unassigned items are placed to the right check (or divided) before confirming.
3. Confirm — the checks are now separate orders, each settled independently, any payment method each.

Notes

- The split is clean because the assignment happened at ring time; a table rung without seats has nothing to split by — use *split by item* instead.
- Per-guest amounts carry their own tax and any per-guest charges (covers) correctly — no calculator at the table.
- A split can be undone (before settlement) with **Undo split** from the orders list if the table changes its mind.

> Ask “together or separate?” at greeting, not at dessert — separate checks known early means seats assigned all along and a 10-second checkout.

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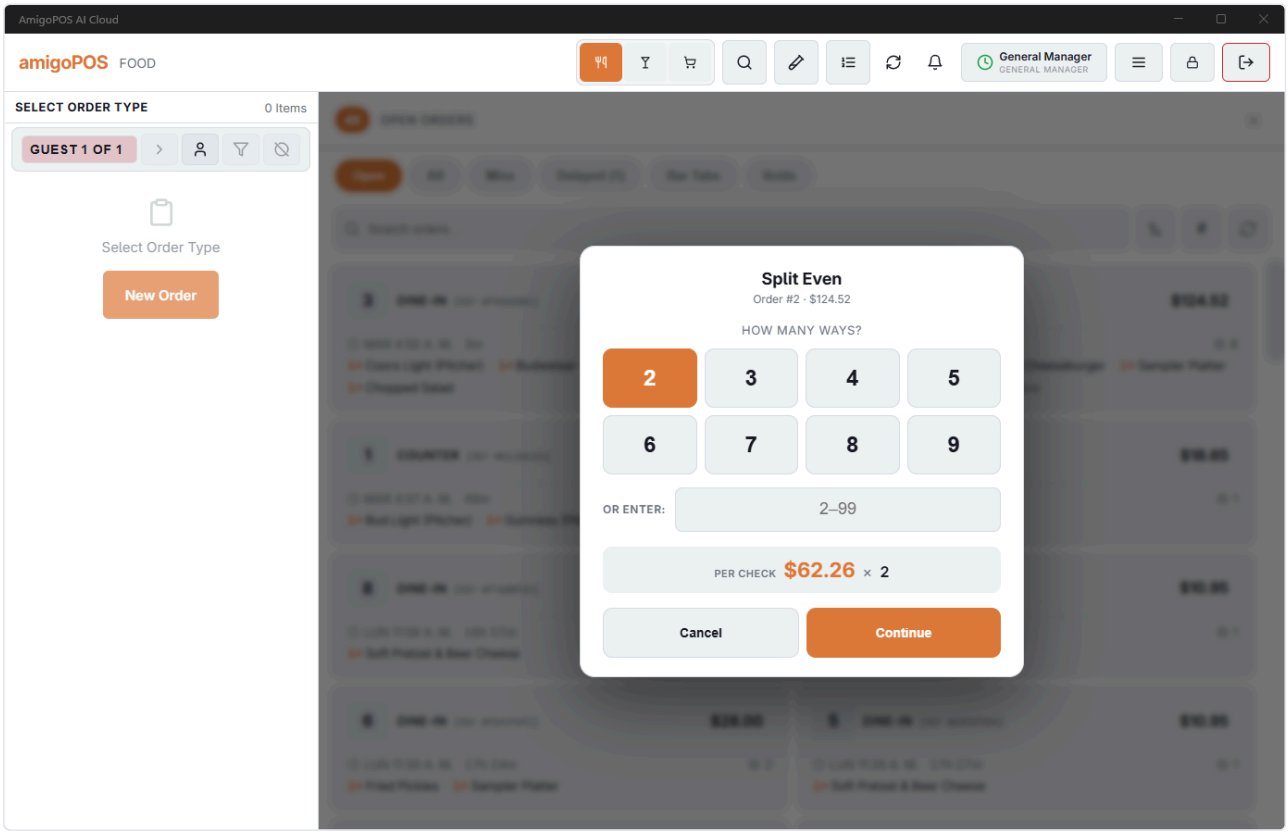
Split evenly

Payments & Settling › Splitting and combining checks

View online ↗

Divide the total N ways regardless of who ate what.

Split evenly divides the total into *n* equal payments — no item accounting, just the math, done correctly.



The flow

1. Select the order, tap **Split**, choose evenly, and set the number of ways.
2. The total — items, tax, charges — divides into equal shares, with rounding remainders placed on one share so the sum is exact to the cent.
3. Each share settles independently: three cards and one cash works fine, and each payer gets their own tip prompt on card flows.

When it's the right tool

Groups that ate communally and just want the damage divided — the most common split in the wild. It's also the fastest: no assignment, no item picking, two taps and a number.

Notes

- **Undo split** (before any share settles) restores the single check.
- Uneven appetites with even splits are a table dynamics problem, not a register one — offer *split by item* when someone objects.
- A share left unpaid keeps the order open; the orders list shows the split marker and the remaining balance.

Not while timers are running

An order with a **running or paused** timer (pool table, lane, rental) cannot be split or combined. The POS says *Order #12 Has A Running Or Paused Timer. Open The Order, Stop The Timers (Not Pause), Then Try Again.*

Recall the order, stop each timer, then split or combine: the stopped time lines split like any other item. See Settling, splitting and combining timed checks.

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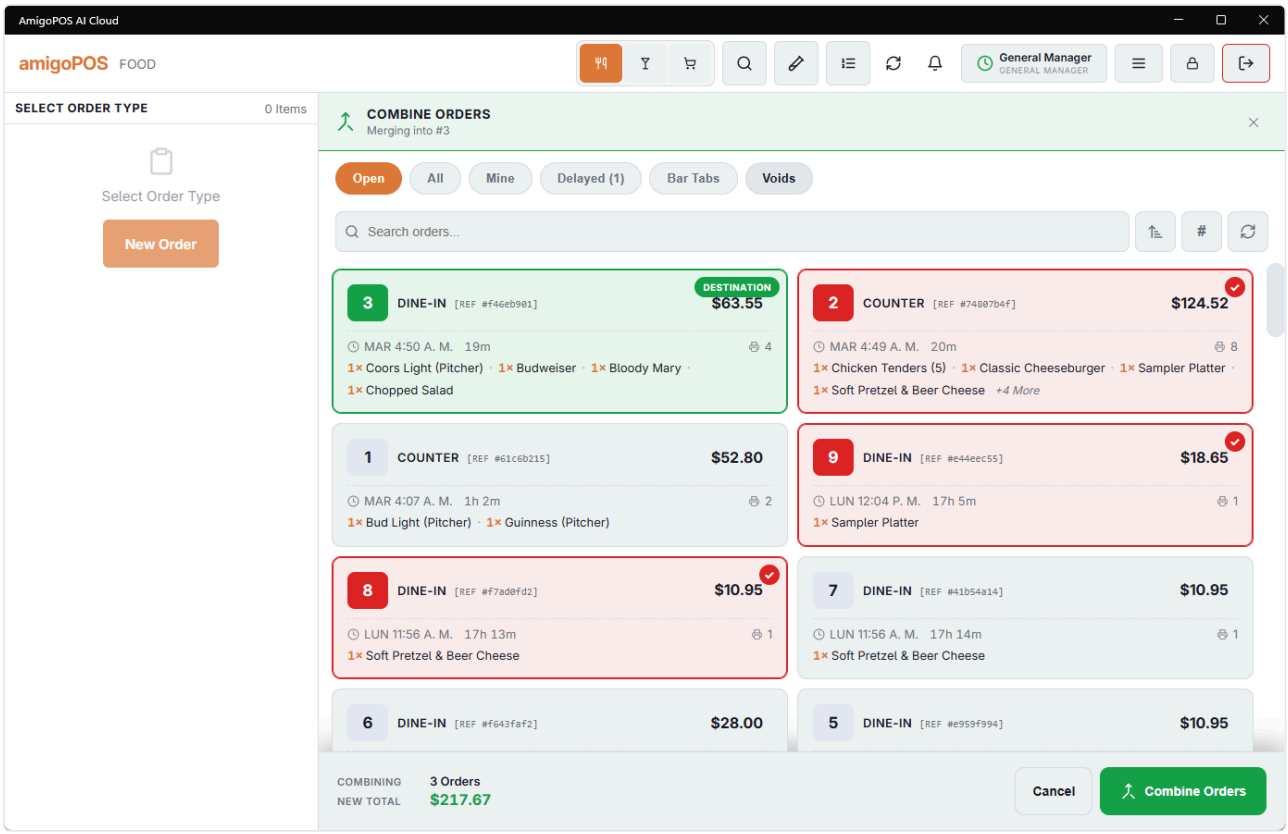
Combining orders

Payments & Settling › Splitting and combining checks

View online ↗

Merging two open checks into one, and what happens to the items and payments.

Combine merges multiple open orders into one check — two tables joining up, a bar tab folding into a dinner table, or one party accidentally rung as two orders.



The flow

1. From the orders list, select the order that will survive and tap **Combine** — it becomes the **destination** (“merging into #214” shows in the header).
2. Tap the source orders to fold in; the combine bar tracks the selection count and the **running new total** as you pick.
3. **Submit**. The sources’ items move onto the destination with their guests and modifiers; the sources close as combined.

Notes

- Everything sent stays sent — combining is bookkeeping; the kitchen sees nothing new and nothing reprints.
- The destination’s table and server win; combine *then* transfer if the merged party also changes hands (*Transferring an order*).
- Partially paid sources bring their payments along; the merged balance reflects them.
- The classic bar-to-table move — “put my tab on the table” — is exactly this: destination = the table’s order, source = the tab.

Not while timers are running

An order with a **running or paused** timer (pool table, lane, rental) cannot be split or combined. The POS says *Order #12 Has A Running Or Paused Timer. Open The Order, Stop The Timers (Not Pause), Then Try Again.*

Recall the order, stop each timer, then split or combine: the stopped time lines split like any other item. See Settling, splitting and combining timed checks.

Permission

Combining needs the **Combine Orders** permission on the job. Without it, tapping **Combine** asks for a manager, who can approve on the spot; the approval is recorded.

Orders that were split

With **Allow combine after split** off (Back Office › Store Setup › General Settings), an order that was split evenly, or made by splitting another, cannot be combined: **Combine** on it says so, and it is not offered as a source either. On, split orders combine like any other. See General settings.

Multiple checks on one table

Payments & Settling › Splitting and combining checks

View online ↗

Running separate checks on the same table from the start, instead of splitting at the end.

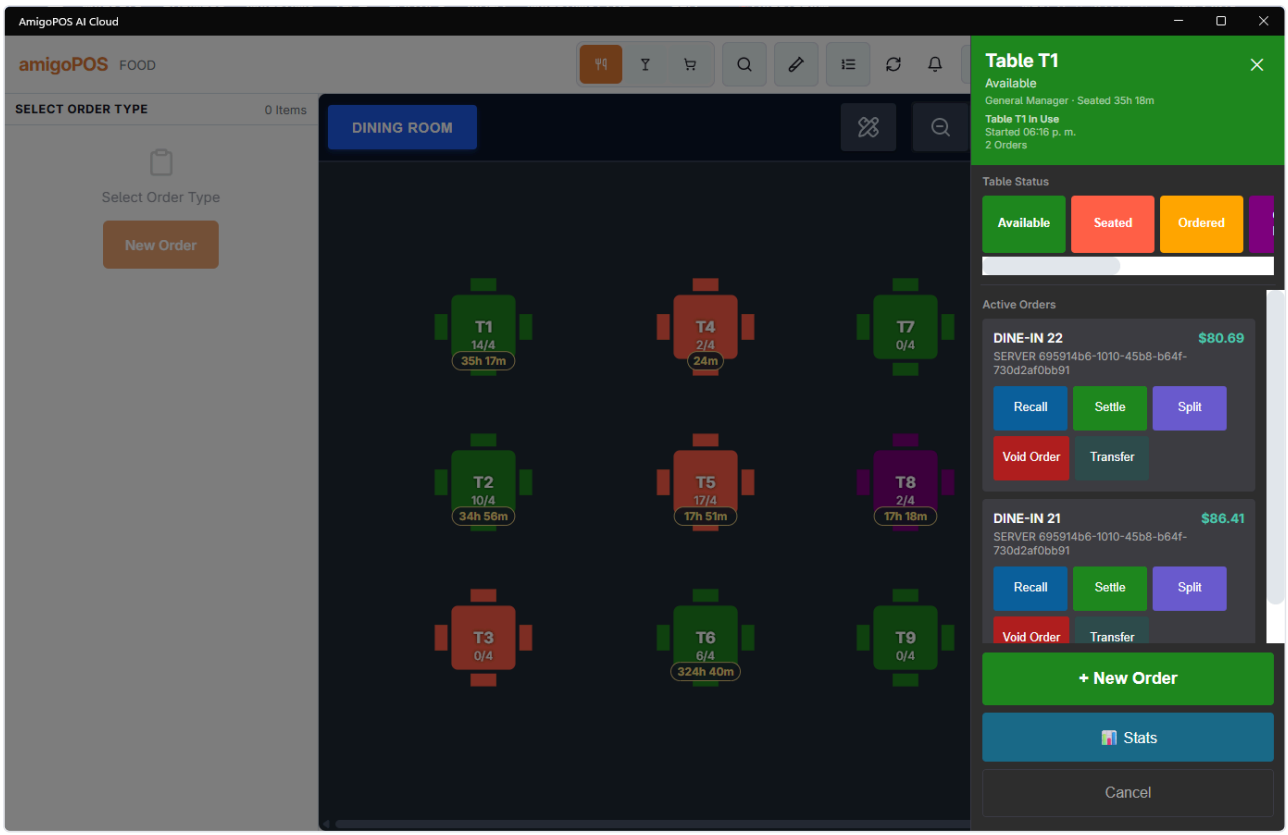
Two couples at one table, or a business lunch where one person pays for themselves — you can run more than one check on the same table rather than building one and splitting it at the end.

Start a new order on a table that already has one and it becomes a second check on that table. Both appear on the table’s action panel, each with its own items, its own total and its own settle.

Which approach to use

- **Separate checks from the start** when you know at the point of ordering. Cleaner, and each guest hears their own total when they ask.
- **One check, split at the end** when it only comes up at payment. See **Split by item**, **Split by guest** and **Split evenly**.

> Per-seat ordering is a third option: one check, items assigned to guests, split by guest in one tap at the end. It suits a table that might or might not want separate bills.



Refunds and corrections

Voids and the void reason prompt

Payments & Settling › Refunds and corrections

View online ↗

Taking something off an order the kitchen already has, and why the reason matters more than the void.

Once an item has been sent, taking it off is a void. A void asks for a **reason** and usually a manager, and both of those are the point rather than an obstacle.

Doing it

- **One line** — open the line and remove it.
- **The whole check** — void the order from the settle screen.

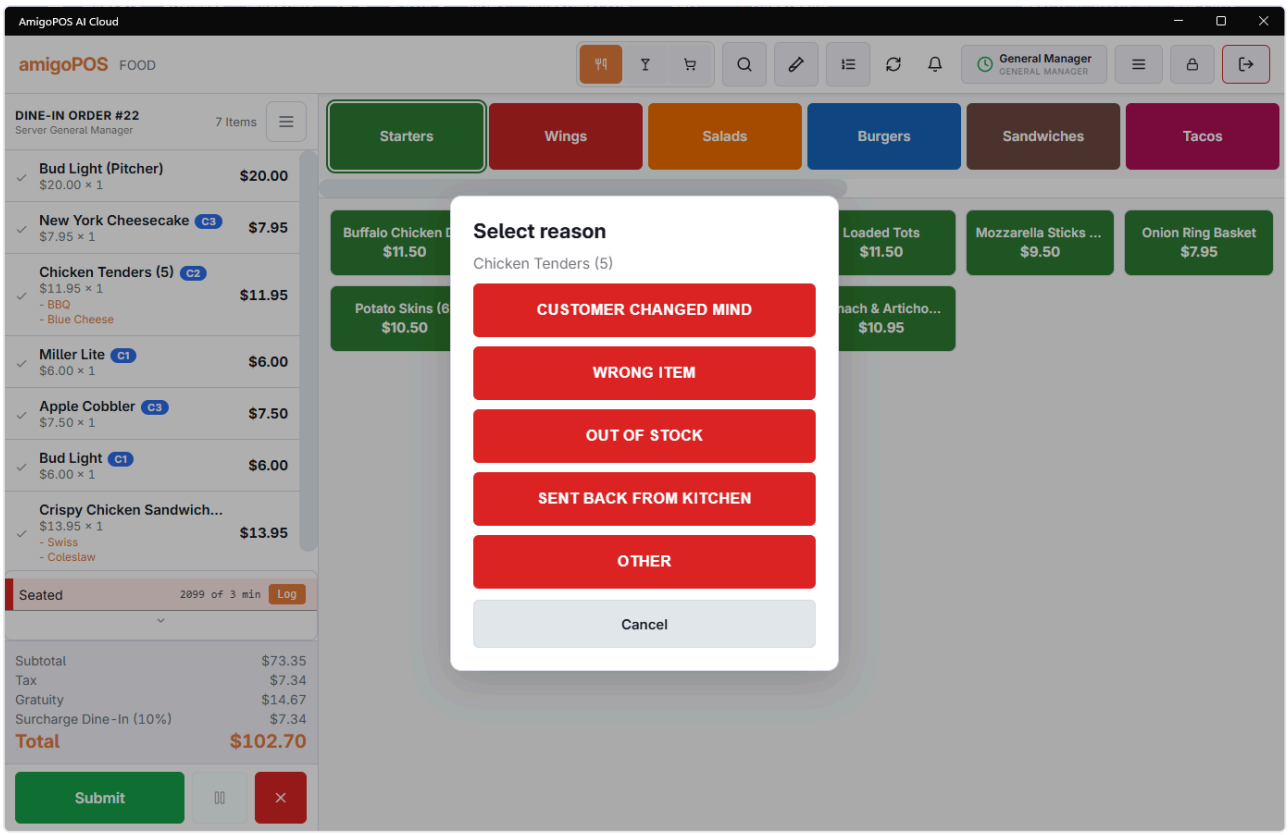
Pick the reason from the list. The kitchen is told, so nobody plates something that is no longer wanted.

Why the reason matters

Voids are recorded against the user with their reason and show up in the audit trail and the void reports. Read together over a month they answer real questions: which dishes come back, which station makes mistakes, whether a pattern of voids follows one person.

None of that works if everything is logged as "other". Keep the reason list short and meaningful — **Store Setup › Order Entry Screen**.

> An order that was never sent is not a void. Discard it instead — nothing was made and nothing needs explaining. See **Cancelling or discarding an order**.



If the order was paid by card

A card taken on the terminal is reversed with the void. For a card taken by phone or paid online, the void screen asks whether to send the money back. See Voiding an order that was paid by card.

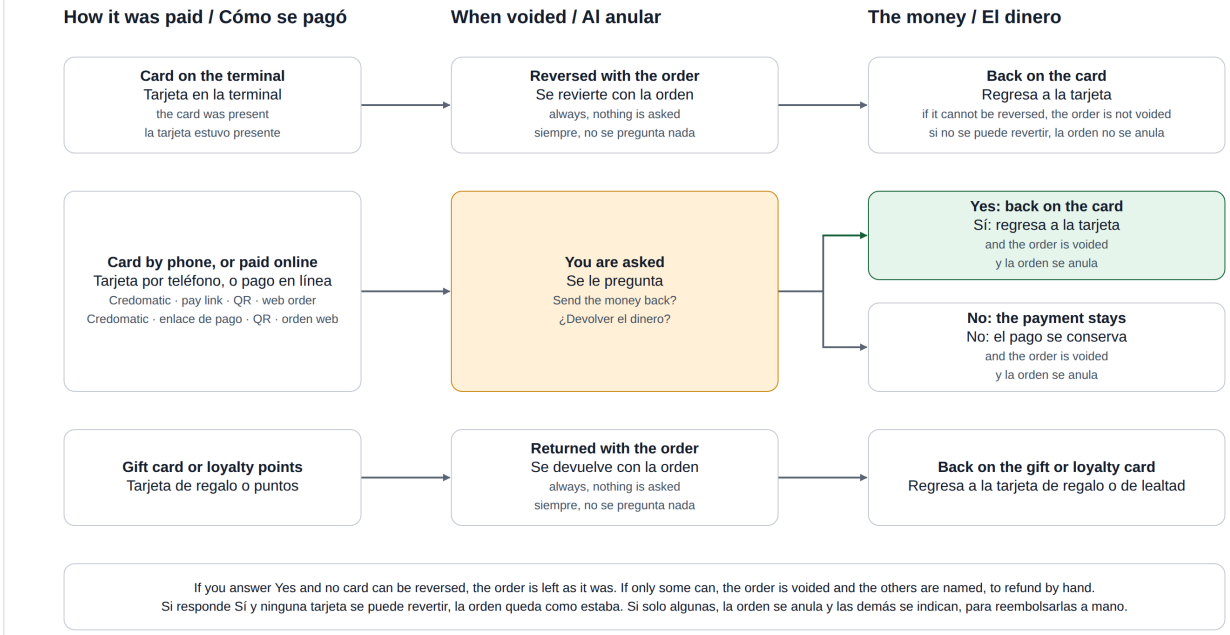
Voiding an order that was paid by card

Payments & Settling › Refunds and corrections

View online ↗

What happens to the payment when a paid order is voided, and the question the void screen asks about cards taken by phone or online.

Voiding an order is not the same as giving the money back. Whether the card is reversed depends on how the order was paid.



The three cases

- **A card on the terminal.** Always reversed with the order; nothing is asked. If it cannot be reversed — the terminal is offline, or the day's batch has closed — the order is *not* voided, so no card stays charged for a cancelled order. Refund that payment instead: see Refunds.
- **A card taken by phone, or an online payment** — a pay link, a QR payment, a web order. The void screen adds a step and asks whether to send the money back.
- **A gift card or loyalty points.** Always returned to the card with the order.

The card step

- Void the order as usual: pick the reason, then answer the inventory question.
- A step named **Card** lists each payment — for example *Credomatic · VISA …1234 · 25.00* or *Stripe · 18.50* — and asks **This Order Was Paid By Card. Send The Money Back?**
- **Yes, Send It Back** reverses the card and voids the order. **No, Keep The Payment** voids the order and leaves the payment as it is.

When a card cannot be reversed

What happened	What the register does	What you do
No card could be reversed	Leaves the order as it was and shows the reason.	Fix the cause and void again; or void again, answer No, and refund by hand.
Some were reversed, some were not	Voids the order and names the ones that failed.	Refund those by hand.
A card taken by phone whose batch has already closed	Reports it as not reversed: a closed batch cannot be voided.	Refund it from the Credit Cards screen. See Credomatic (card not present).

> An online payment is always refunded in full, including a tip paid with it.

Where it applies

On the Orders screen, at the register and at the call center, and in Back Office › Activity › Orders › Orders. Orders voided by End of Day are not asked about and their cards are not reversed.

The reason prompt itself is described in Voids and the void reason prompt.

Refunds

View online ↗

Giving money back on a settled order, and why it is not the same as a void.

A refund is for an order that has already been **settled**. Money has changed hands and has to go back. Before settlement there is nothing to refund — that is a void.

Taking one

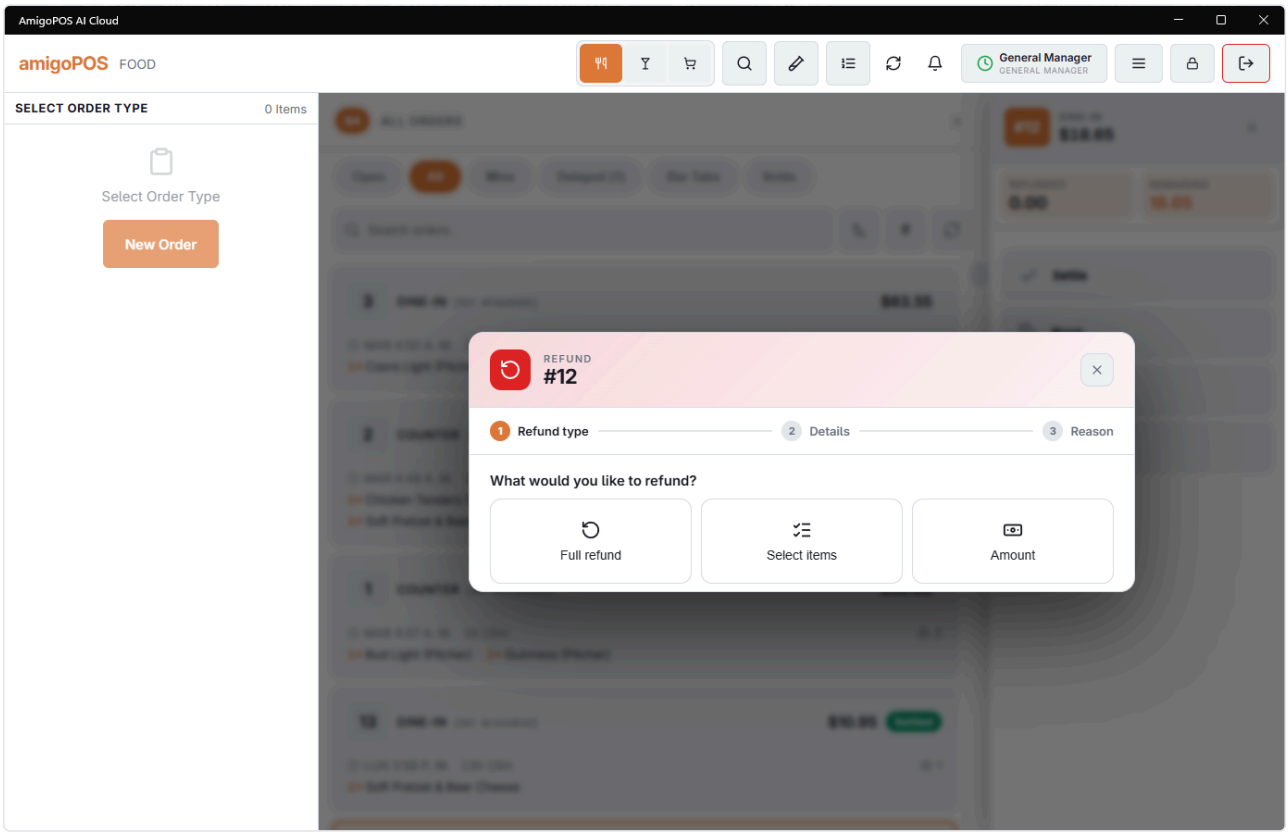
Find the order in the orders list and refund from there. The refund goes back by the method it was paid with wherever it can: card payments reverse to the card, cash comes out of the drawer.

What it does to your numbers

A refund is recorded as its own transaction rather than by editing the original sale. Both stay on the record — the sale happened, and so did the refund. That is why the refunds report is worth reading: money going back out is a number a business should see, not one quietly netted off.

> A card refund is a request to the processor, not an instant reversal. The customer sees it when their bank posts it, which is usually a few days. Say so at the counter — it prevents the second phone call.

> Refunds are typically restricted to managers. If the option is not there, that is the permission, not a fault.



In the accounts

With QuickBooks Online or Xero connected, a refund is sent with the day it was given, not the day of the original sale. In Xero the day's refunds arrive as a credit note next to that day's invoice; in QuickBooks they are lines in the daily journal entry. A card refund made directly on the terminal, without being recorded here, never reaches the accounts.

Refunds to a DC Direct card

Choosing the DC Direct card method as the refund tender sends the refund back to the card used on the original order, without the card present. Only what is left of that payment can be refunded, and a declined refund records nothing. See **Voids, refunds and tip**

adjustments in Integrations › DC Direct.

DC Direct authorizations not yet captured

In pre-auth mode, a card payment that has not been captured yet has charged nothing, so it cannot be refunded: void it instead. See **Table service: authorize, then capture with the tip** in Integrations › DC Direct.

Reprinting a receipt

Payments & Settling › Refunds and corrections

View online ↗

Printing another copy of a receipt or a prep ticket, and where each one comes from.

A customer receipt

Find the order in the orders list and reprint. It goes to the receipt printer bound to the station you are on, which is worth knowing if you are standing at a different till from the one that took the money.

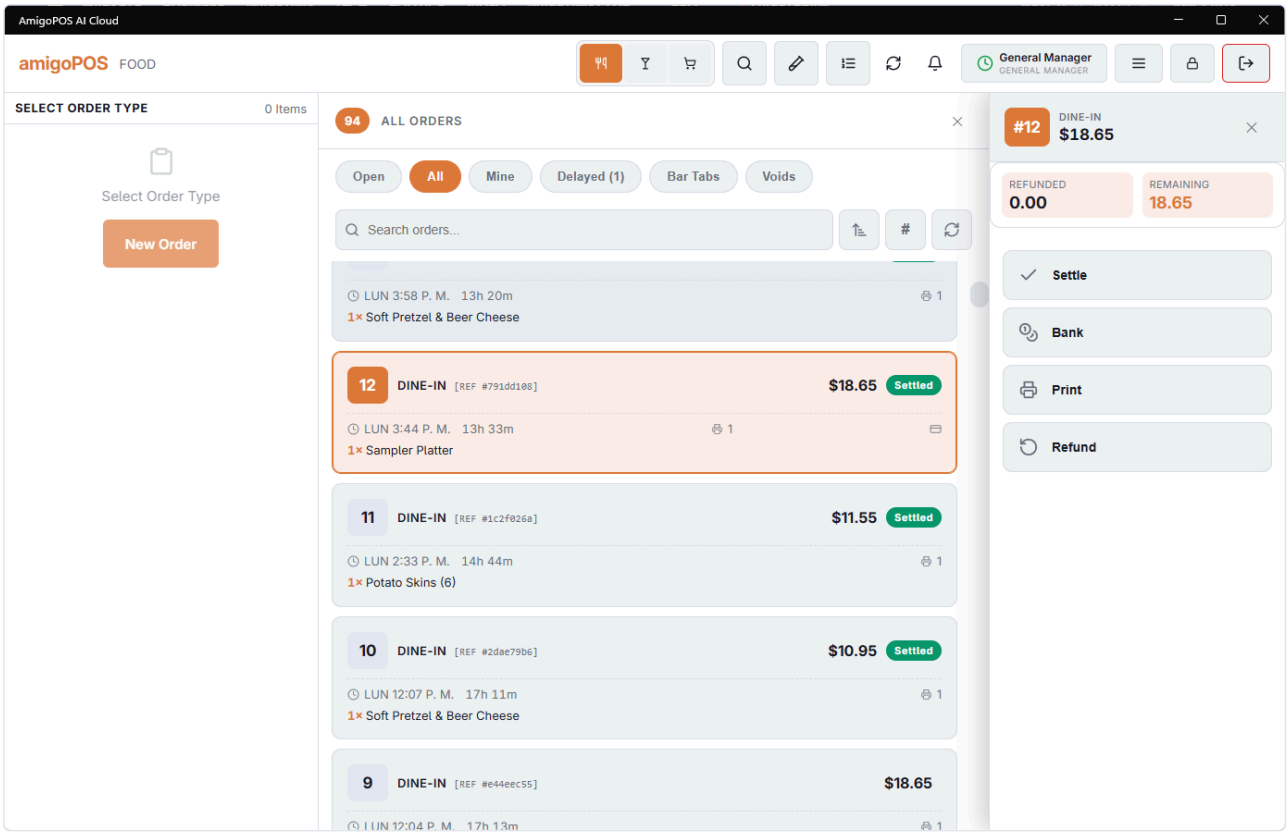
The current settle screen also prints a receipt at any point — before payment, between tenders, or after — so an order still open does not need a reprint at all.

A prep ticket

Prep tickets reprint separately, and a reprinted ticket is **marked as a reprint** so the kitchen does not read it as a second order. That marking is the whole reason to use the reprint rather than re-ringing the items.

> Never re-ring items to get a ticket printed again. It doubles the sale, doubles the food and leaves you voiding your way back out.

> A receipt reprint from the orders list or the deliveries screen needs the **Reprint** permission, and a prep ticket reprint needs **Prep Reprint**. Without one, a manager approves. The receipt the settle screen prints is not a reprint and needs neither.



Payment setup

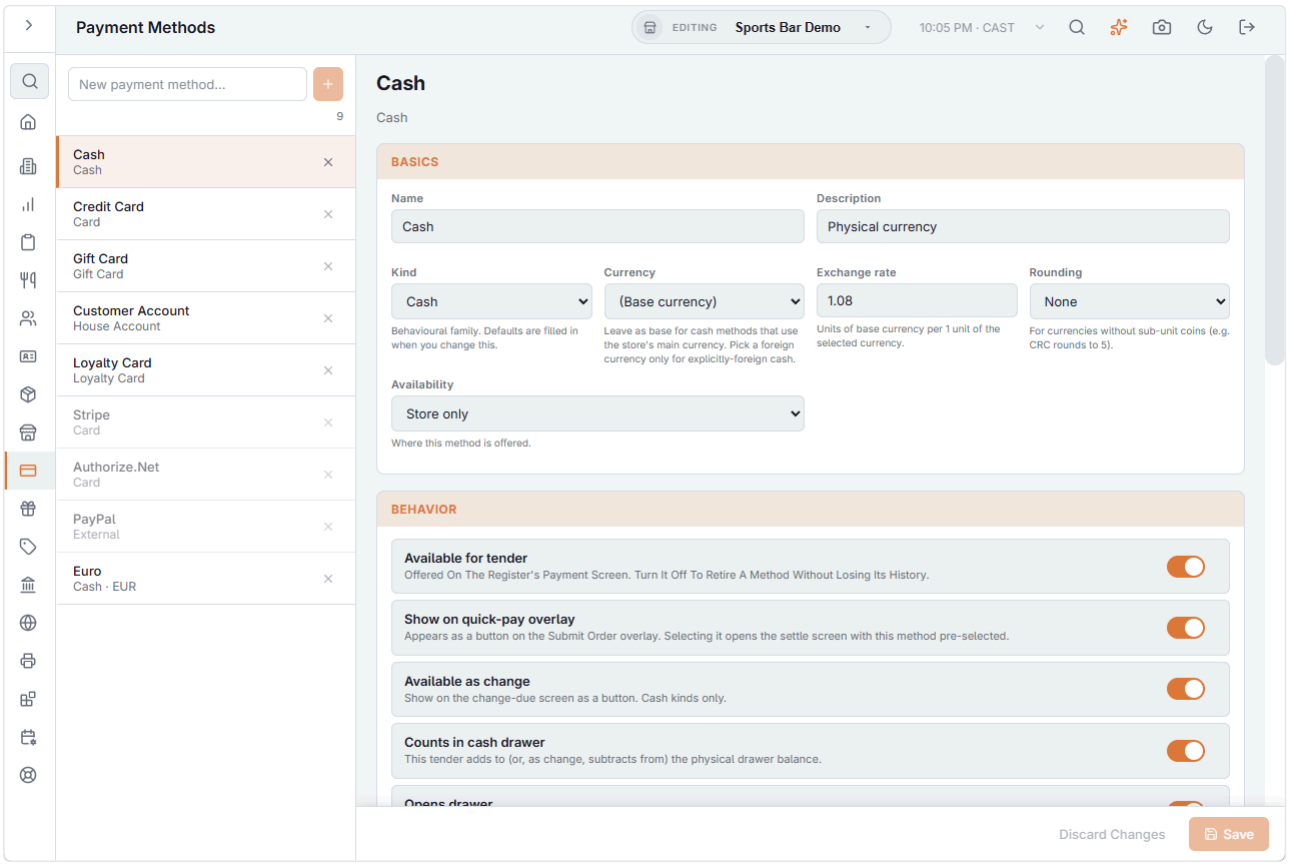
Payment methods

Payments & Settling › Payment setup

View online ↗

Creating the tender types that appear on the settle screen and how each behaves.

Back Office › Payments › Payment Methods defines every payment button the register offers — cash, cards, gift and loyalty cards, house accounts, transfers, vouchers and any local tender. Each method has a **Kind** that sets its basic behavior, and a set of switches you can adjust.



The list

- To add a method, type its name in **New payment method…** and press **+** or Enter. It is created at once with Kind **Other**; pick the right Kind next so its switches are filled in for you.
- Methods are listed by **Button position**, then by name — the same order as the buttons at the register. A method that is not available for tender is shown faded.
- The **×** on a row deletes the method after you confirm. Payments already taken with it keep their history. To stop using a method you may want back later, turn off **Available for tender** instead.

Saving

Changes in the editor are not saved until you press **Save**. While there are unsaved changes, an **Unsaved Changes** banner shows; **Discard Changes** puts everything back after asking you to confirm.

Basics

- **Name** — the button caption. **Description** — an internal note.
- **Kind** — Cash, Card, Gift Card, House Account, Loyalty Card, External, Bank Transfer, Voucher or Other. Changing the Kind fills in the switches below (see the table), and you can adjust them afterwards. Other changes nothing.

- **Currency** and **Exchange rate** — Cash methods only. Leave Currency on **(Base currency)** for the store's own money; pick a foreign currency only for a method that takes foreign cash, and enter how many base units one foreign unit is worth. See Accepting Foreign Currency.
- **Rounding** — None, Nearest 5, Nearest 10, Nearest 50 or Nearest 100 whole units, for currencies without small coins.
- **Availability** — **In-Store, Call Center & Web Orders**, **Store only**, or **Call Center & Web Orders Only**.

Kind	Switches it turns on
Cash	Available as change, Counts in cash drawer, Opens drawer, Allows change (Archives at End of Day off)
Card	Requires authorization, Settles via processor, Allows tips, Archives at End of Day; processing method set to Manual processing
Gift Card, Loyalty Card, External, Bank Transfer, Voucher	Requires reference
House Account	Allows tips

Choosing a Kind other than Cash clears the currency and rate; choosing a Kind other than Card clears the card processing settings.

Credit card processing

Shown only for Kind Card. **Processing method** decides how the button takes the payment:

- **Manual processing** — the card is run on a stand-alone terminal and the cashier records it. See Credit card types and Payment terminals.
- **Integrated — DC Direct** — the register sends the sale to a Datacap terminal. See Setting up DC Direct in Back Office.
- **Credomatic (Card Not Present)** — for card payments taken by phone. See Credomatic (card not present).

> Switching to another processing method clears the settings of the previous one.

Behavior

- **Available for tender** — the button is offered at the register. Turn it off to retire a method without losing its history.
- **Show on quick-pay overlay** — the method also appears on the Submit Order overlay; tapping it opens the settle screen with this method chosen.
- **Available as change** — offered as a button on the change-due screen. Cash only.
- **Counts in cash drawer** — the payment adds to the drawer balance (or, given as change, takes from it).
- **Opens drawer** — the cash drawer opens when this method is used. Usually matches Counts in cash drawer.
- **Requires authorization** and **Settles via processor** — for cards and anything approved and paid out by a processor.
- **Requires reference** — asks for a reference such as a cheque number or voucher code.
- **Allows tips** — a tip can be added to this payment. **Allows change** — the customer can pay more and receive change.
- **Appears on sales reports** — counts in gross sales. Turn it off for internal-use methods.
- **Archives at End of Day** — End of Day archives these payments. Normally off for cash, which the drawer reset handles.

Prompt, Display and Reporting

- **Prompt type** (None, Text or Currency) and **Prompt label** — a field shown when the method is chosen at the settle screen, such as "Voucher code".
- **Button position**, **Icon** (an icon name such as `i-cash` or `i-gift`) and **Icon only (hide label)** — how the button looks and where it sits.
- **Id** under Reporting — the method's fixed identifier, used by exports and integrations.

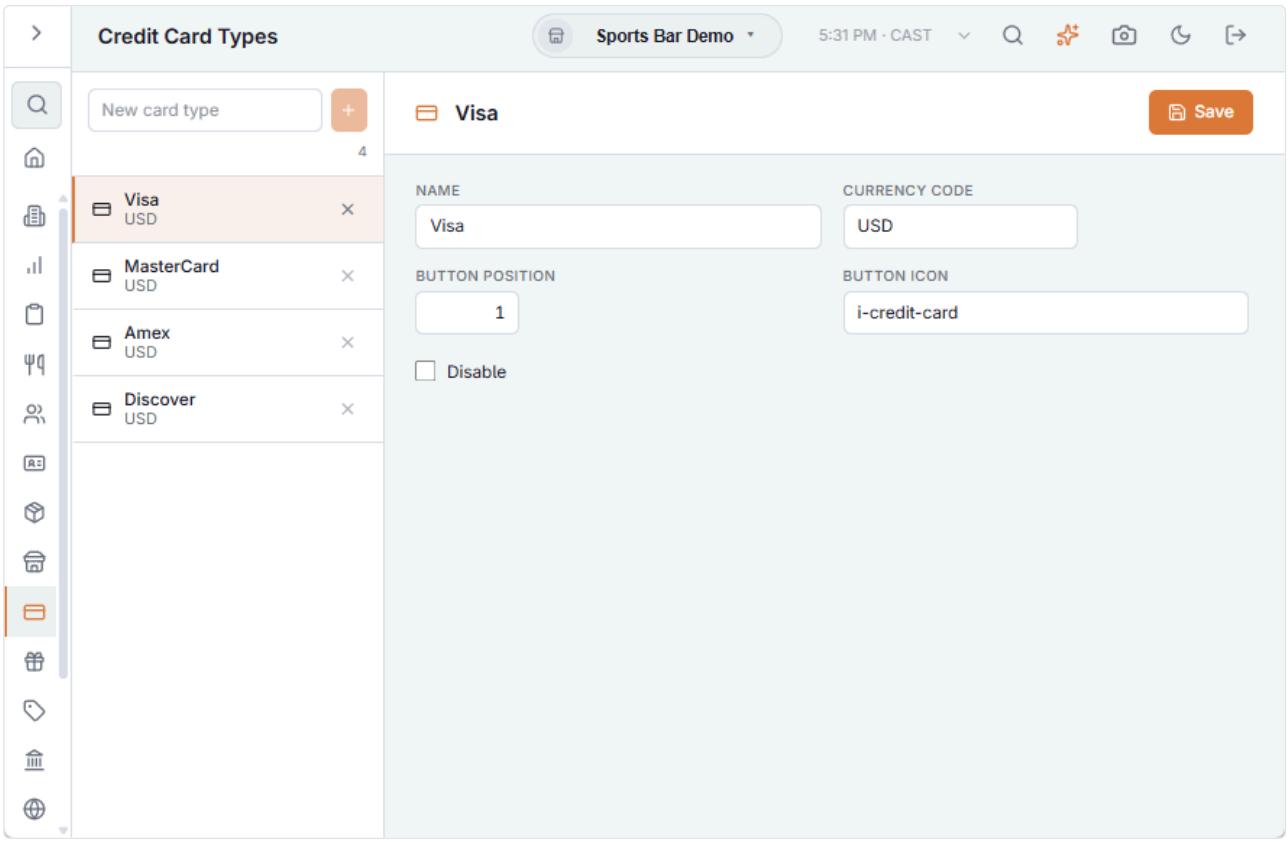
Credit card types

Payments & Settling › Payment setup

View online ↗

Gateway settings, accepted card brands, and card-type reporting.

Back Office › Payments › Credit Card Types lists the card brands a cashier can choose from when recording a card payment run on a stand-alone terminal. Integrated card terminals (such as DC Direct) read the brand from the card themselves and do not use this list.



Managing the list

Visa, MasterCard, Amex and Discover are there to start with. To add a brand, type its name in **New card type** and press **+** or Enter; edit the fields on the right and press **Save**.

- **Name** — the brand as shown on the Manual Credit Card screen and in the daily sales report.
- **Currency code** — a new type starts as **USD**. Only terminals with the same currency are offered for this card type, so change it if your store charges in another currency. Leave it blank to allow every terminal.
- **Button position** — the order of the buttons; the first one is selected for the cashier.
- **Button icon** — an icon name, such as `i-credit-card`.
- **Disable** — hides the brand at the register without removing it from past payments.

The **×** on a row deletes the type after you confirm.

How the cashier uses it

A Card payment method whose processing method is **Manual processing** opens the **Manual Credit Card** screen. The cashier picks the card type, then the terminal it was run on, and enters the amount, tip, last 4 digits and auth code. The daily sales report groups these payments by card type.

> Keep every brand you accept enabled. If one is missing, the cashier has to file the payment under another brand and the day's figures by brand will not match the processor's statement.

Related: Payment terminals, Payment methods.

Payment terminals

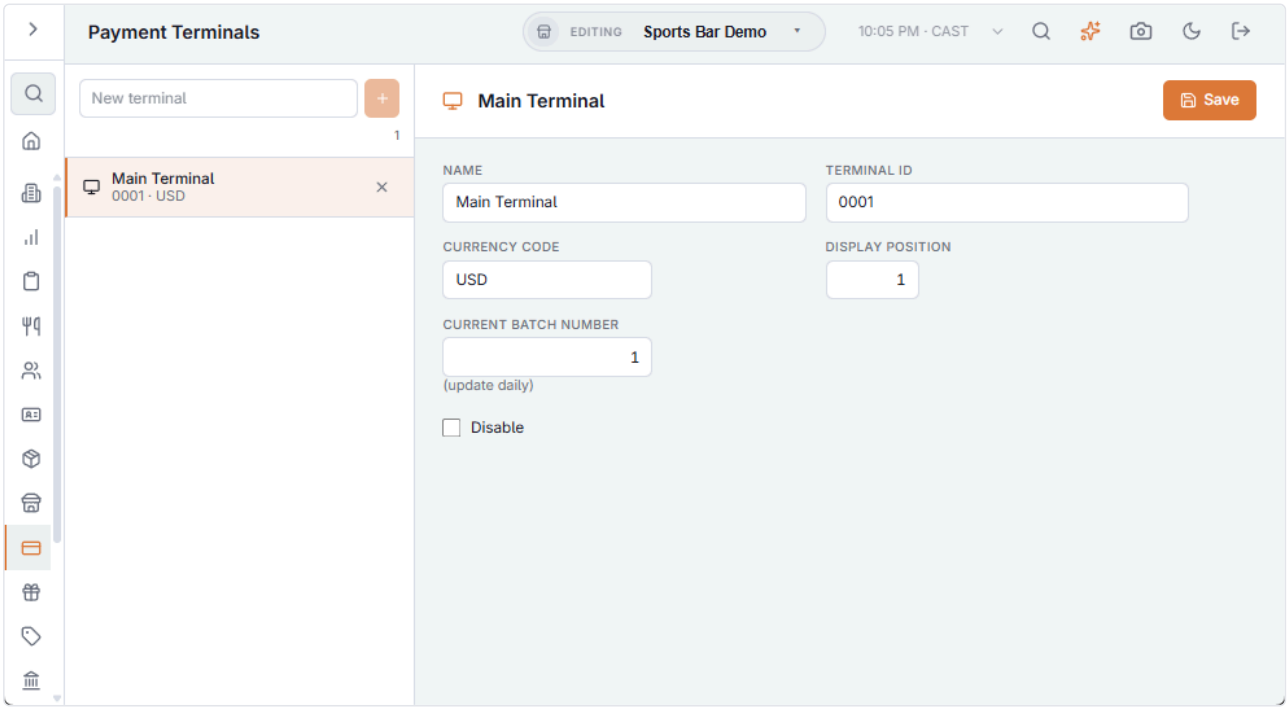
Payments & Settling › Payment setup

View online ↗

Registering card terminals and pairing them to stations.

Back Office › Payments › Payment Terminals lists the store's stand-alone card terminals — machines that are not connected to the register. When a card is run on one of them, the cashier records the payment at the register with **Manual Credit Card** and picks the

terminal it was run on, so each payment shows which terminal and batch it went through.



> Integrated terminals are not set up here. Datacap DC Direct terminals are listed on the DC Direct card payment method, and each station picks its own under **More › Settings › Card Terminal** at the register. See Setting up DC Direct in Back Office.

Adding and editing a terminal

1. Type a name in **New terminal** and press **+** or Enter.
2. Fill in the fields and press **Save**. Changes are not kept until you do.

- **Name** — how the terminal appears on the Manual Credit Card screen (“Bar terminal”, “Counter 1”).
- **Terminal ID** — the ID your processor gave the machine. It is shown on the button and in reports, for reference.
- **Currency code** — the currency the terminal charges in. A new terminal starts as **USD**; change it if your store charges in another currency. The terminal is offered only for card types with the same currency.
- **Display position** — the order of the terminals in the list and at the register.
- **Current batch number** — the terminal’s open batch. Update it each day when the batch is closed; it is stamped on every manual card payment.
- **Disable** — takes the terminal off the register while it is away for repair. It stays on this page, faded, and can be turned back on.

The **×** on a row deletes the terminal after you confirm. Payments already recorded keep its name in reports.

At the register

The Manual Credit Card screen opens for a Card payment method whose processing method is **Manual processing**. The cashier picks the **Card type**, then the **Terminal** (picked automatically when only one fits), and enters the amount, tip, last 4 digits and auth code. If no enabled terminal matches the card type’s currency, the screen says so and the payment cannot be recorded until one is added here.

Manual card payments appear in the daily sales report by terminal and batch. Related: Credit card types, Payment methods.

Accepting Foreign Currency

Payments & Settling › Payment setup

View online ↗

Accept cash in more than one currency and track each physical currency from payment through drawer count and reset.

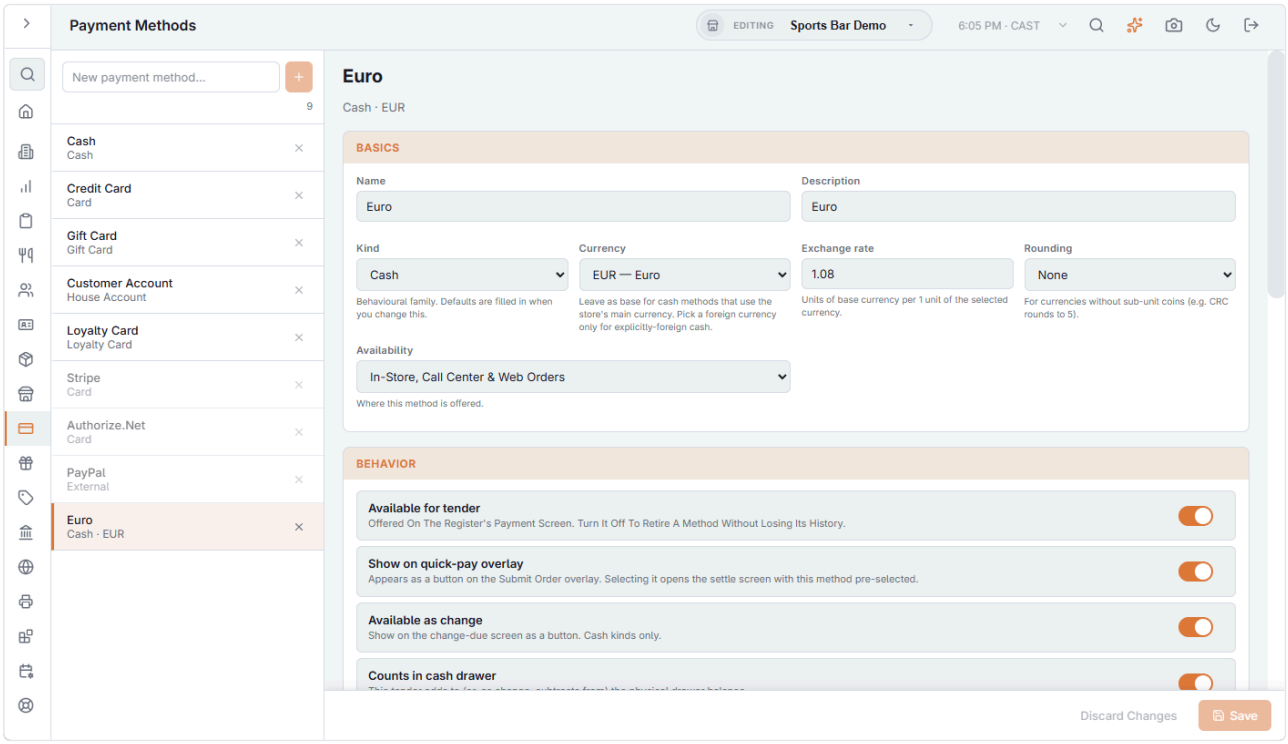
Stores near borders, in tourist areas, or in multi-currency territories can accept cash in more than one currency. CloudPos tracks each physical currency separately from the moment it enters the drawer to the moment the drawer is counted, so the person counting always

knows how much of **each** currency should be in the till.

> Everything runs off one principle: the store has a single **base currency** for pricing and accounting, and foreign cash is converted at a fixed rate you configure. Order totals, reports, and sales figures always stay in the base currency; the foreign currency is tracked as physical money in the drawer.

Setting up a foreign currency

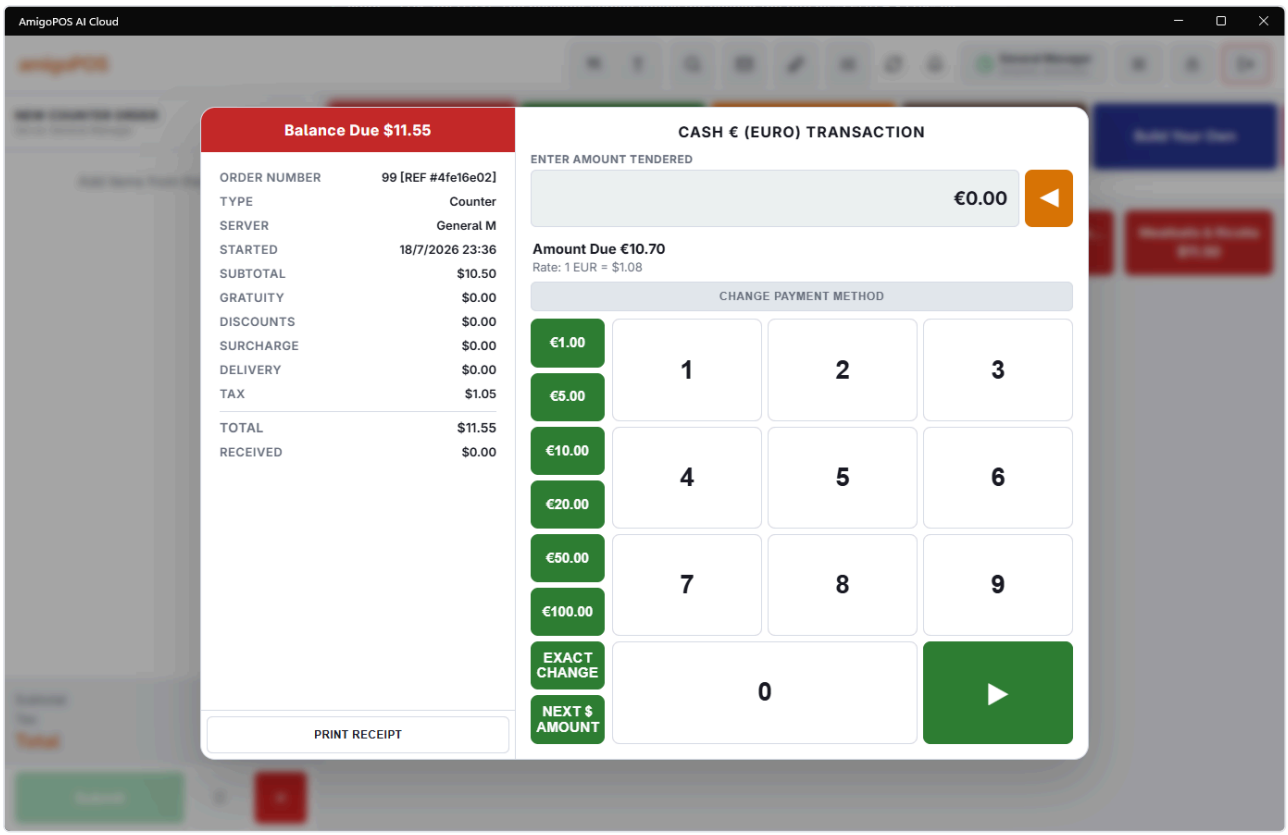
1. Open **Back Office › Payments › Payment Methods** and create a new method (for example “Cash €”).
2. Set **Kind** to *Cash*.
3. Pick the **Currency** (for example EUR — Euro). Leave this blank on your normal cash method — blank means the store's base currency.
4. Enter the **Exchange rate** — the number of base-currency units per 1 unit of the foreign currency. At a US-dollar store accepting euros, `1.08` means 1 EUR = $1.08.
5. Optionally pick a **Rounding** mode for currencies without small coins (for example rounding change to the nearest 0.05).
6. In **Behavior**, enable **Available for tender**, **Available as change**, and **Counts in cash drawer**.



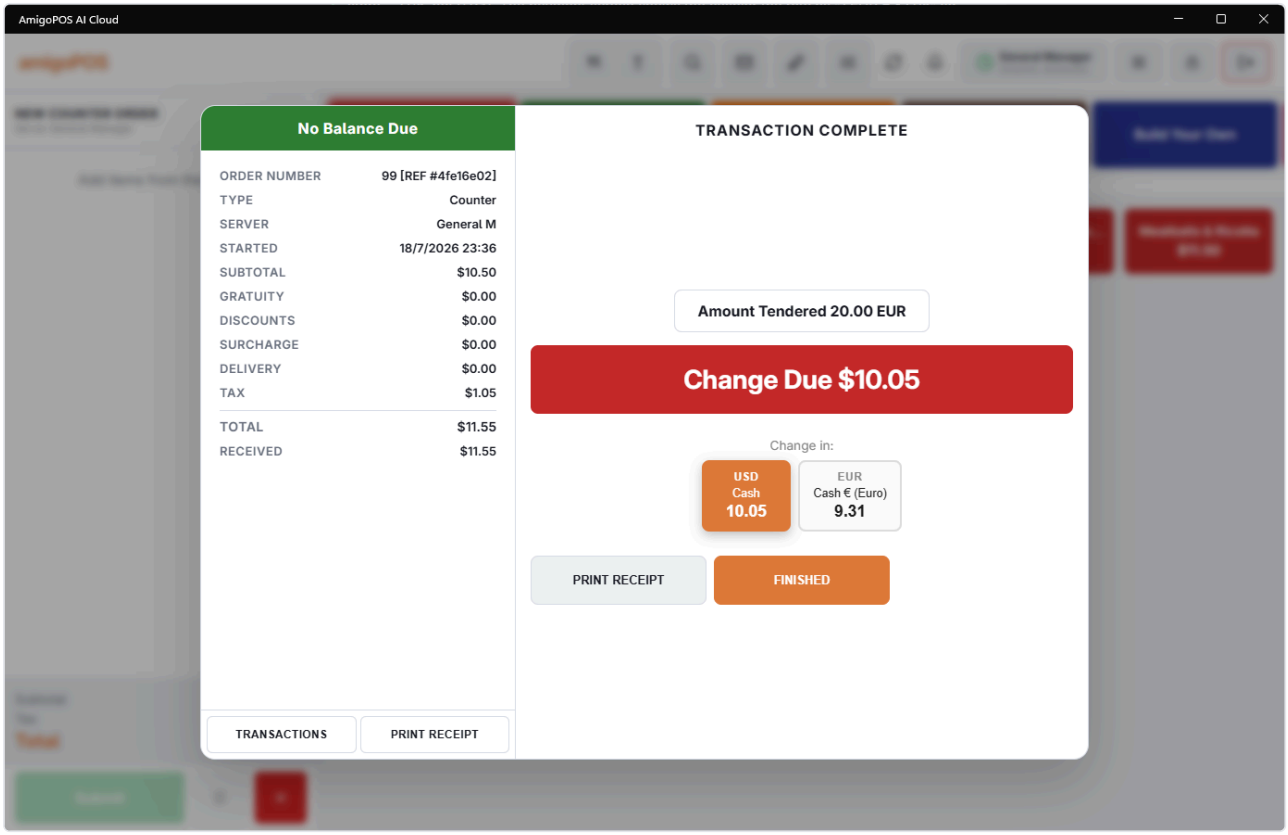
> **Rate direction matters.** If converted amounts look inverted on the settle screen, the rate was almost certainly entered in the wrong direction — it must be *base per 1 foreign unit* (EUR at a USD store ≈ 1.08, not 0.93). The payment screen shows the cashier the rate as “1 EUR = $1.08” so mistakes are caught immediately. The rate is a store setting, not a live market feed; each transaction snapshots the rate in effect at the moment of payment.

Taking a foreign-currency payment

When the cashier selects the foreign cash method on the settle screen, the keypad is denominated in the **foreign currency** — the cashier keys exactly what the customer hands over. The screen shows the amount due converted into the foreign currency, the base-currency equivalent of the entry, and the exchange rate. The quick-cash buttons and the **Exact** button are also denominated in the foreign currency.



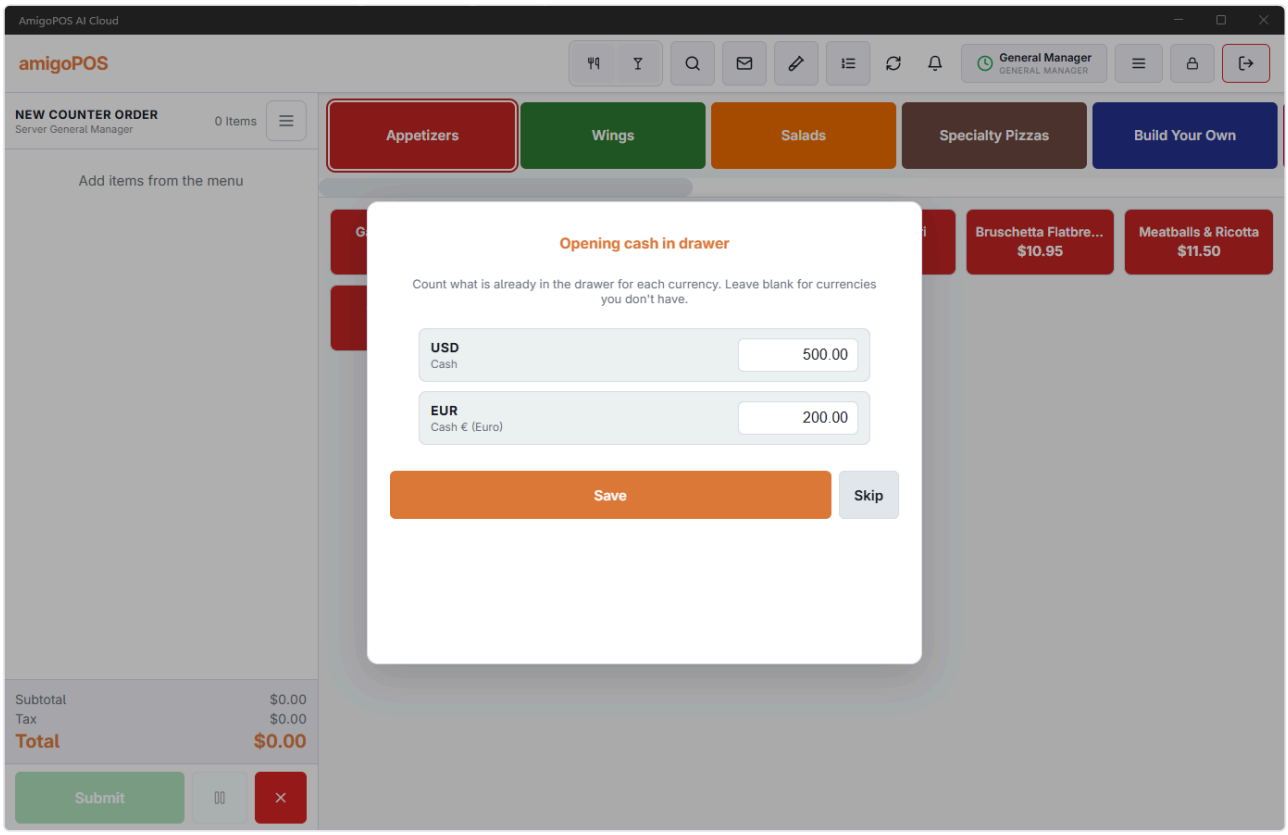
Change is due in the base currency by default. The result screen shows the change amount with a row of currency buttons; tapping one re-denominates the change into that currency at its rate, with rounding applied if configured. Example: a $9.35 bill paid with €10.00 at rate 1.08 is $10.80 tendered, so $1.45 change — or €1.34 if the cashier taps the EUR button.



Opening floats — counting the drawer at clock-in

When a cashier clocks in and claims a drawer, the **Opening cash in drawer** prompt lists one line per currency. Enter what is physically in the drawer for each currency and leave blank any currency you don't stock. These declared floats are the starting point for all expected-cash calculations during the shift.

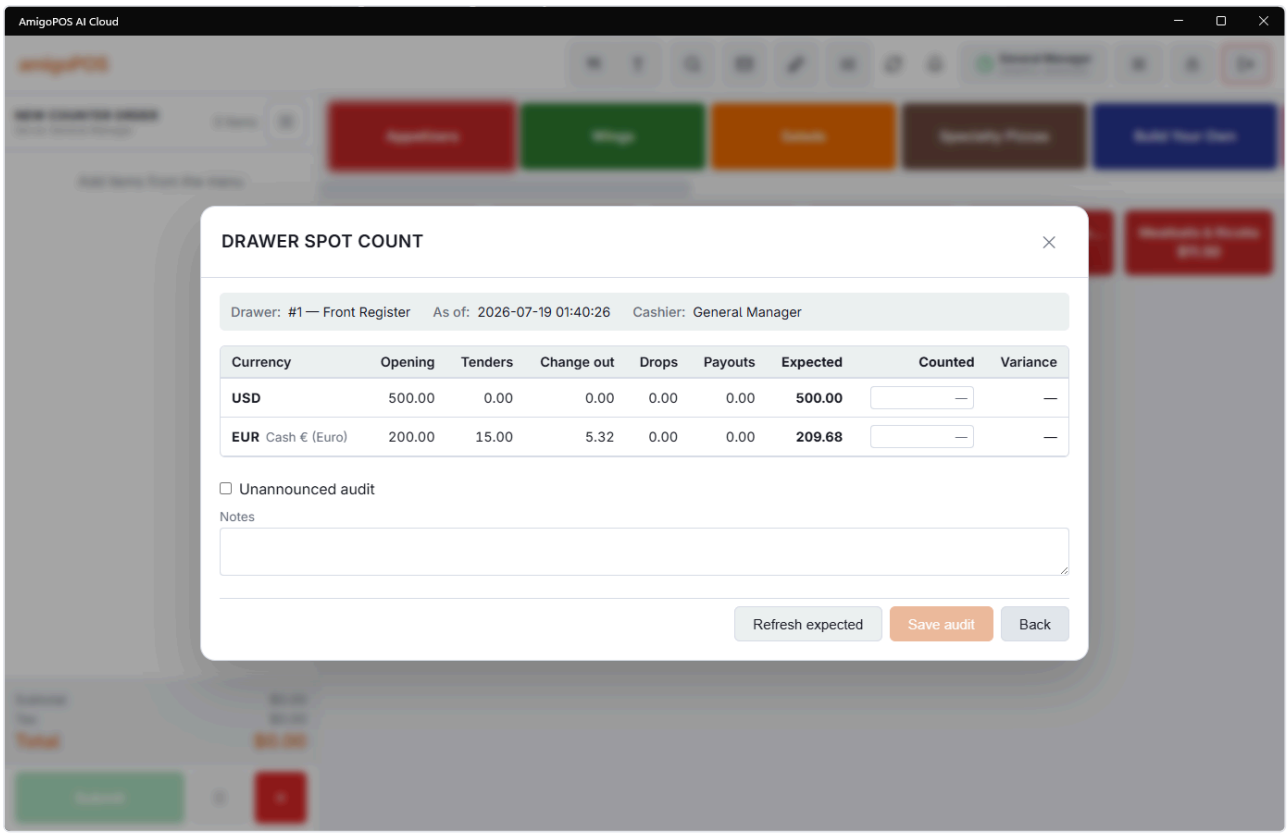
Who gets prompted: the drawer picker appears at clock-in only when the **Assign Cash Drawers** setting is enabled *and* the permission the employee clocked in under allows cash settling (both *Allow Cash Sale* and *Allow Settle*). Kitchen and other non-cash roles skip it. An eligible employee who skipped the picker, or needs to switch drawers mid-shift, can open it any time from the **Cash Drawers** button on the time clock screen. When a second cashier joins a drawer that is already open, the opening count is skipped automatically - the till was declared once, and re-declaring it would double the expected amounts.



> **Two start amounts?** The drawer also has a single **Default Start Amount** (shown on the reset screen). That value is only a *fallback* used when no opening count was declared at clock-in. Stores that always declare floats at clock-in can ignore it (the prompt after a reset can be turned off with **Show prompt** under **Store Setup › Manager Screen › Drawer Reset**). When drawer assignment is off and no opening count exists, expected-cash calculations automatically use the Default Start Amount as the base-currency float — or disable the post-reset start-amount prompt entirely in settings.

Spot counts

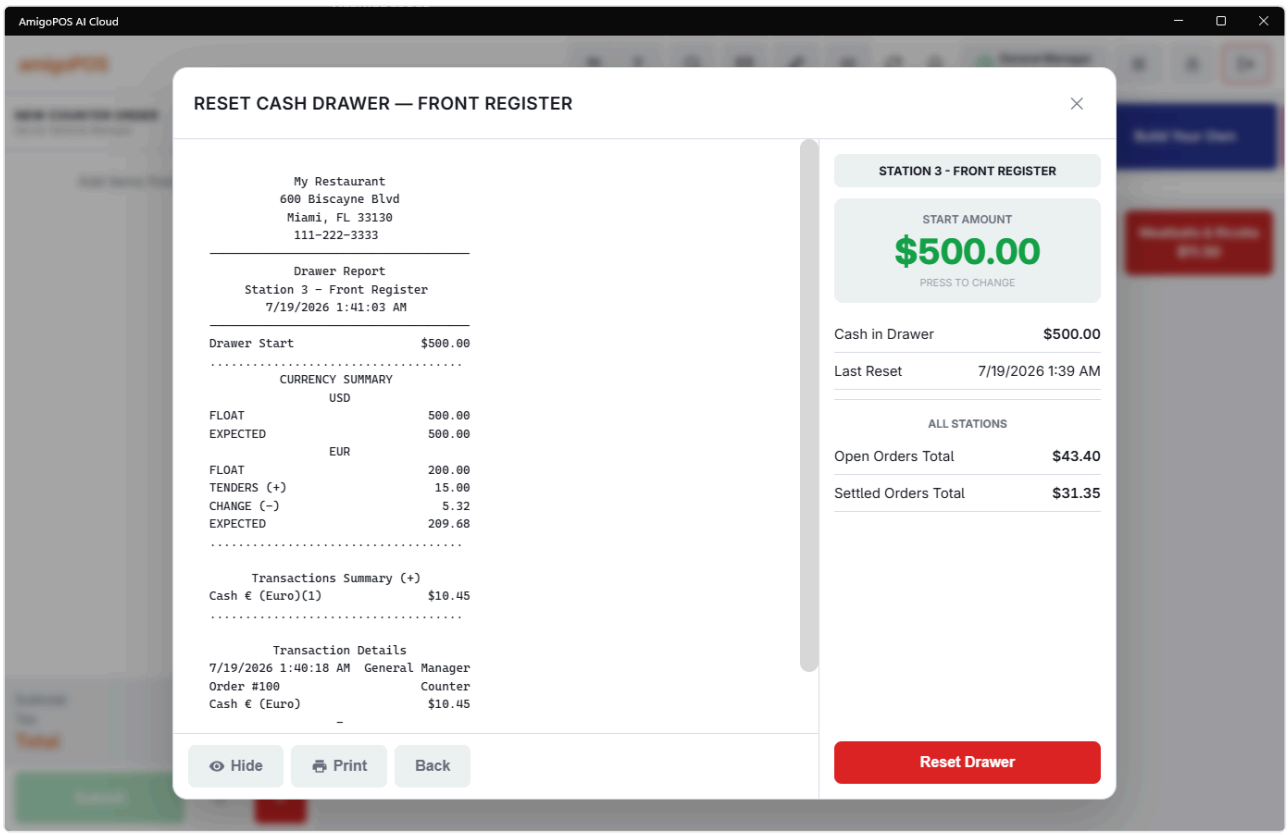
A spot count shows one line per currency: opening float, tenders in, change out, drops, payouts, employee deposits and deposits applied at End Shift (in the base currency, when there are any), and the resulting **expected** amount — all in physical units of that currency. The counter enters the counted amount per line; variance is computed per currency, and per-currency warning and maximum thresholds on the drawer can require a manager override for large discrepancies. Clock-out counts and clock-in verification use the same per-currency screen.



Drawer reset

The reset report includes a **CURRENCY SUMMARY** — float, tenders, change, drops, payouts, the employee deposits the drawer took, the deposits an End Shift at the drawer applied, and expected for every currency with activity — so the person emptying the drawer knows exactly what to pull, per currency, before touching a bill.

- With drawer counts enabled, the **Count Drawer** button opens the same per-currency count as a spot count. Blank lines are recorded as zero. After saving, the reset runs automatically and the printed report (and the stored copy in the reset log) gains a **CURRENCY COUNT** section with expected / counted / over-short per currency.
- Resetting also closes the shift's opening floats and re-baselines the drawer's running ledger to zero in every currency, so a fresh spot count immediately after a reset shows 0.00 expected across the board.
- The **Cash In Drawer** figure on the reset screen is the base-currency expected amount — the same number a spot count shows — while foreign currencies appear in the currency sections.
- Any employee with manager functions can count *any* drawer - no drawer claim of their own is needed - and reset it with the **Reset Drawer** permission or a manager’s approval; the count and reset are recorded under their name. Cashiers may clock out before a reset: the clock-out count and the next cashier's verification count reconcile each hand-off, and the drawer can span multiple shifts between resets.



Worked example: pay in euros, change in dollars

A US store (base USD) with a EUR method at rate 1.08 and opening floats of $500 and €200:

1. A $9.35 order is paid with €10.00 → recorded as $10.80 tendered, $1.45 change in USD.
2. A spot count now expects **$498.55** (500 − 1.45 change) and **€210.00** (200 + 10 tendered).
3. At reset, the CURRENCY SUMMARY shows both lines; the counter pulls $498.55 and €210.00, and any difference prints as per-currency over/short.

Current limitations

- Cash drops and payouts can be in any cash currency the store takes, and lower that currency's expected cash. On the reset report, base-currency payouts are under **Cash Payouts (-)**, and each other currency's payouts get their own section, such as **Cash Payouts EUR (-)**, with plain amounts that are not in the base currency.
- **Employee deposits are recorded in the base currency only.**
- Checks and gift certificates are counted in base currency.
- When foreign change is rounded, the small rounding difference appears as drawer variance rather than a separate ledger line.

Troubleshooting

- **Converted amounts look wrong at the settle screen** — the exchange rate is entered in the wrong direction; it must be base units per 1 foreign unit.
- **A foreign line is missing from the spot count** — no activity and no float was declared for that currency; declare it at clock-in or record a payment.
- **Expected cash looks too high after upgrading** — transactions recorded before the multi-currency upgrade carry no currency information; perform a drawer reset to start clean.

The total in other currencies on the receipt

Once a foreign-currency payment method is available for tender, the customer receipt restates the total under TOTAL in that currency, one line per currency, at the method's exchange rate: *Total in EUR EUR 23.15*. The amount is written with the ISO code rather than a symbol, because € and ƒ are not in every printer's character set.

Nothing to switch on: add or remove a currency method and the receipt follows. To hide the lines at a store that does not want them, delete the `{BlockIf=Currencies}` block from the receipt template. A store with only base-currency methods prints nothing extra.

The foreign-currency payment on the receipt

A payment taken in a foreign currency prints at its value in the store's currency on the payment line, so the payments add up to the total. The line under it shows what was actually handed over, with the rate — *EUR 20.00 @ 1.08* — followed by **Tendered** and **Change** when cash was handed over above the amount, change shown in the currency it was given in.

- A payment counts as foreign when its currency is not the store's **Base Currency** (Store Setup › General Settings › Store Information) — even at a rate of exactly 1. If that setting is wrong, payments in your own currency print as foreign: check it first.
- Amounts print with the currency code, not a symbol, and at the rate stored on the payment.
- A receipt template saved earlier needs the new lines pasted in — see Receipt and prep-ticket templates.

CHAPTER 6

Call Center & Delivery

Call center

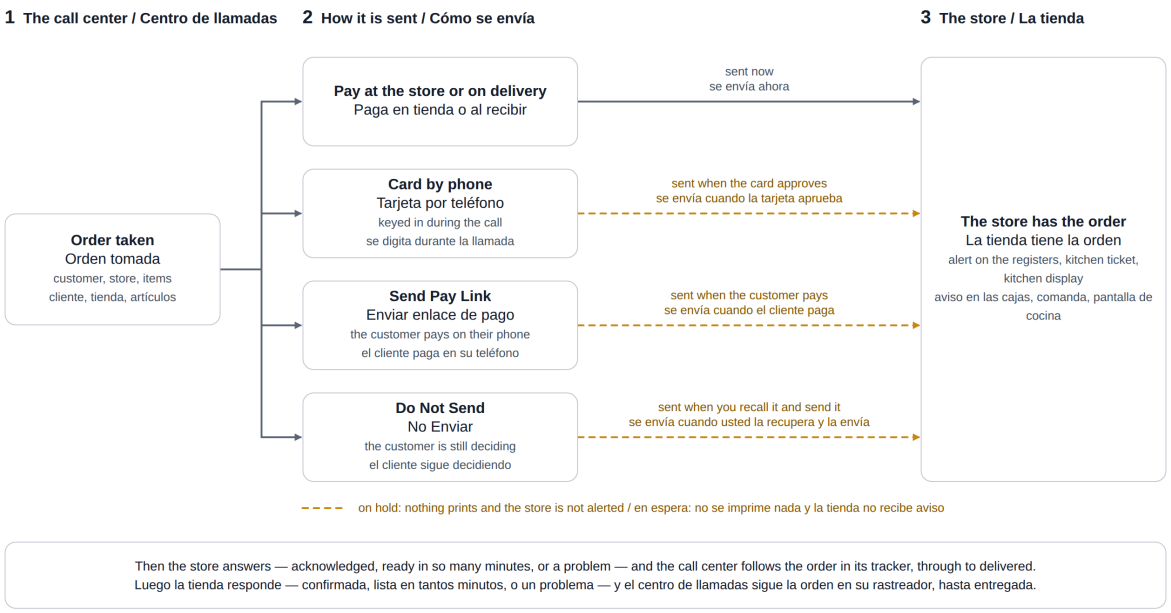
How a call-center order travels

Call Center & Delivery › Call center

View online ↗

From the phone call to the kitchen: the four ways to send an order, and when the store actually gets it.

A call-center order is taken in one place and made in another. What decides **when** the store gets it is how you send it.



The four ways to send

You choose	The store gets the order	Use it when
Pay at the store or on delivery	At once.	The customer pays the driver, or pays at the counter.
Card by phone	The moment the card is approved. A declined card leaves the order in Do Not Send.	The customer reads the card to you. Only where the store has a card-by-phone payment method.
Send Pay Link	When the customer pays, or when you tap Send To Store Unpaid. With Hold Call Center Orders Until Paid switched off: at once, unpaid.	The customer pays on their own phone.
Do Not Send	When you recall it and send it.	The customer is still deciding, or you are waiting for a callback.

On hold means invisible. While an order waits, nothing prints, no register is alerted, and it is not on the kitchen display or the delivery board. The kitchen's timer starts when the store receives the order, not when the call was taken.

What the store does with it

- The registers show the pending order, the kitchen ticket prints and the kitchen display shows it — once, however it was sent.

- Someone at the store **acknowledges** it, promises a **ready time** or **reports a problem**. See Pending call-center orders at the store.
- A delivery order goes on the delivery board and out with a driver. See How a delivery travels.

What comes back to you

Each of those steps shows in the tracker at the top of the call-center screen: waiting, acknowledged, ready in so many minutes, a problem to resolve, out for delivery, delivered. See Following your orders: the tracker.

Changing an order the store already has

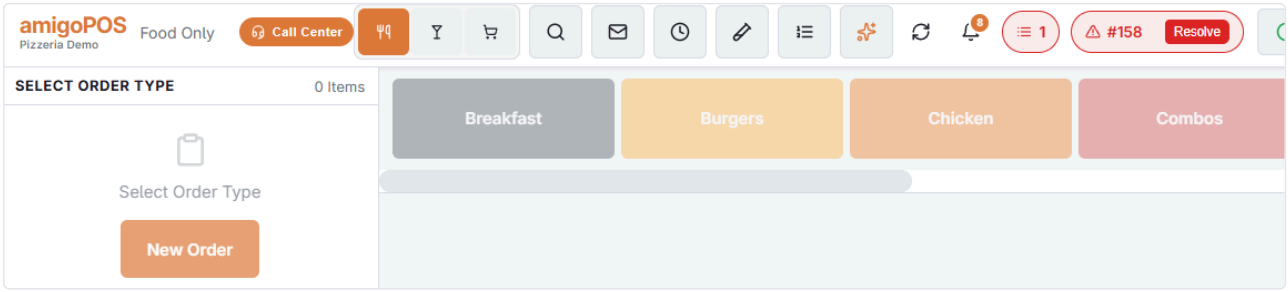
- Recall it, change it and send it again: the store prints an **UPDATED** ticket and has to acknowledge the change.
- It cannot go back on hold. **Do Not Send** is refused for an order the store already has — choose a way to send the changes.
- Cancelling it prints a **CANCELLED** ticket in the kitchen.

The choices themselves are described in Submitting and routing an order to a store and Sending a pay link.

The steps before Submit — the call, the customer and the address, the items — are drawn as a flowchart in Taking a call-center order.

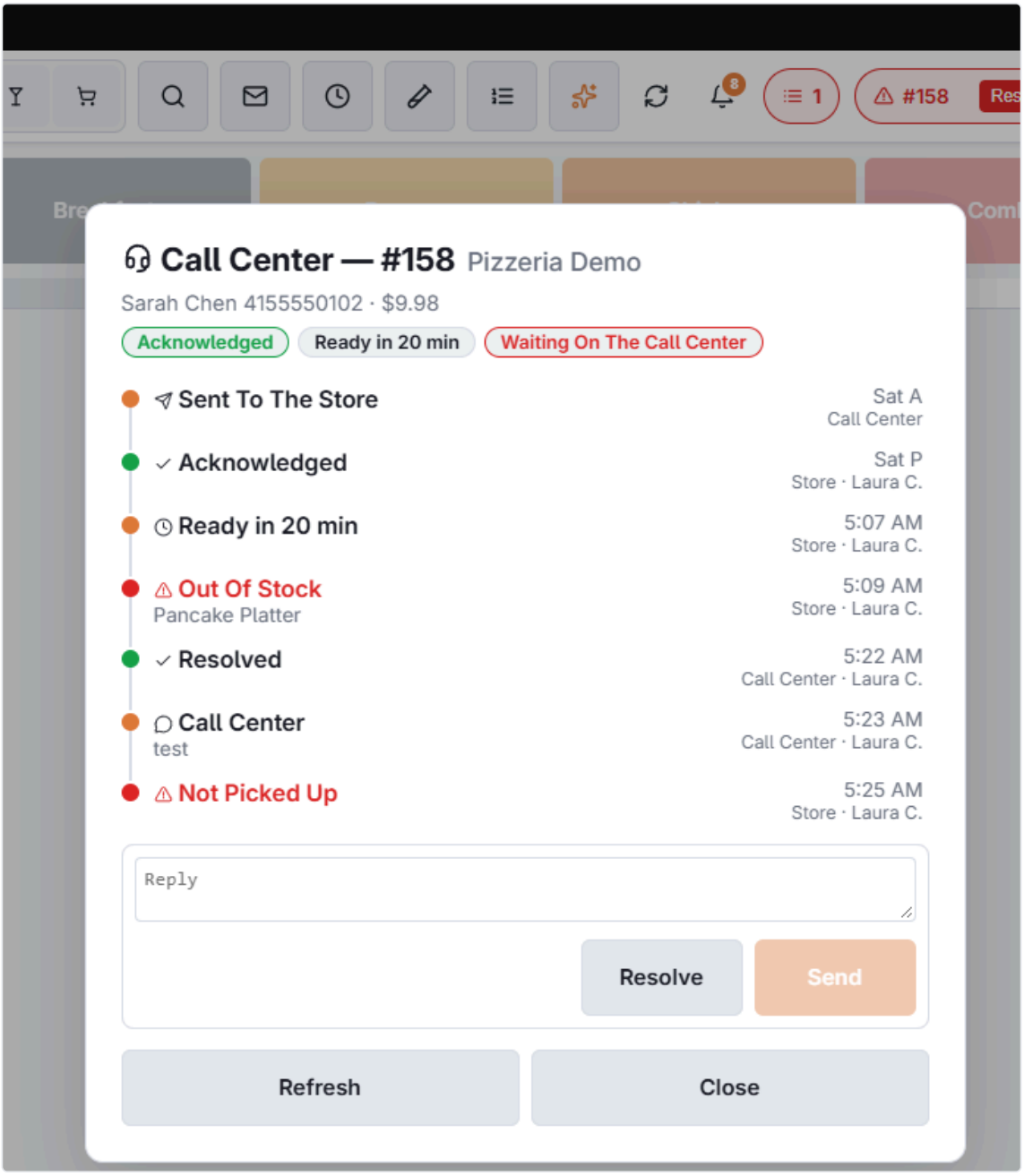
When the store writes back

After the order is sent, the store can answer from its orders list: a ready time, an issue (out of stock — with the item — not picked up, invalid address, customer unreachable, anything else), a free-text reply, or that an issue it reported is resolved. Two things reach you without anyone at the store typing: the total changed at the register (a line removed or added on recall, with the old and new amounts) and the order voided there, with the reason.



A ready time changes the order's pill in **My Orders** to "Ready In 20 Min". Anything that needs you turns the pill red with the message on it and a **Resolve** button, and shows a toast. Red pills reach *every* seat, whoever took the order and however old it is — "never picked up" is reported hours later, when the operator who took the call may be off shift — and they stay until someone resolves them or the store closes the day.

Tap a pill, or a row in the My Orders list, for the whole thread: every event oldest first, who wrote it, the customer's name and phone, and a reply box. **Resolve** there or on the pill once the customer has been called or the matter is closed; the store sees your reply and the resolve as a toast and on its orders-list card.



> The orders list on a seat has the same **Call Center** button on every call-center order, so a message about an order that has already left the tracker can still be read and answered from there.

A delivery that comes back

When the store brings a delivery back undelivered, the order's pill shows the reason, also after the seat is restarted, until the order goes out again. The customer can follow the delivery on the tracking page; the store can text them the link.

Taking a call-center order

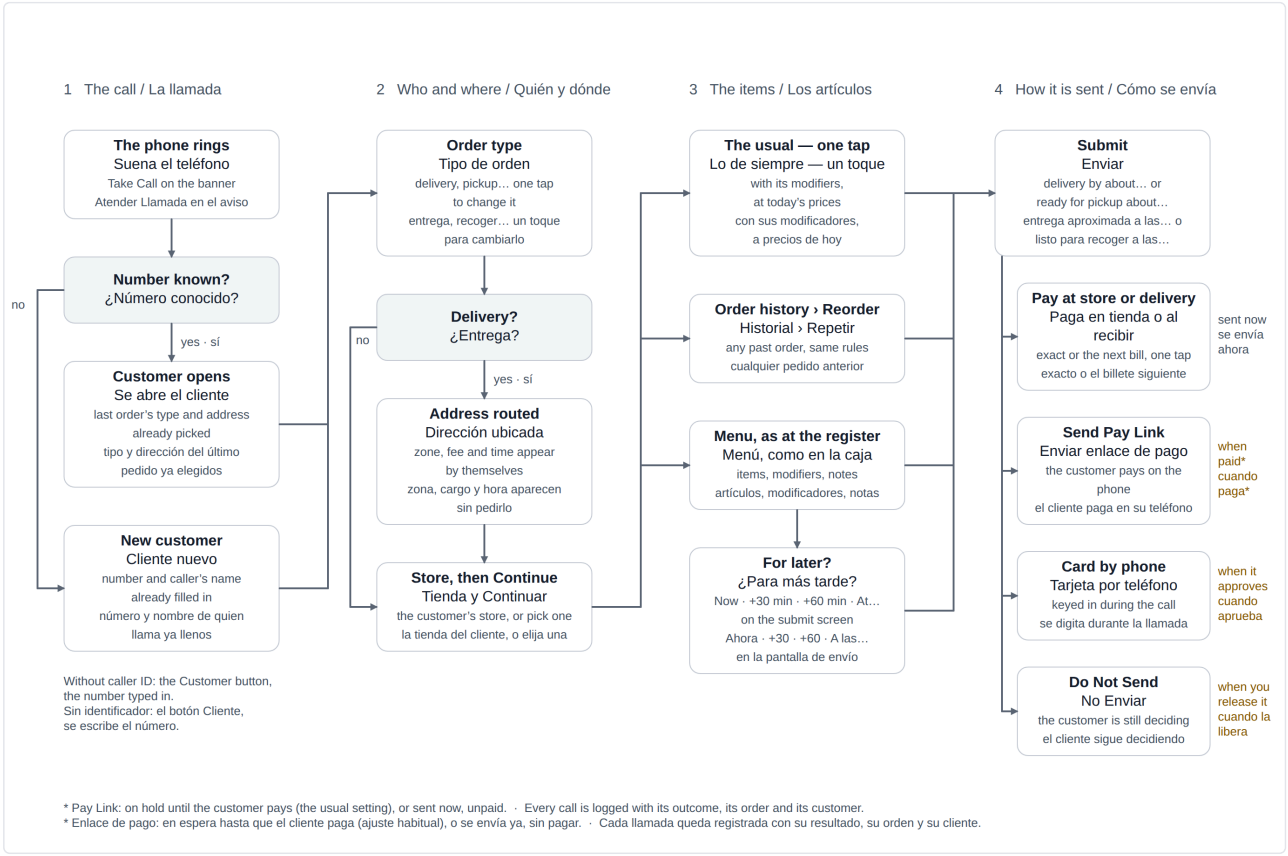
Call Center & Delivery › Call center

View online ↗

Answering the phone, finding the customer, picking the store, and building the order for it.

A call-center order is taken at one place and cooked at another. The sequence matters, because everything after the store choice depends on it.

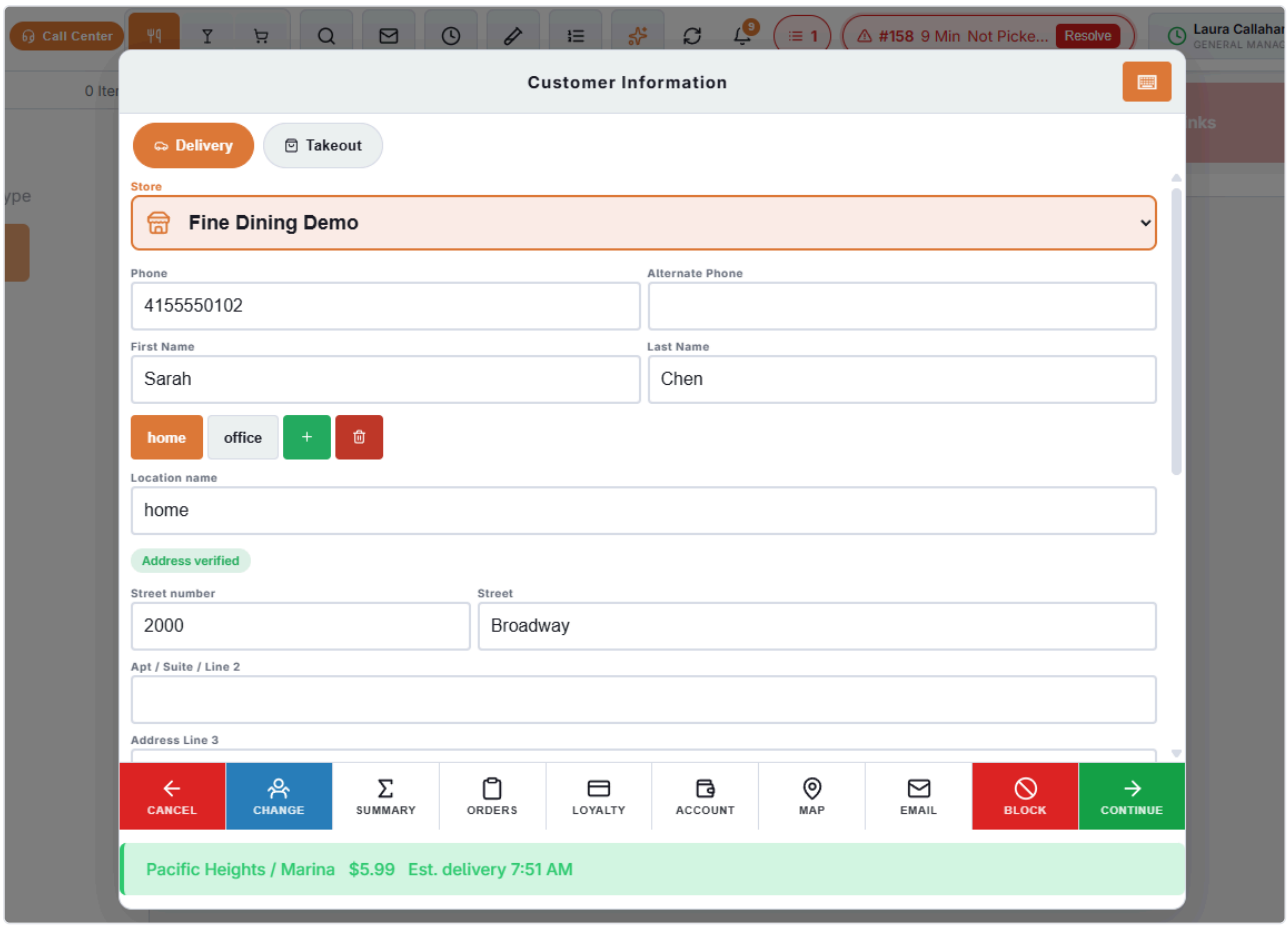
In one picture, from the ring to the store, with the branches along the way. The part after Submit — the four ways to send and when the store gets the order — is drawn in How a call-center order travels.



1. **Find the customer.** Look them up by phone number; an existing customer brings their address and order history with them. A new caller is created here.
2. **Choose the store.** For delivery this follows from the address and its delivery zone. For collection it is whichever store the caller wants.
3. **Build the order** against that store's menu and prices. This is why the store comes before the items — stores do not necessarily sell the same things at the same prices.
4. **Submit it** to the store. See **Submitting and routing an order to a store**.

> The caller's history is worth a glance before taking the order. A repeat customer ordering the same thing every Friday is faster to serve from history than from the menu.

> If the address falls outside every delivery zone, the order cannot be a delivery for that store. Check the zones before promising a time — see **Delivery zones and the zone map**.



With caller ID

When caller ID is connected, every call for any store of the business appears as a banner on the call-center stations while the phone rings. Answer, then tap **Take Call**: the customer lookup opens on the caller's number, the number is recorded on the call, and the other operators' banners clear so nobody takes the same caller twice. Choose the store as usual. See **Taking a call at the register**.

Two operators, one caller

If two stations tap Take Call on the same ringing call, the second is told who took it and nothing opens, so the caller does not end up with two orders. Calling a customer back from Recent Calls is never blocked.

New to the call center? How a call-center order travels shows the whole path in one picture.

Which registers are call center seats

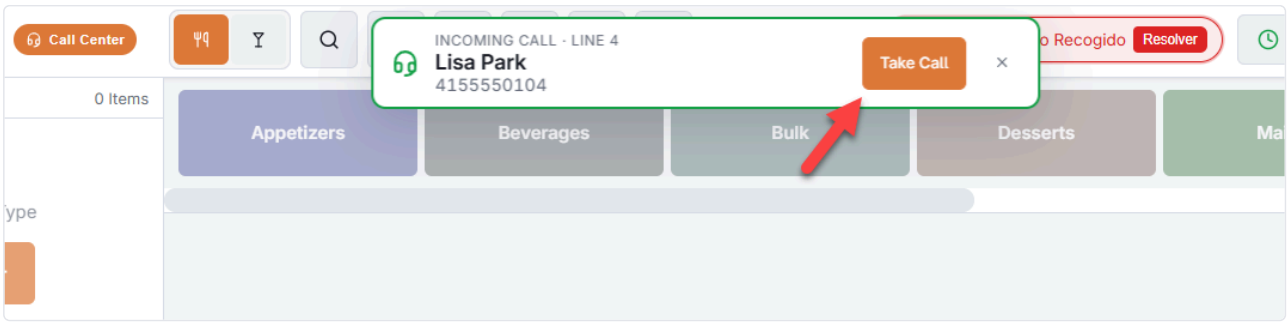
A register is a call center seat because it was set as one in **Back Office › Hardware & Printing › Registered Devices** — it is not something the register can switch by itself. The store's plan has to include the call center and have a seat free. See POS station or call center seat.

Less to tap during the call

Most of what used to be typed or chosen is now on the screen when it opens. The pieces, in the order they come up:

A caller you already know

Take Call on the caller ID banner opens the caller's record straight away: the type of their last order is already chosen, the address of that order is already selected, and for a delivery the zone, the fee and the estimated delivery time are worked out while you are still reading the name back. One **Continue** starts the order. A strip across the top of the screen shows the order types the call center may use with the chosen one lit — tap another when the caller wants something else, and a delivery address is routed again.



A caller you do not know

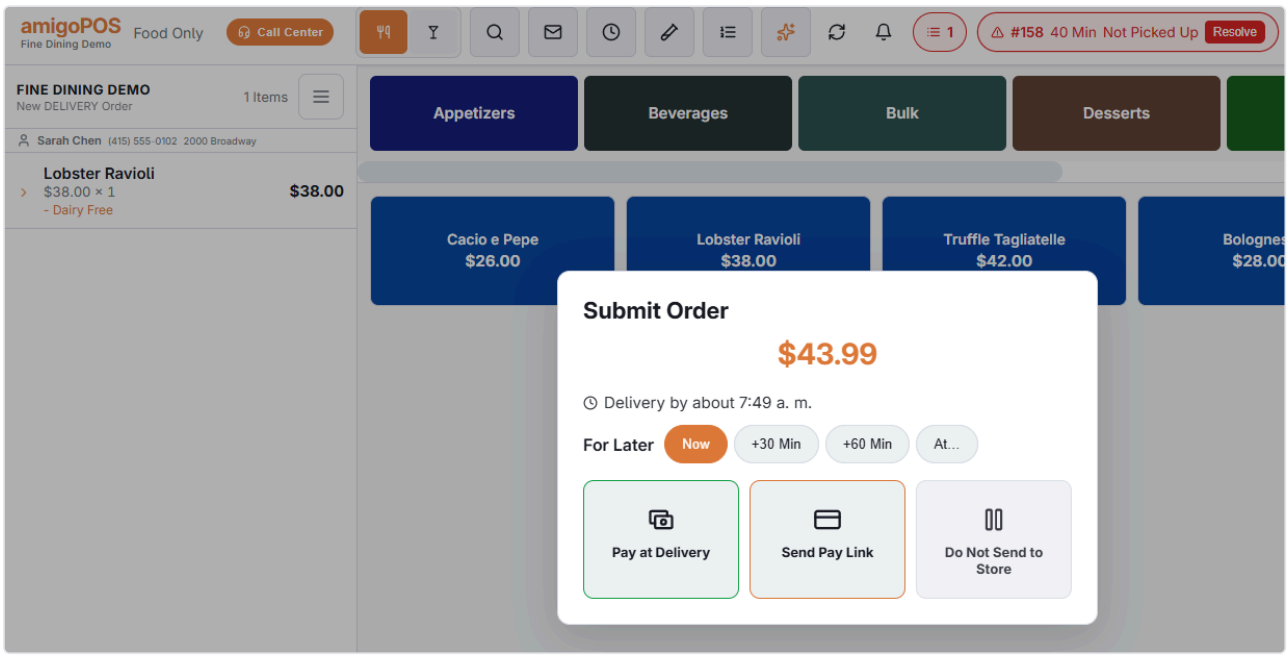
An unknown number opens a new customer with the number — and the name the phone company sent, when there is one — already filled in, so you type the address and press Continue. A record created this way that you never confirm (you press Cancel, or Change customer) is removed again: a wrong number or a question leaves nothing behind.

The usual, and Reorder

Order The Usual on the customer screen, and **Reorder** in the caller's order history, ring a past order in one tap: the items with their modifiers and item notes, at today's prices. Anything that cannot be rung again is left out and named in the message, so you can tell the caller — see The usual: one-tap reorder for regulars.

On the submit screen

- Under the total: **Delivery by about…** for a delivery (the store's quote for that address, including how busy the kitchen is) or **Ready for pickup about…**, to read out to the caller.
- **For Later**: Now, +30 Min, +60 Min or At… schedules the order in one tap — the same as Delay Order, and the screen then shows the scheduled time and when the kitchen gets it.
- **Pay At Delivery** asks what the caller will pay with as chips: Exact Amount, the next bills above the total with the change under each, and Other Amount for anything else. A tap on a chip sends the order.
- **Send Pay Link** can send the link to the caller's number the moment you tap it, when the store switches that on — see Sending a pay link.



Every call is recorded with its outcome — an order, or abandoned — the order it produced and the customer it was for.

A caller who once paid a pay link with "keep my card" ticked has one more way to send: **Charge** their card, on the submit screen — see Sending a pay link. And a seat in an office prints its own copy of each order it sends: The call center's own hardware.

Pending call-center orders at the store

View online ↗

The overlay that will not let a phoned-in order sit unnoticed, and the three things you can do with one.

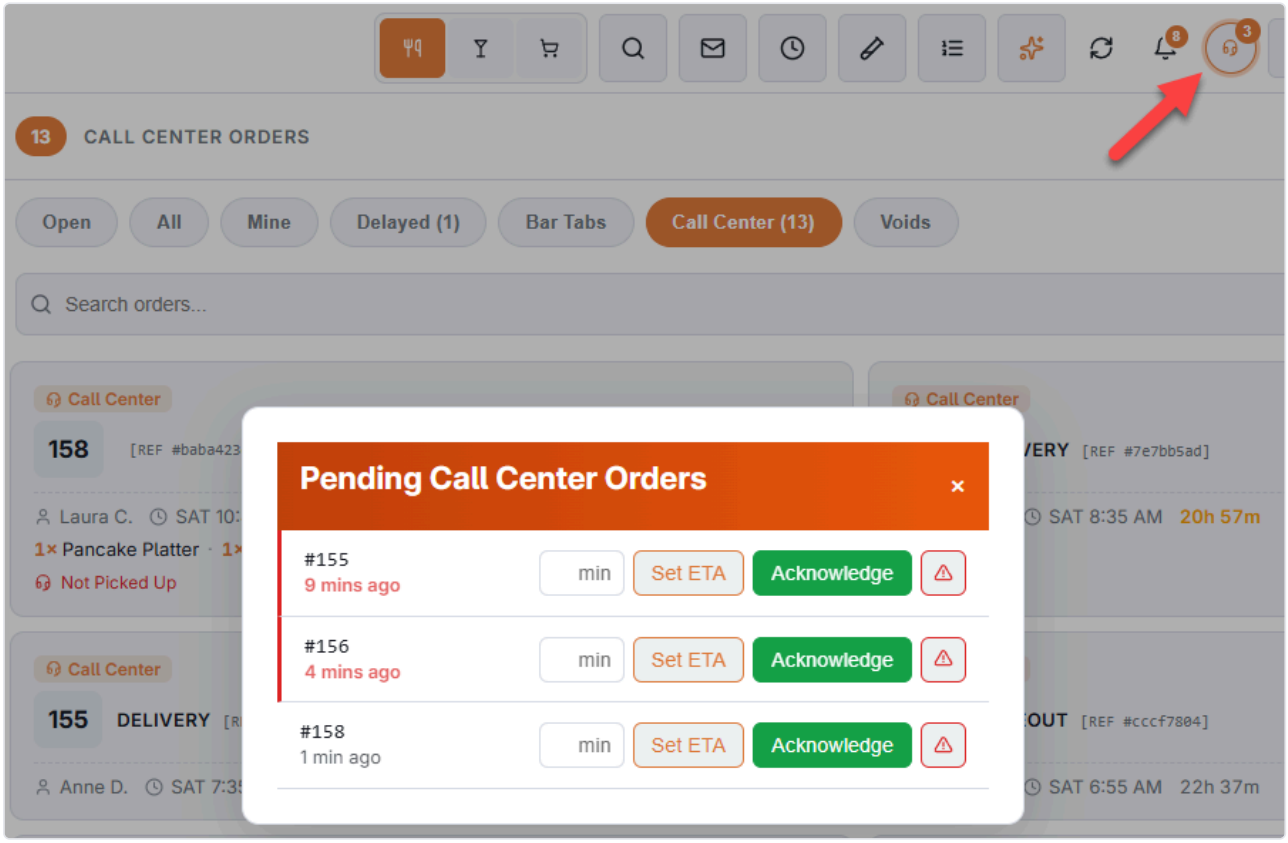
When the call centre sends an order to your store, it lands in the pending overlay and stays there until somebody deals with it. The list shows how long each order has been waiting.

Three actions

- **Acknowledge** — you have it and you are working on it. The order is recalled so you can carry on with it, and the call centre sees it was picked up.
- **Set ETA** — enter how many minutes until it is ready. That promises a time back to the call centre and acknowledges the order in the same step, so it is usually the better of the two.
- **Report an issue** — type what is wrong. Out of an item, the address is not deliverable, the kitchen is an hour behind. The call centre sees it and can call the customer back.

> An unacknowledged order is a customer with no idea whether their food is coming. This overlay exists to stop that; do not close it and mean to get to it later.

> The list updates live as orders arrive and as other stations acknowledge, so two people cannot both pick up the same order.



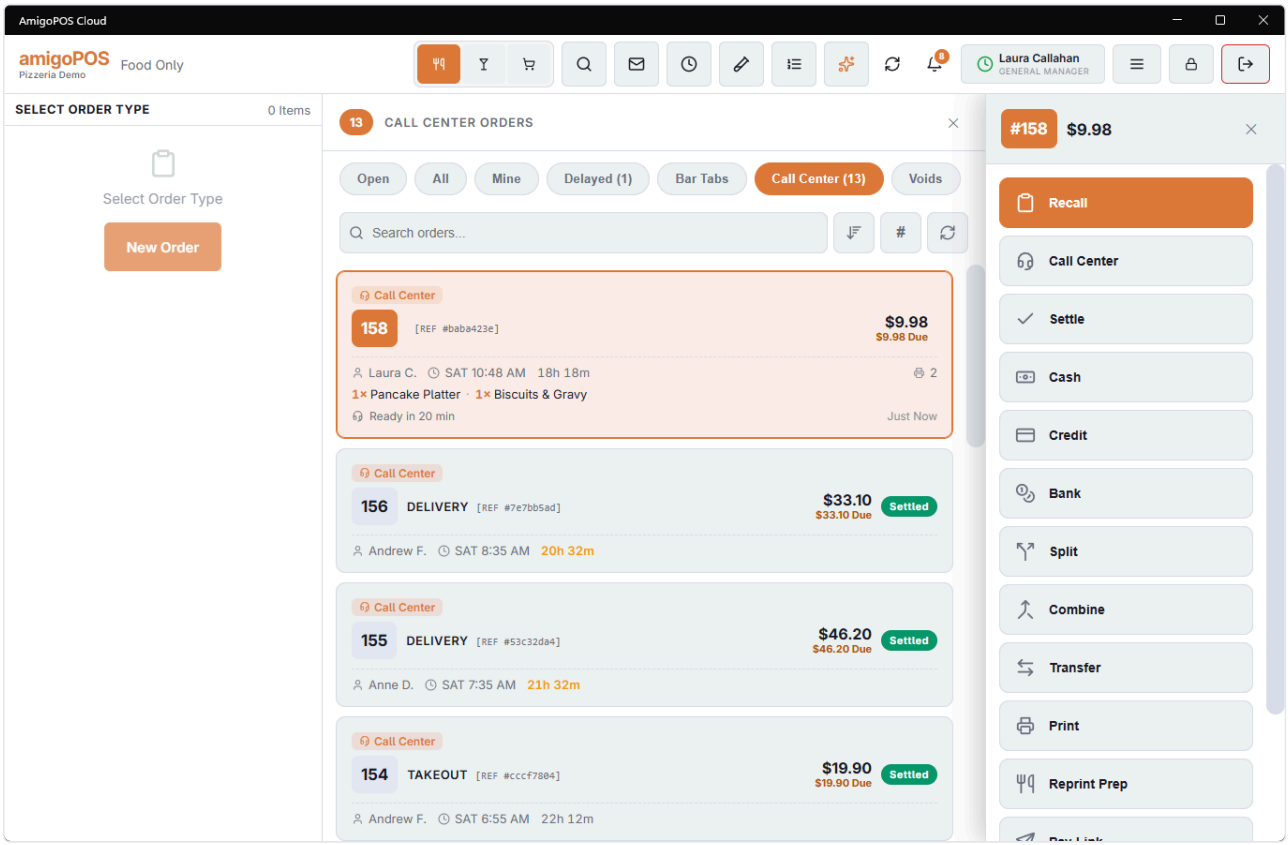
Changes and cancellations

- The badge counts every call-center order waiting for you: new, changed and cancelled.
- A changed order prints an **UPDATED** kitchen ticket and a cancelled one a **CANCELLED** ticket, even when nothing was added — an item taken off, an address corrected.
- A problem you report stays on the call center's screen until they mark it resolved.
- An order the call center is still holding — for a payment, or a callback — does not reach you, the kitchen display or the delivery board until it is sent.

An order whose card on file was declined at the call center waits here too, like one waiting for a pay link; the call center sends the link or takes another card, and the order comes off hold when it is paid.

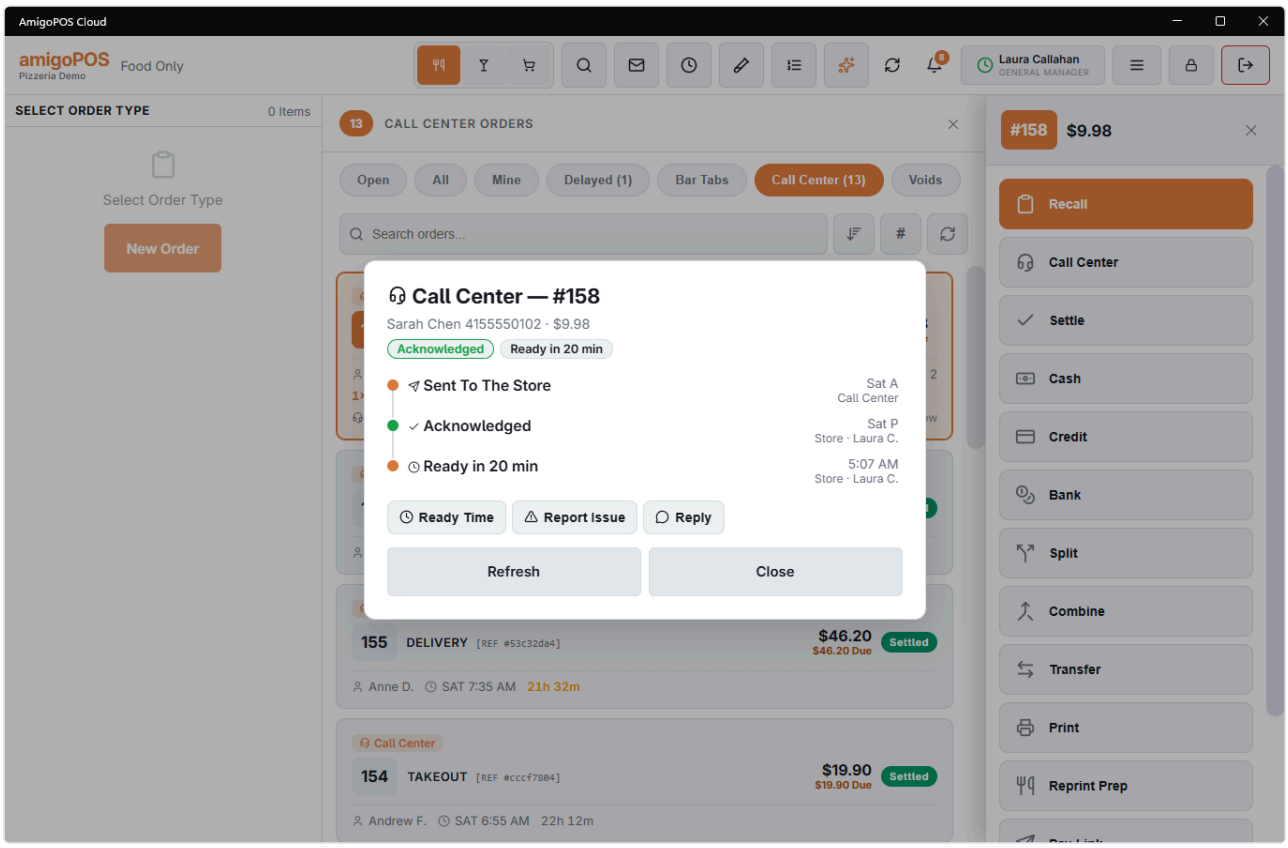
Telling the call center about an order

A phone order is the call center's until it is handed over, and the operator who took it is the one who can call the customer back. Anything the store learns after the order arrives — when it will be ready, that an item is gone, that nobody came for it, that the address is wrong — goes back to the call center from the **orders list**. Select the order and tap **Call Center** on the action rail. The order does not have to be recalled.



The overlay shows the conversation so far — sent, acknowledged, the ready time, every message either side wrote, and what happened to the order (picked up, out for delivery, paid online) — and four things the store can say:

- **Ready Time** — tap +10, +20, +30, +45 or +60, or type the minutes, then **Set ETA**. The seat shows "Ready In 20 Min" on the order's pill. Set it again to change it.
- **Report Issue** — **Out Of Stock** (pick the item from the order's lines), **Not Picked Up**, **Invalid Delivery Address**, **Customer Unreachable**, or **Other** with a note. The note is optional for the first four. An issue stays red on every seat of the call center until an operator resolves it.
- **Reply** — a free-text message, for anything else or to answer the call center.
- **Mark Resolved** — shown while an issue is open; the store found the item after all, or the customer turned up.



A message on an order the store had not acknowledged yet acknowledges it as well, exactly as setting a time or reporting from Pending Call Center Orders does. Out Of Stock only tells the call center; the line stays on the ticket. To take it off, recall the order and remove it — the call center hears about the new total on its own (below).

What the call center hears without anyone typing

- **Total changed** — when a register recalls a call-center order and saves it with a different total (a line removed or added), the seat gets "Total Changed At The Store: $12.50 → $15.00".
- **Voided here** — when a register voids a call-center order, the seat gets "Voided At The Store" with the void reason. Both stay on the seat's tracker until an operator resolves them.

On the card

Each call-center order's card shows the last thing said and how long ago — in red while a message from this store is waiting on the call center. A reply from the seat, or the seat resolving the issue, also appears as a toast on the register.

A message the call center leaves unanswered for too long raises a manager alert: see sales and service alerts and the *Call Center Message Unanswered* threshold in alert setup.

Submitting and routing an order to a store

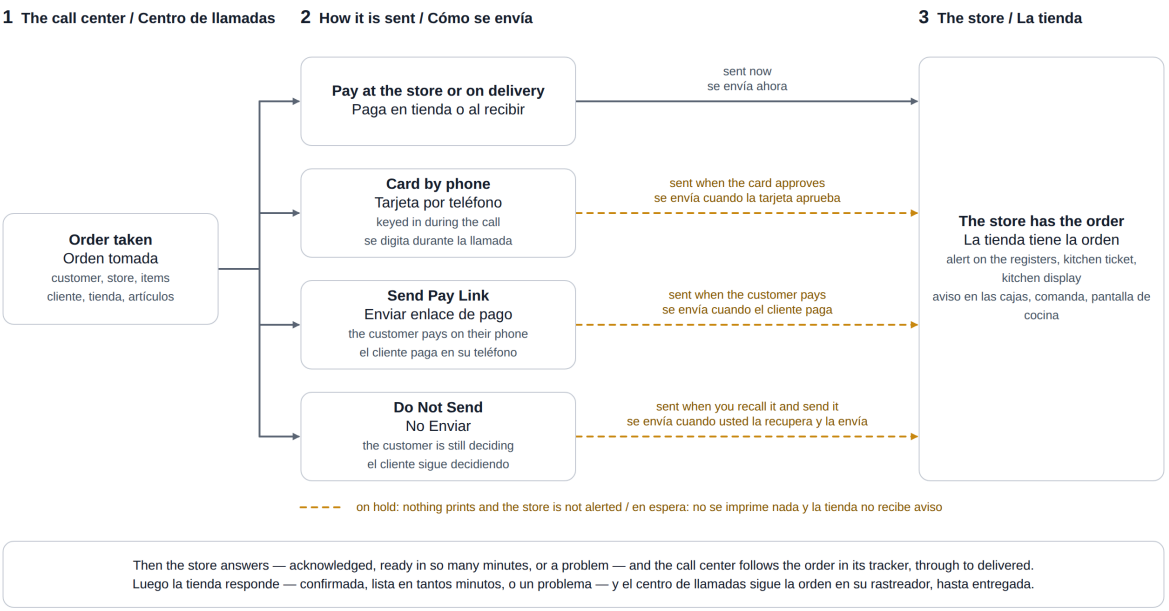
Call Center & Delivery › Call center

View online ↗

The three ways to finish a call-center order, including holding one back deliberately.

When the order is built, submitting it decides how the store will be paid and whether the order goes now.

In one picture: the four ways to send an order, and when the store gets it.



Pay at the store or on delivery

The cash route. You are asked what the caller will pay with — **Exact Amount**, one of the next bills above the total with the change shown under each, or **Other Amount** for anything else — and that goes to the store with the order so the driver leaves with the right float.

Send pay link

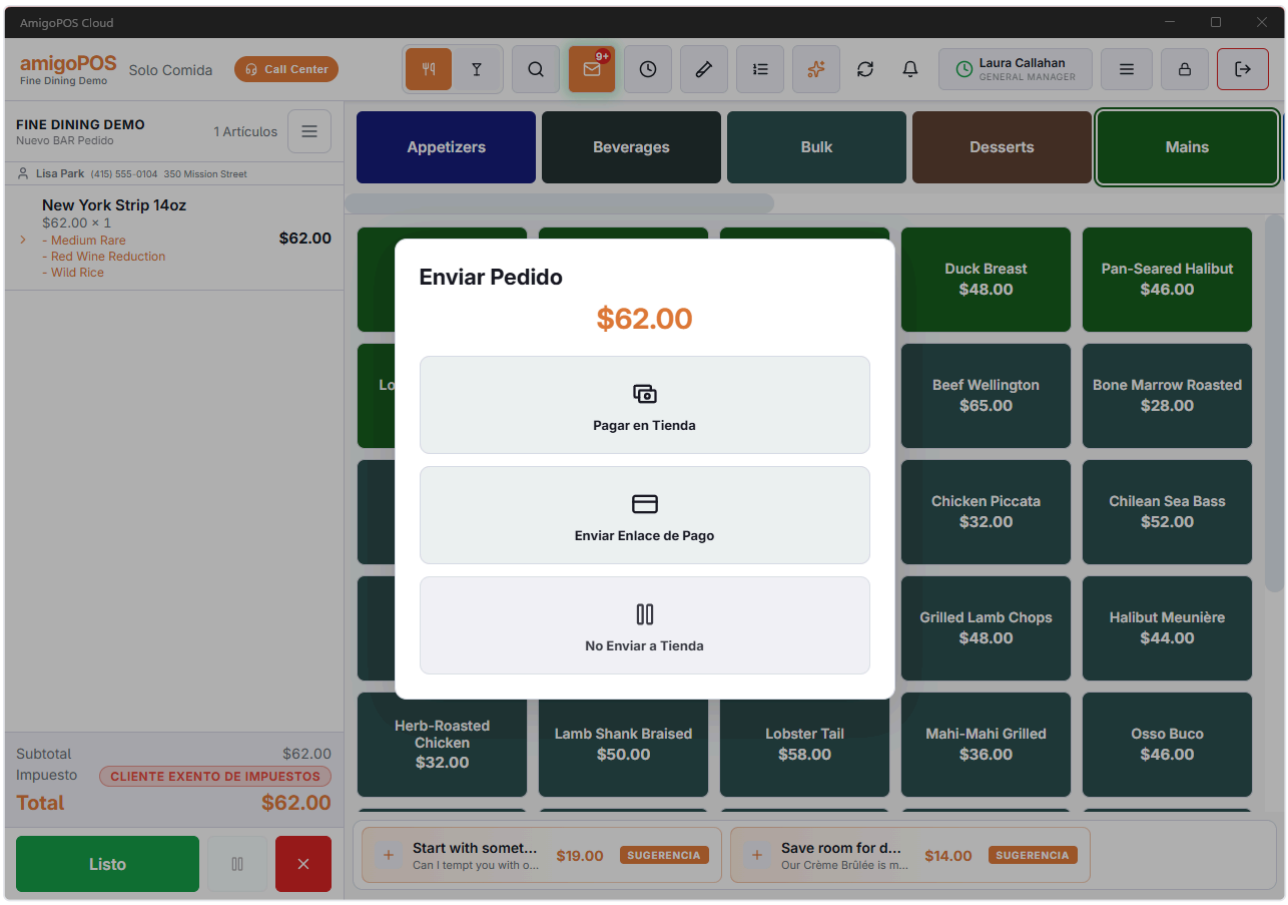
The customer is sent a link to the store's secure payment page — by text message, or by WhatsApp where the store is set up for it. No card number is read down the phone and none is typed into the POS. With **Hold Call Center Orders Until Paid** on (the default), the order waits in **Do Not Send** while the customer pays and goes to the store by itself once it is paid; with it off, the order goes to the store at once, unpaid. See **Sending a pay link**.

Do not send

Keeps the order without routing it — the customer is still deciding, or you are holding it for a callback. It is available to send later, and nothing has reached the store yet.

> Once submitted, the order appears in that store's pending overlay and the clock starts. Everything after that — acknowledgement, ETA, issues — comes back to you as events on the order.

> The store's copy of the order — its prep tickets, its pending alert and its event trail — is written in the same step as the order itself, so an order can never land at a store with nobody alerted to it.



Card by phone

Where the store has a card-by-phone payment method, its button is on the submit screen too. The order is saved on hold, the card is keyed in, and the order goes to the store the moment the card is approved. A declined card leaves the order in Do Not Send, with nothing sent to the kitchen. See Credomatic (card not present).

An order the store already has

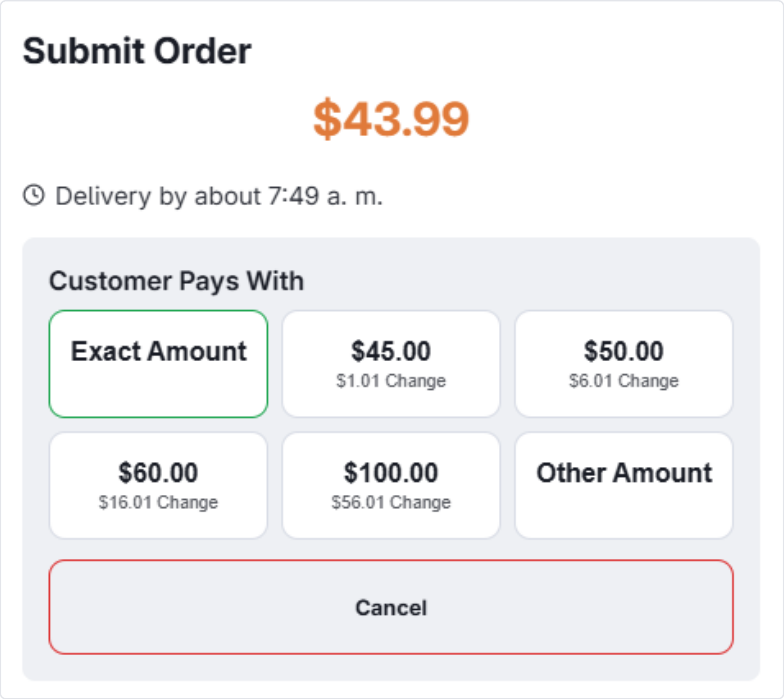
- Recalling it and sending it again sends the changes: the store prints an UPDATED ticket and is asked to acknowledge again.
- **Do Not Send** is refused: an order the store has cannot be taken back onto hold.
- Taking a card by phone for it sends the changes to the store first, then opens the payment.

The change the driver should carry

What you enter for “paying with” travels all the way: it shows on the order’s card on the delivery board as **Change For …** and on the driver’s phone as **Pays With … · Change …**

On the submit screen

- A promise line under the total — **Delivery by about…** or **Ready for pickup about…** — to read out to the caller.
- **For Later** chips (Now, +30 Min, +60 Min, At…) that schedule the order without leaving the screen.
- **Pay At Delivery** asks what the caller will pay with as chips: Exact Amount, the next bills with the change under each, Other Amount. A tap sends the order.



The steps before this screen — the call, the customer, the items — are drawn in Taking a call-center order.

Sending a pay link

Call Center & Delivery › Call center

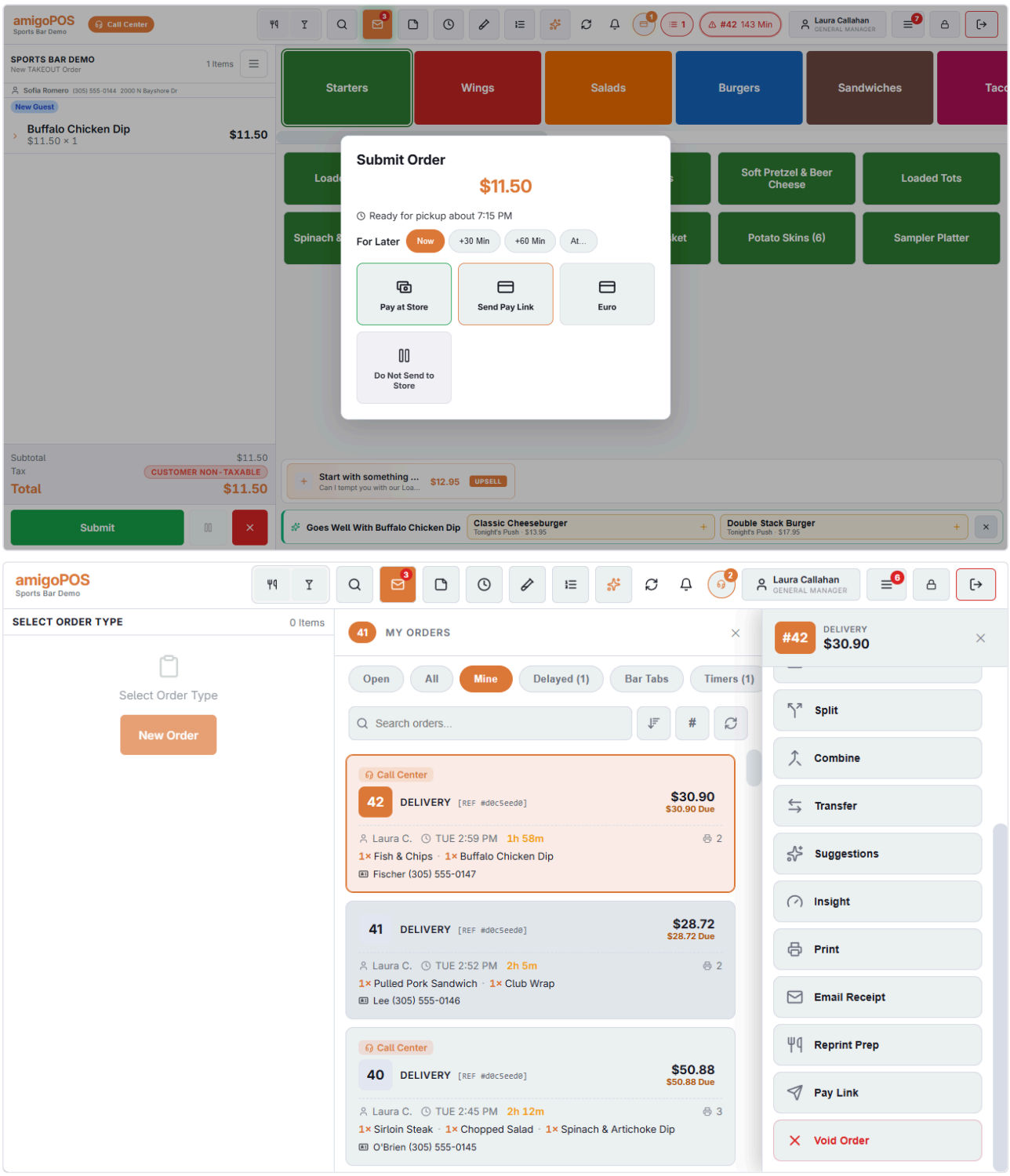
View online ↗

Sending the customer a secure link to pay an open order, by text or WhatsApp, and watching the payment arrive.

A pay link is a message containing a link to the store's secure payment page for one order. The customer pays on their own phone: no card number is read down the phone line, and nothing is typed into the POS.

Where you can send one

- **At call-center submit** — **Send Pay Link** on the submit screen.
- **From the orders list** — **Pay Link** on the rail beside a live, open order that still owes money: the way to catch the ones nobody sent a link for.
- **From the delivery screen** — **Pay Link** on a card in the **Out** tab, for a driver already on the road with an unpaid order.



From the call center: the order waits until it is paid

With **Hold Call Center Orders Until Paid** on (the default), **Send Pay Link** saves the order in **Do Not Send** — nothing prints and the store isn't alerted — and opens the pay link screen. Stay on the line while the customer pays: when the payment lands, the order goes to the store by itself, already paid, and the screen says so.

- If the customer can't pay by link, **Send To Store Unpaid** releases the order now. The link keeps working for later.
- Closing the screen cancels nothing: if the customer pays later, the order still goes to the store.
- An order that is never paid stays in Do Not Send, where it can be recalled like any other held order.

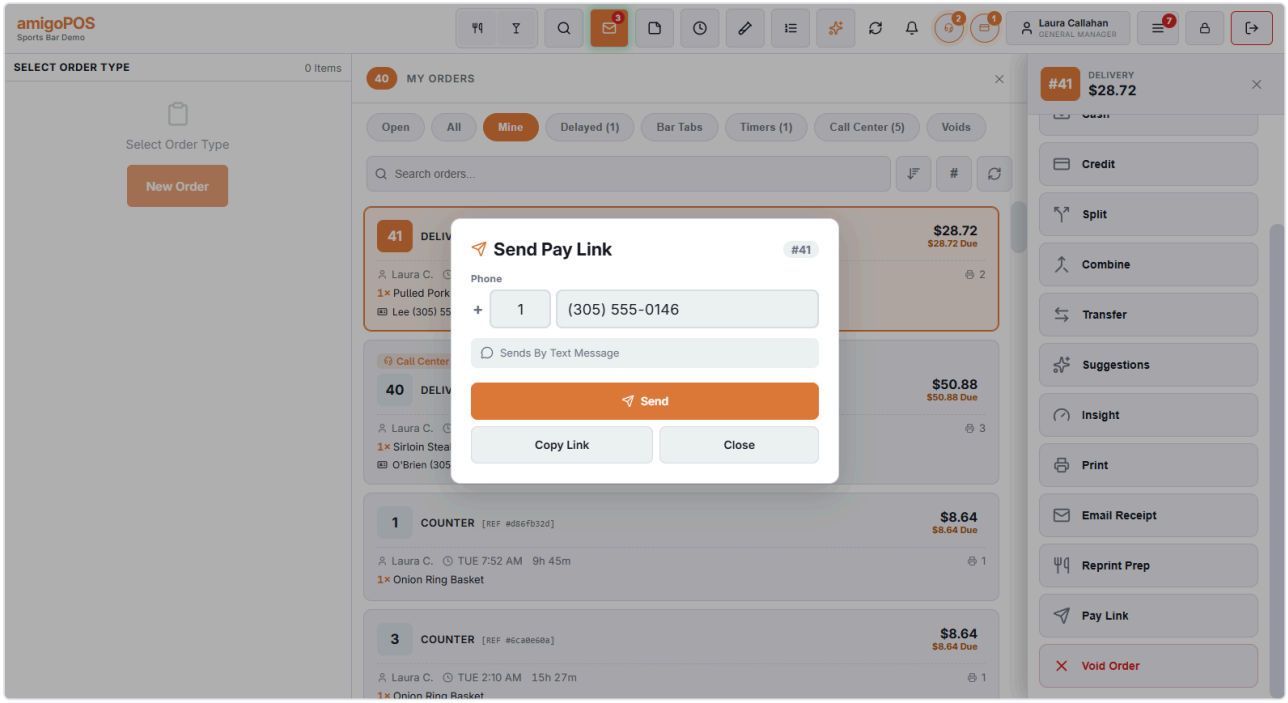
- An order the store already has — recalled to change it — is never taken back onto hold.

With the switch off, the order goes to the store at once, unpaid, and the link follows.

Sending

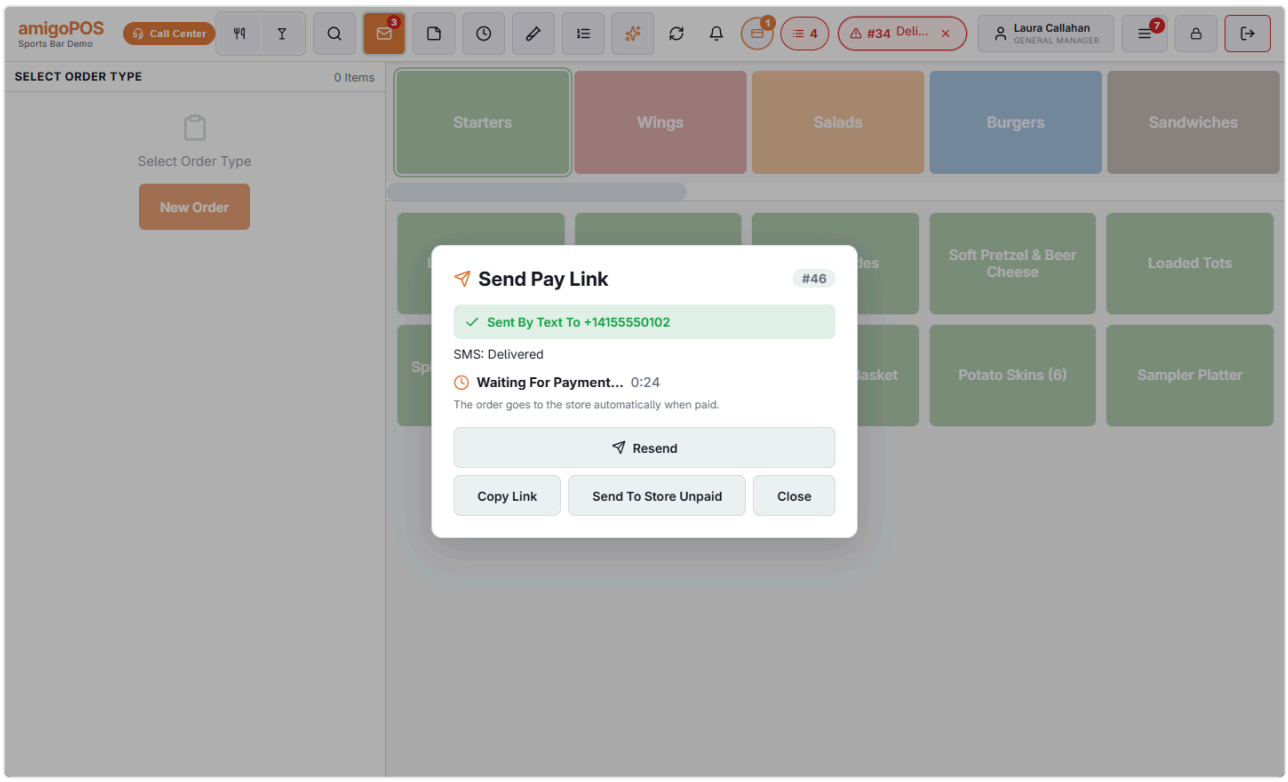
The number is filled in from the order; correct it if needed. It is entered as a fixed **+**, a country code already filled with the store's own, and the number the way the customer says it: change the country code for a foreign number, or paste a number that starts with + as it is. What you type is used for this message only and is never saved on the customer.

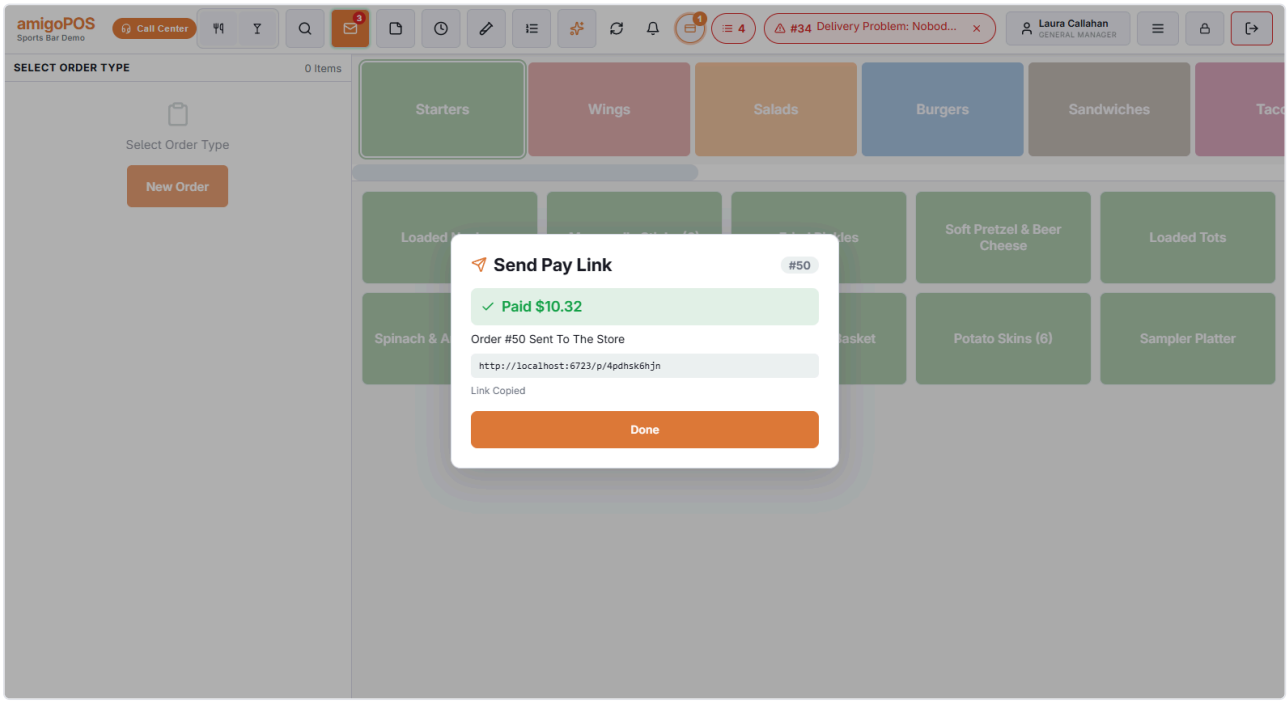
Under the number, the screen says how the link will go — WhatsApp or text — or why it can't. When the store has approved Payment Link templates in more than one language, pick the customer's language.



Watching it arrive

After **Send**, the screen shows how the link went, its delivery status — sending, sent, delivered, read or not delivered — and **Waiting For Payment** with a timer. When the customer pays it shows **Paid** with the amount and, from the call center, that the order has gone to the store. Once the link is out, a tap outside the screen no longer closes it.





When the message doesn’t go out

If sending fails — a landline, a mistyped number, messages switched off — the link is shown on screen. **Copy Link** puts it on the clipboard for any other way of passing it on, and the screen keeps watching for the payment all the same. **Resend** lets you correct the number and send again; the link doesn’t change.

> Payment lands on its own: the amount posts against the order and the balance clears. Where the store has an approved Payment Received template, the customer also gets a WhatsApp confirmation.

A link sent is not money taken. Until the screen shows Paid, or the balance is clear, the order is unpaid: check before handing it over or sending it out with a driver.

When the card is declined

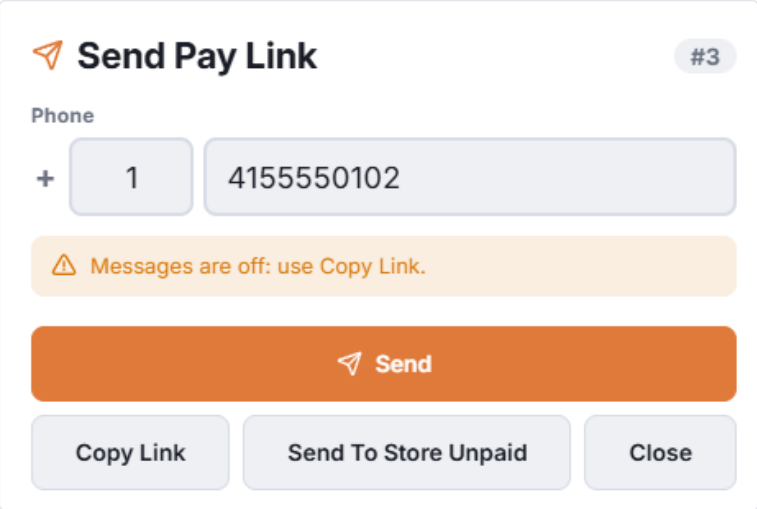
If the customer's card is refused on the payment page, the call center's tracker shows **Payment Failed** with the reason on that order, until it is paid. The link still works: the customer can try again or use another card.

From the driver's phone

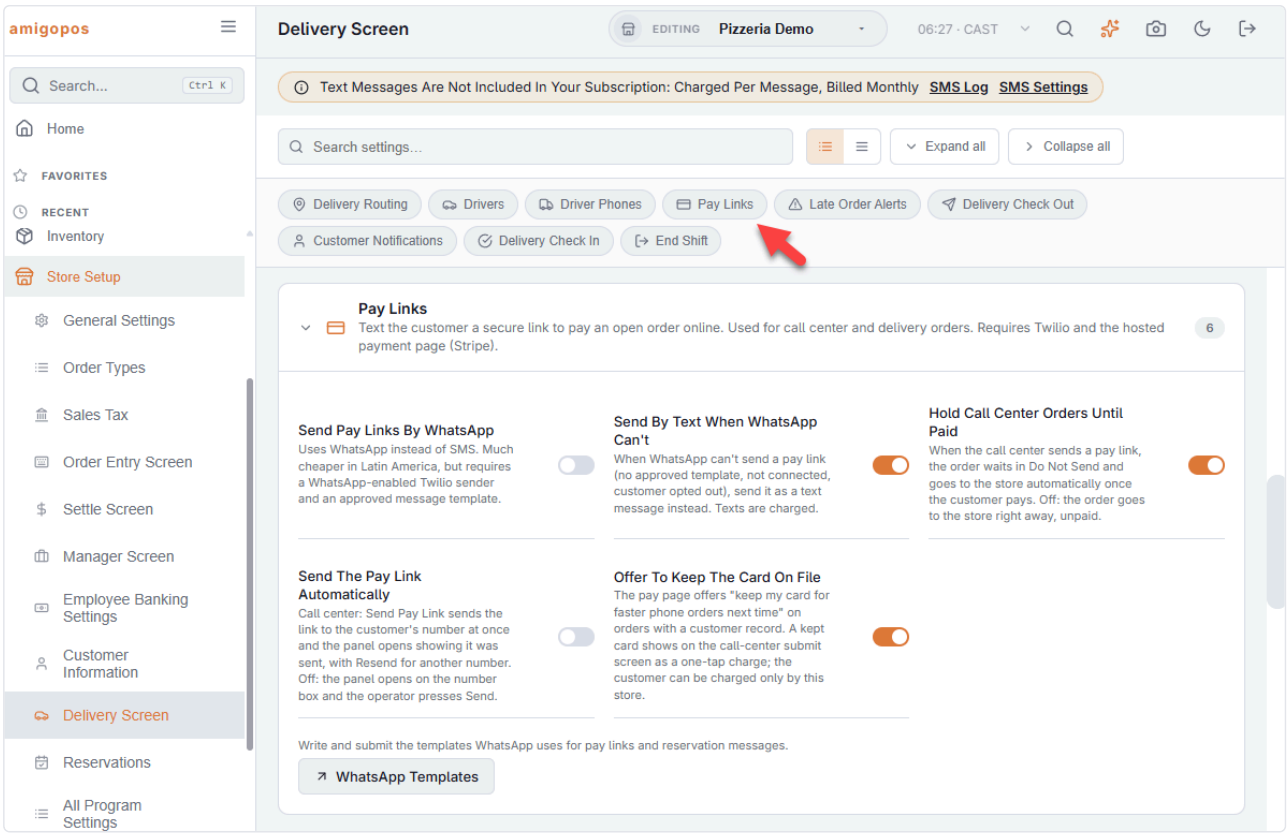
A driver at the door can show the same payment page as a QR code on their own phone, or message the link, with **Pay By Card** on the stop. See Deliveries on the driver's phone. When an order that is out is paid online, the driver's phone is told not to collect.

Sending the link automatically

With **Send The Pay Link Automatically** on (Back Office › Store Setup › Delivery Screen › Pay Links), tapping Send Pay Link on the call-center submit screen sends the link to the number on the order at once. The panel opens showing where it went and the message's delivery status; **Resend** brings the number box back for another number.

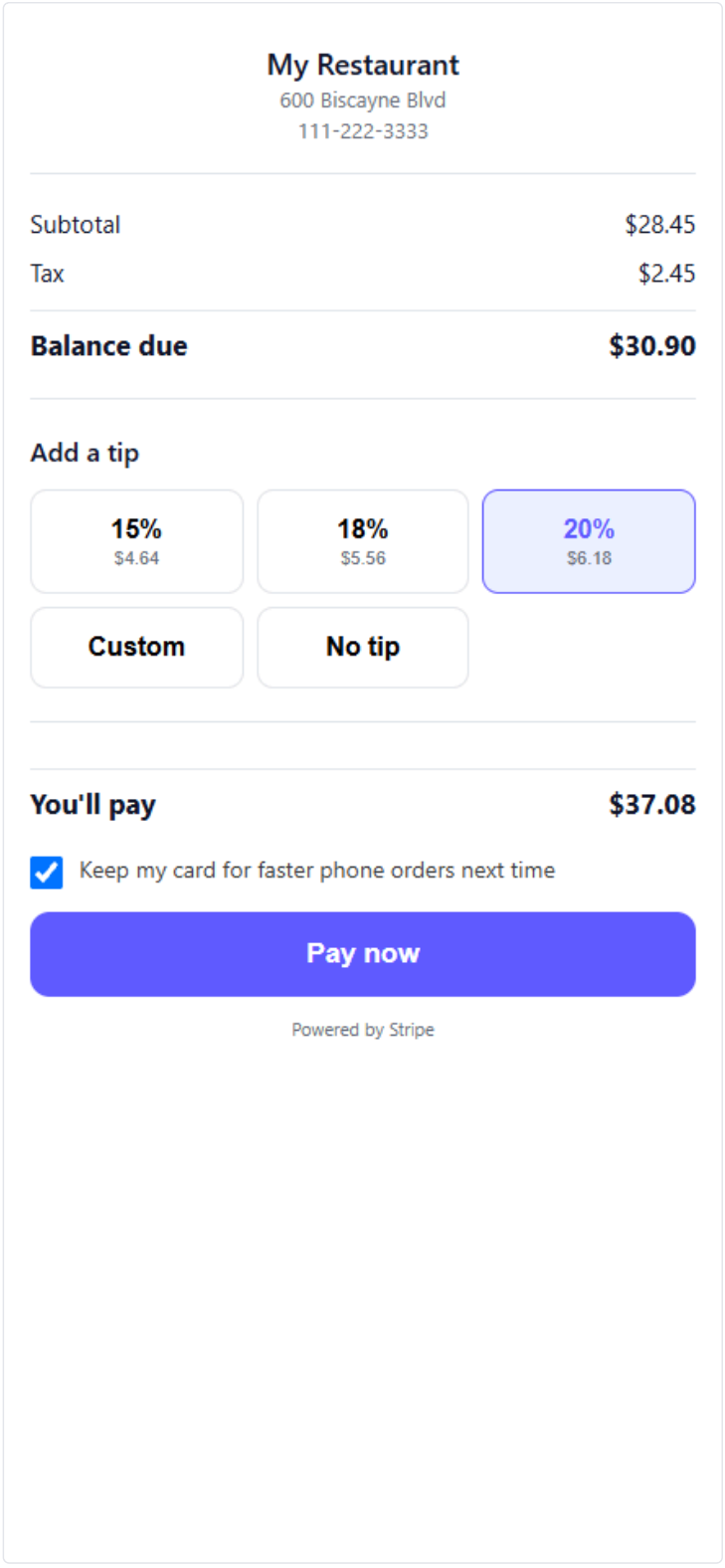


The link is not sent on its own — the panel opens on the number box as before — when the number has fewer than seven digits or the store's messaging is not ready (no public address, no WhatsApp template, no SMS). The orders list and the delivery screen are not affected by the switch: there the link is always sent by hand.

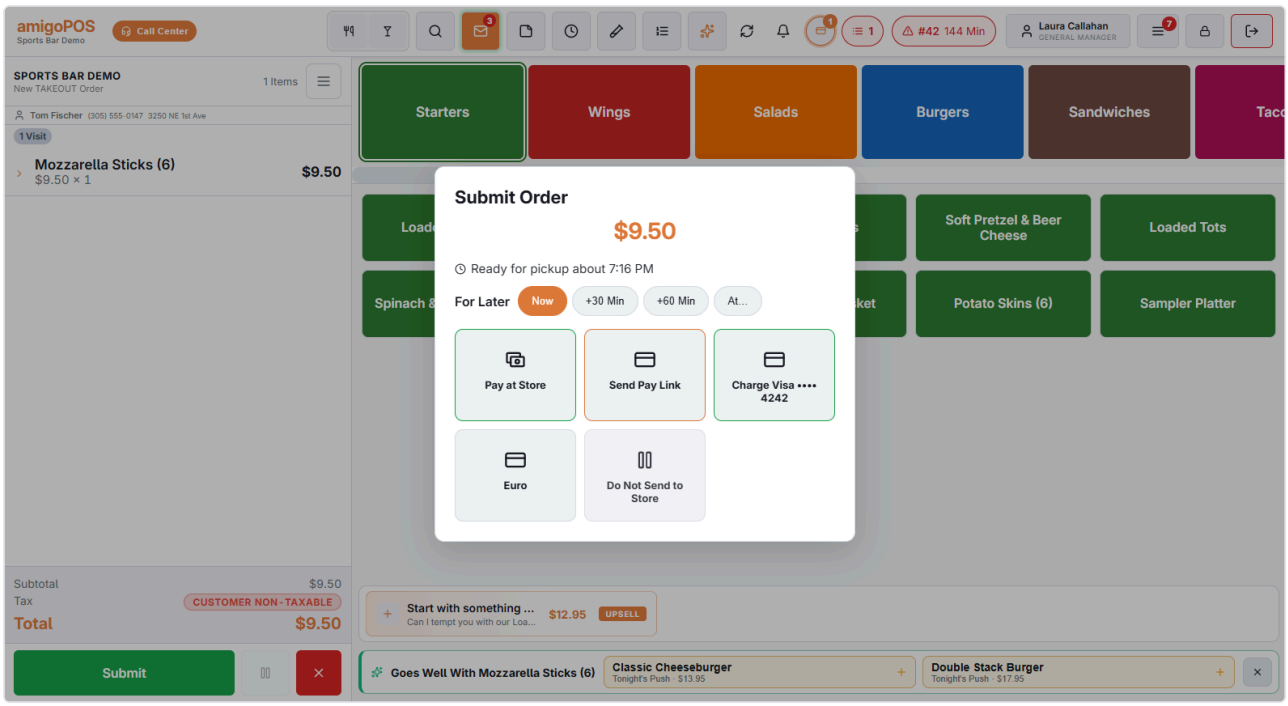


Keeping the card for next time

When the order belongs to a customer record and the store offers it (Setting up pay links), the pay page shows **Keep my card for faster phone orders next time**. Ticked, Stripe keeps the card under the customer; we hold only the brand, the last four digits and the expiry — no card number ever touches the register.



The next time that customer calls, the call-center submit screen shows **Charge Visa •••• 4242** beside the other ways to send. One tap parks the order, charges the card and sends the order to the store the moment the charge is approved — the store gets it with the receipt and the kitchen ticket as usual. A decline leaves the order in Do Not Send with the reason on the screen; a pay link, or another card, can follow from Pending call-center orders at the store.



A card is kept with the store whose pay link took it: a card kept through one store's pay page can be charged by that store only, because each store has its own Stripe account.

Real-time order events and alerts

Call Center & Delivery › Call center

View online ↗

The event trail that follows a call-center order from submission to the door.

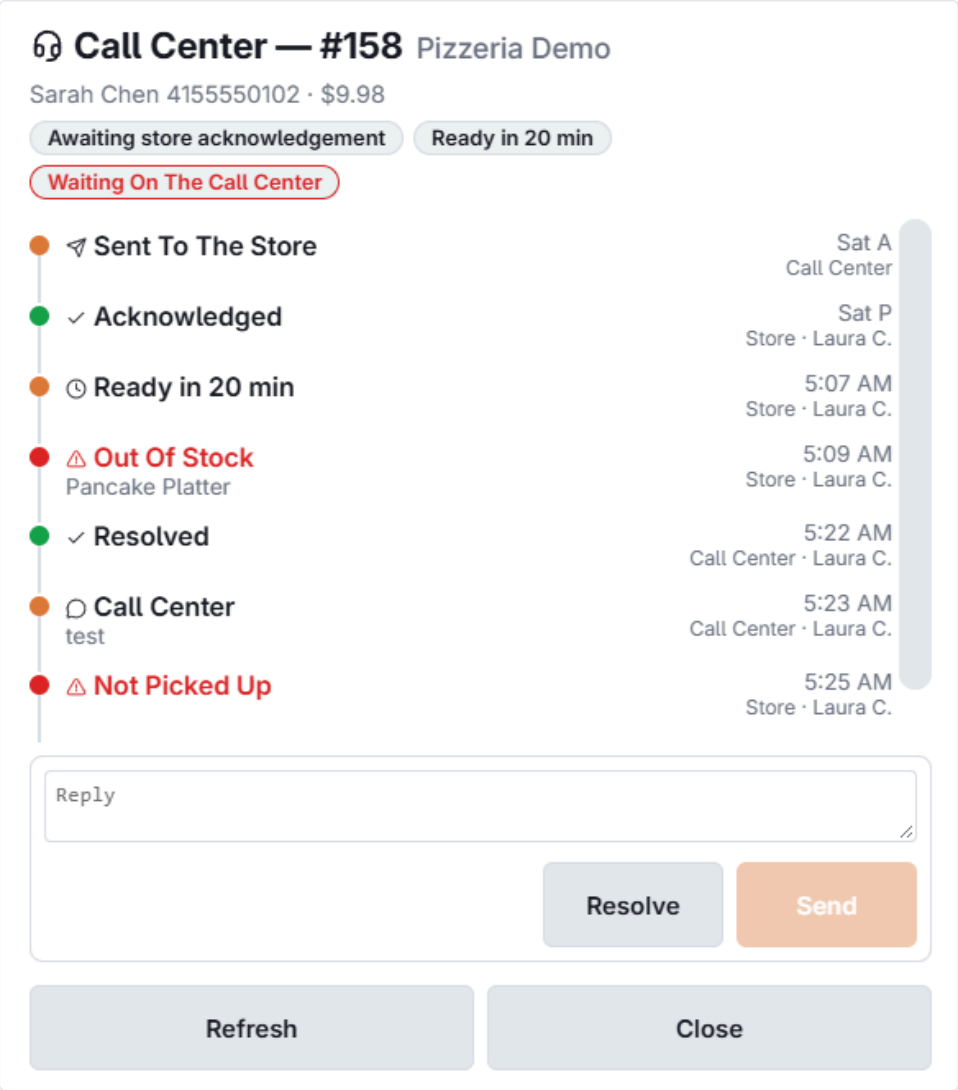
A call-center order carries an event trail, and both ends see it as it happens. It is what lets someone on the phone answer "where is my food?" without ringing the store.

The lifecycle

- **Submitted** — the call centre sent it to the store.
- **Acknowledged** — the store picked it up.
- **Promised ready** — the store set an ETA.
- **Pay link sent** — somebody sent the customer a link to pay online, with the number it went to and whether the message was accepted.
- **Payment received** — the customer paid online, so the balance cleared without anyone touching the order.
- **Issue reported** — the store hit a problem, with its note. The call centre can then mark it resolved.
- **Updated** or **voided** — the call centre changed or cancelled it after sending.
- **Picked up**, **out for delivery**, **delivered** — how it ended.

Events push to both sides as they happen, so a store acknowledging an order removes it from every other station's pending list at the same moment.

Dine-in service pace uses the same event mechanism for its own milestones — seated, drinks served, entrees served. Same trail, different questions.



Delivery and payment news

- **Out for delivery** carries the driver's name, and **delivered** the time it was handed over.
- **Problem at the door** — the driver's report from their phone, with the reason.
- **Payment declined** — the customer's card was refused on a pay link or a QR payment, with the reason.

The call center sees all of it in the tracker: Following your orders: the tracker. The store sees the delivery events on the delivery board.

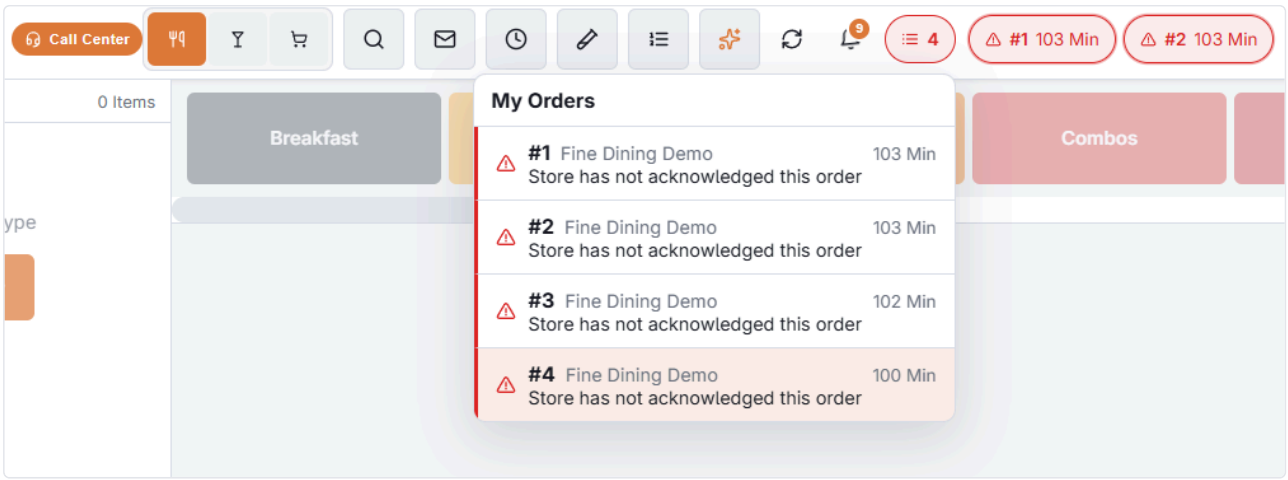
Following your orders: the tracker

Call Center & Delivery › Call center

View online ↗

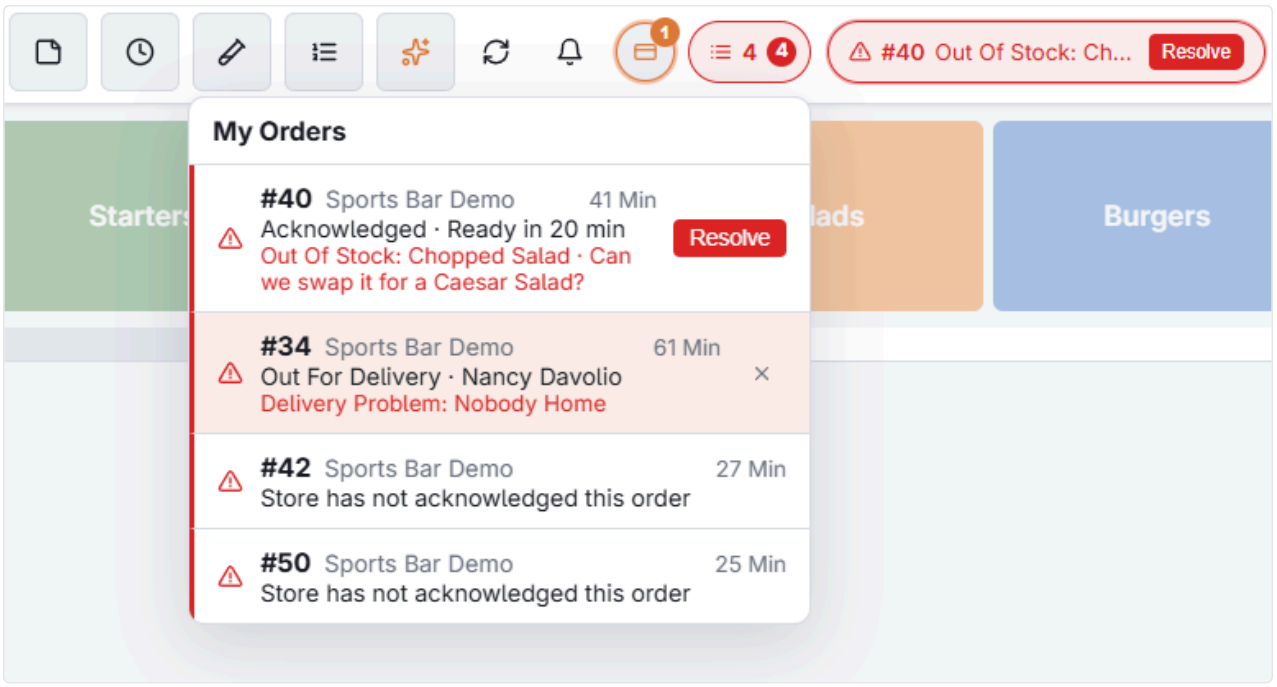
The strip at the top of the call-center screen that shows where each of your orders stands, without calling the store.

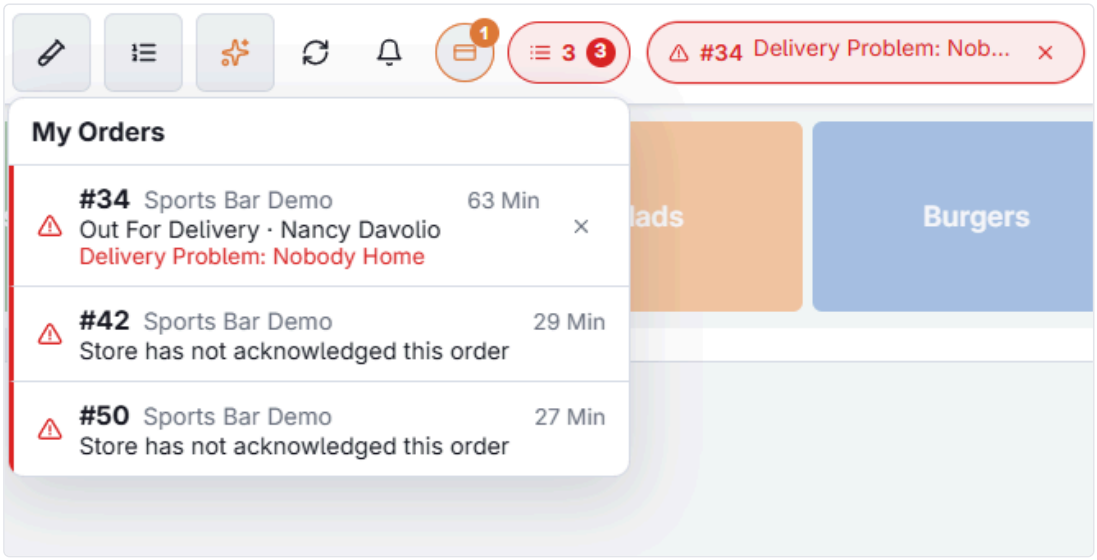
After you send an order it leaves your screen, but not your sight. The tracker in the top bar shows each of your orders as a small pill, and the pill changes as the store and the driver act.



What a pill tells you

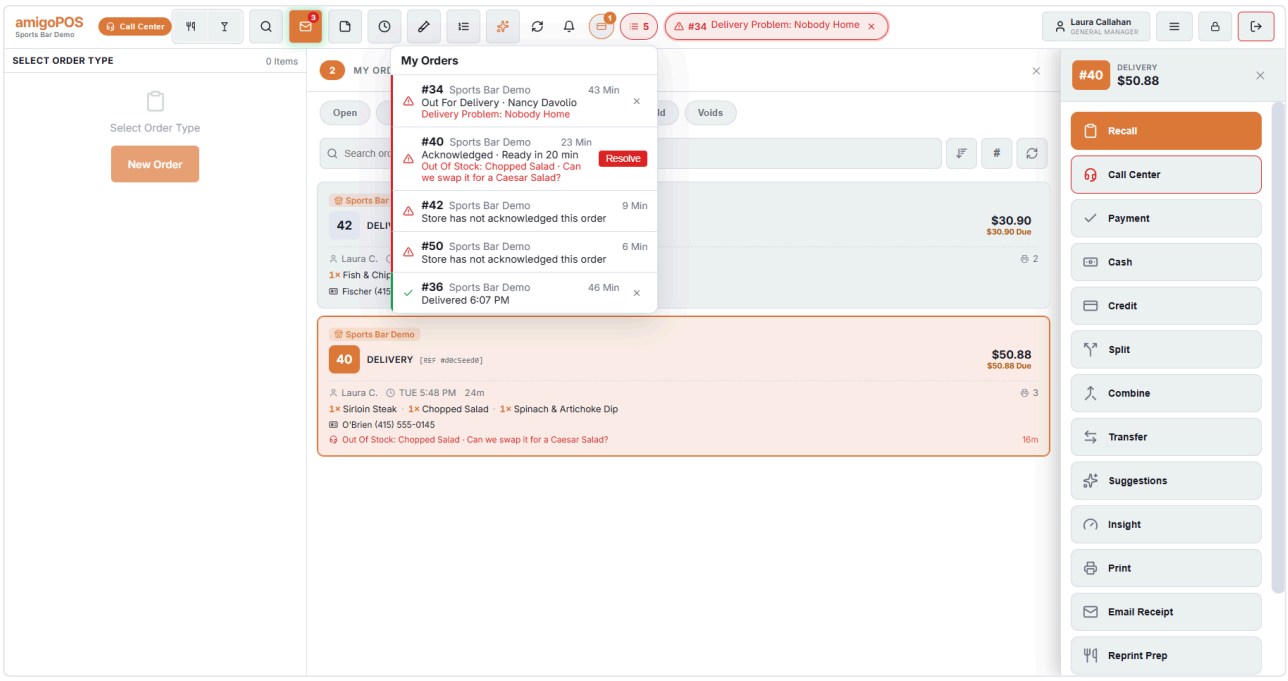
The pill shows	It means	What to do
A clock and an age	Sent. The store has not acknowledged it yet.	Nothing yet.
The same, in red	Two minutes have passed with no answer.	Call the store.
Acknowledged	The store has it. The pill leaves by itself after half a minute.	Nothing.
Ready In N Min	The store promised a time.	Tell the customer, if they are still on the line.
A note and **Resolve**	The store reported a problem: out of an item, an address it cannot deliver to. It stays until you resolve it.	Call the customer, fix the order, then tap Resolve.
Out For Delivery and a name	Dispatched to that driver. Shown for a few minutes.	Nothing.
Delivered and a time	Handed over at the door, or checked in back at the store. Shown for ten minutes.	Nothing.
Delivery Problem and a reason	The driver reported a problem at the door: nobody home, wrong address, could not pay. It stays until the order is delivered or taken back.	Call the customer.
Payment Failed and a reason	The customer’s card was declined on a pay link. It stays until the order is paid.	Call the customer. The same link still works.





When the bar is full

The most urgent pills come first: what needs you, then orders the store has not acknowledged, then delivery news. When there is no room for all of them, the rest wait their turn. The count before the pills opens **My Orders**: every order with its store, where it stands and how long ago you sent it. Tap one to see its trail.



Good to know

- The tracker shows **your** orders of the last eight hours, for every store you send to.
- It is read from the server, so it is still right after the station restarts or the connection drops for a moment.
- A pay-link order that is paid after you closed the pay screen appears by itself when it goes to the store.
- Once the store has acknowledged an order, the X on its pill dismisses it. A pill with a store problem to resolve has no X: resolve it first.
- Quiet deliveries do not crowd the bar. Once acknowledged, an order shows again only when something happens to it.

What each of these events is, and who sees it, is in Real-time order events and alerts.

Setting up pay links

Call Center & Delivery › Call center

View online ↗

What a store needs before pay links work: the online payment page, and texts, WhatsApp or both to send them.

Pay links need two things at each store: somewhere for the customer to pay, and a way to send them the link. Both are store settings, so one store can use pay links while another does not.

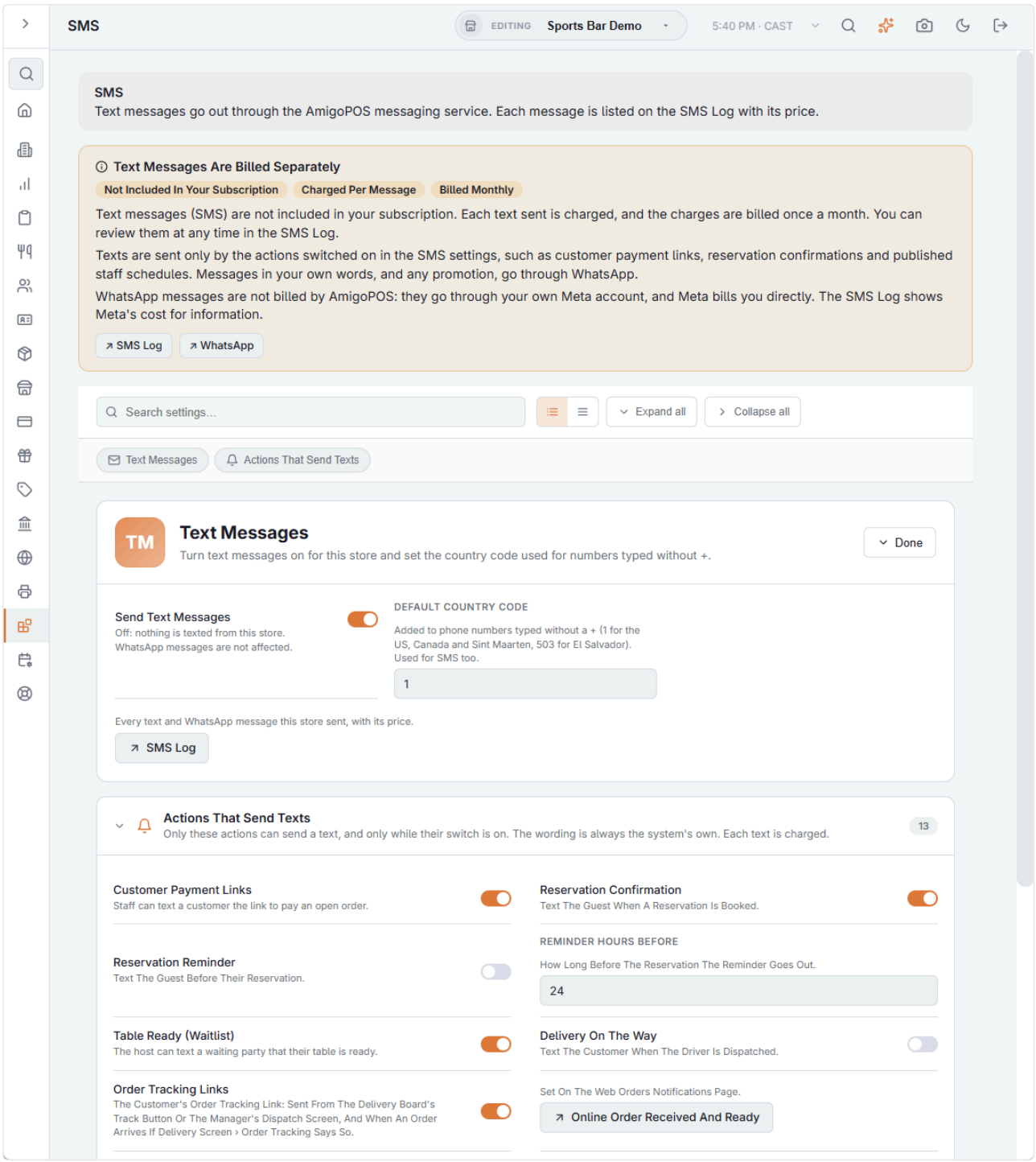
The payment page

Pay links use the same hosted payment page as the table QR code, run by the store's Stripe account. A store already taking QR payments needs nothing new. Where it isn't set up, the pay link screen says so and no link can be made.

The link is short — a few characters after the store's web address — so a pay link sent by text fits in a single message. The payment page appears in the language of the customer's phone (English, Spanish or Arabic), turns away a link whose order has since been voided, and won't let the same balance be paid twice.

Sending by text

Texts go through AmigoPOS's text service: there is nothing to set up, but texting has to be switched on for the store and for pay links on **Back Office › Integrations › SMS**. Each text is charged and billed monthly. The wording is fixed: English, or Spanish for Spanish-language stores.



Sending by WhatsApp

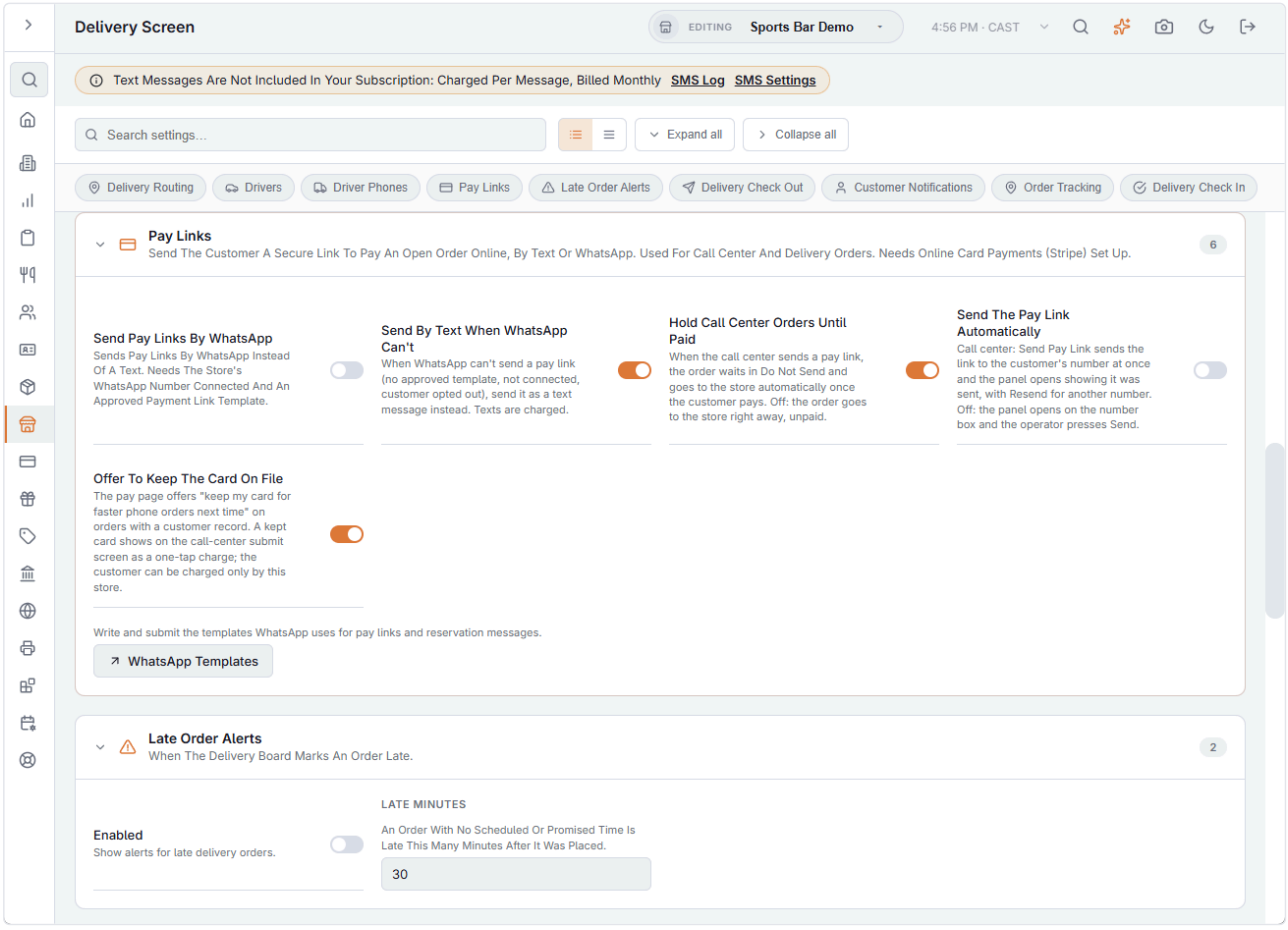
Once the store has connected its own WhatsApp account (*WhatsApp: how it works*) and Meta has approved a **Payment Link** template, turn on **Send Pay Links By WhatsApp**. Meta bills the store directly, usually far less than a text, and it is the channel many customers actually read.

The pay link switches

- **Send Pay Links By WhatsApp** — WhatsApp instead of text.
- **Send By Text When WhatsApp Can't** — no template, not connected, or the customer opted out: the link goes by text instead of failing.

- **Hold Call Center Orders Until Paid** — on (the default), a call-center order sent with a pay link waits in Do Not Send and goes to the store by itself once it is paid; off, it goes to the store at once, unpaid.
- **Confirm Payments By WhatsApp** — the customer gets the Payment Received template once the link is paid.

The first three are on **Back Office › Store Setup › Delivery Screen › Pay Links** and on the WhatsApp page; the last one is on the WhatsApp page. The Pay Links section also has a **WhatsApp Templates** button that opens the message templates.



A message that fails never loses the sale: the pay link screen shows the link to read out or copy.

Two more switches

- **Send The Pay Link Automatically** — call center only: Send Pay Link on the submit screen sends the link to the order's number at once; the panel opens on the sent view with Resend for another number. Off, the panel opens on the number box and the operator presses Send.
- **Offer To Keep The Card On File** — on by default: the pay page offers to keep the customer's card for faster phone orders; a kept card shows on the call-center submit screen as a one-tap charge. See Sending a pay link.

Offer To Keep The Card On File also decides whether storefront checkout offers **Save this card for next time** to signed-in customers — see Customer accounts on the storefront.

The call center's own hardware

Call Center & Delivery › Call center

View online ↗

A call-center seat in an office: the office as a location of its own, caller ID for its line, a receipt printer for the seat's copy of each order.

A call-center seat is usually not in a store at all: an office, a back room, a desk at home. Its hardware lives there too — the office phone line and a receipt printer next to the operator — and that hardware belongs to the office, not to the store the order is for. So the office is

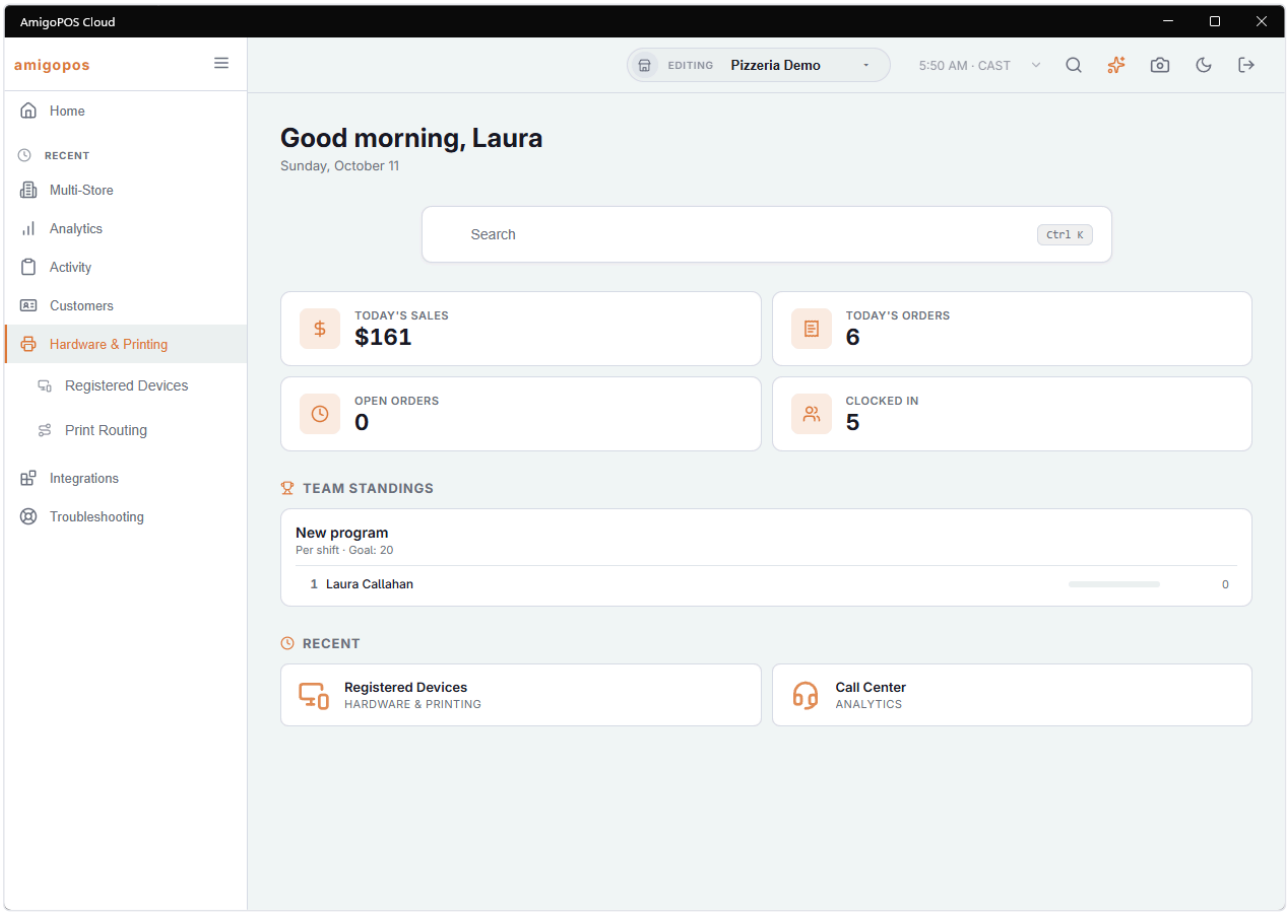
a location of its own: a store record like any other, with no menu needed, that the seats are registered to. Everything below edits that location.

Registering the seats to the office

Create the office in the admin console if it is not there yet (a store record; it needs no menu, no hours, no prices), then register each seat to it with the role Call Center — see POS station or call center seat. A seat still orders for the real stores through the store picker; only its own hardware is the office's.

What a seat can set up in Back Office

A seat's Back Office hides the store-bound pages on purpose (menu, inventory, employees, store setup), because a seat has no store of its own to edit. It keeps the pages that belong to its location: **Hardware & Printing › Registered Devices** and **Print Routing**, and **Integrations › Caller ID**. They edit the office, which is exactly what the office needs.



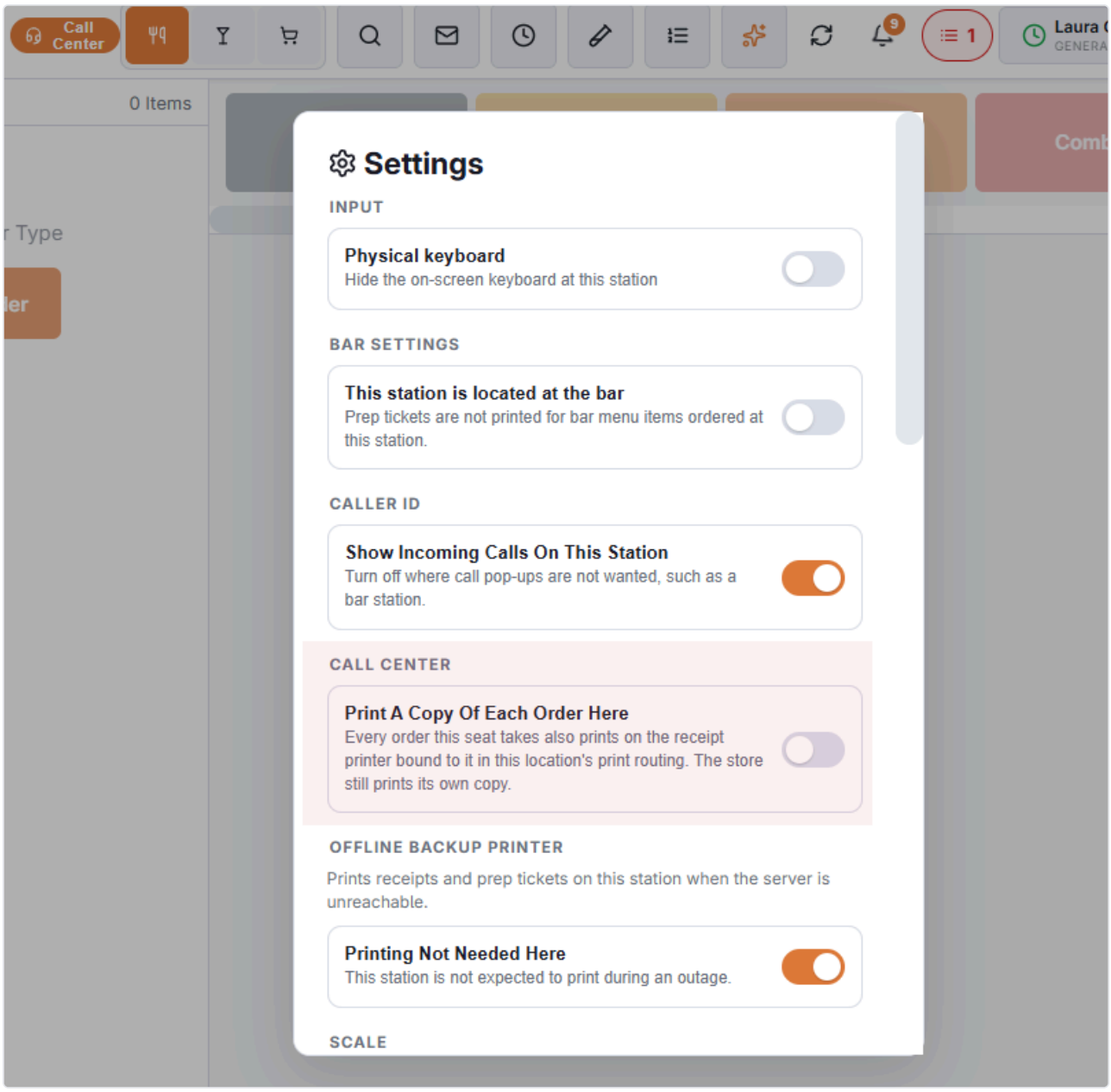
Caller ID for the office line

Back Office › Integrations › Caller ID on the seat sets up the office line the way a store sets up its own — the username and password for the PBX, or the CallerID.com box, and Send Test — see Setting up caller ID in Back Office. Calls on the office line reach the seats; calls on a store's line reach that store's registers and the seats. A seat listens whenever caller ID is on anywhere in the business, so an office with no line of its own still rings for the stores.

A receipt printer at the office

The store still prints its own copy of every order; this is the seat's copy, next to the operator. Three steps:

1. Install the Print Agent on a computer in the office and activate it to the office location — the activation code comes from Registered Devices on the seat (see Activating an agent for the right store); add the receipt printer in the agent.
2. On the seat, Back Office › Hardware & Printing › Print Routing: bind the Receipt slot to that printer, for the location or for the seat alone (Print routing).
3. On each seat, More › Settings › Call Center: turn on **Print A Copy Of Each Order Here**.



From then on every order the seat sends — pay at the store or on delivery, a pay link, a card by phone, Do Not Send — prints its receipt at the office as well. The receipt is the order's: the store's name, the store's receipt layout, the store's prices; the paper simply comes out where the operator sits. A later release from Do Not Send does not print it again, and a missing printer never stops an order going out — it only logs a warning.

> The number of copies follows the office's own Print Routing (its Receipt slot's Extra Copies), not the store's.

Delivery

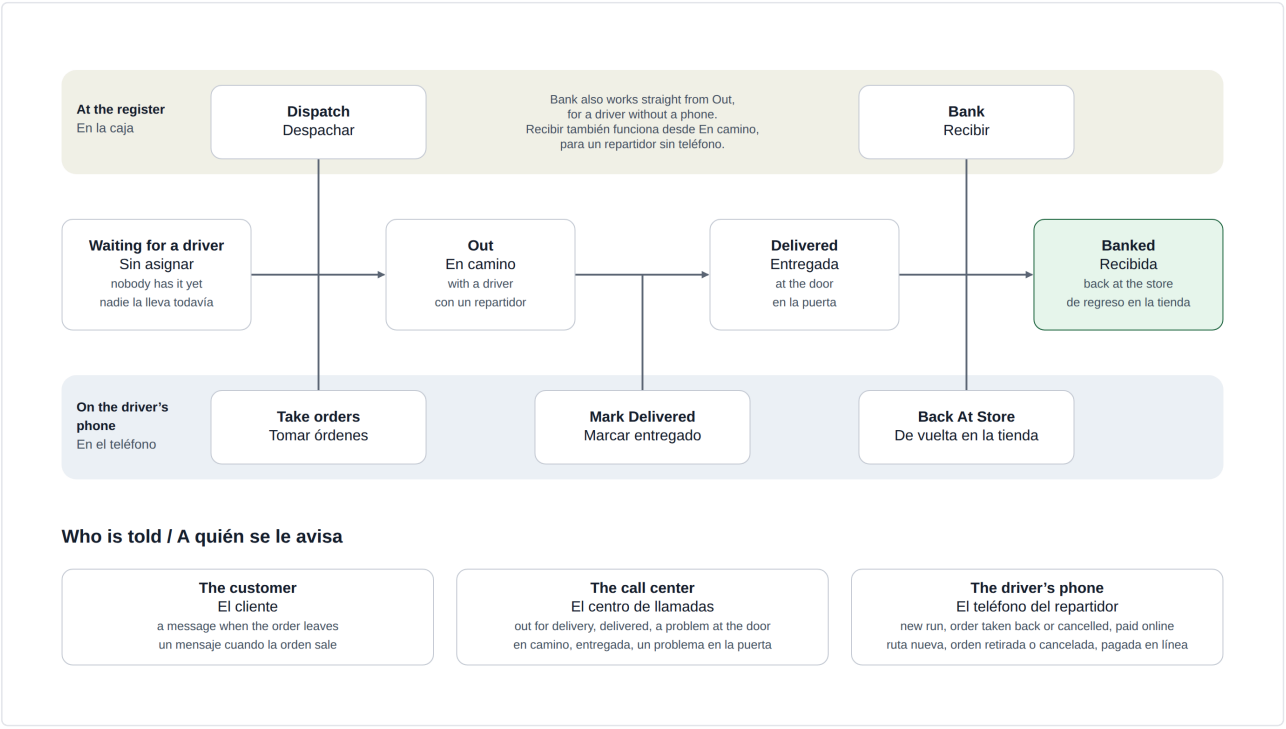
How a delivery travels

Call Center & Delivery › Delivery

View online ↗

The four stages of a delivery, who moves it from one to the next (the register or the driver's phone) and who is told.

A delivery order goes through four stages. Each step can be made at the register or, where drivers use the staff site, on the driver's own phone.



The four stages

Stage	Where you see it	How it gets there
Waiting for a driver	The Unassigned tab of the delivery board, and Waiting For A Driver on the drivers' phones.	The order was sent to the store. An order still on hold is not listed.
Out	The Out tab, and the driver's Deliveries screen.	Dispatch at the register, or the driver takes it on the phone.
Delivered	Still in the Out tab, tagged Delivered with the time.	The driver taps Mark Delivered at the door. A store whose drivers have no phone skips this stage.
Banked	The Banked Today tab.	Bank at the register, or Back At Store on the phone. The cash is now the driver's to hand in.

Who is told

- **The customer** gets an "on the way" message when the order leaves, if the store sends them.
- **The call center** sees out for delivery with the driver's name, delivered with the time, and any problem at the door. See Following your orders: the tracker.
- **The driver's phone** is notified of a new run, an order taken back or cancelled, and an order paid online while it is out.
- **The delivery board** on every register reloads by itself.

When something goes wrong

- **A problem at the door.** The driver reports it from the phone. The order stays Out, and the store decides: call the customer, or take the order back with Cancel on the board.
- **The order is voided while it is out.** It leaves the driver's list and the driver is told to bring it back.
- **The driver wants to clock out.** Not while a delivery is out, or delivered and not banked.

In detail: Delivery orders and driver assignment, The delivery screen and dispatch, Deliveries on the driver's phone and Drivers taking orders from their phone.

When an Entreo driver delivers it

A store that uses Entreo hands the order to Entreo instead of one of its own drivers. The order leaves Unassigned for the board's Entreo tab, counts as out for delivery once the Entreo driver has picked it up — the call center sees the driver's name with (Entreo) — and as delivered when the driver marks it at the door. It is never banked: the driver carries no money for the store. If Entreo cannot deliver it, it comes back to Unassigned. See How Entreo deliveries work.

Delivery orders and driver assignment

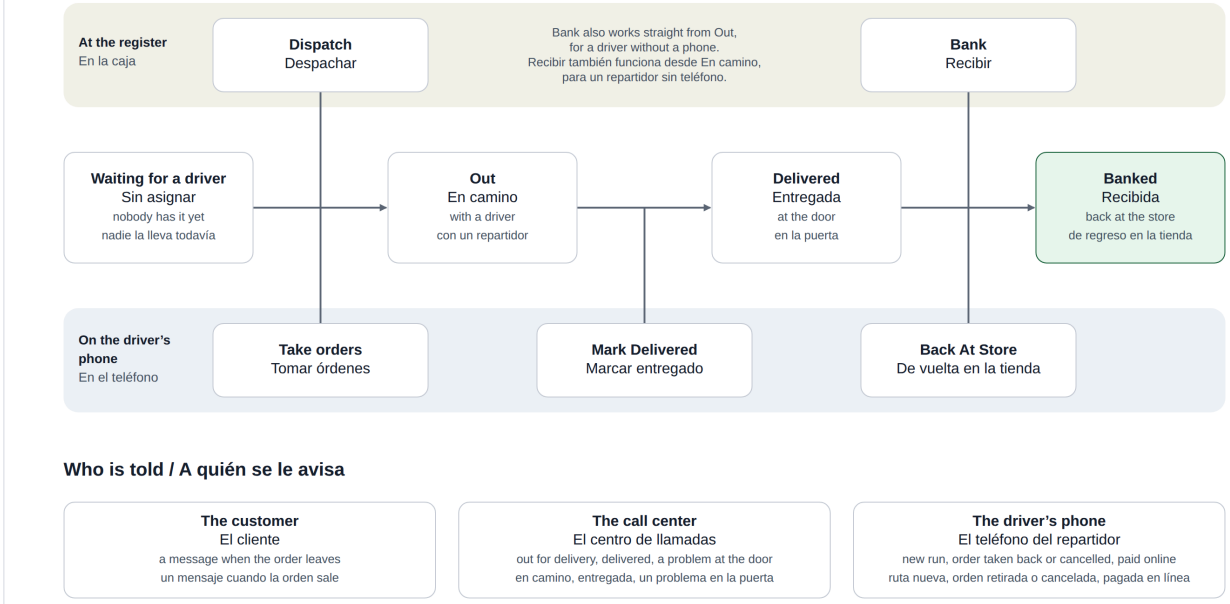
Call Center & Delivery › Delivery

View online ↗

The three tabs of the delivery board, and how a driver is suggested for you.

The delivery board is three tabs, which is also the life of a delivery order:

In one picture: the four stages of a delivery, and who moves an order from one to the next.



- **Unassigned** — ready to go, nobody carrying it.
- **Out** — with a driver right now.
- **Banked today** — back from the road, cash accounted for.

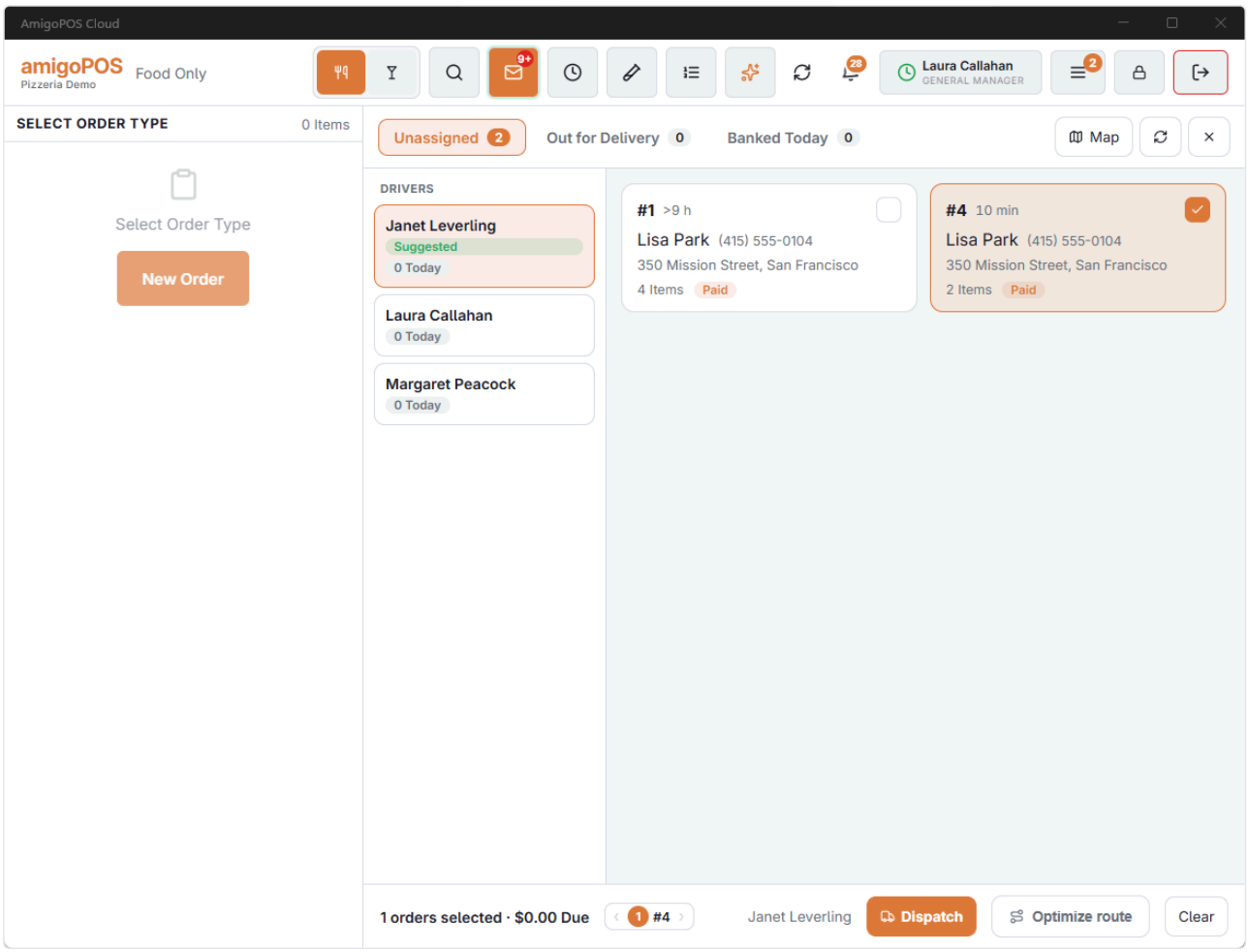
Choosing a driver

Only drivers who are **clocked in** can take deliveries. One is **suggested**: the clocked-in driver with the fewest active deliveries, and among equals, whoever has been out longest. It is a suggestion, not a rule — override it whenever the geography says otherwise.

Building a run

Select the orders for the run. **The order you select them in is the stop order**, and it can be rearranged in the dispatch bar before you send, so a driver's route is decided here rather than in the car.

> A driver carrying too much unbanked cash is stopped from taking more. See **The delivery screen and dispatch** for what to do about it.



Who appears on the driver rail

A driver is listed when they are clocked in **at this store** on a job marked as a driver job, whichever store their employee record was created at. With Order Drivers By Last Time Out on, drivers who are in come first, the one who has waited longest at the top.

Drivers can take orders themselves

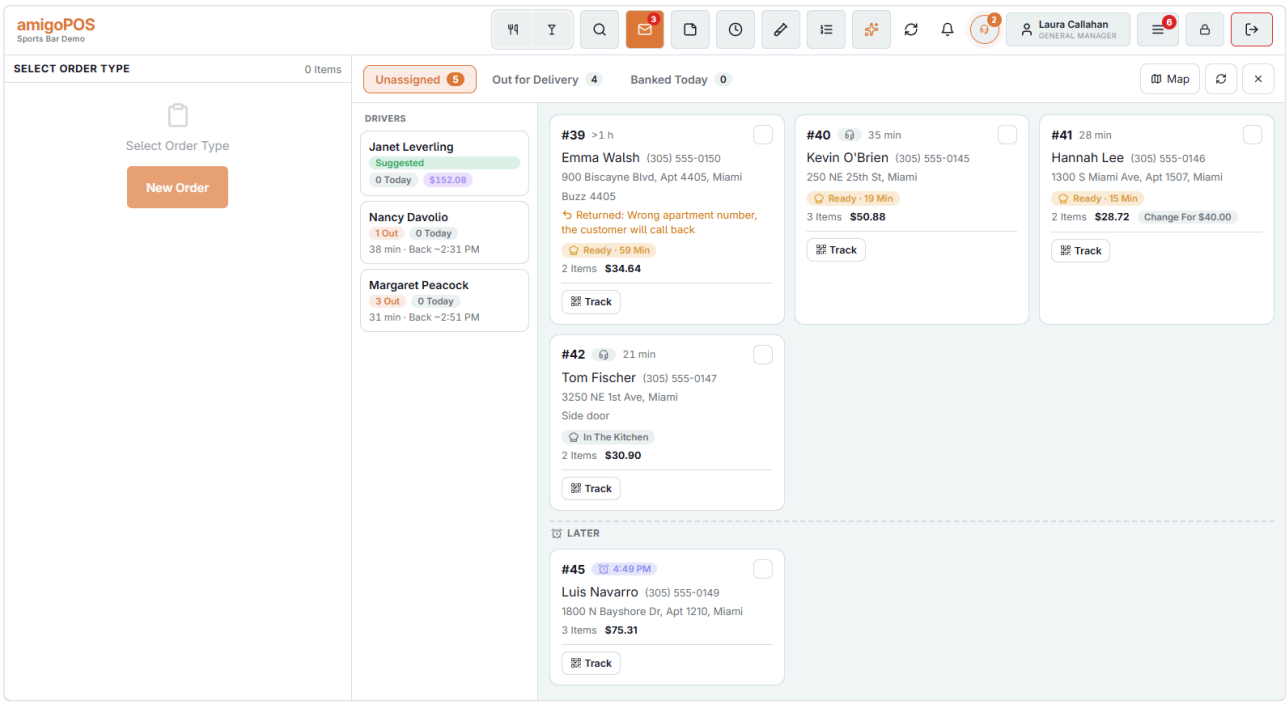
Where drivers use the staff site, they can take waiting orders from their own phone instead of being dispatched. See Drivers taking orders from their phone.

What is not on the board

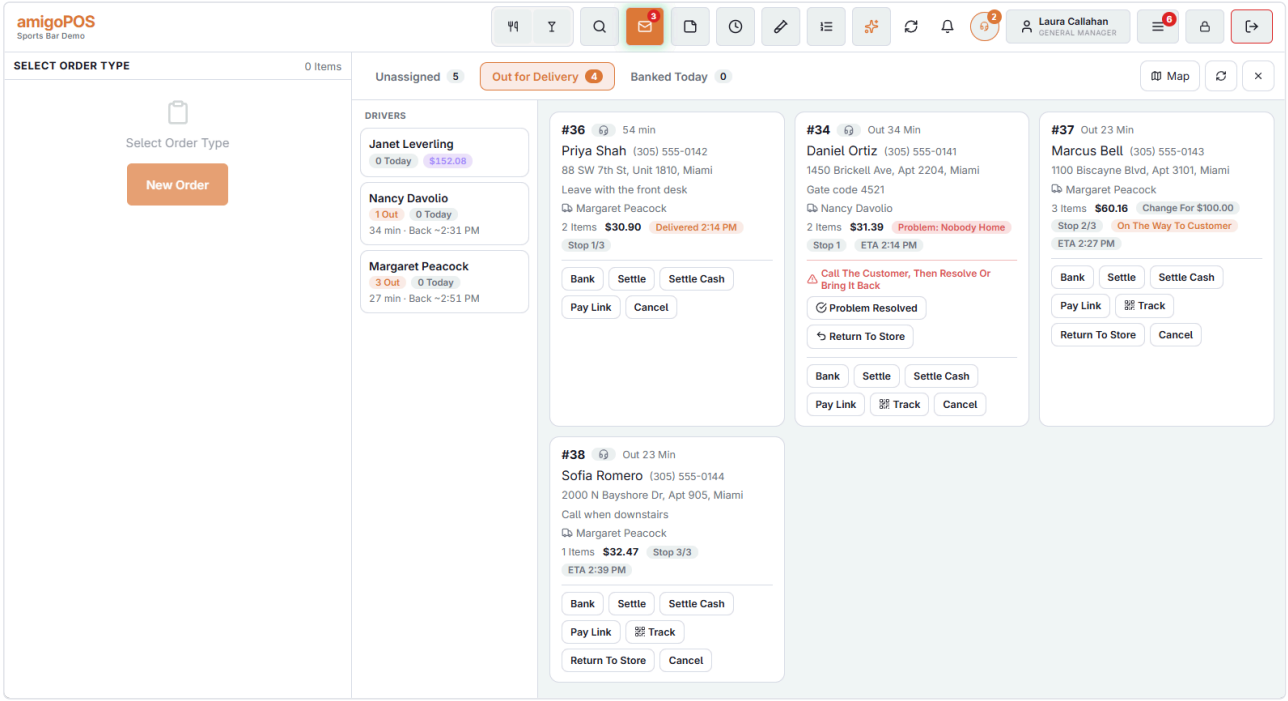
An order the call center is holding (Do Not Send, or waiting for a payment), and a web order waiting for its payment, are not listed until they are released.

What the cards tell you

- **The kitchen** — at a store with kitchen screens, an unassigned card reads **In The Kitchen** until the order is bumped, then **Ready · 6 Min**: how long it has been waiting for a driver.
- **Later** — a scheduled order sits in its own group with the time it is for, until it is due in the kitchen, so it is not sent out early by mistake.
- **Returned** — an order brought back shows why, until it goes out again. See when a delivery runs into trouble.



On the Out tab a card shows how long it has been out (**Out 14 Min**), its place in the run (**Stop 2/3**) and, when the driver taps them on the phone, **On The Way To Customer** and **Arrived**. A driver who is out shows on the rail when they should be back (**Back ~7:45 PM**).



The delivery screen and dispatch

Call Center & Delivery › Delivery

View online ↗

Sending a run, the liability limit that blocks one, and the three ways money comes back.

Dispatching

Pick the driver, select the orders in stop order, and dispatch. Depending on the store's settings this prints a **trip ticket** for the run and can reprint each customer's receipt. Route optimisation can be on by default and turned off for a run where you know better.

When dispatch is refused

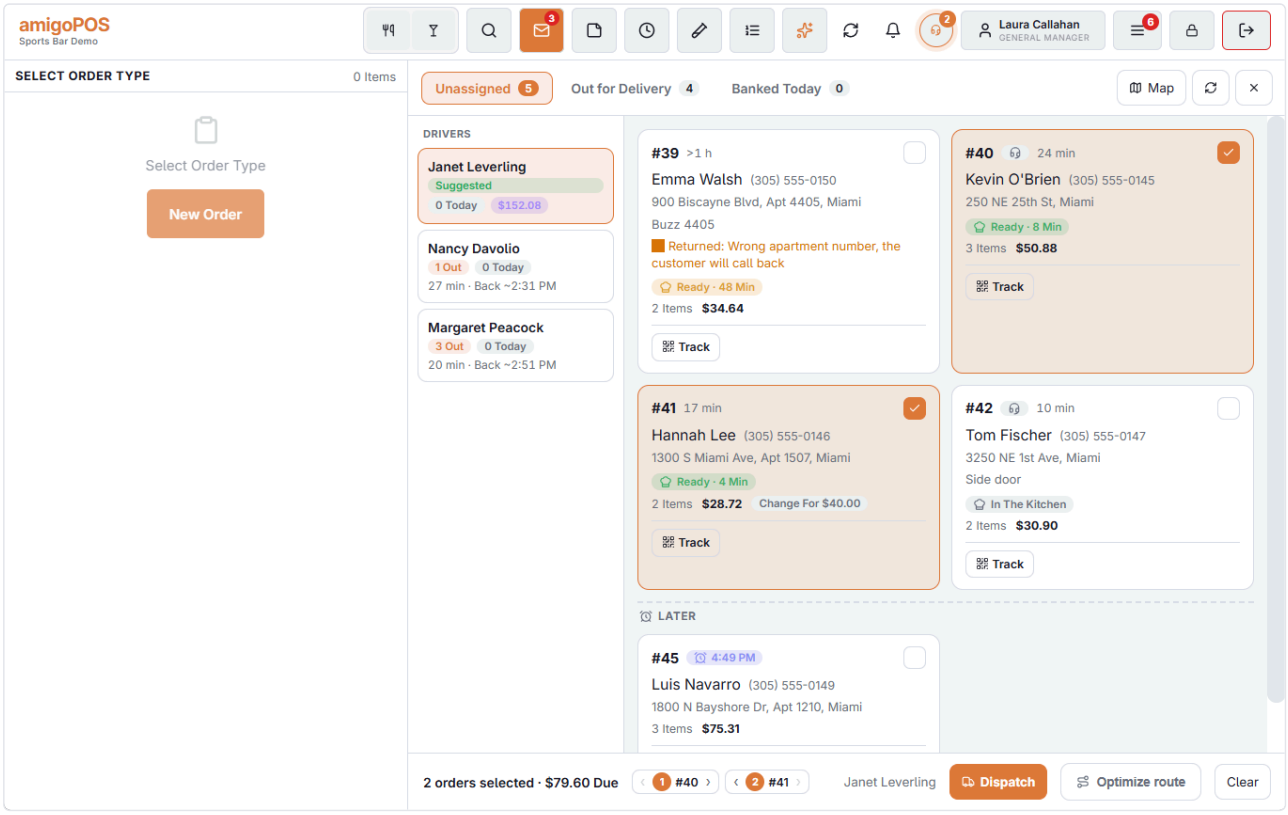
A driver who is already carrying more unbanked cash than the store allows cannot be given more work. The screen says the driver is over the limit. Bank what they have and dispatch again — the limit is there so no one is walking around with a night's takings.

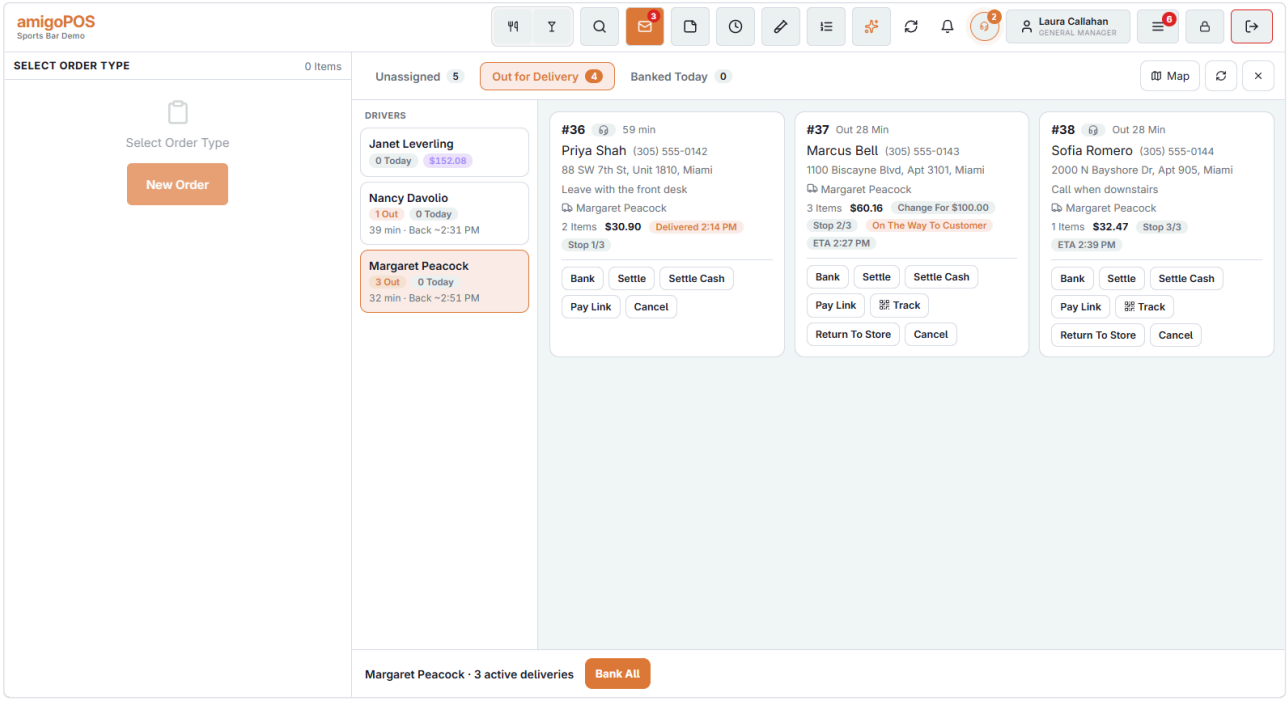
Money coming back

- **Bank** — the driver is back and hands over custody of the cash for that order. The order is *not* settled yet and the liability moves to them being accountable for it. Card-paid orders bank nothing, because there is no cash.
- **Bank all** — the same for everything that driver is carrying, in one step at the end of a run.
- **Settle cash now** — skip banking: the cash goes into the current operator's drawer immediately and the order is settled. It asks you to confirm the amount and the customer first.

> Undoing a bank puts the order back, but it does **not** reverse gift-card operations that banking already carried out. If a gift card was issued or emailed, that has happened and has to be dealt with by hand.

> The map view shows the active deliveries. Turning it off frees the screen on a small station.



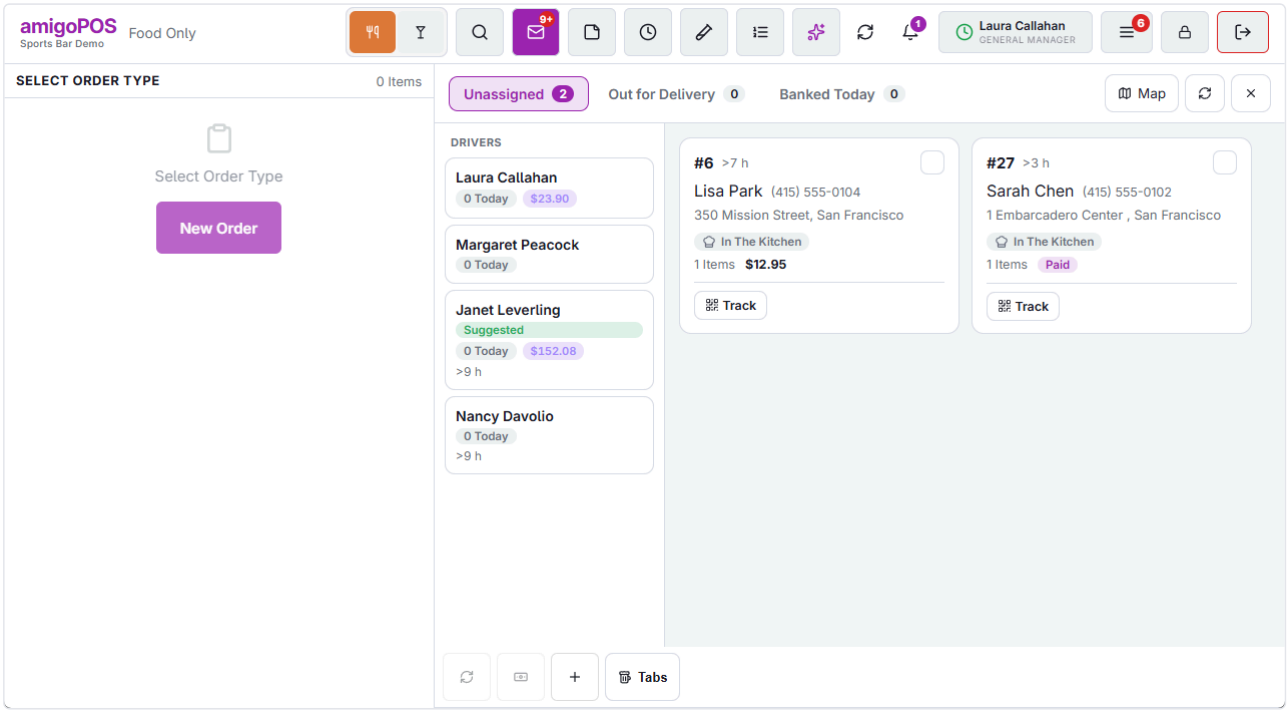


A board that keeps itself current

The board reloads by itself when another register dispatches or banks, when a driver acts on their phone, when a delivery order arrives and when one is paid. Refresh is still there, and should rarely be needed.

What a card shows

- The address with its apartment or unit line, and the address note.
- A headset mark on an order taken by the call center.
- **Paid** instead of an amount when nothing is due, and **Change For …** when the customer said what they would pay with.
- In Out and Banked Today: the driver; **Delivered** with the time, once the driver marked it at the door; **Problem** with the driver's reason; and **Photo** when one was taken.



Safeguards

- An order cannot be dispatched twice. If another register, or a driver on the phone, took one of the orders you selected, the rest are dispatched and the screen says how many were left out.
- **Cancel** asks before it takes an order back from a driver, and the driver's phone is told.
- Voiding an order that is out closes its delivery and tells the driver to bring it back.
- **Settle Cash Now** checks the order in only once the payment has been saved.
- Banked Today and the drivers' counts follow the store's business day.

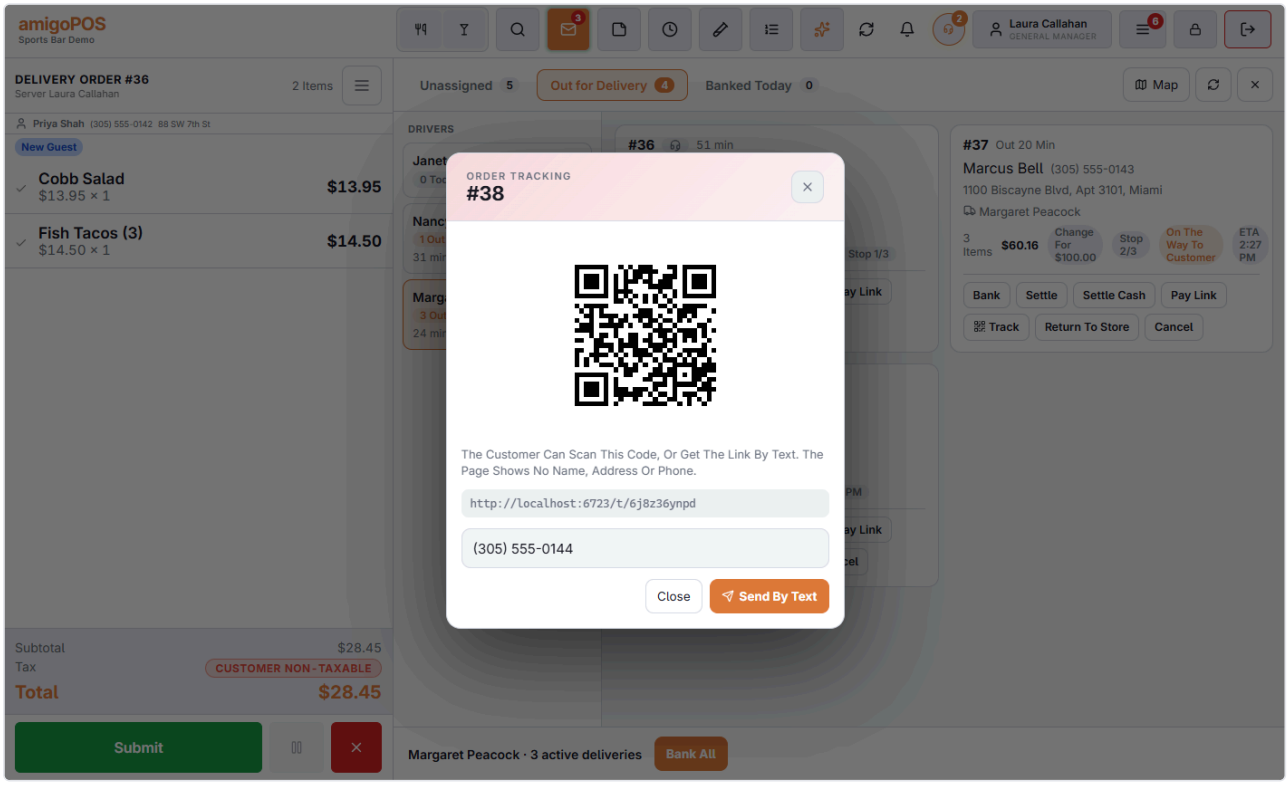
> The Settle and Settle Cash Now buttons, the order of the driver rail and the late marking follow Delivery Screen settings.

Entreo drivers

Stores that use Entreo have an **Entreo** tab on the board and a **Send To Entreo** button on every Unassigned card and in the dispatch bar. An order that is with Entreo is not listed under Unassigned; one Entreo gives back returns there with a red pill saying why. See Entreo on the delivery board.

Track, Problem Resolved and Return To Store

Each card on the Out tab has a **Track** button: a QR code the customer can scan at the counter or on the phone, and **Send By Text** to the number on the order or another one typed in (used once, never saved). See the customer's order tracking page.



Problem Resolved and **Return To Store** answer a driver who is stuck at the door, or bring back an order that cannot be delivered — see when a delivery runs into trouble. The same board is on a manager's phone: dispatching from a manager's phone.

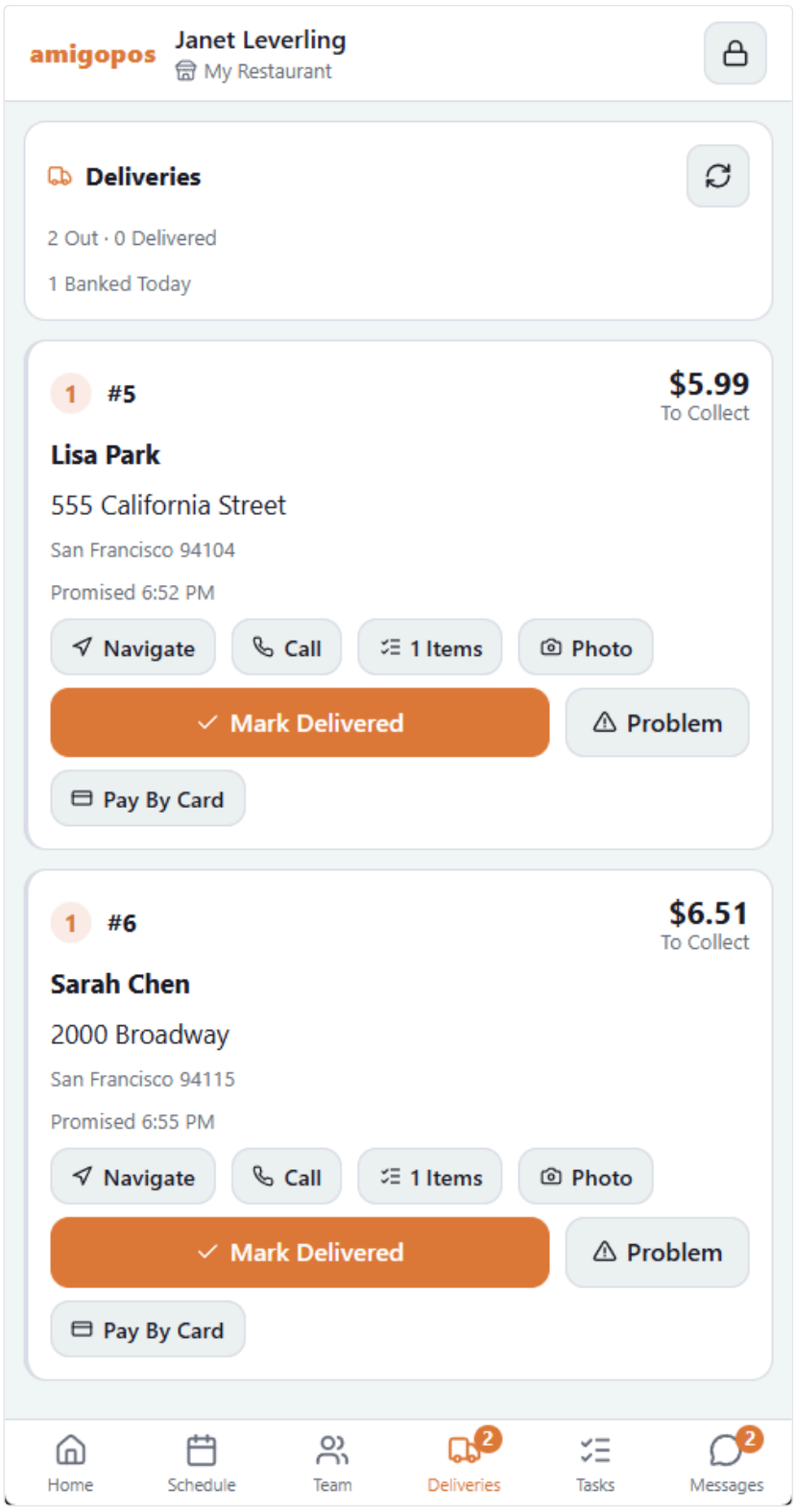
Deliveries on the driver's phone

Call Center & Delivery › Delivery

View online ↗

The Deliveries screen of the staff site: your run in stop order, with everything you need at the door and back at the store.

Drivers see their run on their own phone, in the staff site. A **Deliveries** tab appears in the bar at the bottom for anyone who holds a driver job, with a badge counting the stops still out.



Your run

Each stop is a card, in the order the run was built:

- the stop number and the order number, and what there is **To Collect** — or **Paid**;
- the customer's name, the address with its apartment or unit line, the address note and the order note;
- **Pays With … · Change …** when the customer said what they would pay with, so you leave with the right change;

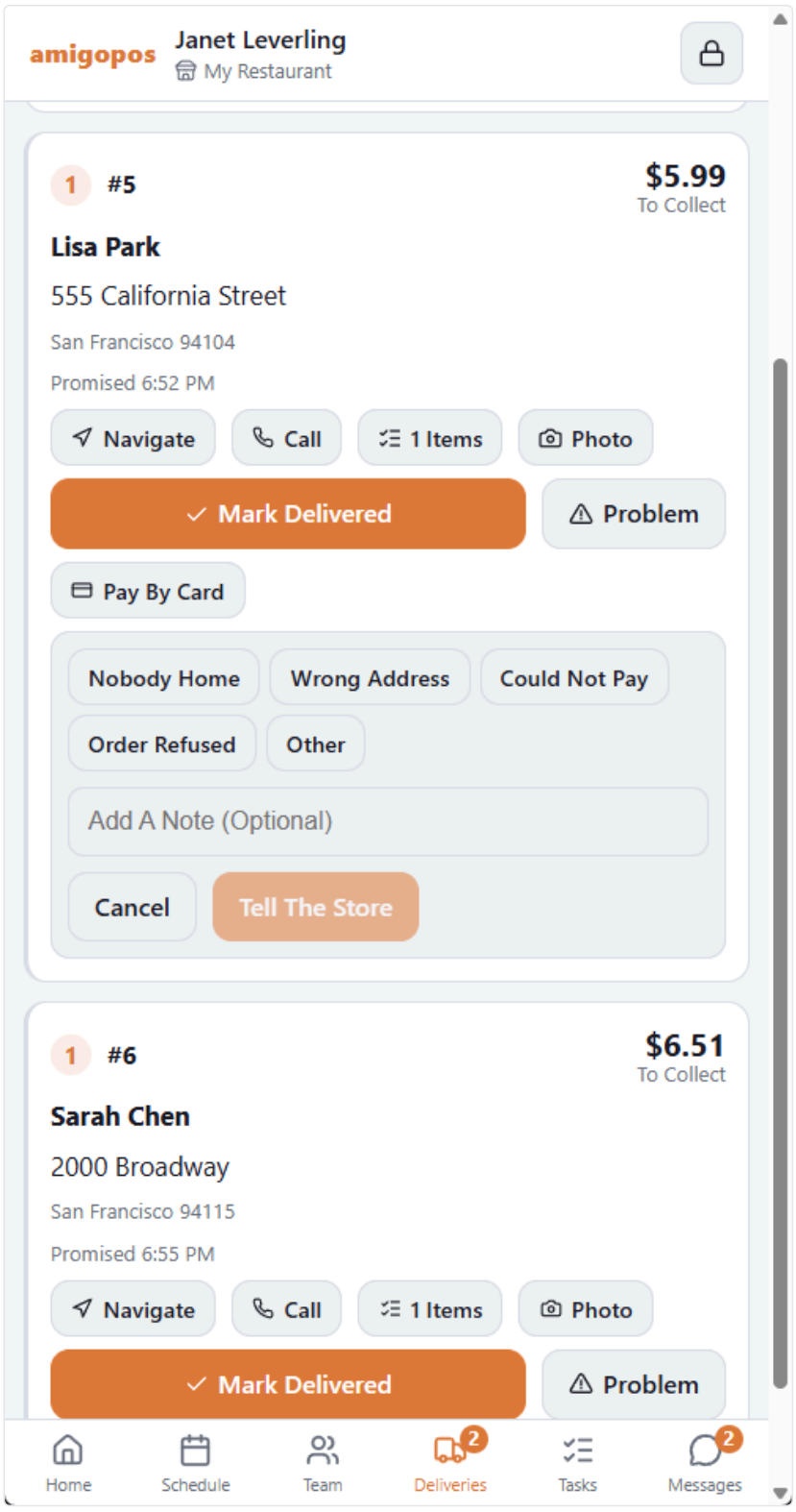
- the promised time, and **Late** once it has passed.

Navigate opens the phone's maps with directions to the stop. **Call** dials the customer. **Items** lists what should be in the bag. **Photo** is described in Photo at the door.

The list keeps itself current: a stop added, taken back or paid online shows up without touching the phone, and each one raises a notification — see Phone notifications and schedule alerts.

At the door

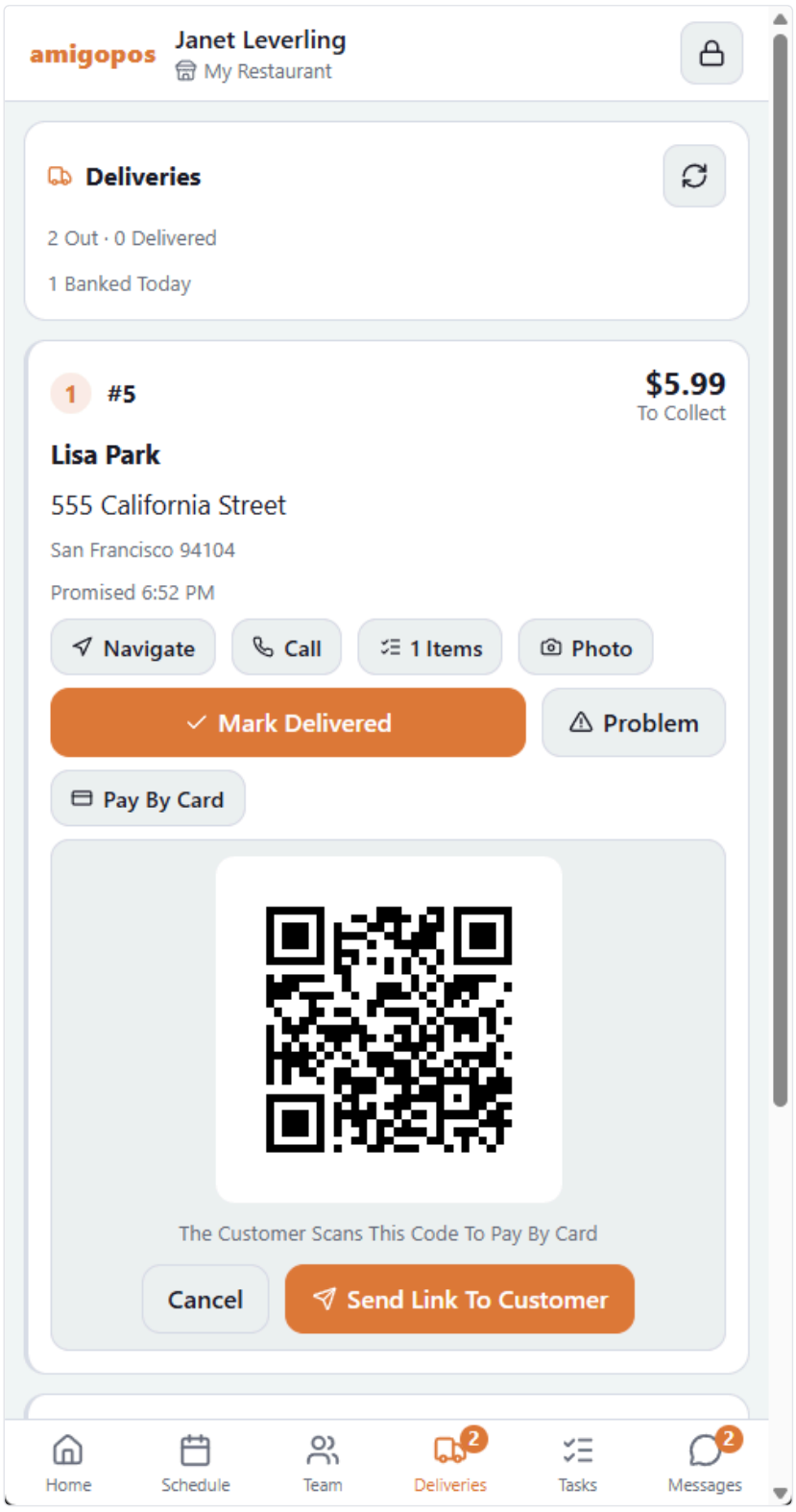
- **Mark Delivered.** If money is due, the phone first asks whether you collected it. The stop turns green and stays on your list until you are back at the store.
- **Not Delivered Yet** undoes a tap made by mistake.
- **Problem.** Choose Nobody Home, Wrong Address, Could Not Pay, Order Refused or Other, add a note if it helps, and tap Tell The Store. The store and the call center see it at once. The stop stays yours: deliver it later, or bring it back and the store takes it off your run.



When the customer wants to pay by card

On an unpaid stop, tap **Pay By Card**. A QR code appears on your phone: the customer scans it and pays on their own phone, on the store's secure payment page. **Send Link To Customer** messages the same link to the number on the order instead. The stop changes to Paid by itself when the payment arrives.

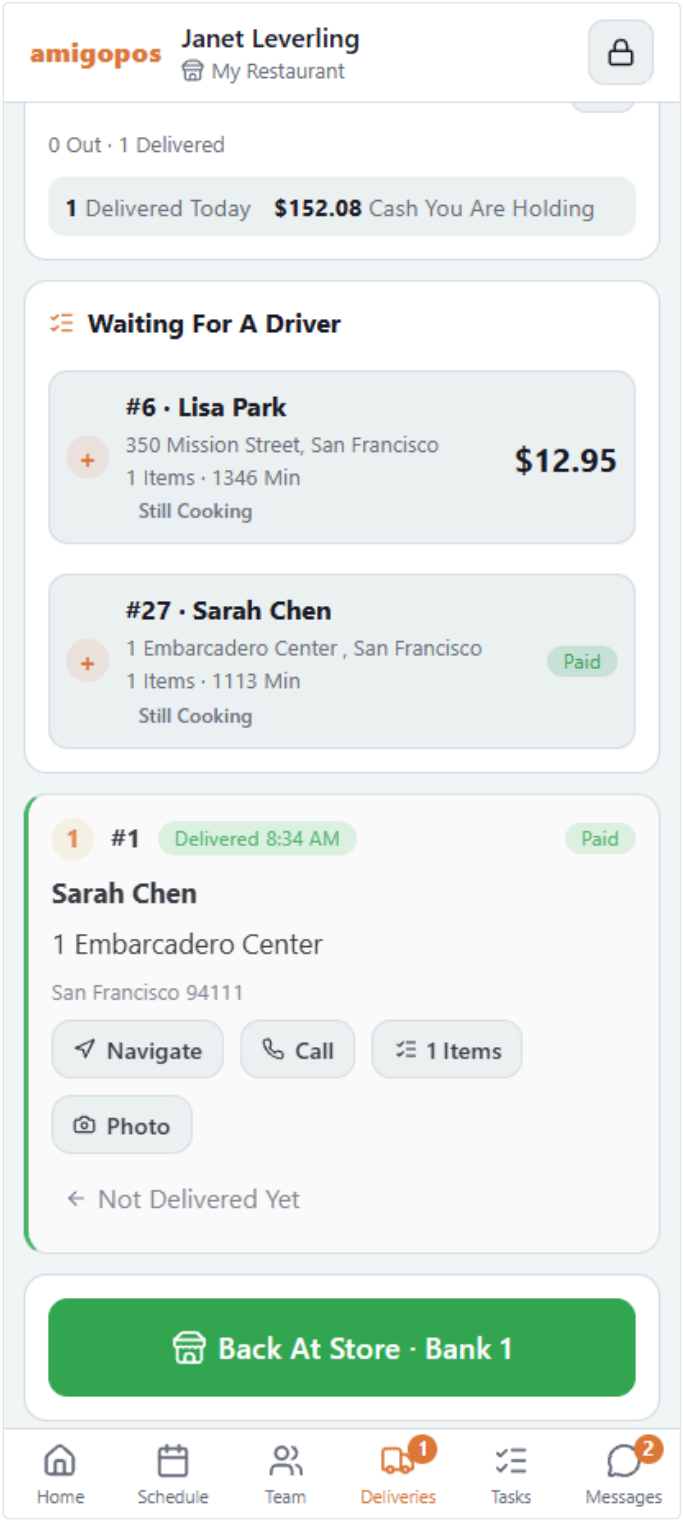
> This needs online payments set up for the store — see Setting up pay links. No card number is ever typed into your phone.



Back at the store

Once at least one stop is delivered, a **Back At Store** button appears at the bottom, with the cash you are holding for those stops. Tap it when you are back: the delivered stops are banked, exactly as Bank does at the register. Stops still out stay on your list.

> Banking makes that cash yours to hand in. You cannot clock out while a delivery is out, or delivered and not banked.



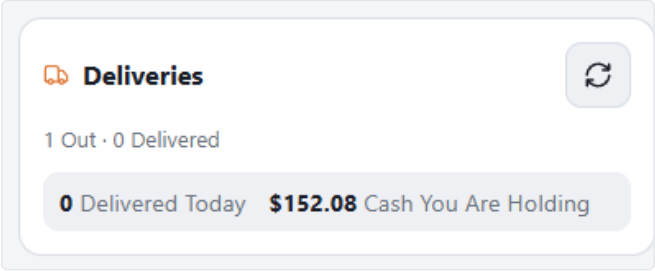
If the Deliveries tab is missing

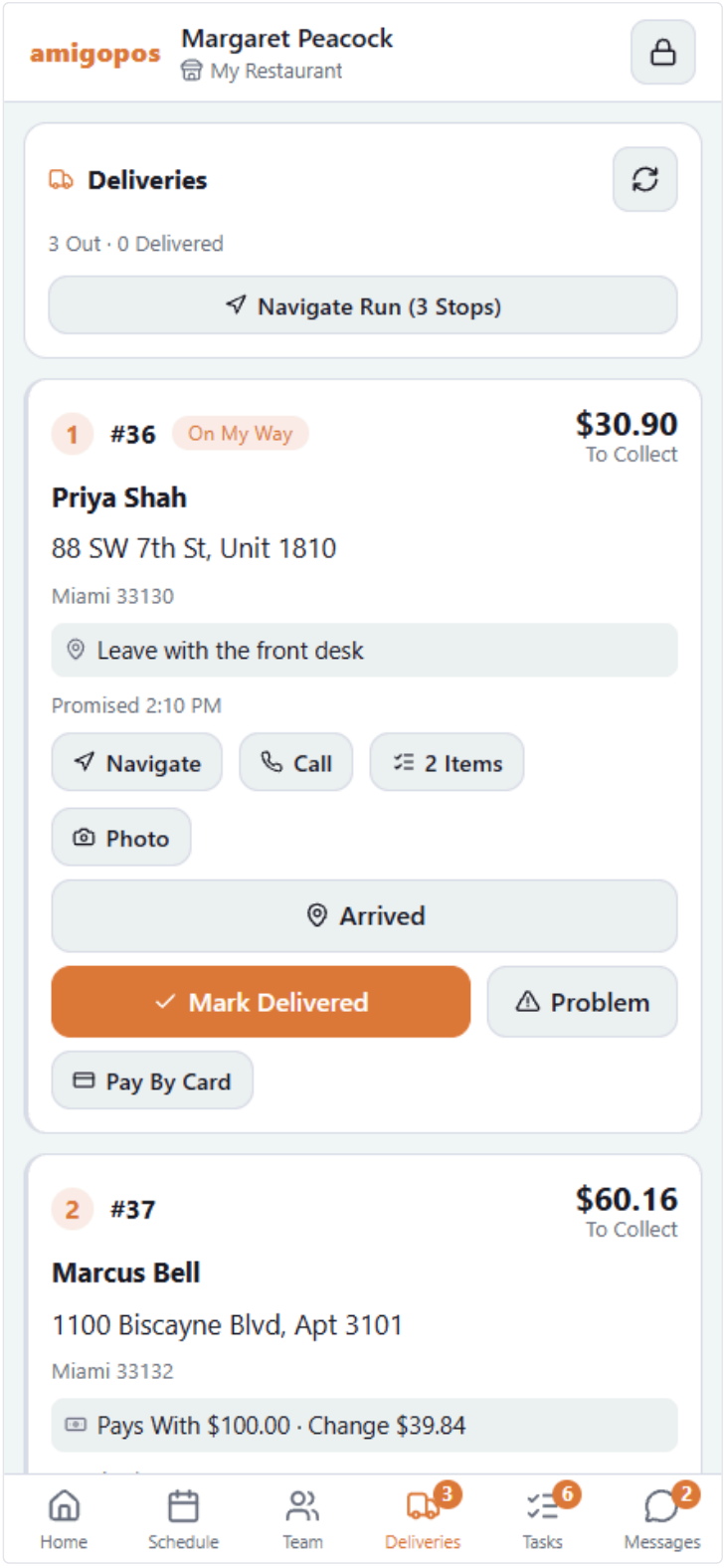
- Your job must be marked as a driver job. Ask a manager — see Jobs, roles, and permissions.
- The phone must be set up for the staff site and unlocked with your PIN.

On the road

- **Delivered Today** and **Cash You Are Holding** sit at the top of the tab for the shift so far.
- **Navigate Run (3 Stops)** opens the phone's maps app with every stop of the run, in order.

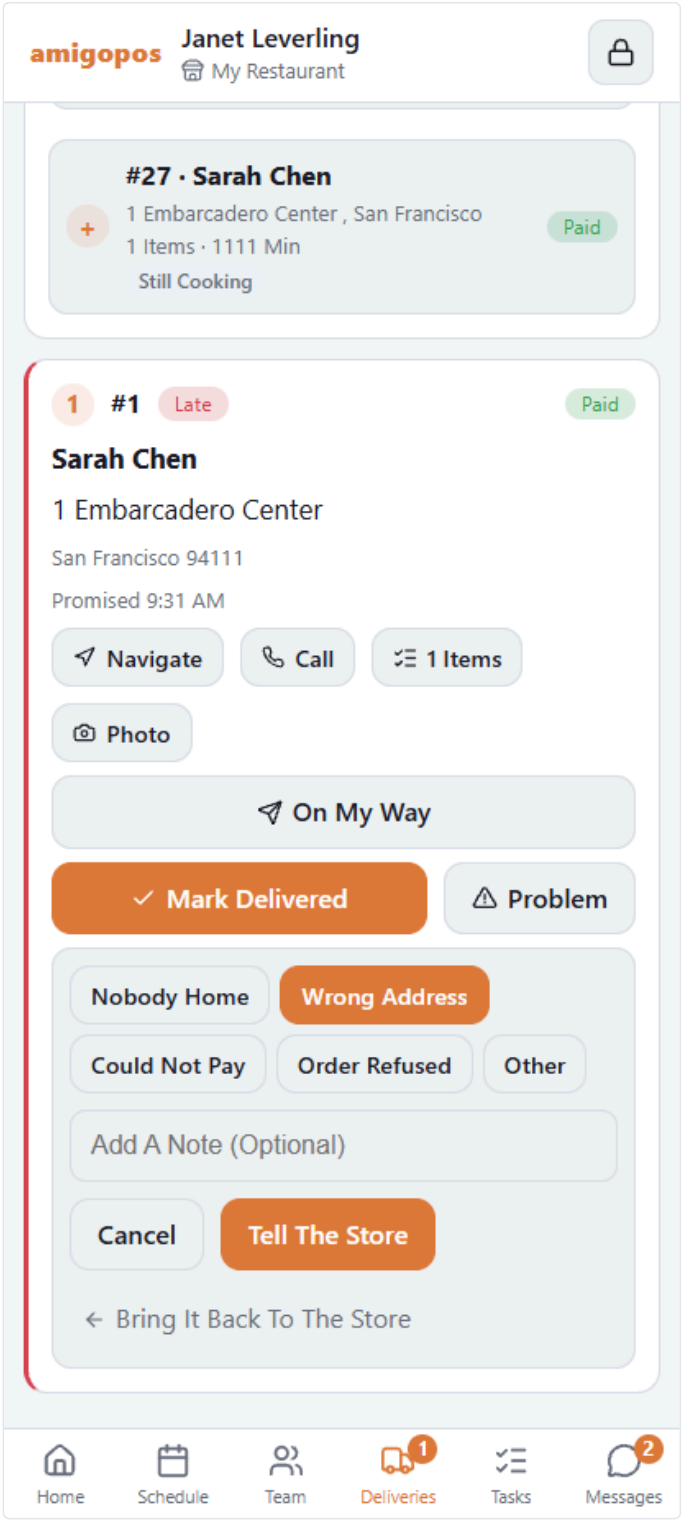
- **On My Way** when leaving for a stop, and **Arrived** at the door. The store's board shows it, and the customer sees it on the tracking page — nothing is texted.





Bringing it back

When an order cannot be delivered, open **Problem**, pick the reason and tap **Bring It Back To The Store** instead of Tell The Store. The stop leaves your run and goes back to the store's waiting list with your reason. See when a delivery runs into trouble.



The store can answer a problem you reported: you are notified when it is resolved (carry on) or when the store wants the order brought back.

Drivers taking orders from their phone

Call Center & Delivery › Delivery

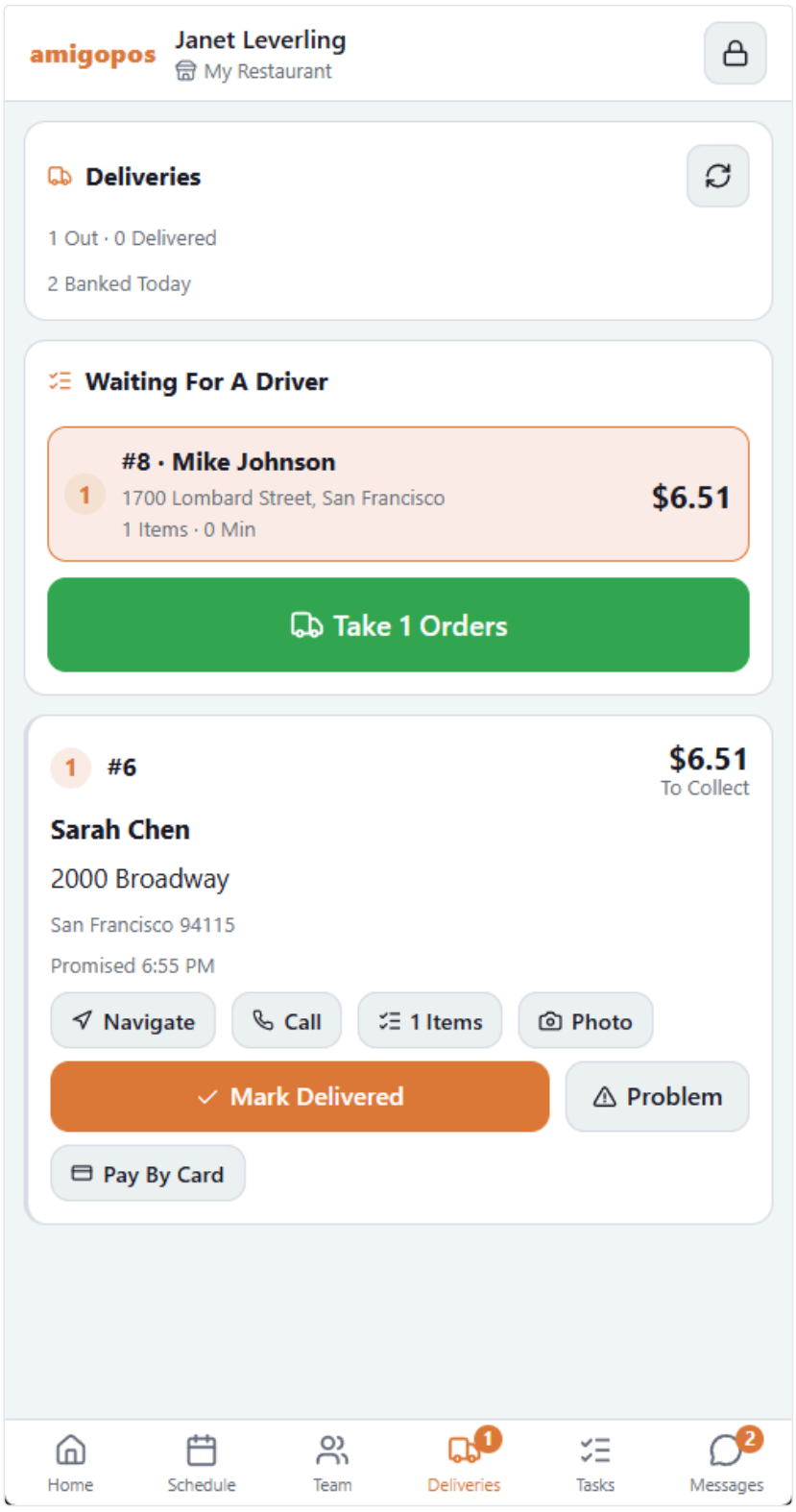
View online ↗

Letting drivers pick up waiting delivery orders themselves, without anyone dispatching them at the register.

In a busy store nobody has to stand at the delivery board. With **Drivers Take Orders** on, each driver sees the delivery orders that are waiting for a driver, on their own phone, and takes them.

Taking orders

- Open **Deliveries**. **Waiting For A Driver** lists the orders nobody has yet, oldest first, with the address, the number of items and the total, or Paid. An order scheduled for later shows the time it is for.
- Tap the orders in the order you will deliver them. Each one gets its stop number; tap it again to take it out.
- Tap **Take N Orders**. They are now your run.



It is the same dispatch the register makes: the customer gets the on-the-way message, the route is worked out, the call center sees the order leave, and the delivery board moves the orders to Out.

When it says no

The phone says	Why
Clock In On A Driver Job To Take Orders	With Clocked In Drivers Only on, you must be clocked in at this store, on a driver job.

The phone says	Why
You Are Holding Too Much Cash. Make A Deposit First.	The same liability limit that stops a dispatch at the register.
Those Orders Were Already Taken	Another driver, or the register, got there first. When only some were taken, you get the rest and the message says how many were not yours.
This Store Does Not Let Drivers Take Orders	The switch is off.

Switching it on or off

Back Office › Store Setup › Delivery Screen › Driver Phones › **Drivers Take Orders**. It is on by default. Switched off, drivers still see and work their own run; only the waiting list is hidden. See Delivery Screen settings.

> No trip ticket is printed for a run taken from the phone: the phone is the trip ticket.

Is it ready?

At a store with kitchen screens, each waiting order shows **Still Cooking** or **Ready · 4 Min**, so nobody takes an order that is still on the grill. A scheduled order stays off the list until it is due in the kitchen.

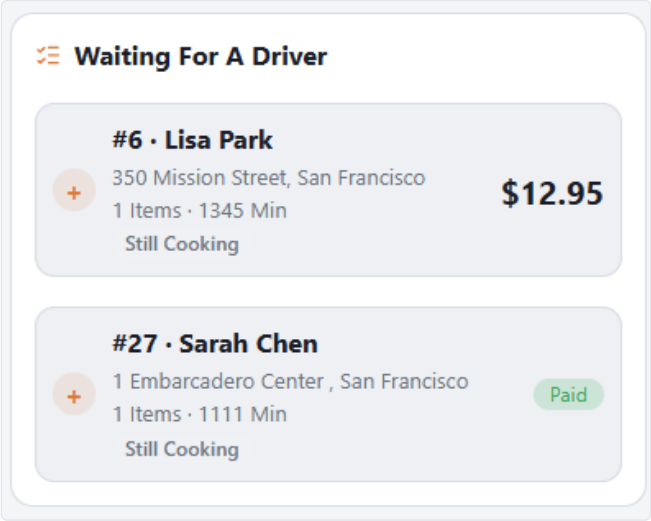


Photo at the door

Call Center & Delivery › Delivery

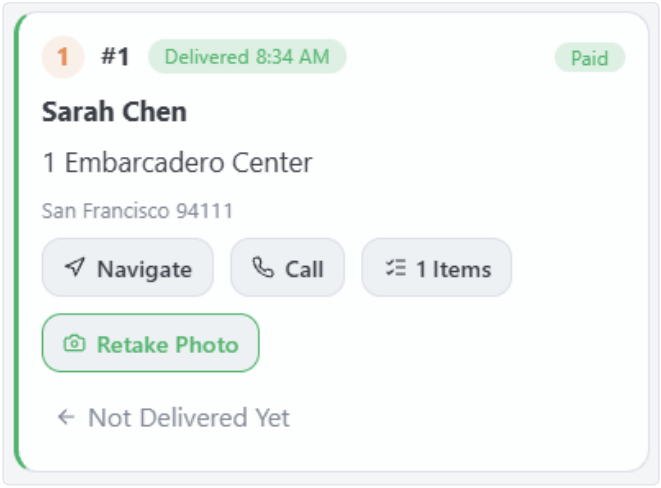
View online ↗

A proof-of-delivery photo taken on the driver's phone, where the store sees it, and how long it is kept.

A driver can photograph the delivery — the bag on the doorstep, the order being handed over — so the store can answer "it never arrived" with a picture.

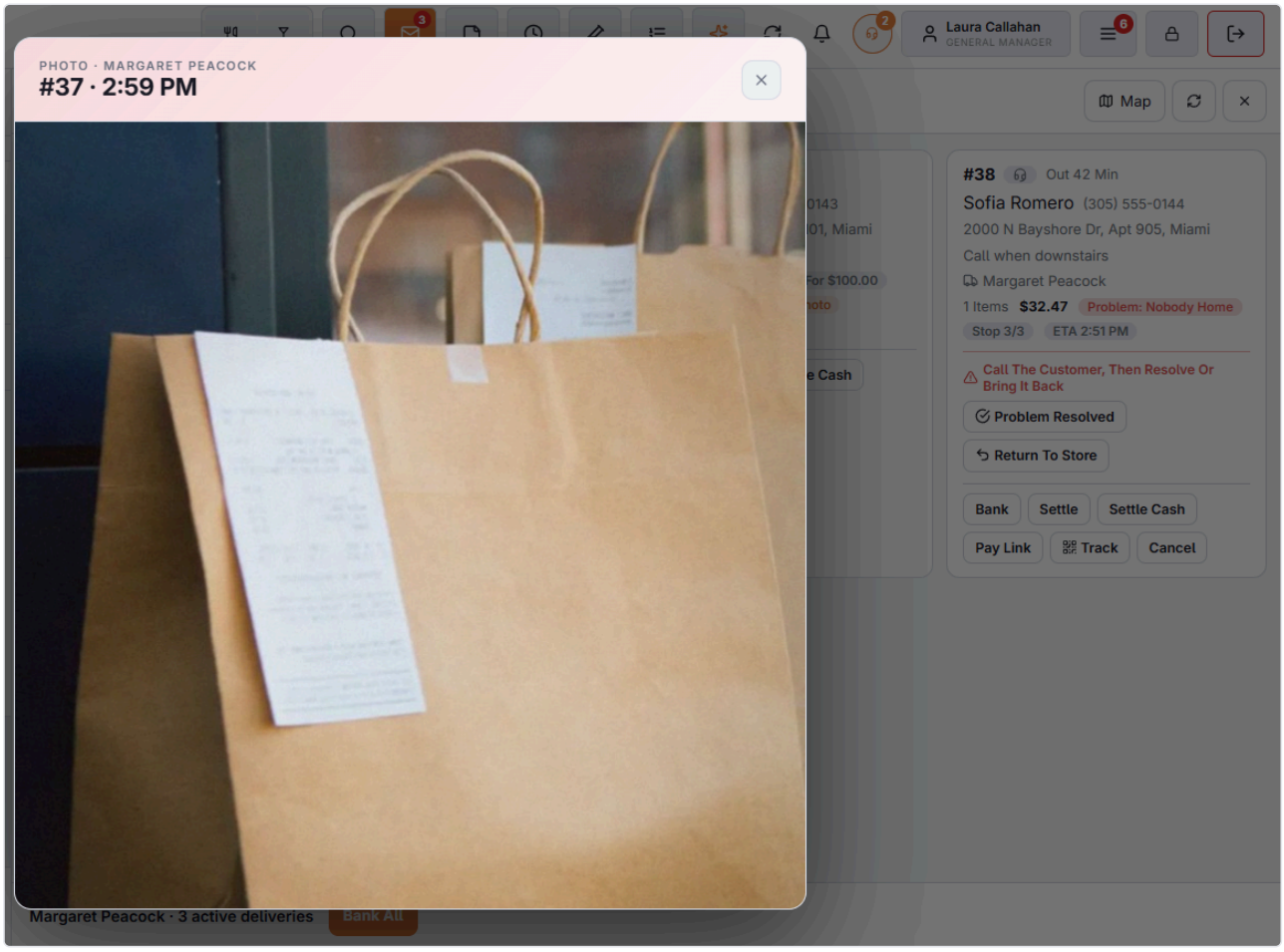
Taking it

- On the stop, tap **Photo**. The phone's camera opens.
- Take the picture and accept it. The phone shrinks it before sending, so it goes through on a weak signal.
- The button turns green and reads **Retake Photo**. A new photo replaces the old one: there is one per order.



Seeing it at the store

On the delivery board, an order with a photo shows a **Photo** pill on its card, in the Out and Banked Today tabs. Tap it to open the picture, with the driver's name and the time it was taken.



Requiring it

Back Office › Store Setup › Delivery Screen › Driver Phones › **Require A Photo At The Door**. With it on, Mark Delivered is refused until the stop has a photo.

How long photos are kept

Keep Photos (Days), in the same section: 30 by default. Older photos are removed as new ones arrive; 0 keeps them all.

> Photograph the order where it was left, not the people.

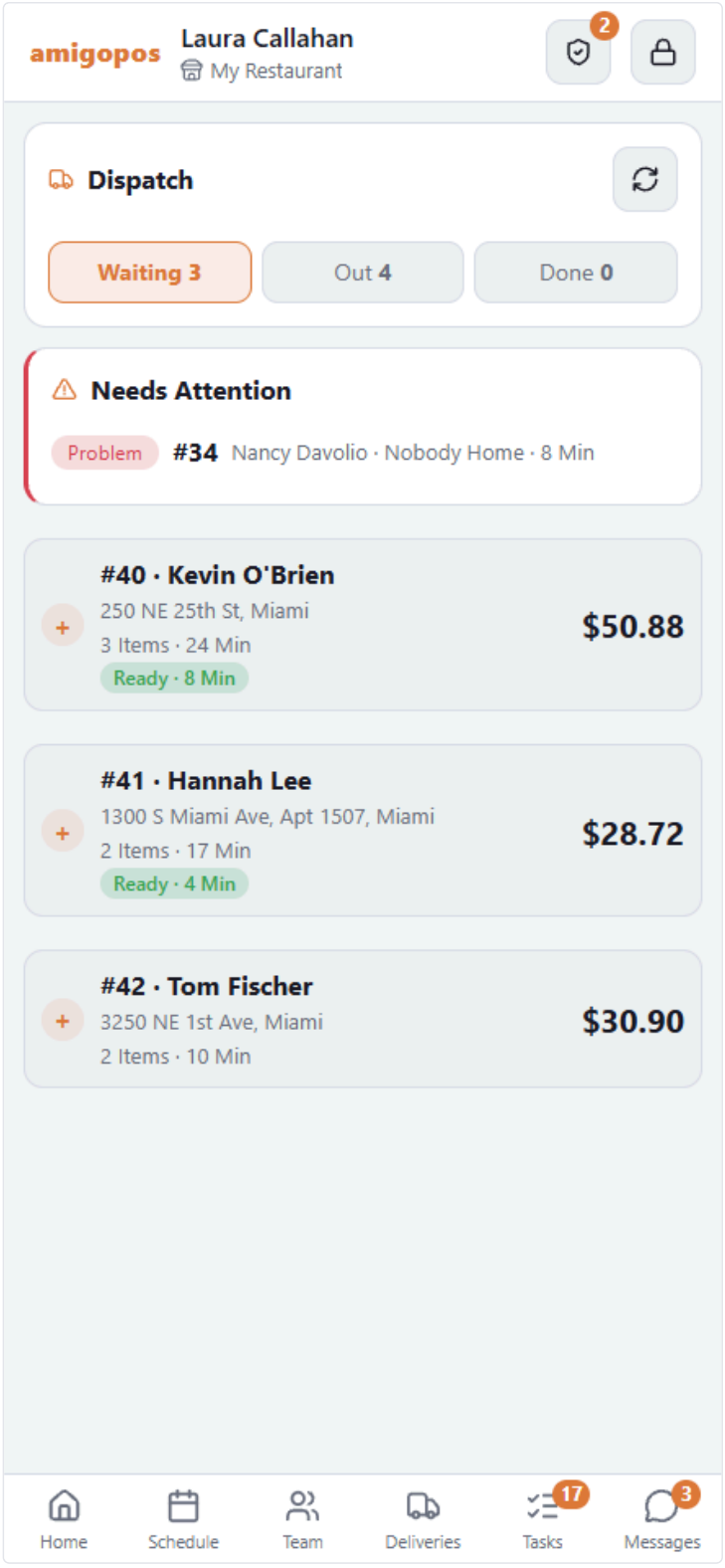
Dispatching from a manager's phone

Call Center & Delivery › Delivery

View online ↗

The staff site's Dispatch page: the delivery board on a manager's phone, for when nobody is standing at the register.

A manager can run deliveries from the phone: the staff site's **Dispatch** page is the register's delivery board without the register. It appears in the menu for managers at a store that delivers its own orders, with a red count when something needs attention.



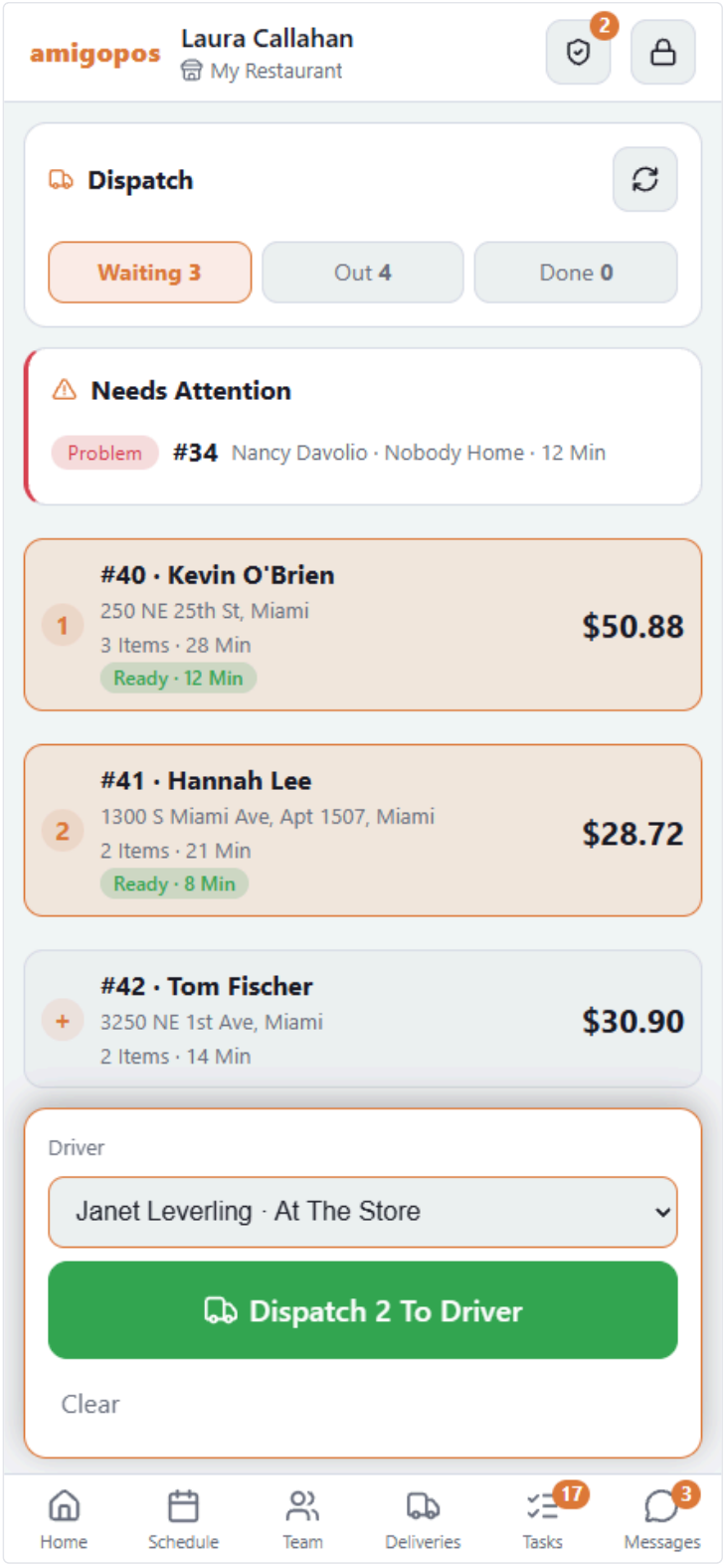
Needs Attention

At the top: deliveries with a problem at the door, orders brought back, and deliveries running late. Each opens to the same answers as at the register — **Call**, **Resolved**, **Return To Store**. See when a delivery runs into trouble.

Waiting

Orders waiting for a driver, oldest first, with how long they have waited and whether the kitchen has finished them. A scheduled order waits under **Later (Scheduled)** until it is due in the kitchen.

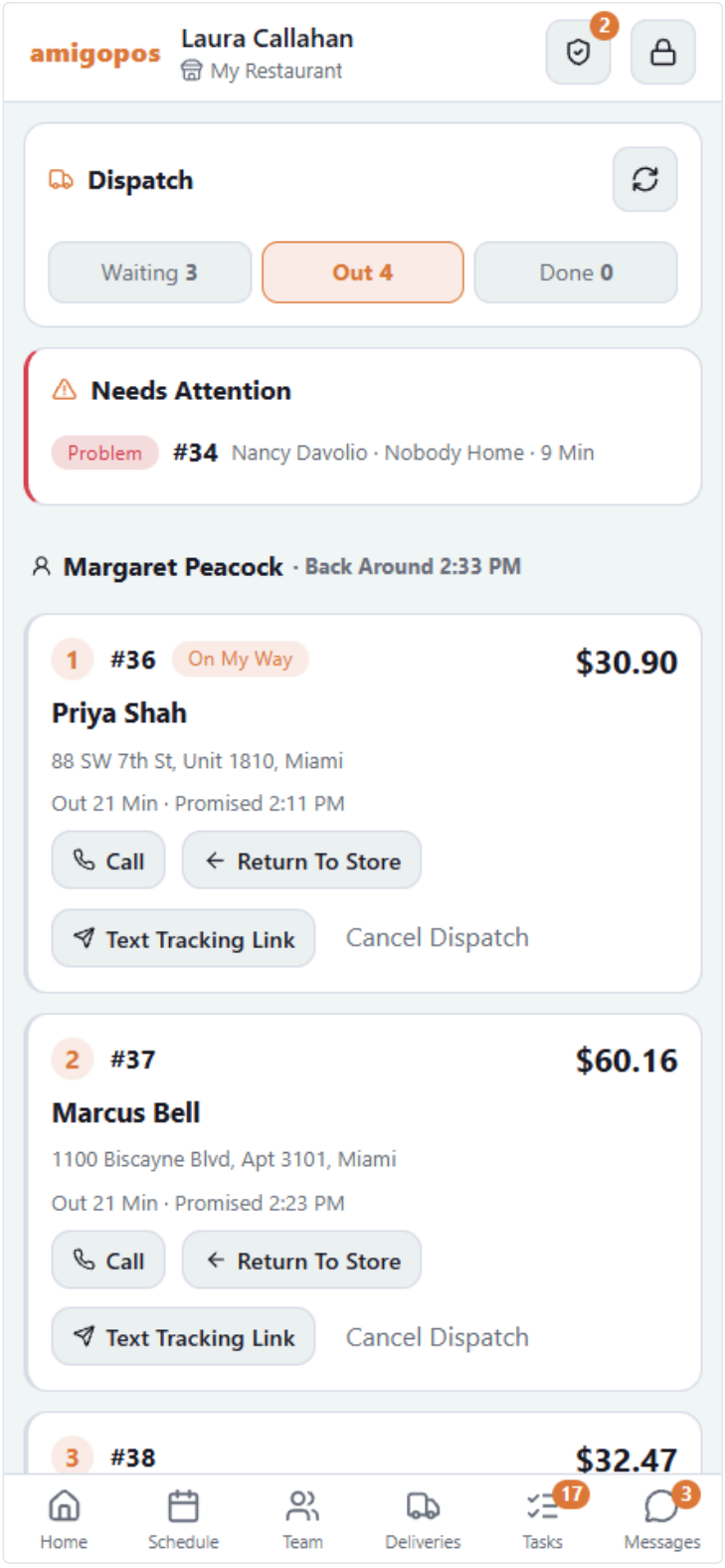
1. Tap the orders in the order they will be delivered. Each gets its stop number.
2. Pick the driver. The list shows who is **At The Store**, who is out (**1 Out**, with the time they should be back) and who is **Not Clocked In**.
3. Tap **Dispatch 2 To Driver**.



It is the same dispatch the register makes: the promise time, the route, the customer's on-the-way message, the liability limit and the call-center notice. No trip ticket is printed.

Out and Done

Out lists each driver's run. On a stop: **Call** the customer, **Return To Store**, **Text Tracking Link** (sends the customer the tracking page), or cancel the dispatch. **Done** lists today's delivered orders.



The page refreshes itself every 15 seconds. A driver's cash is banked at the register, or by the driver's own Back At Store.

When a delivery runs into trouble

Call Center & Delivery › Delivery

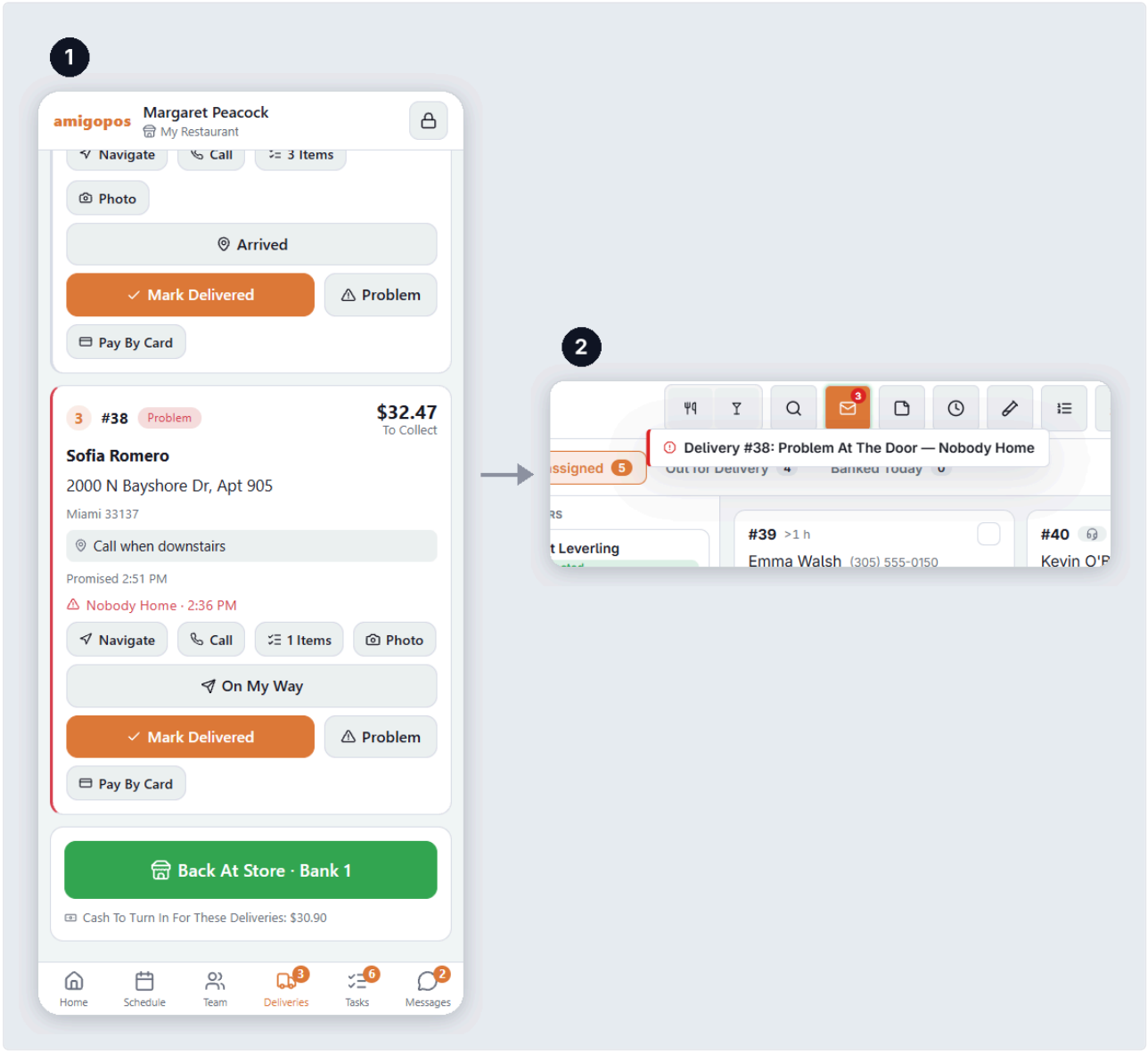
View online ↗

Problems at the door, orders brought back and late deliveries: who is told, and the two ways the store answers.

A delivery can go wrong in three ways: the driver reports a **problem at the door**, the order is **brought back** undelivered, or it is **running late**. The store hears about each one wherever it is looking.

Who is told

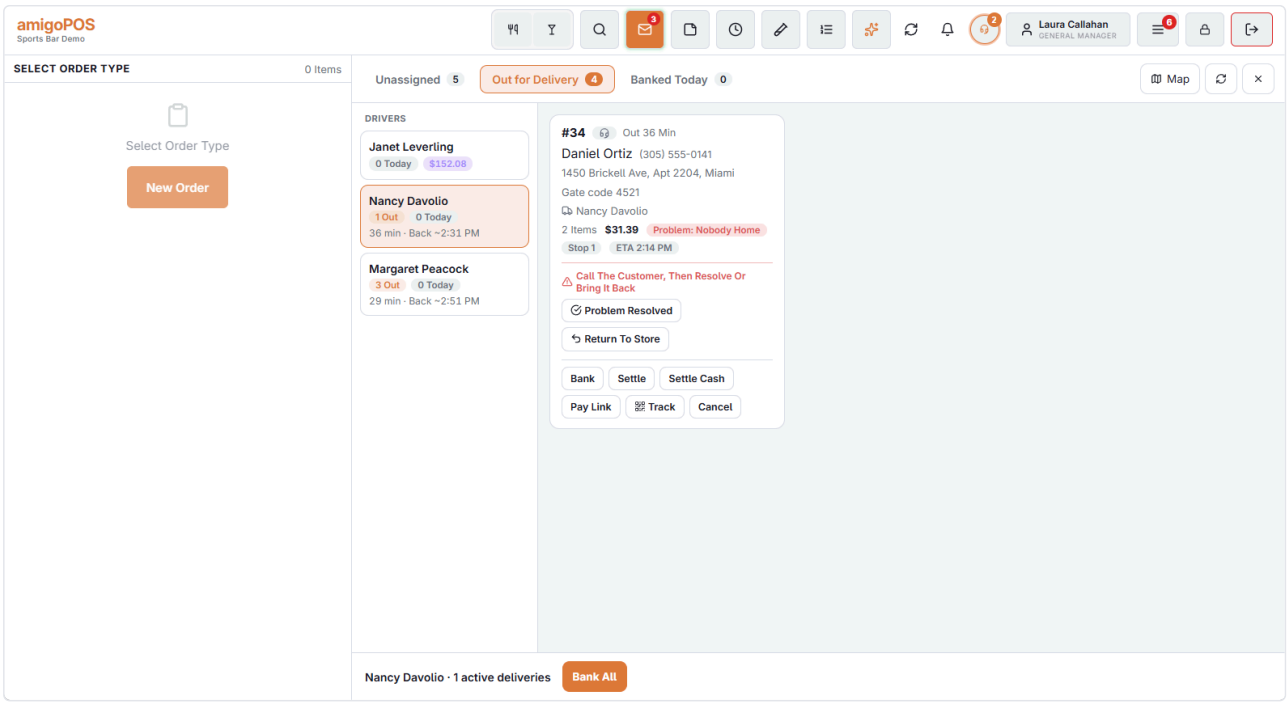
- **Every register** of the store shows a toast, whether the delivery board is open or not — “Delivery #12: Problem At The Door — Nobody Home”, “Delivery #12 Is Coming Back To The Store”, “Delivery #12 Is Running Late”. Late deliveries are checked every two minutes and follow the *Late Order Alerts* setting. When a register signs in with several already waiting, one toast sums them up.
- **Managers’ phones** get a notification for a problem and for an order coming back; it opens Dispatch.
- **The call center** sees the problem, or the reason the order came back, on the order’s pill.
- **The customer** sees a plain notice on the tracking page.



Answering a problem at the door

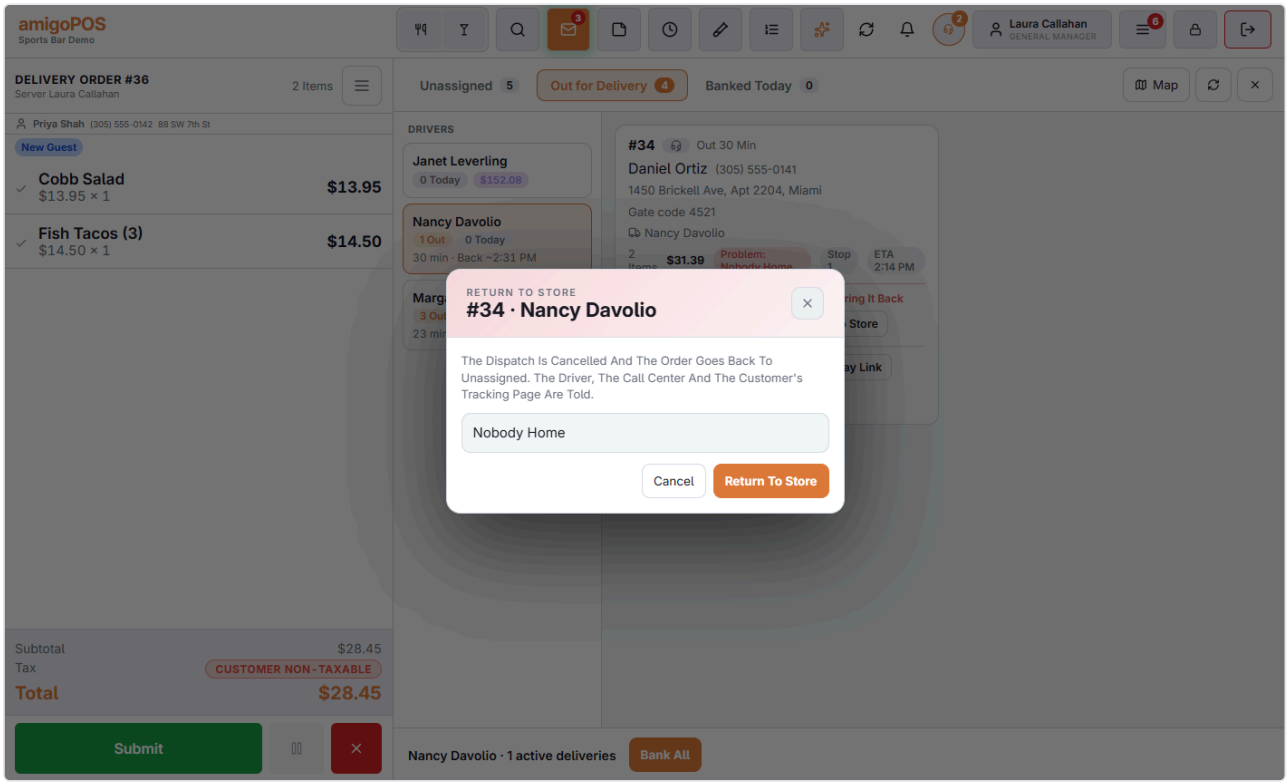
On the delivery board, Out tab, the card shows the driver’s reason and two buttons. Call the customer first, then:

- **Problem Resolved** — the customer answered or the address is sorted out. The driver’s phone is told to carry on, and the notice leaves the tracking page and the call center.
- **Return To Store** — the order comes back.



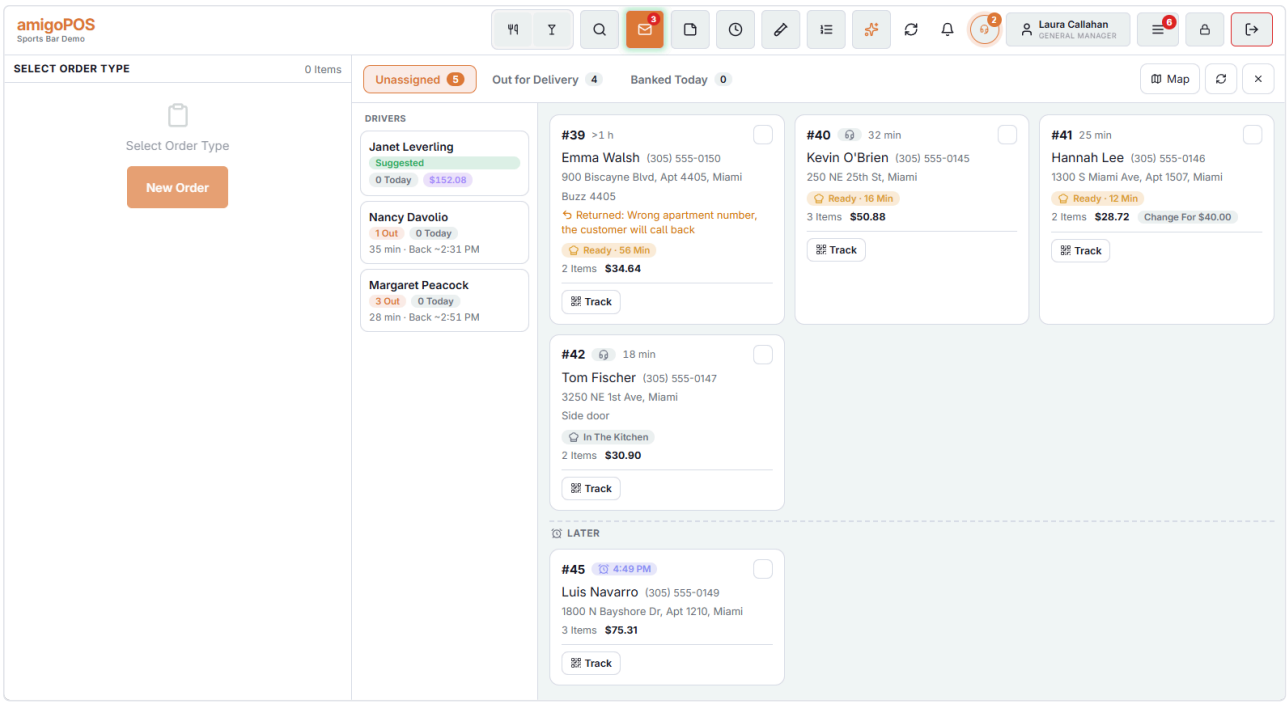
Bringing an order back

Return To Store is on every card that is out, problem or not. Type why it is coming back and confirm. The dispatch is cancelled and the order goes back to **Unassigned**; the driver's phone, the call center and the customer's tracking page are told.



A driver can do the same from the phone: in the Problem panel, pick the reason and tap **Bring It Back To The Store**. See the Deliveries tab.

Back on Unassigned the card shows **Returned:** with the reason until the order goes out again. Dispatch it again, call the customer to collect it, or void it.



Only orders that are still out can be brought back. A delivered order is not; a delivery-partner order is cancelled from its own buttons.

Delivery zones and the zone map

Call Center & Delivery › Delivery

View online ↗

What a zone controls — charge, minimum, time — and how an address is matched to one.

A delivery zone is an area you deliver to and the terms you deliver on. An address is matched to a zone, and the zone decides what the order costs and how long it takes.

What a zone carries

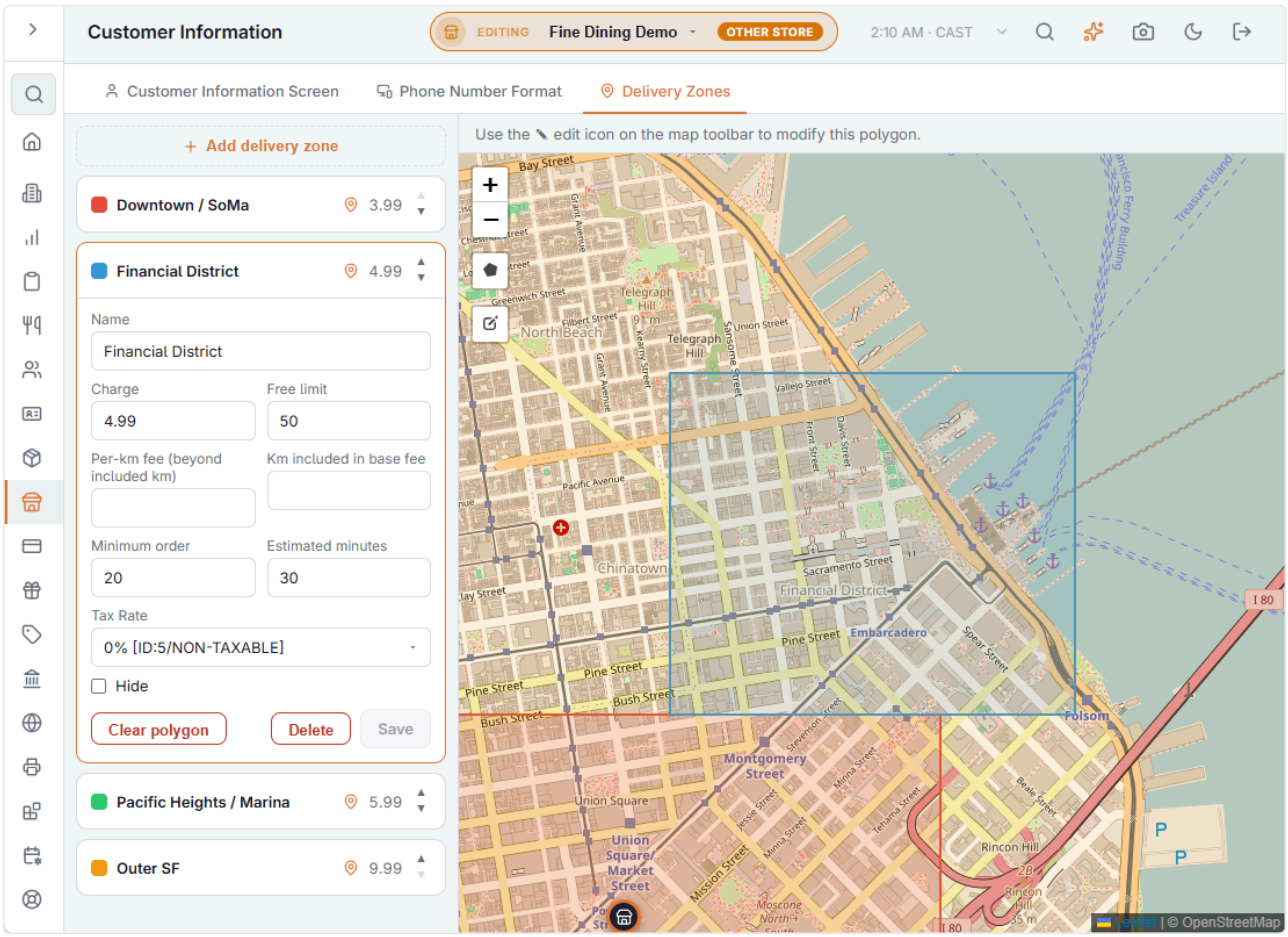
- **Delivery charge**, and a **free-delivery limit** — the order value above which the charge is dropped.
- **Per-distance fee** with a number of units **included**, for zones charged by how far out the address is.
- **Minimum order** — what an order must reach before you will deliver there.
- **Estimated minutes**, which is where the promised time comes from.
- **Tax rate** on the delivery charge, where that is taxed separately.

Drawing the map

Zones can be drawn as areas on a map rather than described in words, which is how a zone follows a river or a main road instead of a circle. A zone with an area drawn is marked as such.

Zones are ordered, and the order matters where they overlap. A zone can also be hidden from the register while staying configured.

An address that matches no zone is telling you something true: you have not said you deliver there. Either it is out of area, or the zones need widening.



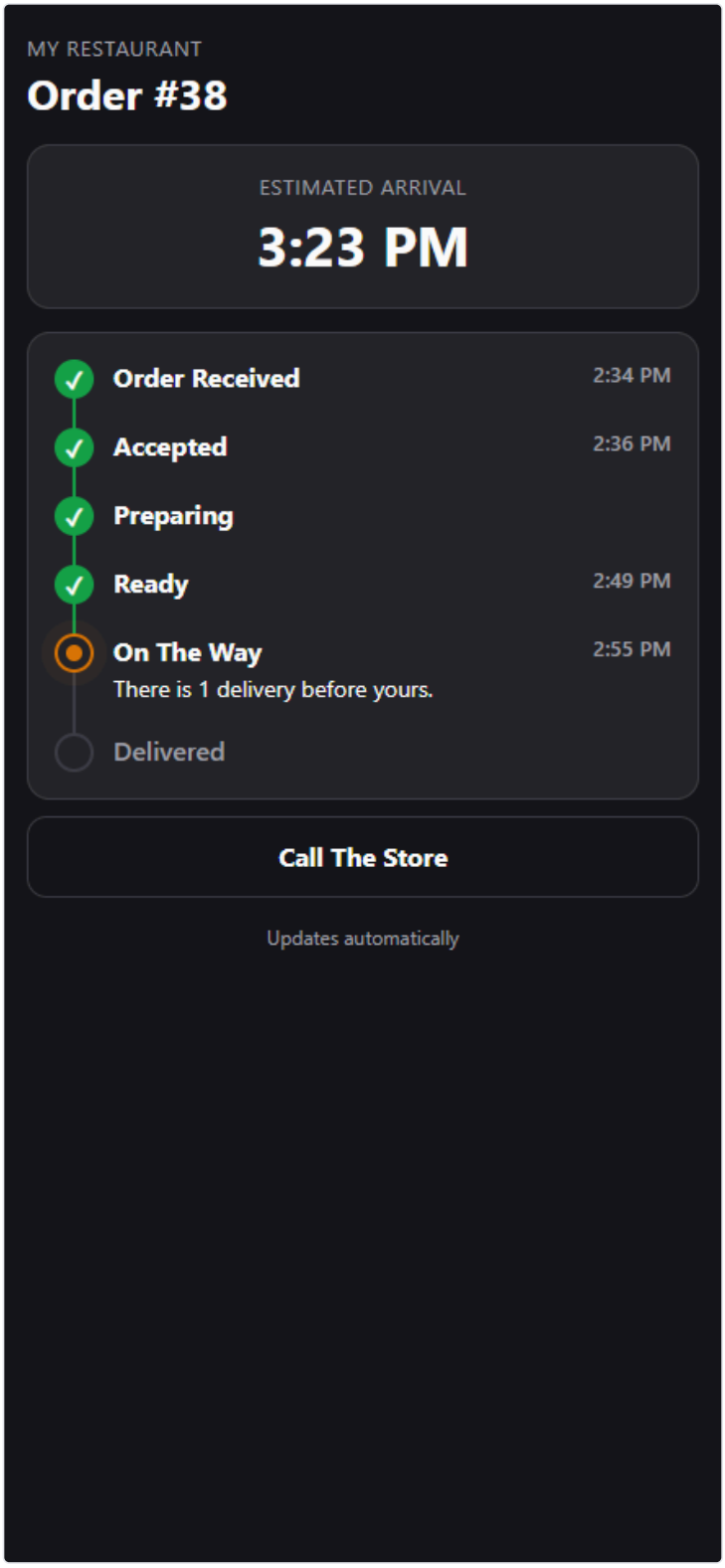
The customer's order tracking page

Call Center & Delivery › Delivery

View online ↗

A private page where a delivery customer follows the order live: what it shows, where the link comes from and when it stops working.

Every delivery order can have its own tracking page. The customer opens a short link — from the on-the-way text or email, the web store's confirmation, the QR code on the receipt, or a link the store sends — and sees where the order is, live, without logging in.



What the customer sees

- **The steps** — Order Received, Accepted, Preparing, Ready, On The Way, Delivered, each with the time it happened. A web pickup order ends with Ready For Pickup and Picked Up instead.
- **Estimated Arrival** — worked out from the driver's route once the order is out (the stops before this one, plus a few minutes at each door), otherwise the time the store promised. Close to the time it reads *Any Minute Now*. A scheduled order shows the time it is for.

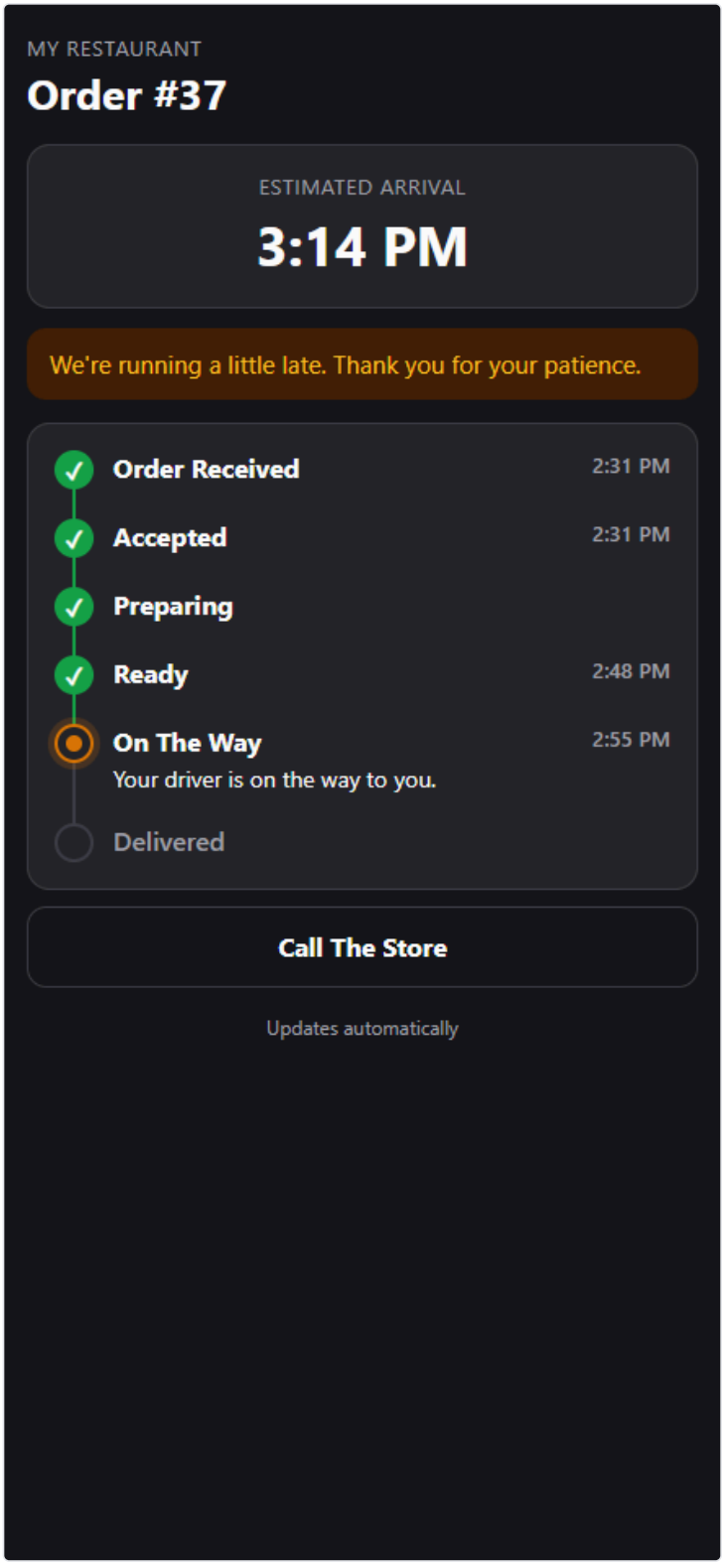
- **The driver** — “There are 2 deliveries before yours”, then, when the driver taps **On My Way** and **Arrived** on the phone, “Your driver is on the way to you” and “has arrived”. With *Show The Driver’s First Name* on, the first name replaces “Your driver”.
- **The store** — its name, logo and a **Call The Store** button.

> The page shows no customer name, address, phone or items. The link is a random ten-character code, so it cannot be guessed from the order number.

When something goes wrong

The page tells the customer, in plain words, without details the store would rather give on the phone:

- **Running late** — five minutes past the promised time.
- **The driver can’t reach you** — the driver reported a problem at the door; it goes away when the store marks it resolved.
- **Delayed, the store will be in touch** — the order was brought back to the store.
- **Payment didn’t go through** — a pay link was declined; a **Pay Now** button opens the payment page again.
- **The store made a change to your order** — after the store adjusted it.
- For a delivery-partner driver: finding a driver is taking longer, the store is arranging another driver, or **Open Map** to follow the partner’s driver.



The page refreshes itself every 20 seconds and speaks the customer's phone language (English, Spanish or Arabic).

Where the link comes from

- The **on-the-way** text and email sent when the order is dispatched (when the store sends them), in the store's language.
- The **web store** confirmation and order pages, as a Track button — for pickup orders too.
- The **receipt**: the default customer receipt prints a "Track your order" QR code on tracked deliveries.

- The **Track** button on the delivery board and **Text Tracking Link** on a manager's phone — see the delivery screen and dispatch.
- Optionally, a text as soon as a register or call-center delivery order reaches the store.

When it stops working

The link keeps working for the hours set in *Link Works For* (2 by default) after the order is delivered, picked up or cancelled, and never more than 24 hours after the order was due. After that the page reads "This tracking link has expired."



To switch tracking on or off and choose these options, see setting up order tracking.

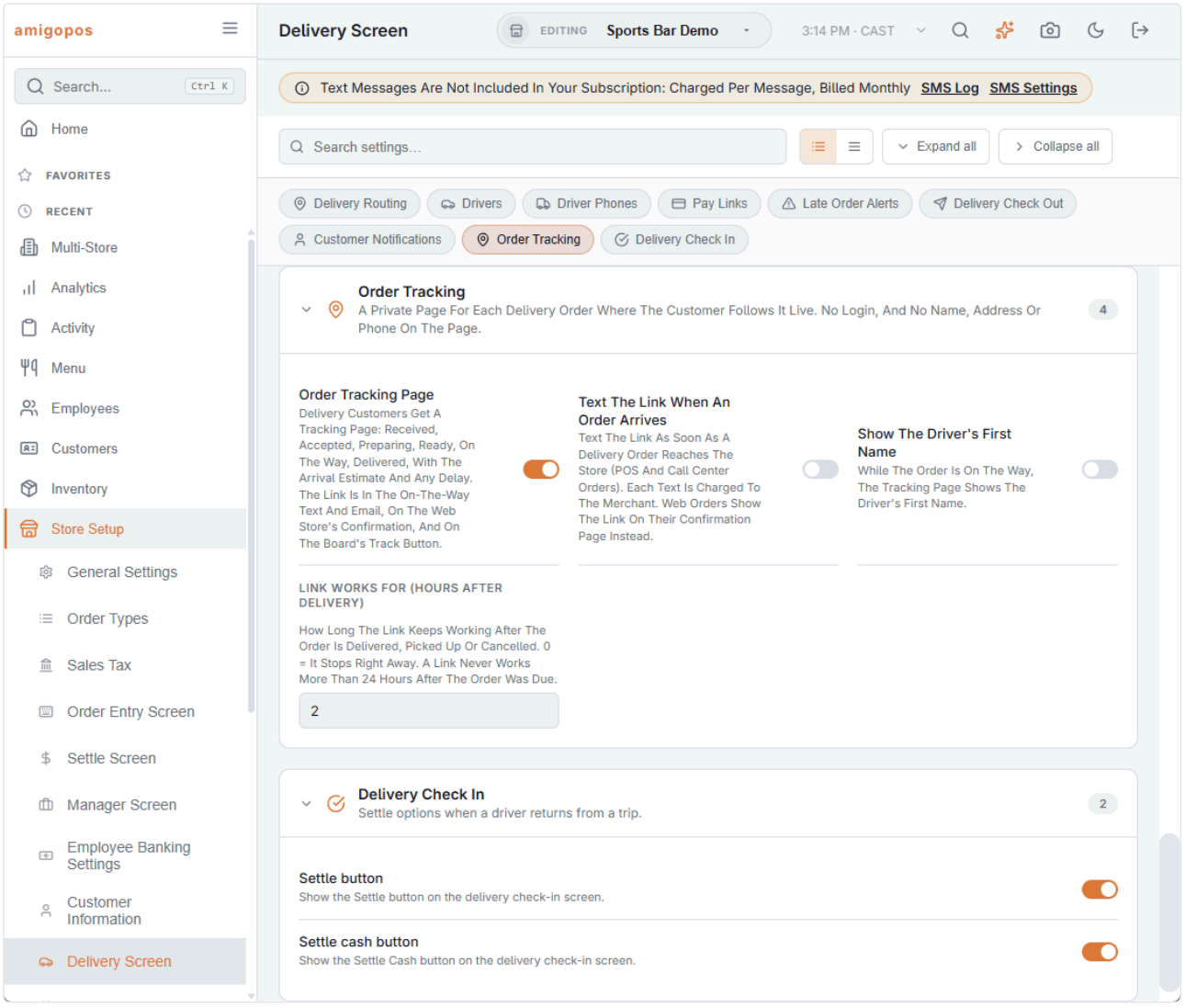
Setting up order tracking

Call Center & Delivery › Delivery

View online ↗

The Order Tracking settings on the Delivery Screen page, the text-message switch, the receipt QR and the public address the link uses.

Order tracking is on for every store that delivers. The settings are in **Back Office › Store Setup › Delivery Screen › Order Tracking**.



Setting	What it does	Starts as
Order Tracking Page	Delivery customers get a tracking page. Off, no links are made: the on-the-way message goes out without one, the board has no Track button and receipts print no QR.	On
Link Works For (Hours After Delivery)	How long the link keeps working after the order is delivered, picked up or cancelled. 0 stops it right away. Never more than 24 hours after the order was due.	2
Show The Driver's First Name	While the order is on the way, the page shows the driver's first name instead of "Your driver".	Off
Text The Link When An Order Arrives	Texts the link as soon as a delivery order from a register or the call center reaches the store. Web orders show the link on their confirmation page instead.	Off

> Every text is charged to the merchant. With *Text The Link When An Order Arrives* on, a delivery order with a phone number gets one text when it arrives and another when it goes out (if the store sends the on-the-way text).

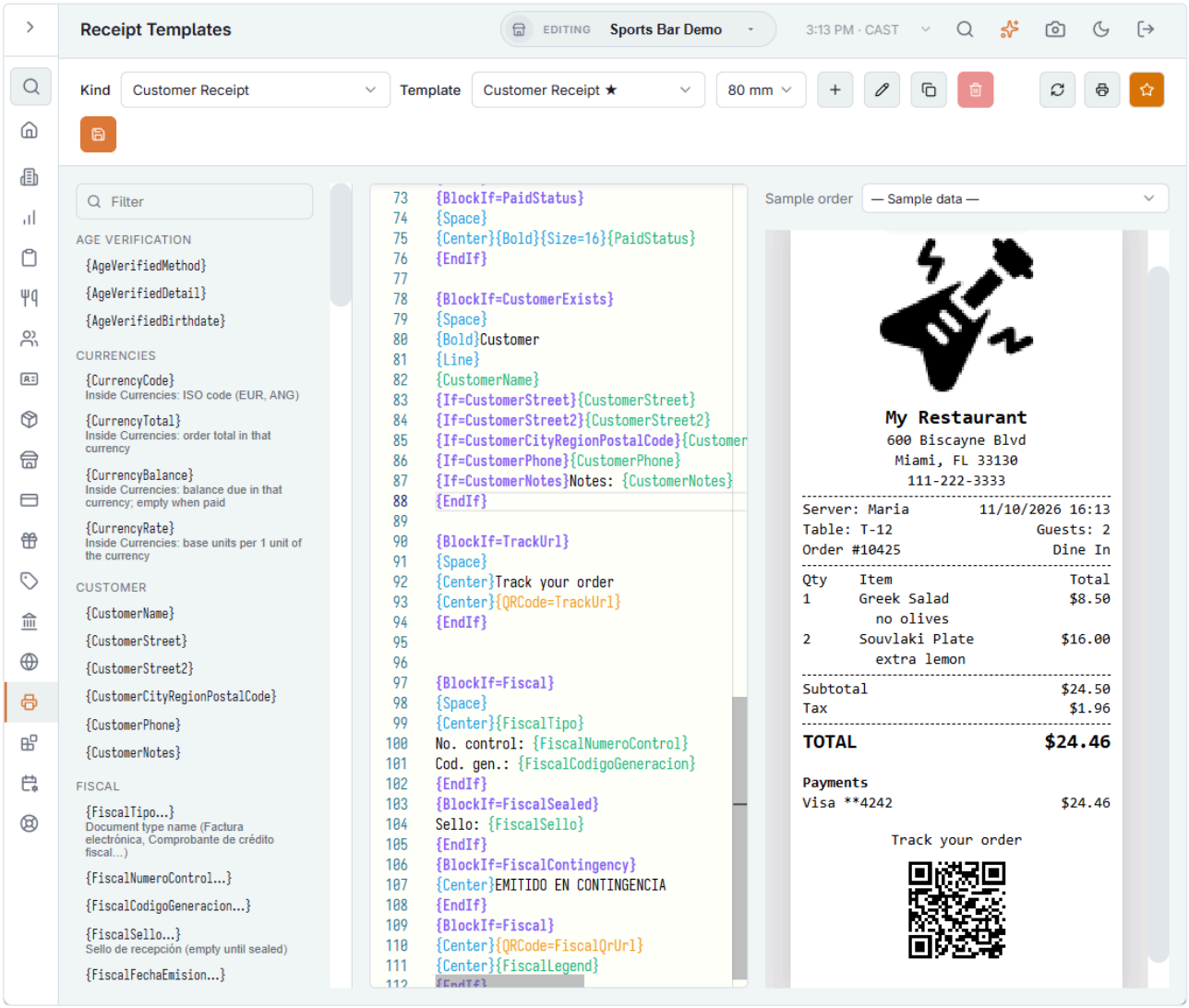
Text messages

Texts that carry the link go out under the store's text-message action **Order Tracking Links**, which is on by default. Switch it off to stop every tracking text while keeping the page and the other links.

The receipt

The default customer receipt prints a "Track your order" QR code on tracked deliveries. A receipt template the store has already edited does not change by itself: add this where the code should print.

```
{BlockIf=TrackUrl}
{Space}
{Center}Track your order
{Center}{QRCode=TrackUrl}
{EndIf}
```



The address in the link

The link uses the same public address as the pay-at-table page when the store has set one (see Stripe setup), otherwise the system's own. When neither is available the board says "Tracking Is Not Available For This Order".

What the customer sees is described in the customer's order tracking page.

Maps, geocoding, and address verification

Call Center & Delivery › Delivery

View online ↗

The API key behind address validation, zones, and the map views.

CloudPos includes mapping, address geocoding, and route calculation as built-in services — there is nothing to sign up for, no API key to create, and no per-store configuration.

What it does

- **Address verification** — when a delivery address is entered, it is resolved to map coordinates automatically. A verified address shows the checkmark; see *Customer lookup at the register*.
- **Failed lookups** — an address that cannot be resolved is flagged rather than silently accepted; correct the address and it re-verifies on save.
- **Routing and distance** — trip tickets with turn-by-turn directions, distance-based delivery fees, and the dispatch map all use the same built-in service; see *Delivery zones* and *Delivery screen and dispatch*.

> If addresses in your area consistently fail to verify, include more detail (postal code, region) — and note that new construction can lag map data by months. An unverified address can still be delivered to; verification exists to power distance fees and directions, not to block orders.

Driver bank report

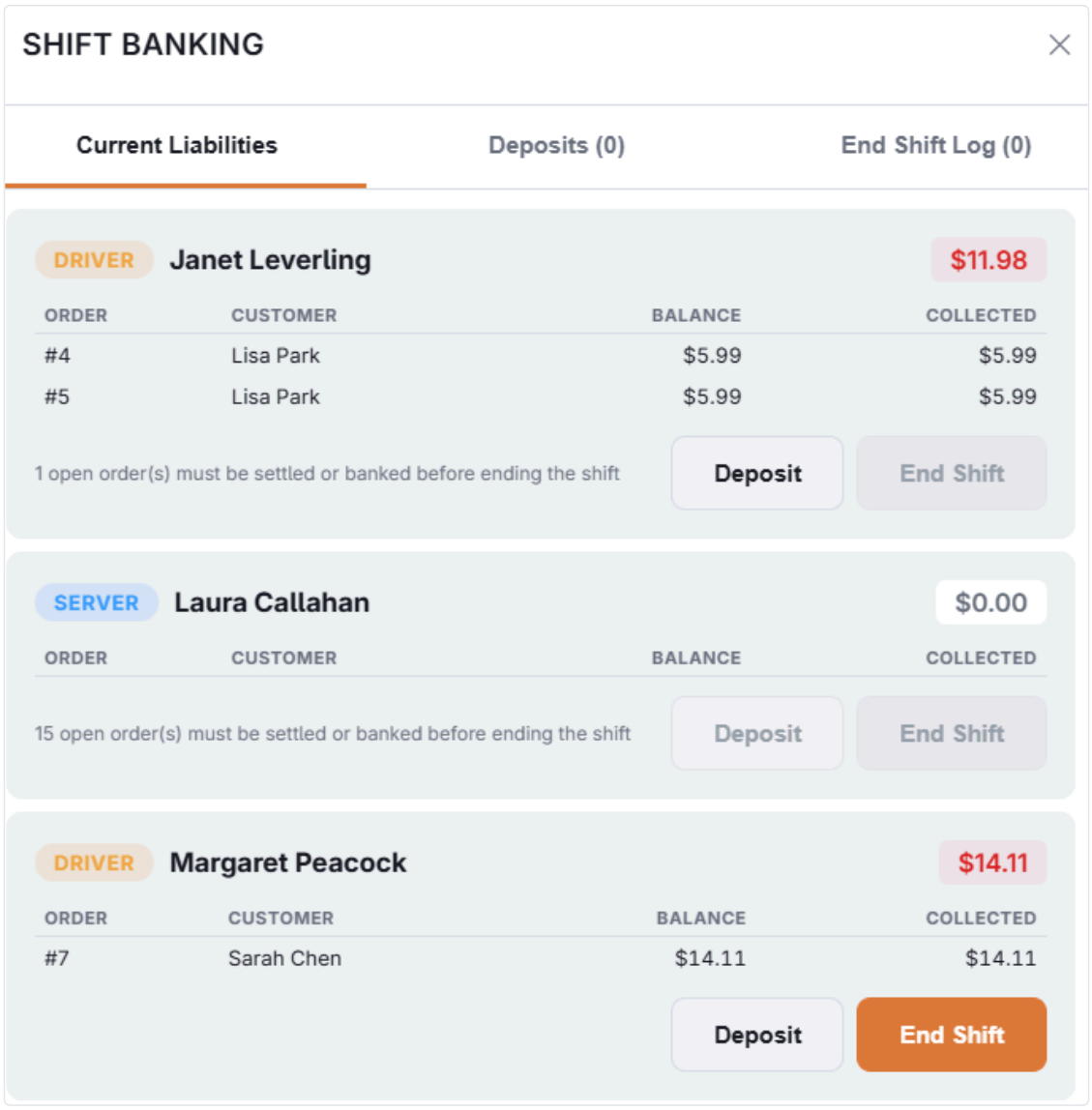
Call Center & Delivery › Delivery

View online ↗

Reconciling a driver's cash, fees, and tips at shift end.

The driver bank report totals a driver's shift: orders delivered, cash collected, card payments, delivery fees, tips, and the **net owed to the house**. Runs join the driver's bank as they are **banked** on return; the report is the reconciliation of that bank.

1. Open it from Reports (or the driver's clock-out flow surfaces the same numbers as their liability — the **Bank report** button on the time clock prints it on demand).
2. Verify the cash against the report, record the deposit in the shift banking overlay, and the driver's liability zeroes — unblocking clock-out.



The delivery screen's driver rail shows each driver's live liability, tinting as it approaches the store's warning threshold — and **dispatch is blocked once a driver would exceed the liability limit**, so a heavy bank is settled before the next run goes out. Limits and thresholds are set in *Back Office › Cash Management › Employee Banking*.

Deliveries out block clock-out

A driver cannot clock out — at the register or on the staff site — while a delivery is out, or delivered and not banked. Bank them on the delivery board, or with Back At Store on the driver's phone. There is no manager override.

CHAPTER 7

Kitchen Display (KDS)

KDS overview and ticket layout

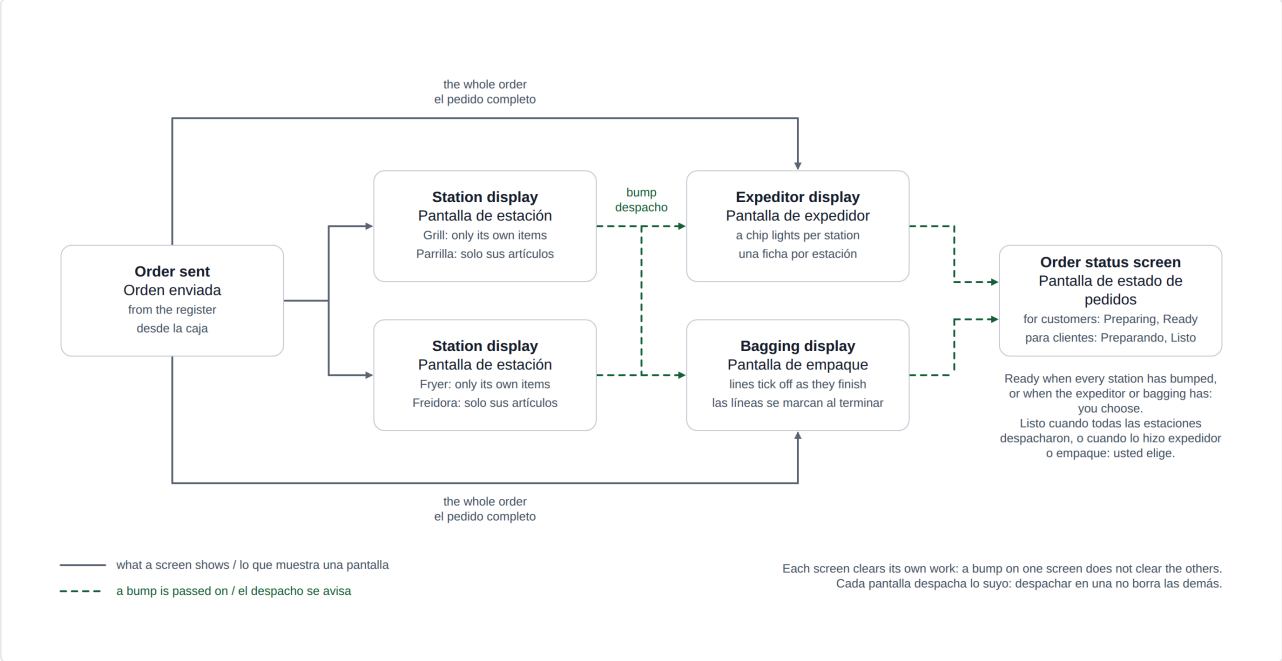
Kitchen Display (KDS)

View online ↗

How to read a card, what the timer colours mean, what a rush band is, and the filters that cut the board down mid-rush.

The KDS shows one card per order routed to this screen. Cards sit in the order the work should be started, and a **rush** order jumps to the front.

In one picture: which screen shows what, and how a bump on one screen reaches the others.



Reading a card

- A **two-line header**. The first line is the order number and a **timer pill** showing how long the order has been waiting; the pill takes the colour of the order's age. The second line is the order type, the table, the server and the item count.
- **Item lines**, each with its quantity in a box on the left so a 3 is never mistaken for a 1 from across the kitchen.
- **Modifiers** as a bulleted list under their item.
- **Note** and **allergen** bars — special instructions and allergen warnings in their own coloured bands. Allergen bars are never dimmed, whatever else is happening to the card.
- Guest headers where the order is split by seat, and course headings where the order is coursed.

Colour and age

The timer pill starts neutral, turns to the **aging** colour after the aging threshold and to **late** after the late threshold. The thresholds are set in Back Office, overall and per order type — see Aging and late thresholds. Ages are measured against **server** time, so a display whose own clock is wrong still colours correctly.

Rush

A rushed order carries a red **RUSH** band and is sorted to the front on every display that shows it. See Rushing an order.

Changed orders

When an order is changed after it was sent, the card comes back with the **new lines bold** and the lines that were already there **dimmed**. Voided lines are struck through rather than removed, so the line that was cancelled is still visible.

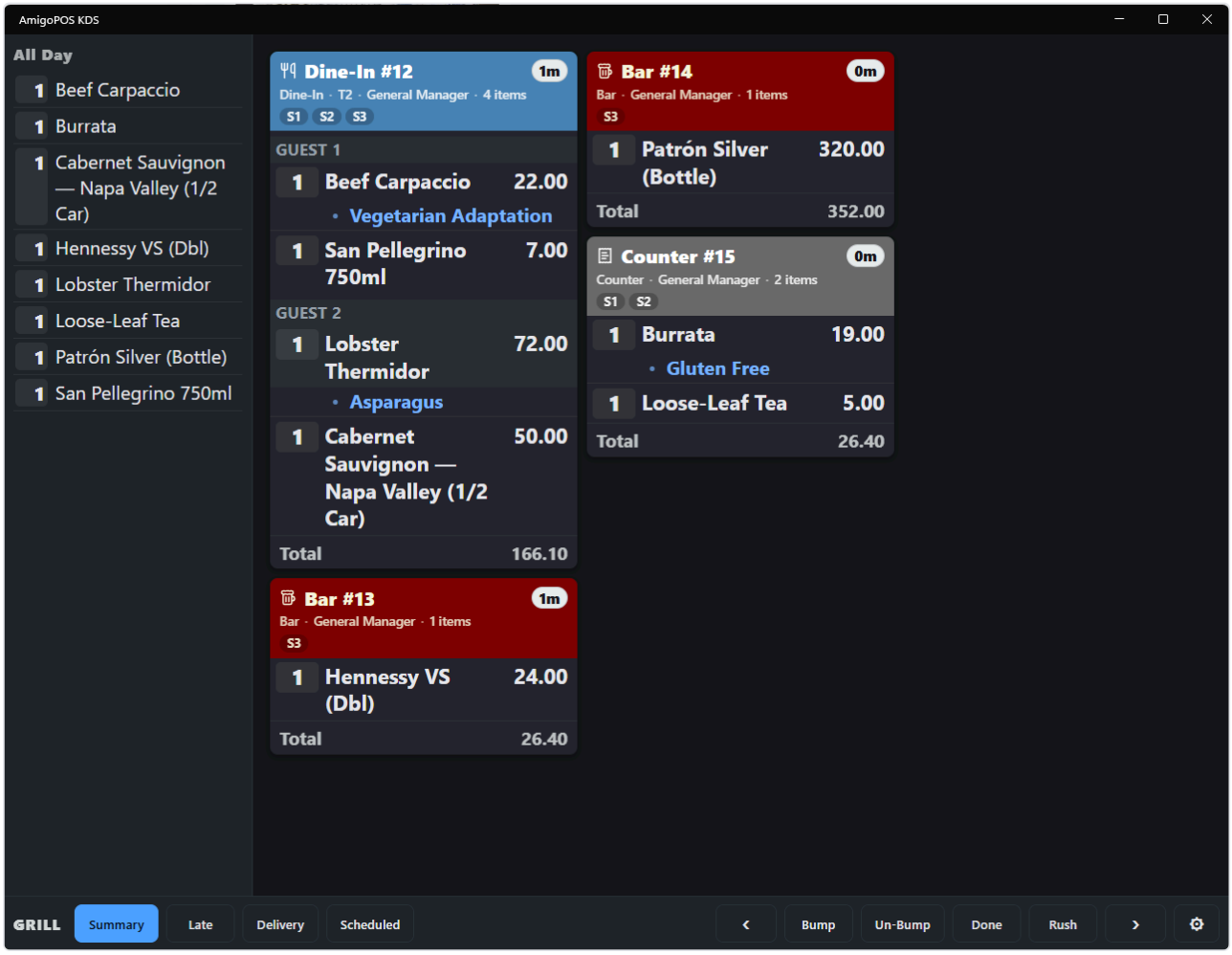
Struck lines

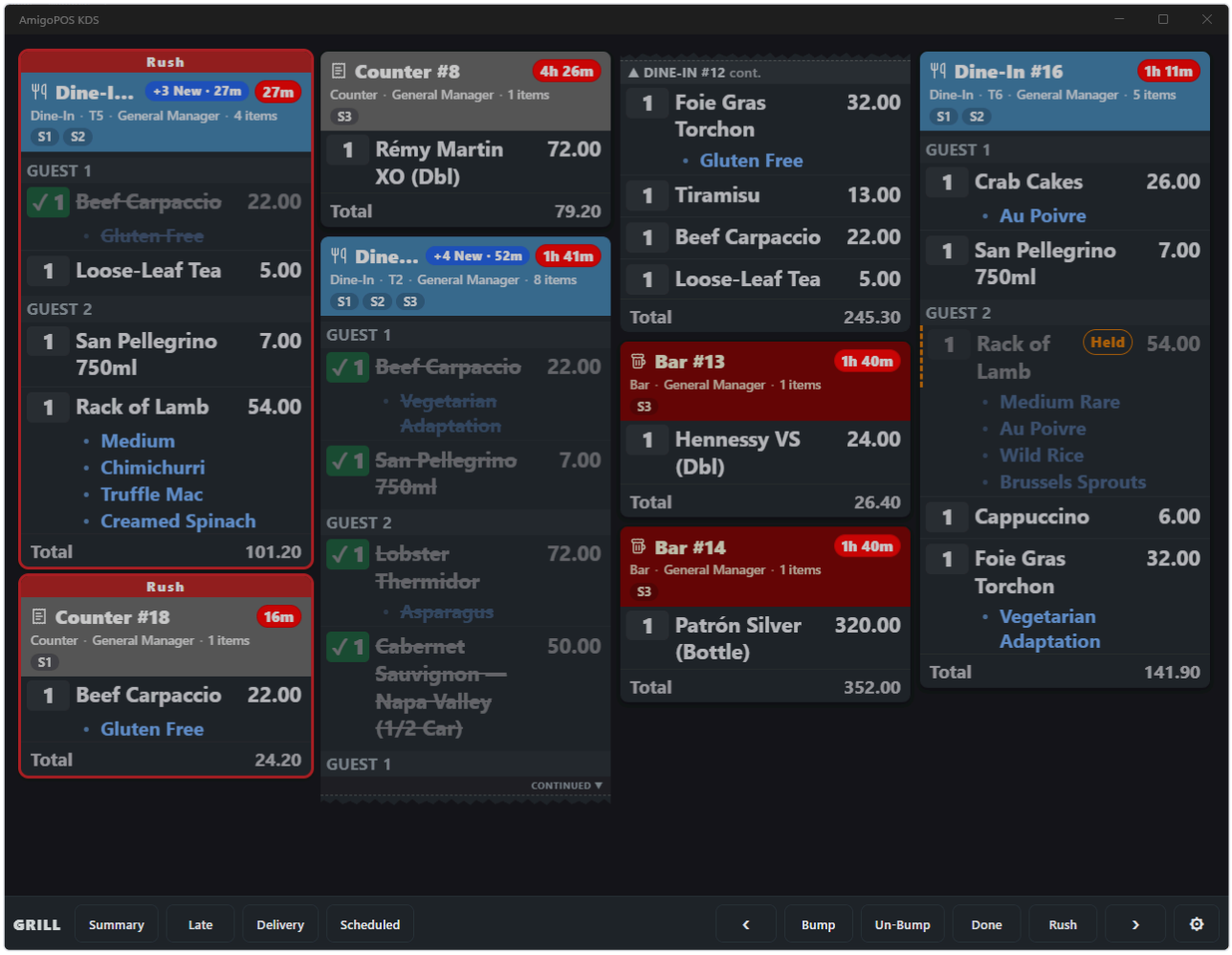
A line that a cook has bumped on this display is struck through with its modifiers. Struck lines stay on the card until the whole card is bumped, and drop out of the all-day summary. See Bumping, item bumps and the Done tray.

Cutting the board down

Filters show only **late** orders, only **delivery**, or only **scheduled** ones. The **all-day summary** replaces the cards with total quantities per item across everything still to be made — how many steaks, not which tickets.

> What the header, items and modifiers look like — size, weight and colour — is set per display in KDS settings.




AmigoPOS KDS
Rush
Dine-I... +3 New · 27m 27m
Dine-In · T5 · General Manager · 4 items
S1 S2
GUEST 1
✓ 1 Beef Carpaccio 22.00
Gluten Free
1 Loose-Leaf Tea 5.00
GUEST 2
1 San Pellegrino 750ml 7.00
1 Rack of Lamb 54.00
Medium
Chimichurri
Truffle Mac
Creamed Spinach
Total 101.20
Rush
Counter #18 16m
Counter · General Manager · 1 items
S1
1 Beef Carpaccio 22.00
Gluten Free
Total 24.20
Counter #8 4h 26m
Counter · General Manager · 1 items
S3
1 Rémy Martin XO (Dbl) 72.00
Total 79.20
Dine... +4 New · 52m 1h 41m
Dine-In · T2 · General Manager · 8 items
S1 S2 S3
GUEST 1
✓ 1 Beef Carpaccio 22.00
Vegetarian Adaptation
✓ 1 San Pellegrino 750ml 7.00
GUEST 2
✓ 1 Lobster Thermidor 72.00
Asparagus
✓ 1 Cabernet Sauvignon — Napa Valley (1/2 Car) 50.00
GUEST 1
CONTINUED
▲ DINE-IN #12 cont.
1 Foie Gras Torchon 32.00
Gluten Free
1 Tiramisu 13.00
1 Beef Carpaccio 22.00
1 Loose-Leaf Tea 5.00
Total 245.30
Bar #13 1h 40m
Bar · General Manager · 1 items
S3
1 Hennessy VS (Dbl) 24.00
Total 26.40
Bar #14 1h 40m
Bar · General Manager · 1 items
S3
1 Patrón Silver (Bottle) 320.00
Total 352.00
Dine-In #16 1h 11m
Dine-In · T6 · General Manager · 5 items
S1 S2
GUEST 1
1 Crab Cakes 26.00
Au Poivre
1 San Pellegrino 750ml 7.00
GUEST 2
1 Rack of Lamb Held 54.00
Medium Rare
Au Poivre
Wild Rice
Brussels Sprouts
1 Cappuccino 6.00
1 Foie Gras Torchon 32.00
Vegetarian Adaptation
Total 141.90
GRILL
Summary
Late
Delivery
Scheduled
‹
Bump
Un-Bump
Done
Rush
›



Paid orders and split checks

- **Paid orders stay until they are bumped.** An order paid at the counter before it is cooked still reaches the kitchen and stays on the board. A paid order nobody bumps drops off 6 hours after it started (or after its scheduled time).
- A check **split at payment** does not come back as new cards — its items were already on the board under the original order.
- A check split **before** payment shows only the items the kitchen has not made yet; if nothing is left to make, no card appears and no chime plays.

Besides station and expeditor screens, a display can be a bagging display or a customer order status screen. Scheduled orders wait for their kitchen time — see Scheduled orders on the KDS.

Call-center orders and orders on hold

- An order taken by the call center carries a call-center mark, and its card shows the customer's name, phone and address, with the apartment or unit line.
- An order that has not been sent to the store yet — held at the call center, waiting for an online payment, or waiting for a server to approve a QR order — is not on any display until it is released.
- Its timer starts when the store received it, not when it was first rung in, so an order paid by link twenty minutes after the call does not arrive already late.

Cancelled orders

When an order is voided while its card is on the board, the card does not just vanish. For 15 seconds it stays up with a flashing red **Cancelled** band, a red outline and every line struck through, and the new-order bell rings if **Sound** is on — so whoever is cooking it knows to stop.

- Bump the card to clear it straight away. Its lines can't be struck, and it is left out of the all-day summary.
- When orders are combined, or a check is split by guest, the original order is voided behind the scenes; its card simply goes, because the food lives on in the new orders.
- Station, expeditor and bagging screens all show it. The customer order status screen never does.

Modifier alerts

A modifier set to **Show as alert on kitchen display** — for example everything in an *Allergies* group — prints on the card in bold red with a warning sign, the way allergen lines do, so “no nuts” can’t hide in a list of sides. It does not change how the card bumps, and it is not shown on a line that was removed from the order.

Set it up in Food modifiers, groups, and levels.

Delivery tickets

A delivery ticket shows a truck. On an order for as soon as possible it also shows the time the order is due at the customer’s door, so the kitchen sees how much of the promise is left, not only how long the ticket has been up.

The KDS app for Windows and Android

Kitchen Display (KDS) View online ↗

Run the kitchen display as an installed app instead of a browser tab: kiosk mode, auto-start and automatic updates.

The kitchen display can run two ways. In a **browser**, by opening the KDS web address on any device with a screen; or as an **installed app** on Windows or Android. Both show the same board and the same settings. The app is better for a screen that is switched on in the morning and expected to just work.

Why the app

- It opens full screen at start with no address bar, tabs or system bars to catch a greasy finger.
- It **updates itself**, and it does so at a quiet moment.
- On Android the screen stays on and the device stays in landscape.
- It keeps a copy of the board, so a network drop does not blank the screen — see When the display loses the server.

Windows

1. On the **Downloads** page of the AmigoPOS Cloud web site, download the **Kitchen Display for Windows** installer and run it. It installs per user with no administrator rights.
2. The app starts with Windows from then on. Activate the display the first time it opens.
3. **Window mode** in the settings overlay switches between full screen and a normal window, which is handy while a screen is being set up at a desk.

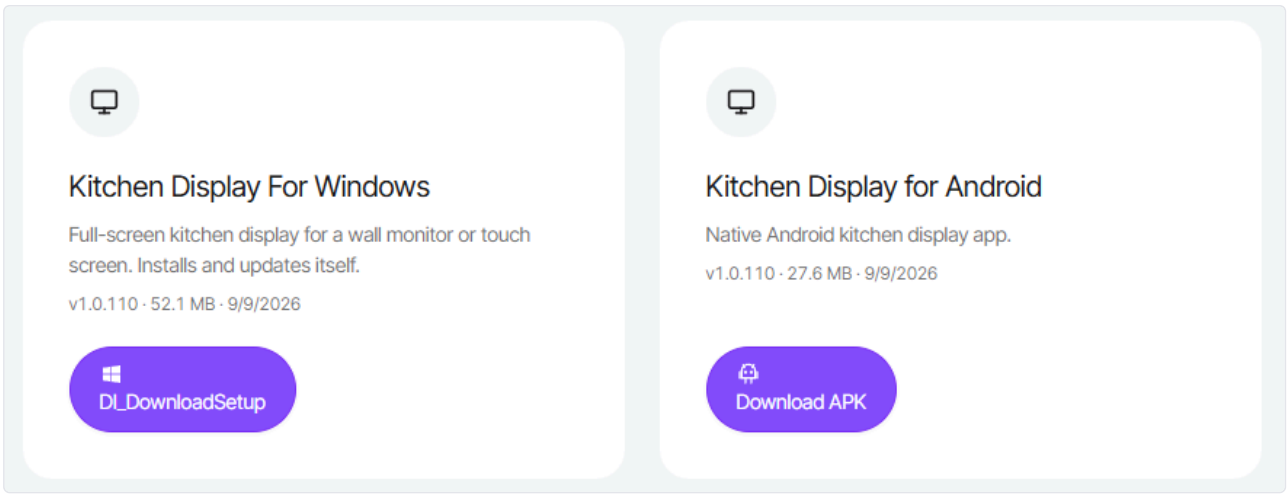
Android

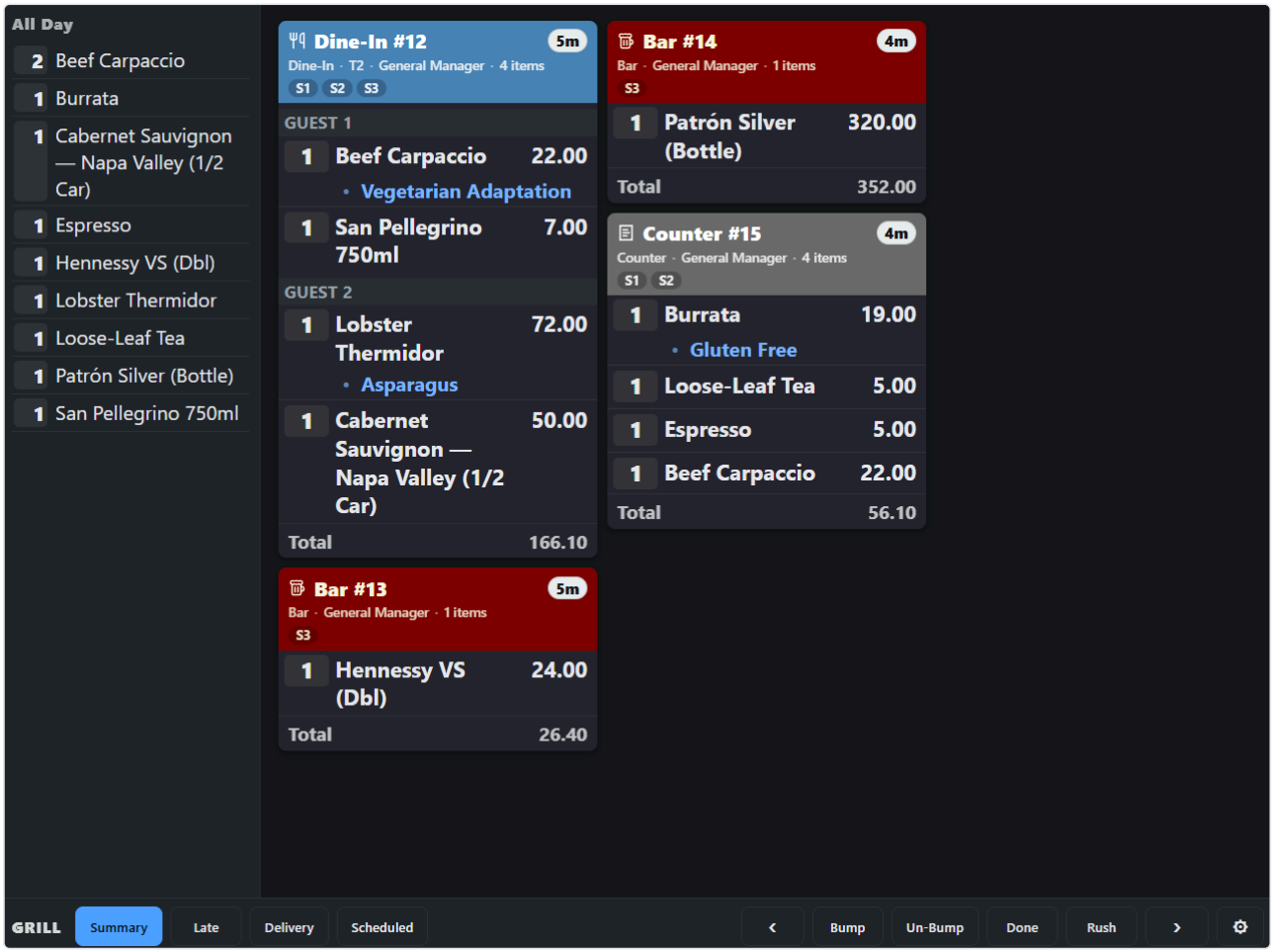
1. On the tablet or Android box, open the **Downloads** page and download the **Kitchen Display for Android** APK. Allow the browser to install apps when Android asks.
2. Install and open it. It runs as a **kiosk**: full screen, landscape, screen always on. Activate it the first time it opens.
3. **Android bars** in the settings overlay brings the status and navigation bars back when you need them; they hide again on the next start.

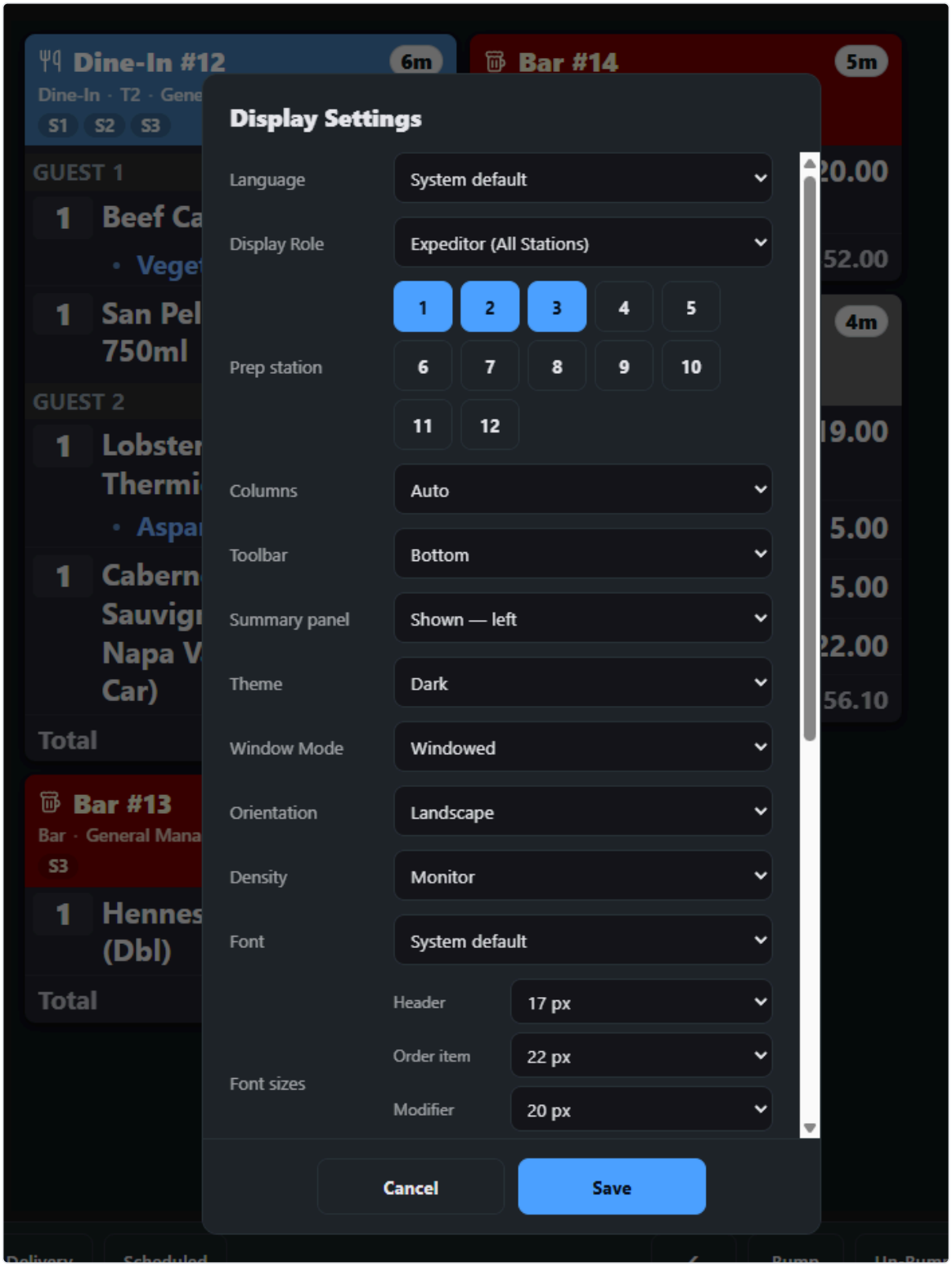
Updates

The app checks for new versions on its own. To avoid pulling the board away mid-service, an update is applied only after the kitchen has been **quiet for about ten minutes** — no new tickets and no bumps. On Windows it restarts itself. On a managed Android device (set up as a kiosk by your reseller) it installs silently; on an ordinary Android device it asks you to confirm the install. **Check for updates** in the settings overlay shows the current version and forces a check.

> The browser version keeps working and is still the right choice for a screen driven by a smart TV or a device that cannot install apps. Use one or the other on a given screen, not both.


Kitchen Display For Windows
Full-screen kitchen display for a wall monitor or touch screen. Installs and updates itself.
v1.0.110 · 52.1 MB · 9/9/2026
DI_DownloadSetup
Kitchen Display for Android
Native Android kitchen display app.
v1.0.110 · 27.6 MB · 9/9/2026
Download APK


All Day
2 Beef Carpaccio
1 Burrata
1 Cabernet Sauvignon — Napa Valley (1/2 Car)
1 Espresso
1 Hennessy VS (Dbl)
1 Lobster Thermidor
1 Loose-Leaf Tea
1 Patrón Silver (Bottle)
1 San Pellegrino 750ml
Dine-In #12
5m
Dine-In · T2 · General Manager · 4 items
S1 S2 S3
GUEST 1
1 Beef Carpaccio 22.00
• Vegetarian Adaptation
1 San Pellegrino 750ml 7.00
GUEST 2
1 Lobster Thermidor 72.00
• Asparagus
1 Cabernet Sauvignon — Napa Valley (1/2 Car) 50.00
Total 166.10
Bar #13
5m
Bar · General Manager · 1 items
S3
1 Hennessy VS (Dbl) 24.00
Total 26.40
Bar #14
4m
Bar · General Manager · 1 items
S3
1 Patrón Silver (Bottle) 320.00
Total 352.00
Counter #15
4m
Counter · General Manager · 4 items
S1 S2
1 Burrata 19.00
• Gluten Free
1 Loose-Leaf Tea 5.00
1 Espresso 5.00
1 Beef Carpaccio 22.00
Total 56.10
GRILL
Summary
Late
Delivery
Scheduled
‹
Bump
Un-Bump
Done
Rush
›



Bumping, item bumps and the Done tray

Kitchen Display (KDS)

View online ↗

Clearing a finished order, striking single items as they are plated, getting a bumped order back, and why a bumped one sometimes returns on its own.

Bump clears a finished order from the board. **Recall** brings it back. Between the two, an **item bump** strikes one line at a time so a cook can track a big ticket as it is plated.

Bumping a whole order

Tap the card's header or footer, or select it and press **Enter** or **Space**. The card leaves the board at once and the bump is sent to the server behind it, so a slow network never leaves a cook waiting for a card to disappear.

Bumping items one at a time

Tap an item line to **strike** it. Its modifiers strike with it, the line drops out of the all-day summary, and the card stays until every line is struck. Tap a struck line to un-strike it. Item bumps are **per display**: the grill striking its steak does not strike anything on the salad screen.

Two settings shape this, both in KDS settings:

- **Item bump mode** — whether tapping a line strikes it, and whether the whole card bumps itself once the last line is struck.
- **Auto-bump after N minutes** — off by default. On a pass-through screen that only needs to *see* tickets, this clears cards on their own after the set time so nobody has to touch the screen.

Recall and the Done tray

Bumped orders go into the **Done** tray at the edge of the board, most recent first. Open it to see what was just cleared, and tap an order to bring it back onto the board with its lines intact. **R** recalls the last bump without opening the tray; press it again to walk further back.

Keys and bump bars

The board is built to run without a touchscreen:

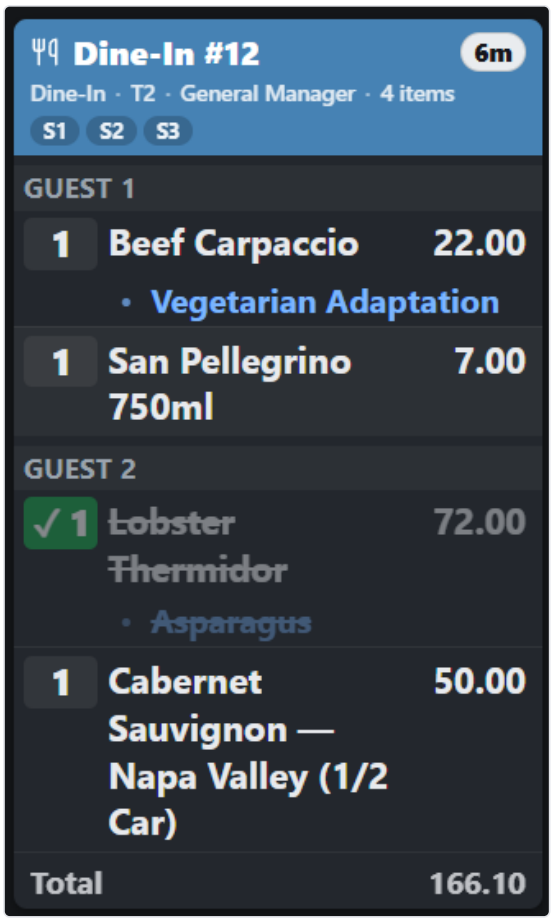
- **Enter** or **Space** — bump the selected card
- **Arrow keys** — move the selection
- **R** — recall the last bump; **!** — rush the selected order
- **S** — all-day summary, **L** — late only, **D** — delivery only, **F** — show the full order

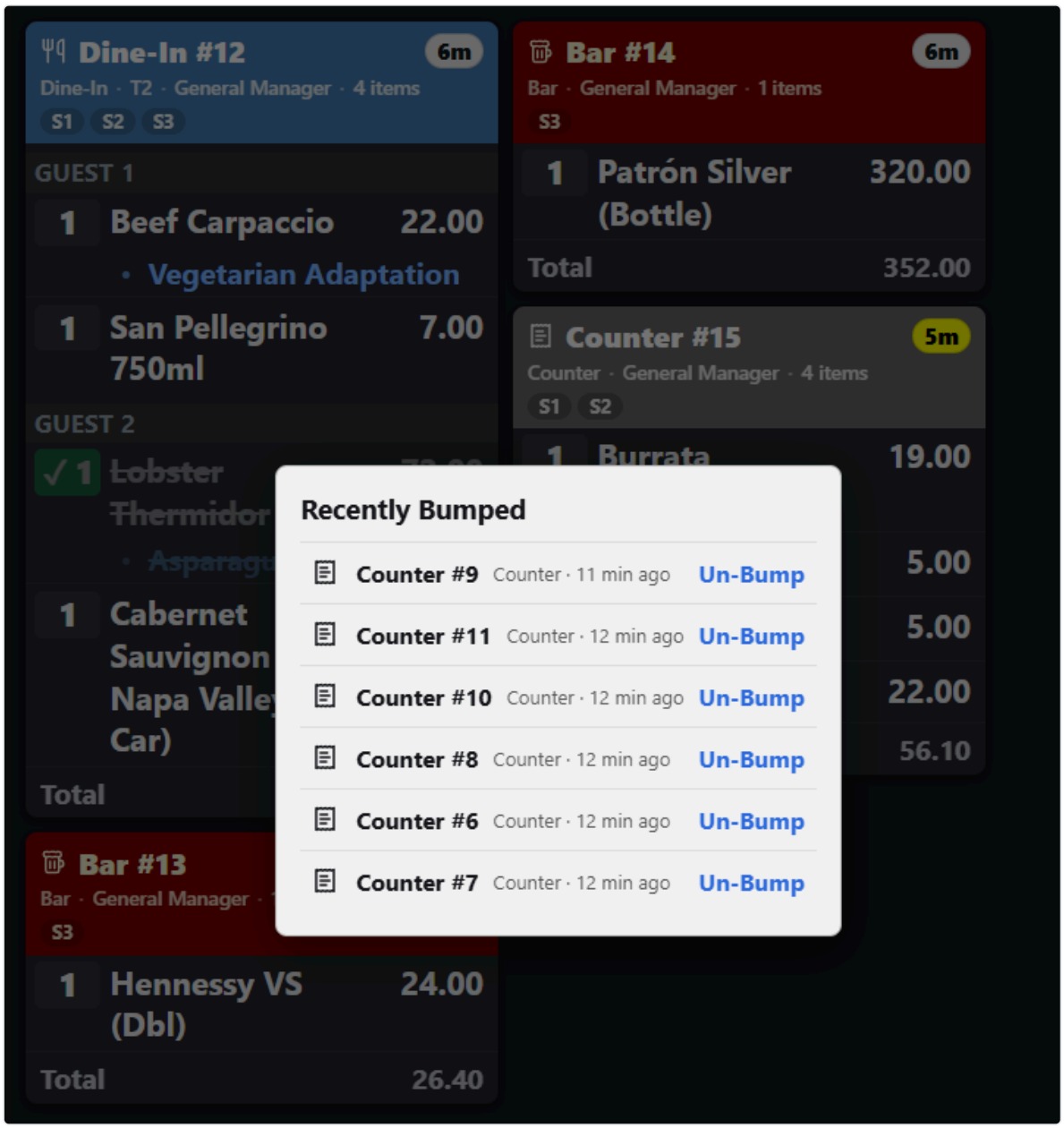
Most bump bars send ordinary key presses, so they work as they are; the mapping can be changed per station to match a specific bar.

Why a bumped order can come back

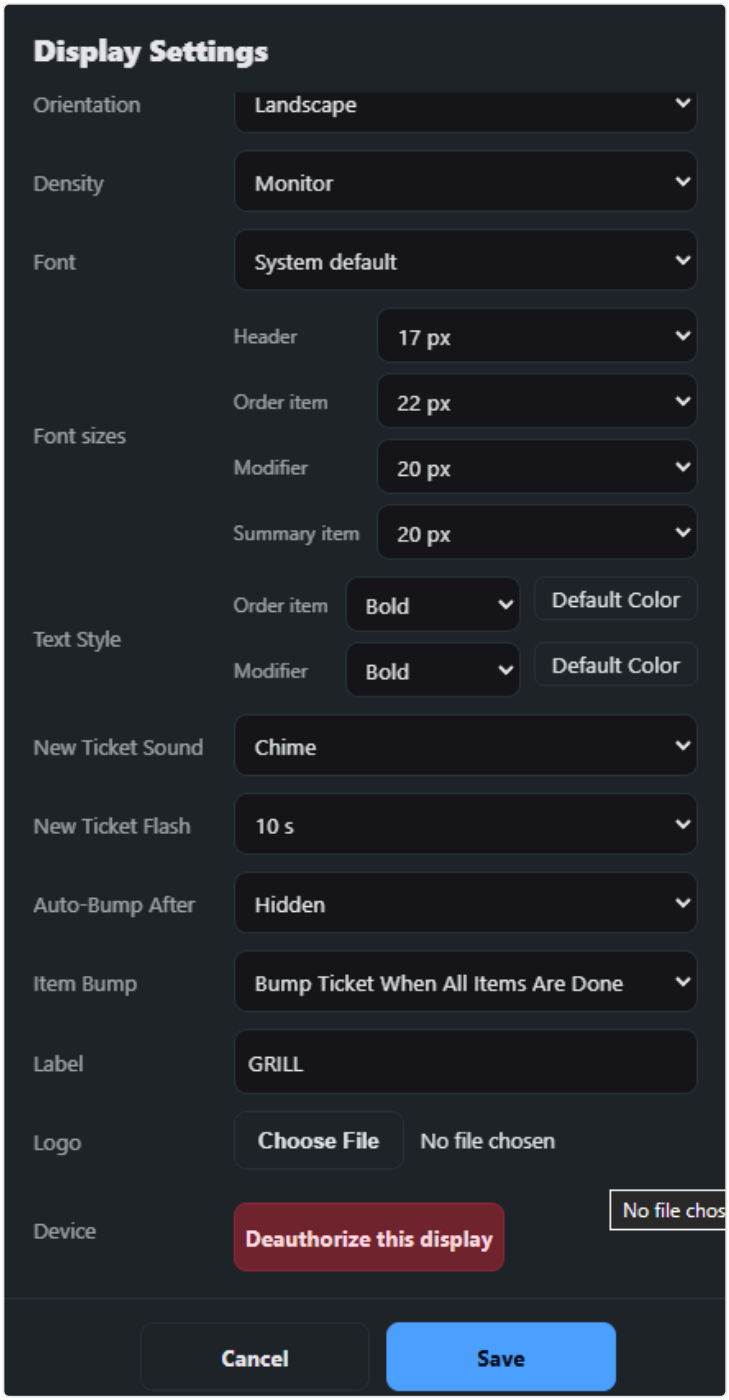
A bump hides **that version** of the order. If someone adds to the check afterwards, the order is now a newer version and it **reappears on its own**, showing the added lines in bold. That is deliberate: the alternative is food that never gets made because the ticket was bumped a minute before the addition.

> On an expeditor screen, bump the card only when the runner has taken it. The per-station chips already show what the kitchen has finished.


Dine-In #12
6m
Dine-In · T2 · General Manager · 4 items
S1
S2
S3
GUEST 1
1
Beef Carpaccio
22.00
• Vegetarian Adaptation
1
San Pellegrino 750ml
7.00
GUEST 2
✓ 1
Lobster Thermidor
72.00
• Asparagus
1
Cabernet Sauvignon — Napa Valley (1/2 Car)
50.00
Total
166.10


Dine-In #12
6m
Dine-In · T2 · General Manager · 4 items
S1 S2 S3
GUEST 1
1 Beef Carpaccio 22.00
• Vegetarian Adaptation
1 San Pellegrino 750ml 7.00
GUEST 2
✓ 1 Lobster Thermidor
1 Cabernet Sauvignon Napa Valley Car)
Total
Bar #14
6m
Bar · General Manager · 1 items
S3
1 Patrón Silver (Bottle) 320.00
Total 352.00
Counter #15
5m
Counter · General Manager · 4 items
S1 S2
1 Burrata 19.00
5.00
5.00
22.00
56.10
Recently Bumped
Counter #9 Counter · 11 min ago Un-Bump
Counter #11 Counter · 12 min ago Un-Bump
Counter #10 Counter · 12 min ago Un-Bump
Counter #8 Counter · 12 min ago Un-Bump
Counter #6 Counter · 12 min ago Un-Bump
Counter #7 Counter · 12 min ago Un-Bump
Bar #13
Bar · General Manager
S3
1 Hennessy VS (Dbl) 24.00
Total 26.40


Bar #14
+1 New · 0m
1h 54m
Bar · General Manager · 2 items
S1 S3
✓ 1 Patrón Silver (Bottle) 320.00
1 Crab Cakes 26.00
• Au Poivre
Total 382.80



Bump bars and keys

- One press is one command: holding a bump-bar key a moment too long no longer bumps the next tickets too.
- Enter and Space never “click” a toolbar button that kept focus after a tap, and the arrow and page keys no longer scroll the screen.
- `P` prints the selected ticket and `I` opens its recipe card; every key works even when its toolbar button is hidden.

Bumping an Entreo delivery

When the store sends its deliveries to Entreo and Kitchen Bump Means Ready is on, the first bump of a delivery order tells Entreo the food is ready, and Entreo starts looking for a driver straight away. See Ready time, changes and cancelling.

Bumping a cancelled card

A card flashing **Cancelled** was voided at the register. Bump it to clear it, or leave it: it goes by itself after 15 seconds. Its lines can’t be struck one at a time. See KDS overview and ticket layout.

Rushing an order

Kitchen Display (KDS)

View online ↗

Push one order to the front of every screen that shows it, and take it back off rush when it is out.

Rush marks one order as more urgent than everything else on the board — a complaint being made good, a VIP, a delivery driver waiting at the door.

Rushing

Select the card and use the **Rush** button on the toolbar, or press **!**. The card gets a red **RUSH** band and moves to the front of the board. The flag is on the *order*, not the screen: every display showing any part of that order re-sorts it to the front at the same moment, so the grill and the fryer both see it jump.

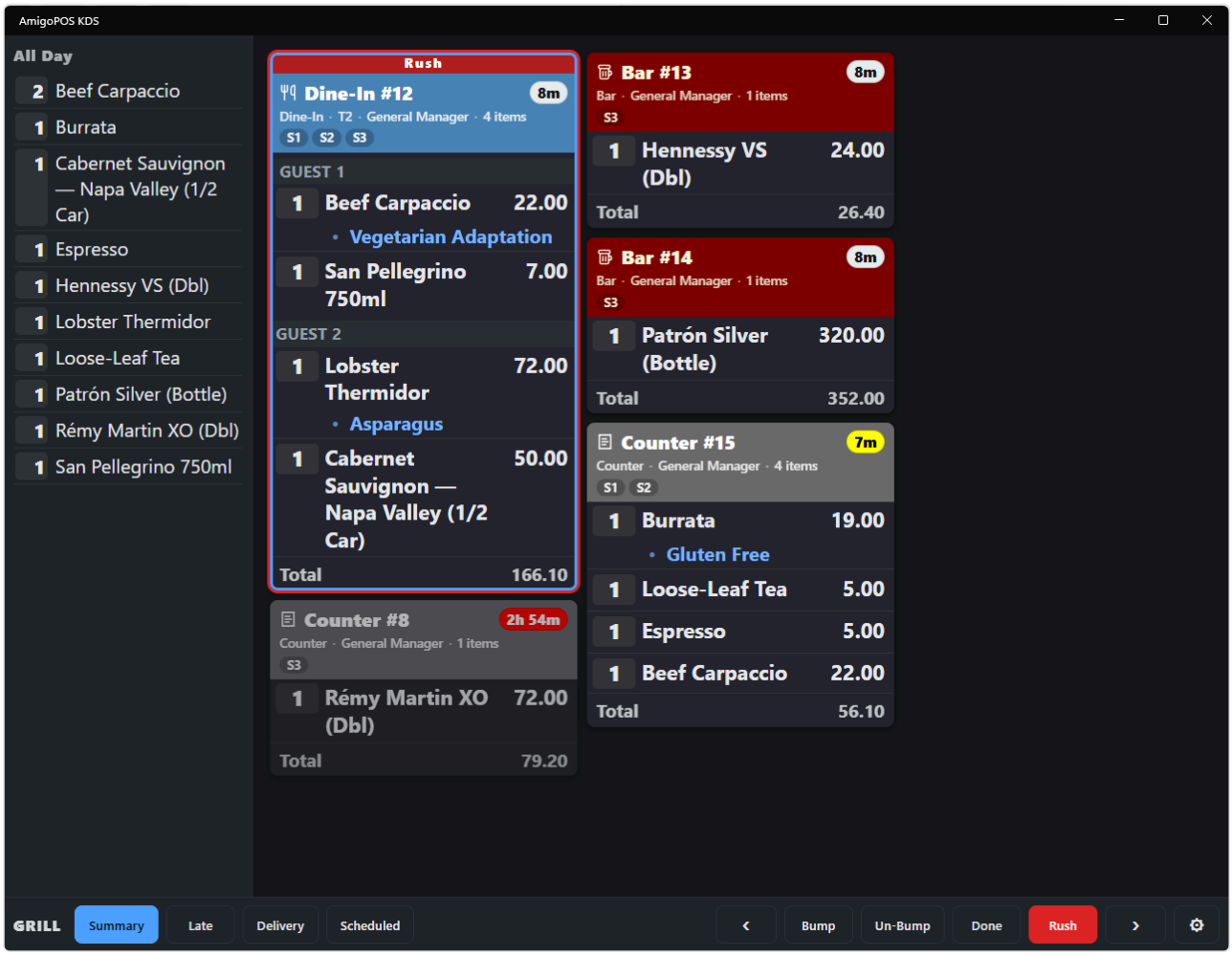
Un-rushing

Rush the same card again to clear the flag. Bumping the order clears it as well; a rushed order that comes back after a change comes back rushed.

What rush does not do

- It does not change the order's timer or its late colour — the pill keeps counting from when the order was sent.
- It does not notify the POS or the customer. It is a kitchen signal only.

> Two rushed orders sort between themselves by age, oldest first. If everything is rushed, nothing is — keep it for the one or two tickets that need it.



Courses and held items on the KDS

Kitchen Display (KDS)

View online ↗

How coursed orders arrive, and what a HELD course heading is telling the kitchen.

When an order uses courses, the card groups its lines under course headings instead of listing everything in ringing order.

Course headings

Each group is headed **COURSE 1**, **COURSE 2** and so on, in order. A course whose items have not been fired yet is headed **COURSE n — HELD** and its heading is dimmed.

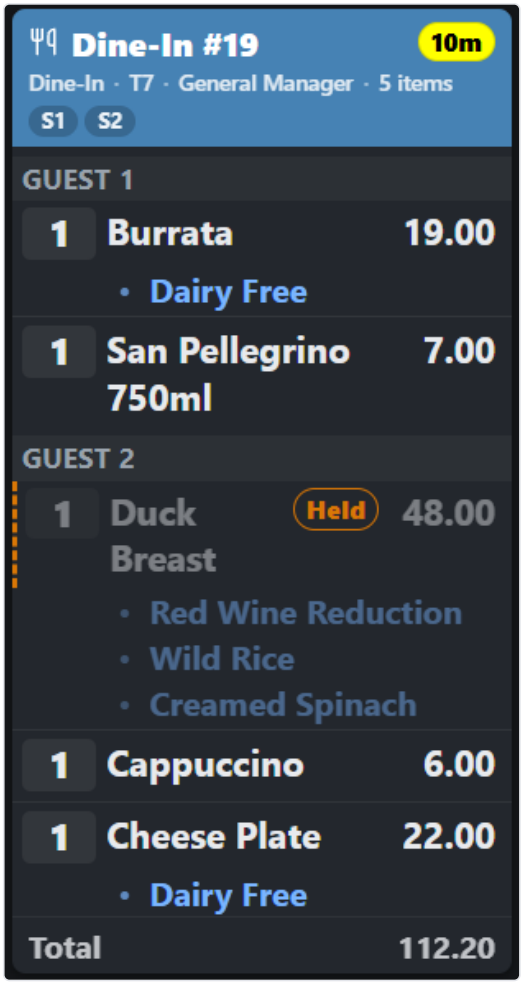
That is the whole message: dimmed and marked HELD means **do not start this yet**. It is on the card so the kitchen can see what is coming and plan around it — how many mains are behind the starters they are plating now.

When a course is fired

The server fires the course from the POS. The card updates, the HELD marking comes off that course, and its lines become live work.

> Nothing is bumped course by course. The card is one order; bump it when the order is done. If the courses are far enough apart that the card is in the way, bump it and let it re-surface when the next course is fired.

> Coursing is set on the POS side — see **Order Entry › Order actions › Course management and fire**.



To have everything in a course ready together, give items a cook time — see Cook times: finishing a course together. A held course is paced from the moment it is fired.

Bumping a course is what starts the clock for the next one: see Course fire reminders.

Scheduled orders on the KDS

Kitchen Display (KDS)

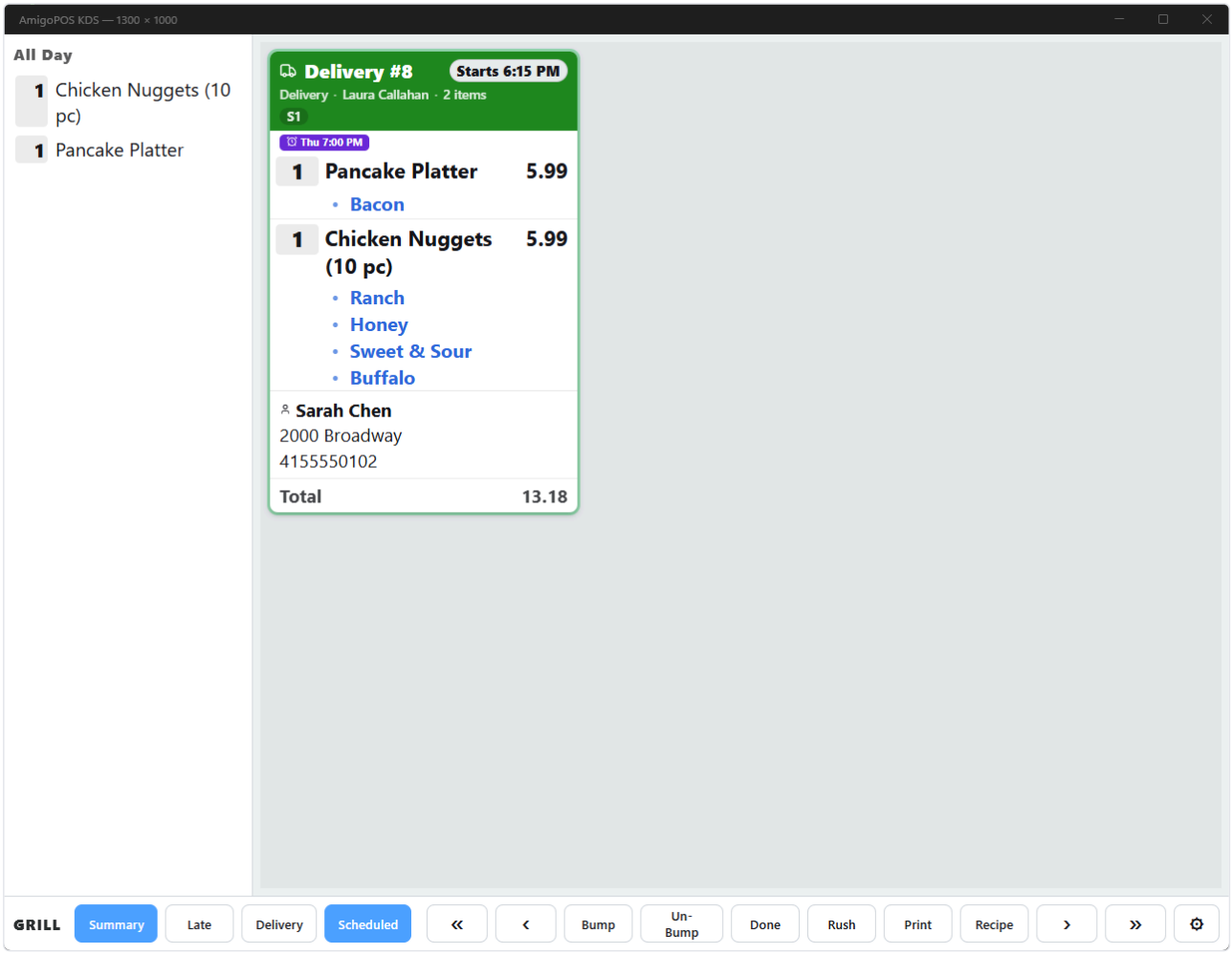
View online ↗

A scheduled order reaches the kitchen at its kitchen time, not when it is taken: prep tickets wait, and the KDS card waits under Scheduled.

A scheduled order — the 7:00 pickup taken at noon, tomorrow's web order — goes to the kitchen at its **kitchen time**: the scheduled time minus the store's lead time. Until then nothing prints and the card stays out of the live queue, so the lunch rush never has a dinner ticket in the middle of it. This works the same for orders from the POS, the call center, the web store and delivery marketplaces.

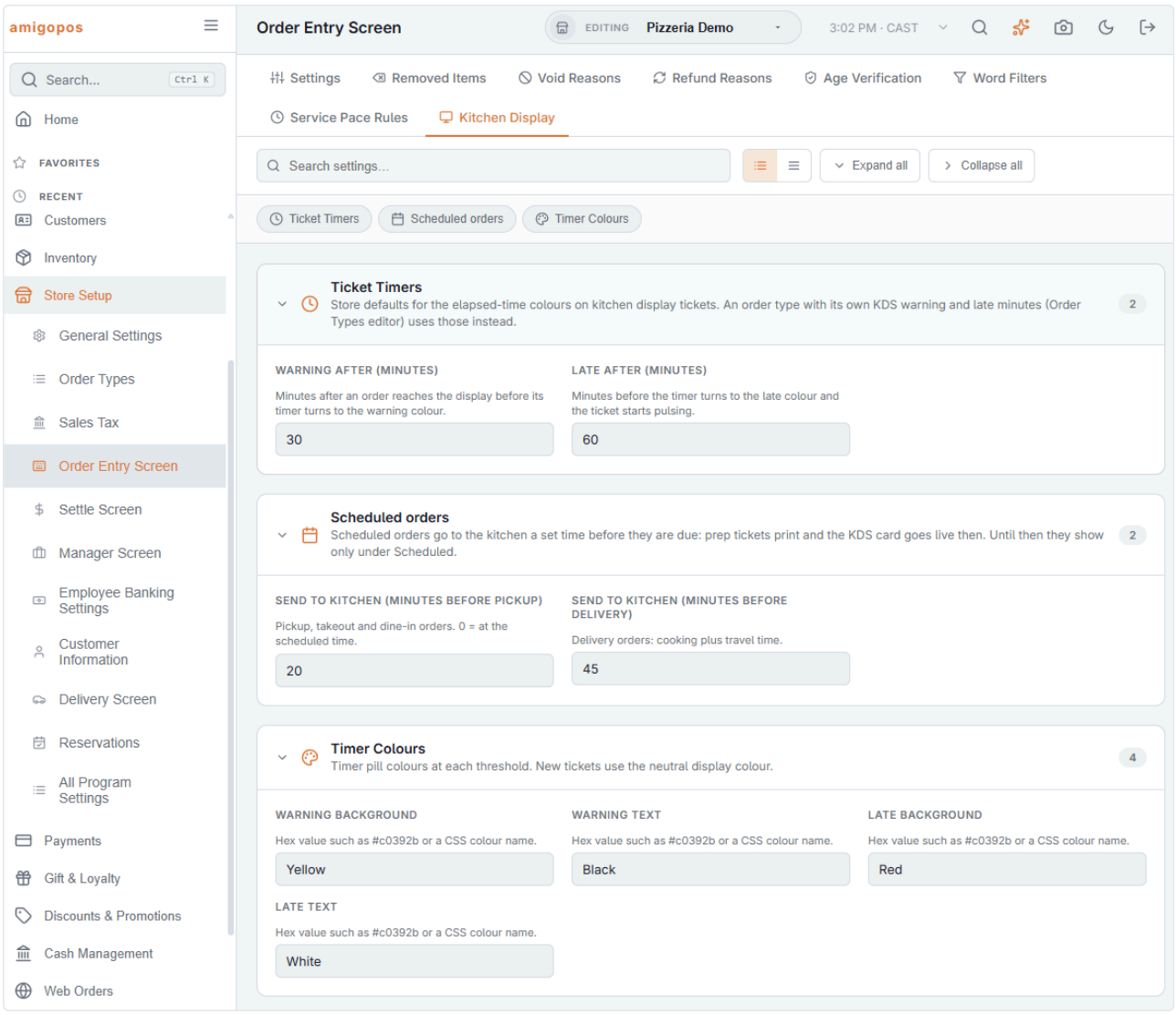
What the kitchen sees

- **Before the kitchen time** the card is shown only under the **Scheduled** filter, with *Starts 6:40 PM* where the timer usually is.
- **At the kitchen time** it joins the live queue with the new-order chime. Its timer, its place in the queue and the speed-of-service figures all count from the kitchen time, not from when the order was taken.
- **Prep tickets and labels** print at the kitchen time. The receipt for the bag of a web or call-center order prints then too; a receipt a station prints at the counter prints at once.



Setting the lead time

In **Back Office › Store Setup › Order Entry Screen › Kitchen Display**, the **Scheduled orders** section has two settings: **Send to kitchen (minutes before pickup)** for pickup, takeout and dine-in (default 20), and **Send to kitchen (minutes before delivery)** for delivery orders, which also covers the drive (default 45); each takes 0–240. Set them to what the kitchen really needs; 0 sends the order at its scheduled time.



Changes and cancellations

- Change the scheduled time or clear it at the POS and the kitchen time moves with it; clearing it sends the order to the kitchen straight away.
- An order voided or cancelled before its kitchen time never prints and never reaches the live queue.
- The POS shows the kitchen time on the order — see Delaying and timing an order.

If the server is unreachable for a long stretch across the kitchen time, a held prep ticket that is more than 20 minutes late is dropped rather than printed stale; the KDS card still goes live, and the ticket can be reprinted from the orders list.

Cook times: finishing a course together

Kitchen Display (KDS)

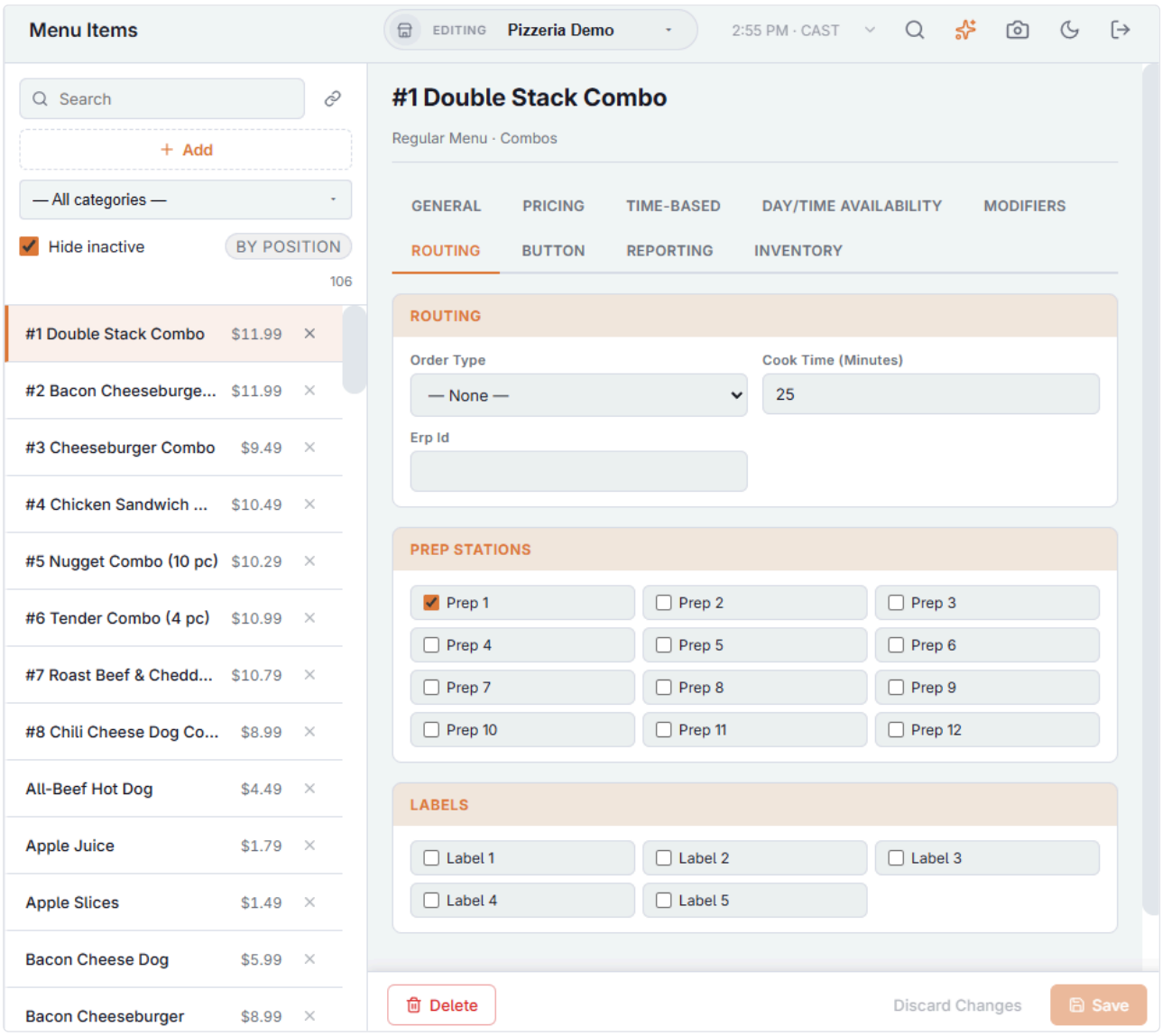
View online ↗

Give items a cook time and the KDS paces each course so everything in it is ready at the same moment.

When a table orders a 12-minute steak and a 3-minute salad, the salad should not sit wilting for nine minutes. Give items a **cook time** and the KDS starts each item late enough for its whole course to finish together — across screens, so the salad station waits while the grill starts the steak.

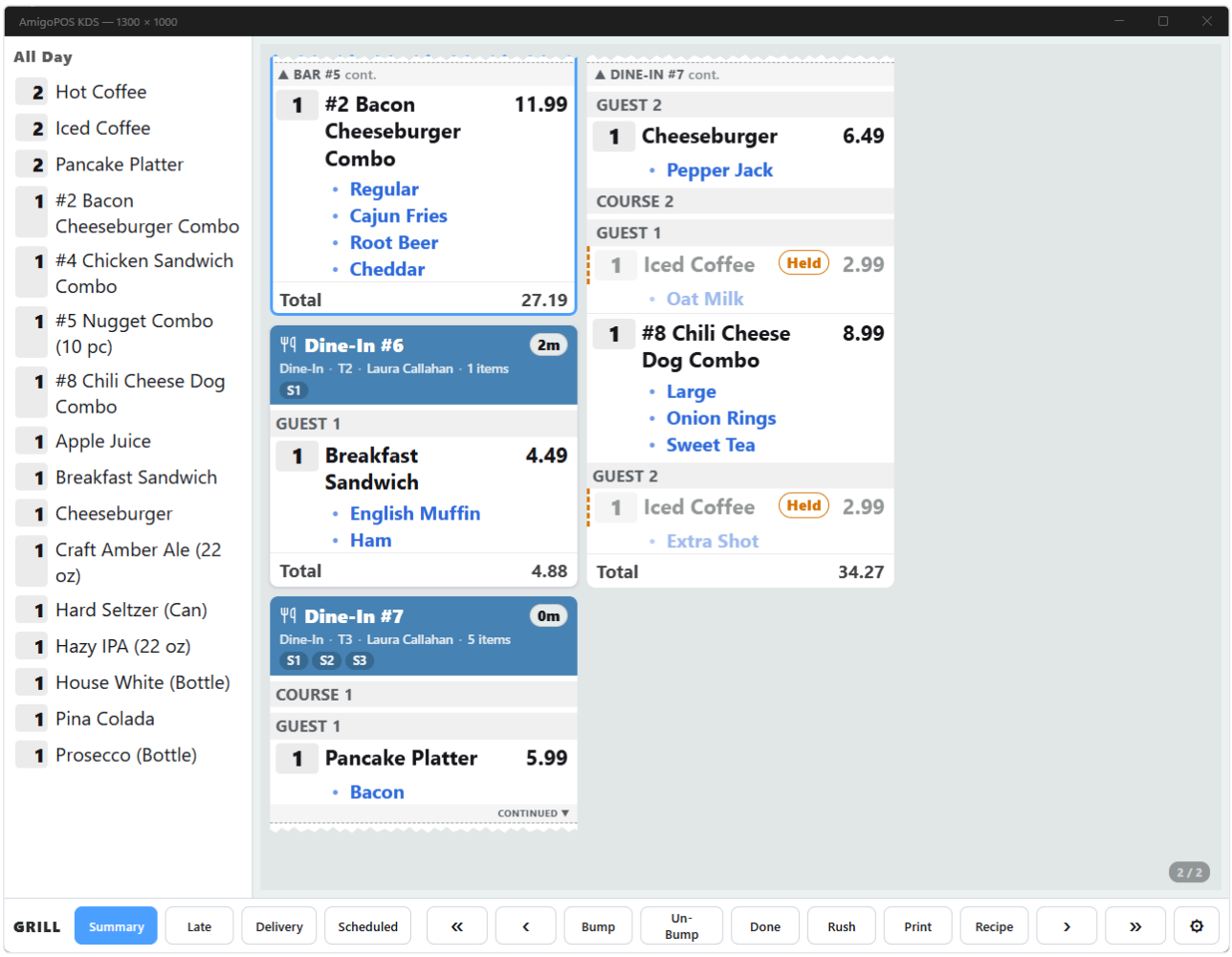
Setting cook times

In the Back Office item editor, on the **Prep stations** tab, enter the minutes in **Cook Time (Minutes)** (older versions call the field *Additional prep time*). Items with no cook time — drinks, sides you plate at once — are not paced and start immediately.



On the screen

- Within each course, the item with the longest cook time starts right away. Each other paced item waits for the difference: a 3-minute salad on a course with a 12-minute steak waits 9 minutes.
- A waiting line is dimmed with an amber ▸ **4m** countdown; its modifiers wait with it. When its time comes the line pulses amber and the display plays the other sound, so it is not mistaken for a new ticket.
- A cook can still strike a waiting line early.



With coursing

Pacing works per course. A held course is paced from the moment it is fired at the POS — see Course grouping and held items. If a display is restarted while a line is waiting, it counts from when the line was sent.

The expeditor display

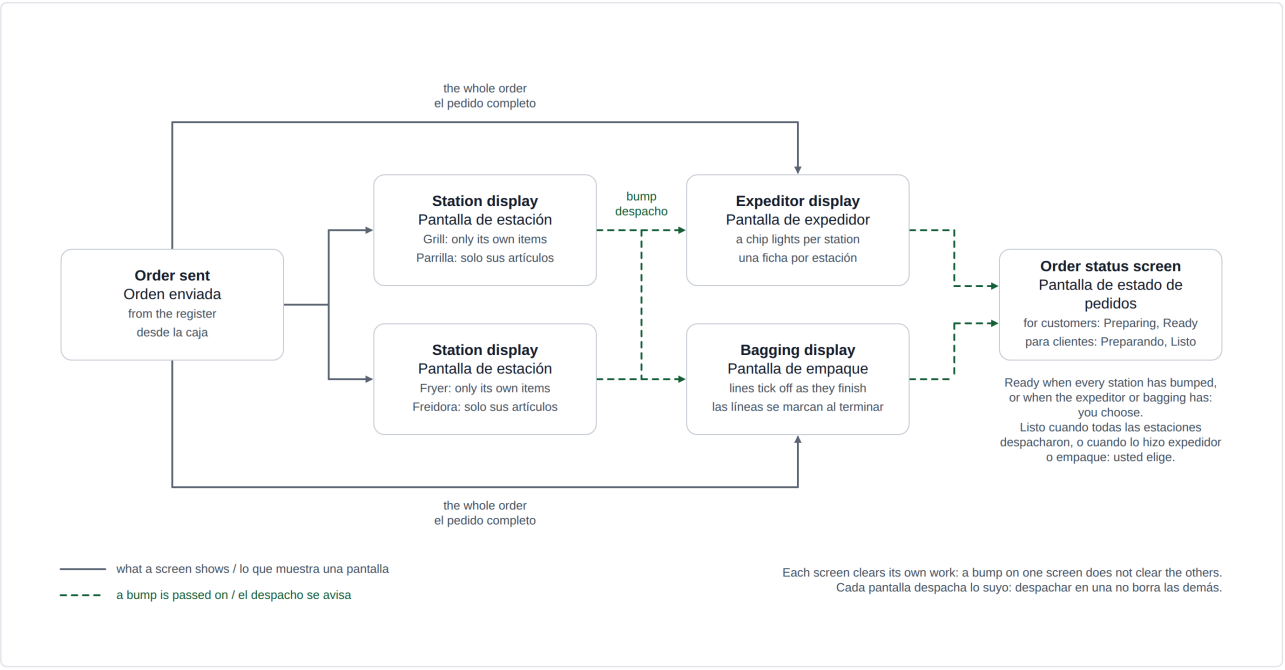
Kitchen Display (KDS)

View online ↗

One screen that sees every station, shows which stations have finished each order, and says READY when they all have.

A station display shows only the items routed to its prep stations. An **expeditor** display shows every order in full, whatever stations it touches, and tracks what each station has finished — the screen for the pass.

In one picture: where the expeditor display sits among the other screens.



Setting a screen as expeditor

In KDS settings set **Display role** to **Expeditor**. The prep station picker no longer applies; the screen receives everything.

Reading an expeditor card

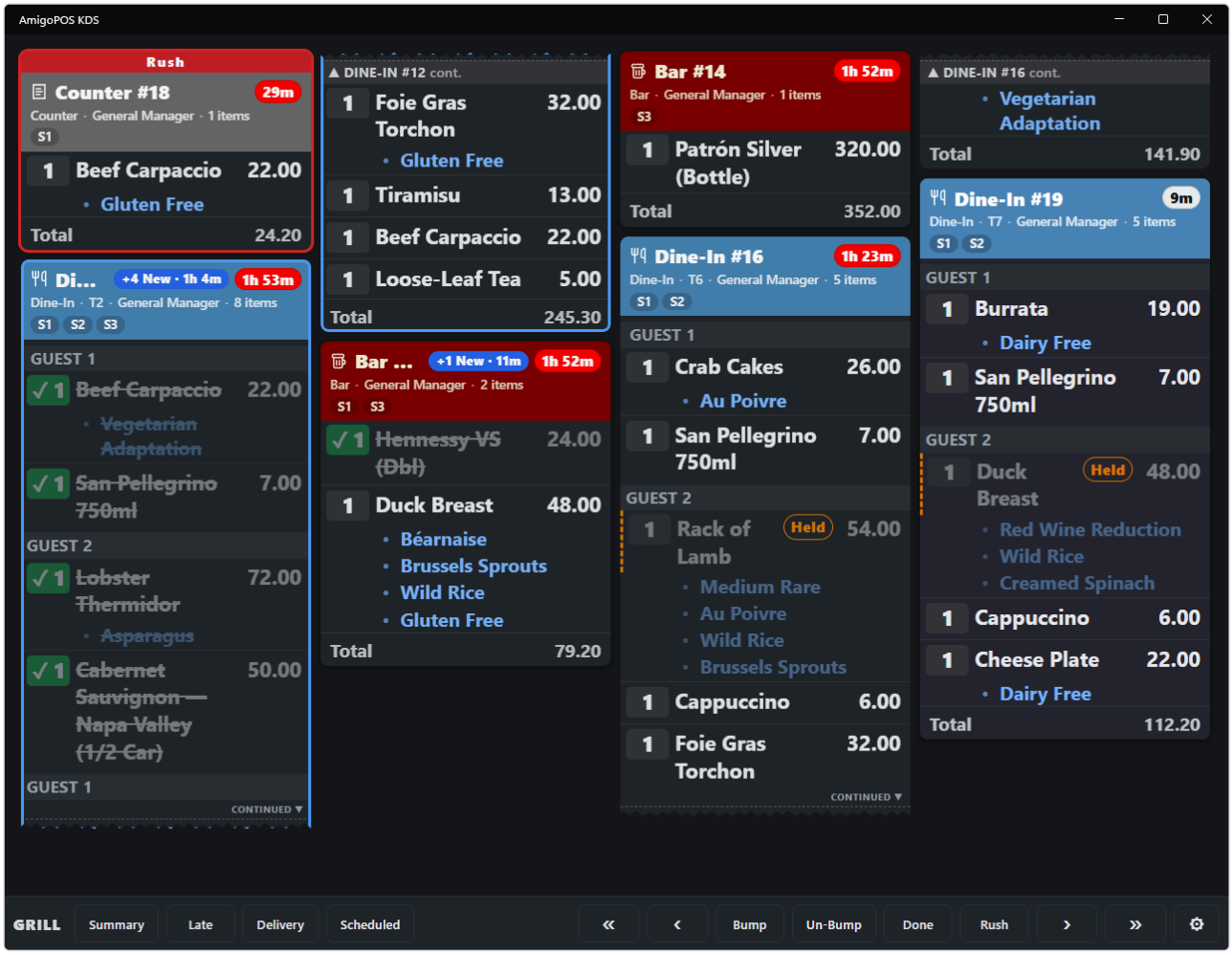
- The card carries a row of **station chips**, one per prep station that has items on the order.
- A chip lights up when that station bumps the order — whether by bumping the card or by striking its last item. It updates the moment the station bumps, on every expeditor screen.
- When every chip is lit the card shows **READY**: everything is plated and the order can go.

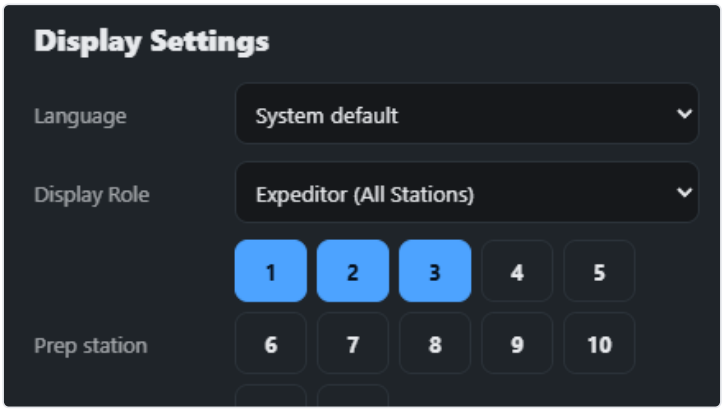
Bumping on the expo

Bumping on the expeditor screen clears the order from the expo only. It does not bump it on the stations, and a station bumping does not clear the expo; each screen tracks its own work. Rush, recall and the Done tray behave as on any other screen.

> A ticket that changes after a station bumped it comes back to that station with the new lines in bold, and its chip on the expo goes dark again until the station bumps the new version.

> An expeditor screen next to a printer-only station still works: the chip for that station simply never lights, and the expo bumps on the runner’s word.





Related roles

For counter service where someone assembles each order, the bagging display shows every line of the order, including items no station makes. A customer-facing order status screen can move orders to Ready when the expeditor or bagging screen bumps them.

The bagging display: the whole order

Kitchen Display (KDS)

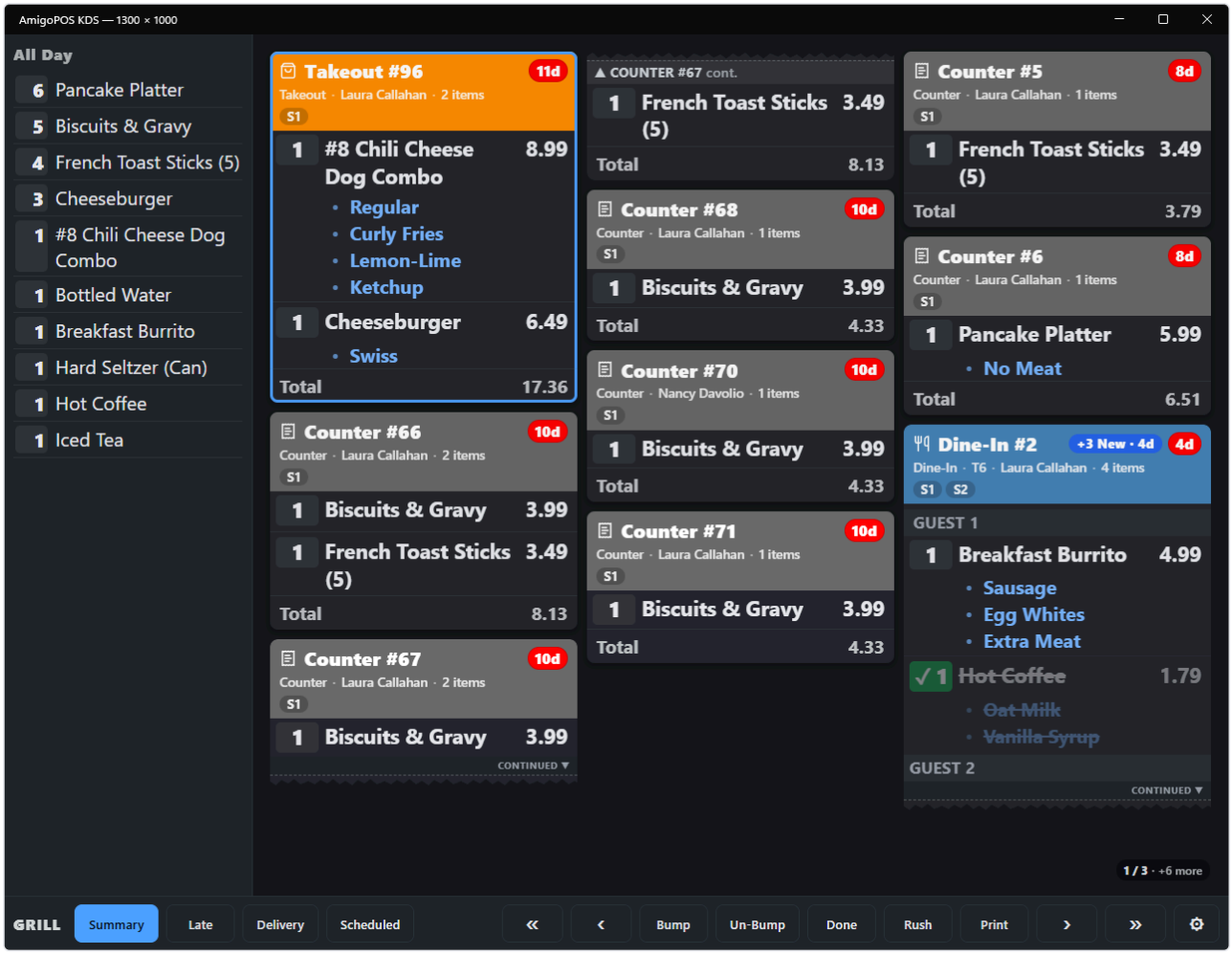
View online ↗

For counter and fast-food service: one screen that shows every order in full, marks what the stations have made, and is bumped when the order is bagged.

In counter and fast-food service someone assembles each order — the burger from the grill, the fries, the drink from the counter — and hands it over. The **Bagging (Whole Order)** display is that person's screen.

What it shows

- **Every line of every order**, including items no kitchen station makes, such as drinks or desserts added at the counter.
- A line **dims with a green ✓** once the station that makes it has bumped it. The per-station chips from the expeditor view show what is still cooking.
- Orders the POS has marked as picked up drop off.



Using it

Bag the order, then bump it — bumping here means *bagged and handed over*. **Print On Bump** works on this screen too, for example to print the receipt or labels for the bag (see Printing from the KDS). With an order status screen set to *Bagging Or Expo Has Bumped It*, the order moves to Ready when it is bumped here.

Setting it up

On the display, open ⚙, set **Display Role** to **Bagging (Whole Order)** and save. The station selection is not used; the screen follows every station, like the expeditor display.

The order status screen for customers

Kitchen Display (KDS)

View online ↗

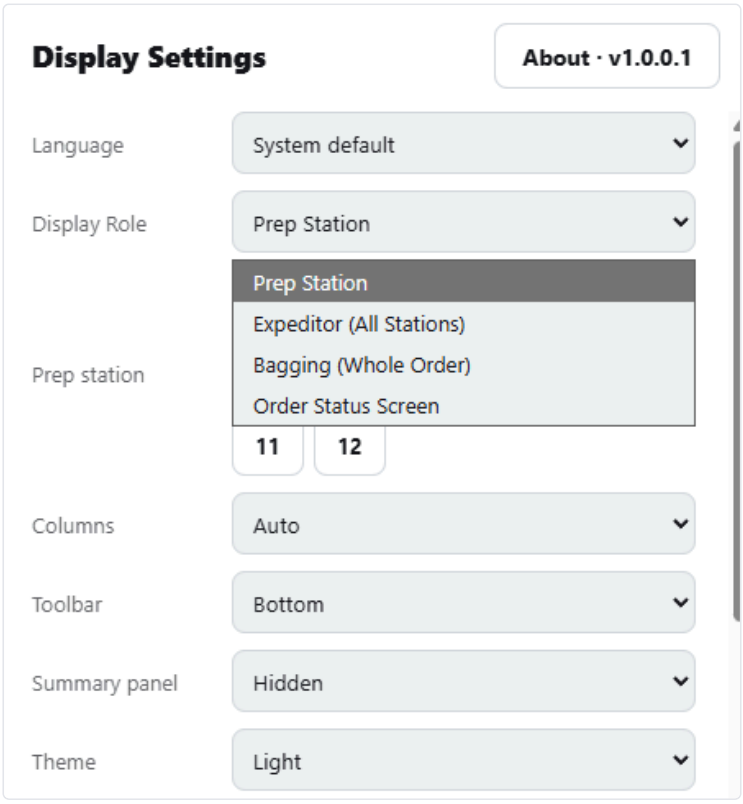
A customer-facing screen with two columns, Preparing and Ready, showing order numbers and first names.

The **Order Status Screen** is a KDS display meant for customers: a TV at the counter showing two large columns, **Preparing** and **Ready**, with the order number and the customer's first name only. A bell rings when an order turns Ready.

Settings

On the display, open ⚙ and set **Display Role** to **Order Status Screen**. Three more settings appear:

- **Ready When** — *Every Station Has Bumped It* (default), or *Bagging Or Expo Has Bumped It*. Use the second when the store has a bagging or expeditor screen, so an order is not shown ready before it is bagged.
- **Keep Ready For** — how many minutes an order stays under Ready (default 5).
- **Orders Shown** — all orders, or takeout and delivery only.



How orders move

- An order leaves Ready after **Keep Ready For**, when the POS marks it picked up, or when someone taps it on the screen.
- With *Every Station Has Bumped It*, an order with nothing for the kitchen to make is not shown.
- The toolbar shows only ⚙. The screen keeps its own timing, so restarting it shows recent Ready orders again for their minutes.

KDS settings: what each display shows and how it behaves

Kitchen Display (KDS) View online ↗

Everything on this screen is set on this screen — role, stations, layout, text style, sounds, bump behaviour, window and updates.

KDS settings are **per display**. The screen over the grill and the screen on the pass can look and behave completely differently, and changing one does not touch the other. Open the overlay from the toolbar; **Save** and **Close** stay pinned at the bottom however long the list gets, and changes take effect as soon as they are saved.

What the board shows

- **Display role** — *Station* shows the items routed to the prep stations picked below; *Expeditor* shows every order with per-station readiness chips. See The expeditor display.
- **Prep stations** — which of the twelve prep slots this screen displays. Pick more than one; a small kitchen might put everything on one screen. Two screens can show the same station.

- **Columns** — fixed count, or auto to fit the display width.
- **Summary panel** — hidden, or docked left or right.
- **Toolbar** — top or bottom, whichever suits the mounting.

Readability

- **Theme** — dark or light. Dark for most kitchens; light where the screen faces a window.
- **Orientation** — landscape or portrait, and **density** — monitor or compact.
- **Font** and separate **sizes** for headers, items, modifiers and the summary, adjustable a pixel at a time.
- **Text style** — weight and colour for item lines and, separately, for modifiers. Bold white items over grey modifiers is the usual choice; a kitchen that reads modifiers first can invert it.

New tickets

- **Sound** — a chime when a new ticket arrives. It plays for new tickets only, never for a refresh or a reconnect. In a browser the first chime needs one tap on the screen after the page loads; the app needs nothing.
- **Flash** — the new card flashes on arrival, for a screen where the chime cannot be heard.

Bumping

- **Item bump mode** — whether tapping a line strikes it, and whether the card bumps itself once every line is struck.
- **Auto-bump after N minutes** — off by default; clears cards on their own on a screen nobody touches.

Both are explained in Bumping, item bumps and the Done tray.

Identity

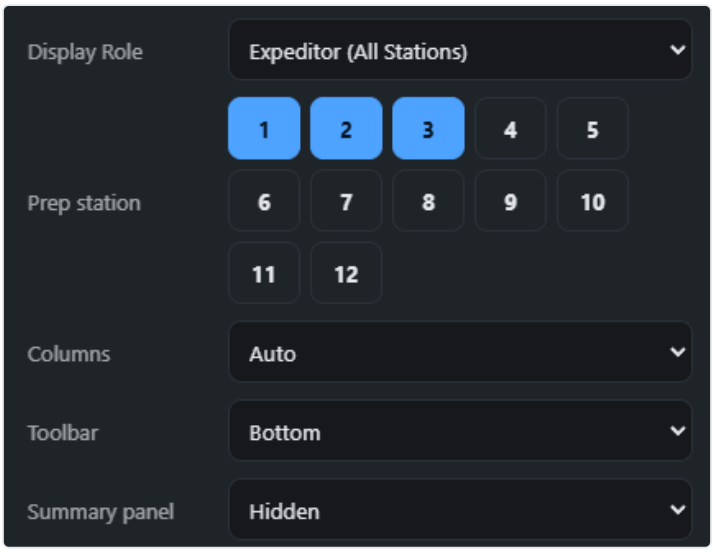
A **label** (EXPO, GRILL, BAR) and a small **logo** to tell screens apart at a glance, and the **language** for this display. Language is per screen, so the kitchen can read Spanish while the pass reads English.

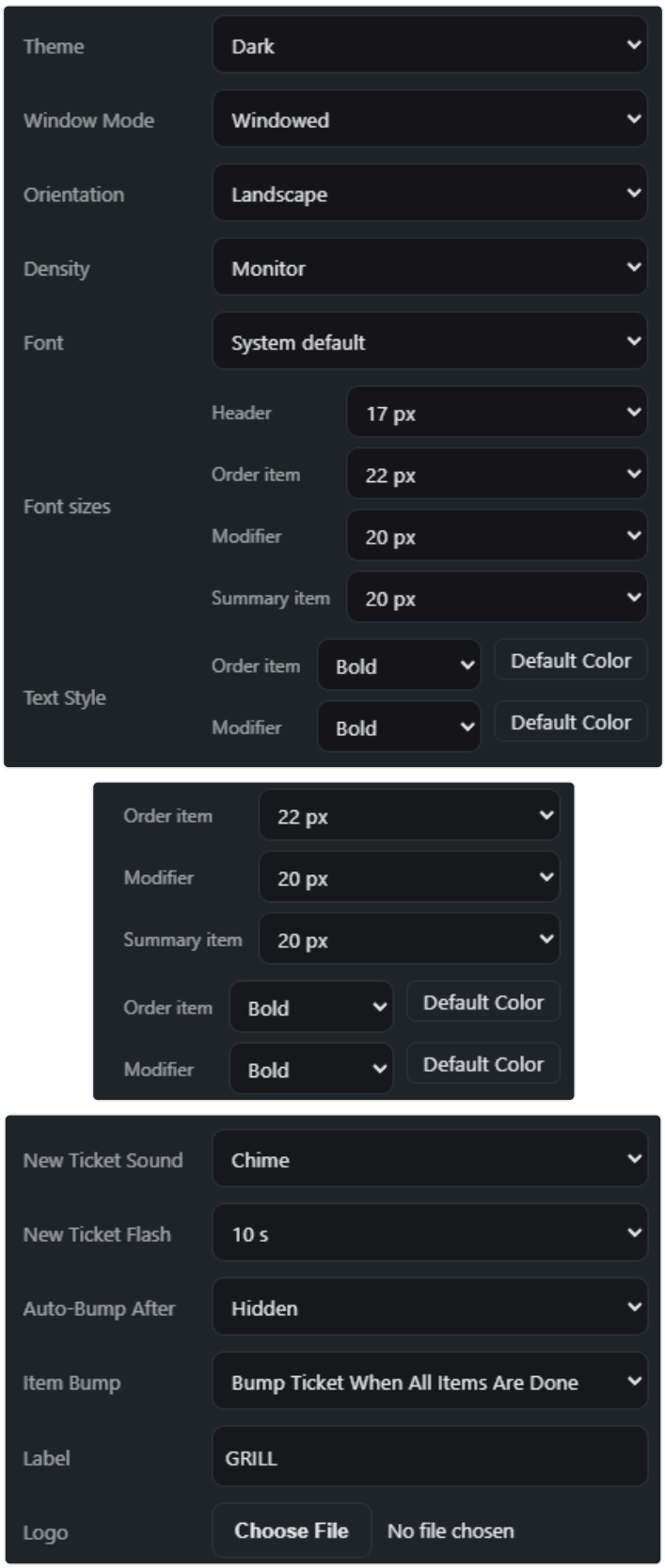
The app

On the installed app the overlay also has **Window mode** (Windows: full screen or a normal window), **Android bars** (show or hide the system bars), and **Check for updates**, which shows the version and forces a check. See The KDS app.

> Settings also holds **deauthorize**, which unregisters this display. Use it when retiring a screen; it needs a new activation code afterwards.

> The **aging** and **late** thresholds are not here. They are store settings, set once in Back Office for every screen — see Aging and late thresholds.

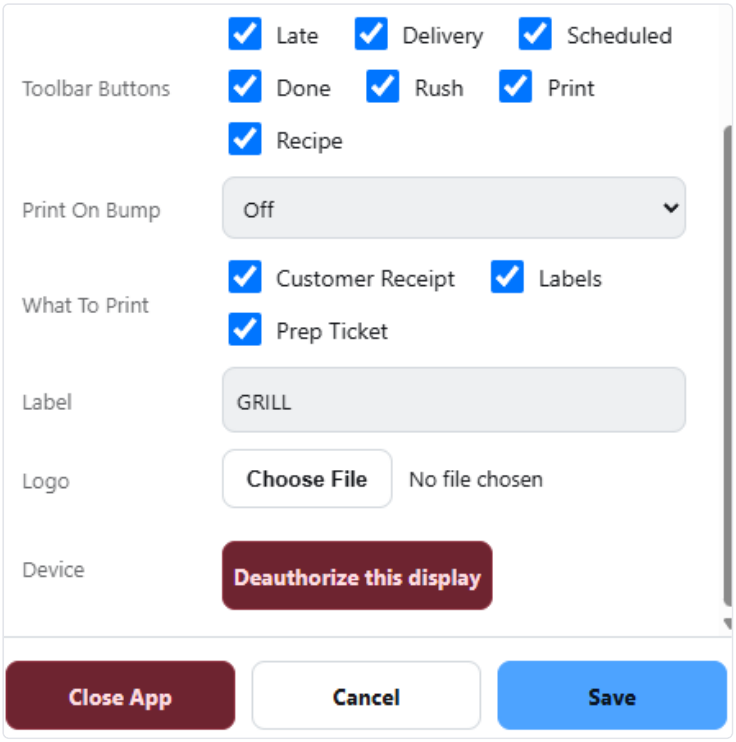




More settings

- **Display Role** also offers **Bagging (Whole Order)** and **Order Status Screen** — see The bagging display and The order status screen.
- **Print On Bump** and **What To Print** — see Printing from the KDS.

- **Warning After**, **Late After**, **Ticket Order**, **Tell The Server When Bumped** and **Show Server Calls** — see Setting up a bar screen.
- **Toolbar Buttons** — tick which of Late, Delivery, Scheduled, Done, Rush, Print and Recipe appear, to save space. All show except Recipe. A hidden button's key still works, and hiding Late, Delivery or Scheduled also switches that filter off.
- **Close App** — the red button in the footer closes the app. It takes two taps; the second reads *Tap Again To Close*.



Printing from the KDS: Print On Bump and the Print button

Kitchen Display (KDS) View online ↗

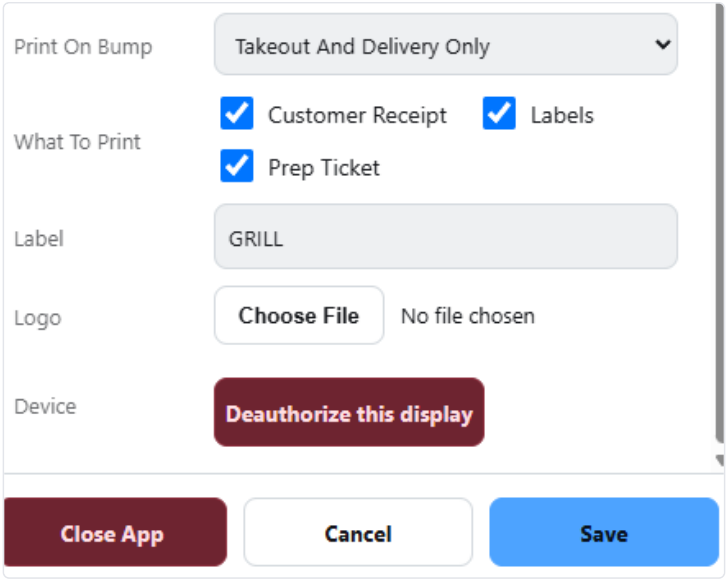
A display can print the customer receipt, labels or a prep ticket when an order is bumped, or on demand with the Print button.

A KDS display can print without a printer of its own: it sends the job to the store's printers through the Print Agent, like the POS does. Use it to print the receipt that goes in the bag when an order is bumped, labels for takeout, or a copy of the ticket at the pass.

Settings

On the display, open ⚙:

- **Print On Bump** — *Off* (default), *All Orders*, or *Takeout And Delivery Only*.
- **What To Print** — any of *Customer Receipt* (checked by default), *Labels* and *Prep Ticket*.

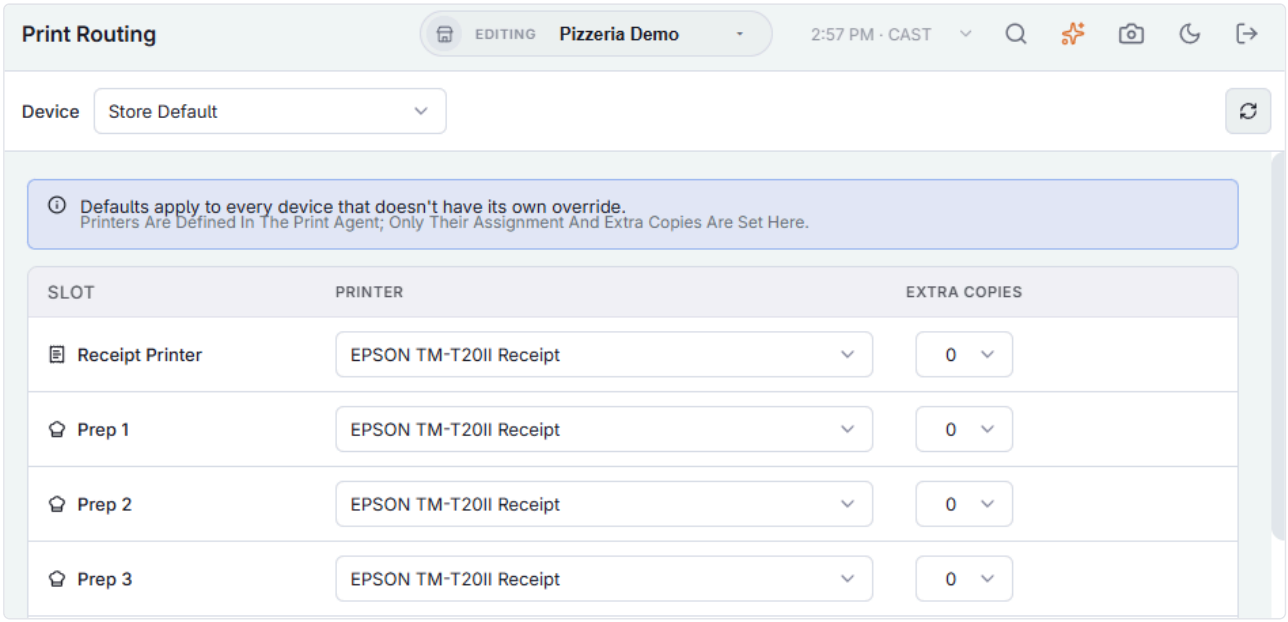


How it behaves

- **On bump** the display prints what is checked, for the orders Print On Bump covers. Bumps sent after the display was offline print nothing, so the printer does not burst out old tickets on reconnect.
- The **Print** button (toolbar, or the `P` key) prints the checked documents for the selected ticket, or the customer receipt when nothing is checked.
- **Labels** on bump print only the labels not printed yet — if the order printed its labels when it was placed, nothing prints. The Print button reprints them all.
- **Prep Ticket** prints a full copy with the usual *REPRINT* banner.

Which printer

The receipt goes to the Receipt printer, labels to the label printers and prep tickets to the prep printers set on Print routing. KDS displays appear in that page's device list: select the display and set its own Receipt printer to send its receipts to, say, a printer at the pass. Otherwise the store's default printer for each slot is used.



Aging and late thresholds

Kitchen Display (KDS)

View online ↗

When a ticket turns from new to aging to late, set once in Back Office for the store and overridden per order type.

The colour a ticket turns is a store decision, not a screen decision. Two numbers drive it: after how many minutes an order is **aging**, and after how many it is **late**. Every display — station or expeditor, app or browser — colours from the same numbers.

Where to set them

1. Open **Back Office › Store Setup › Order Entry Screen** and pick the **Kitchen Display** tab.
2. Under **Ticket Timers**, enter the store-wide **Warning After (Minutes)** (1–240, 5 to start) and **Late After (Minutes)** (1–480, 20 to start). Late tickets pulse.
3. Each box saves when you leave it; there is no Save button.

Per order type

A delivery order can afford more time than a bar tab, and a scheduled pickup is not late until its due time. Each **order type** can carry its own aging and late minutes, set on the order type itself under **Store Setup › Order Types**. Leave them blank to use the store numbers.

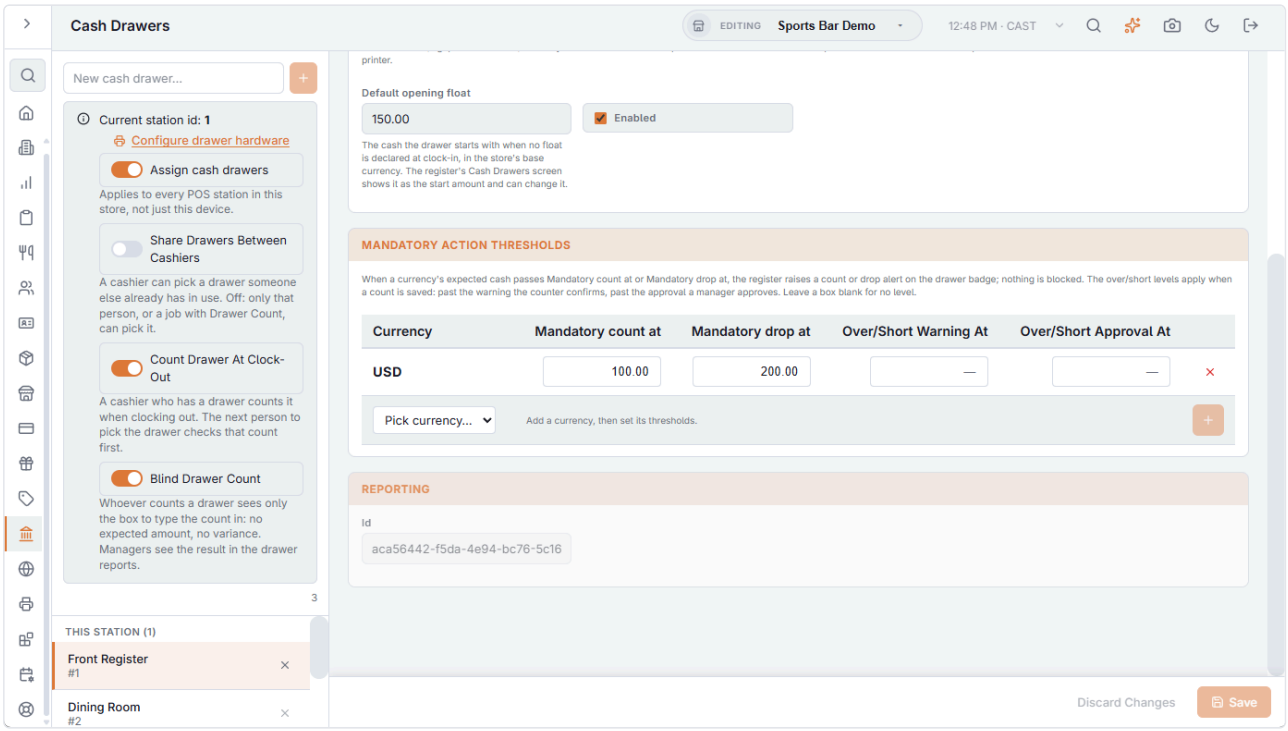
What the numbers mean

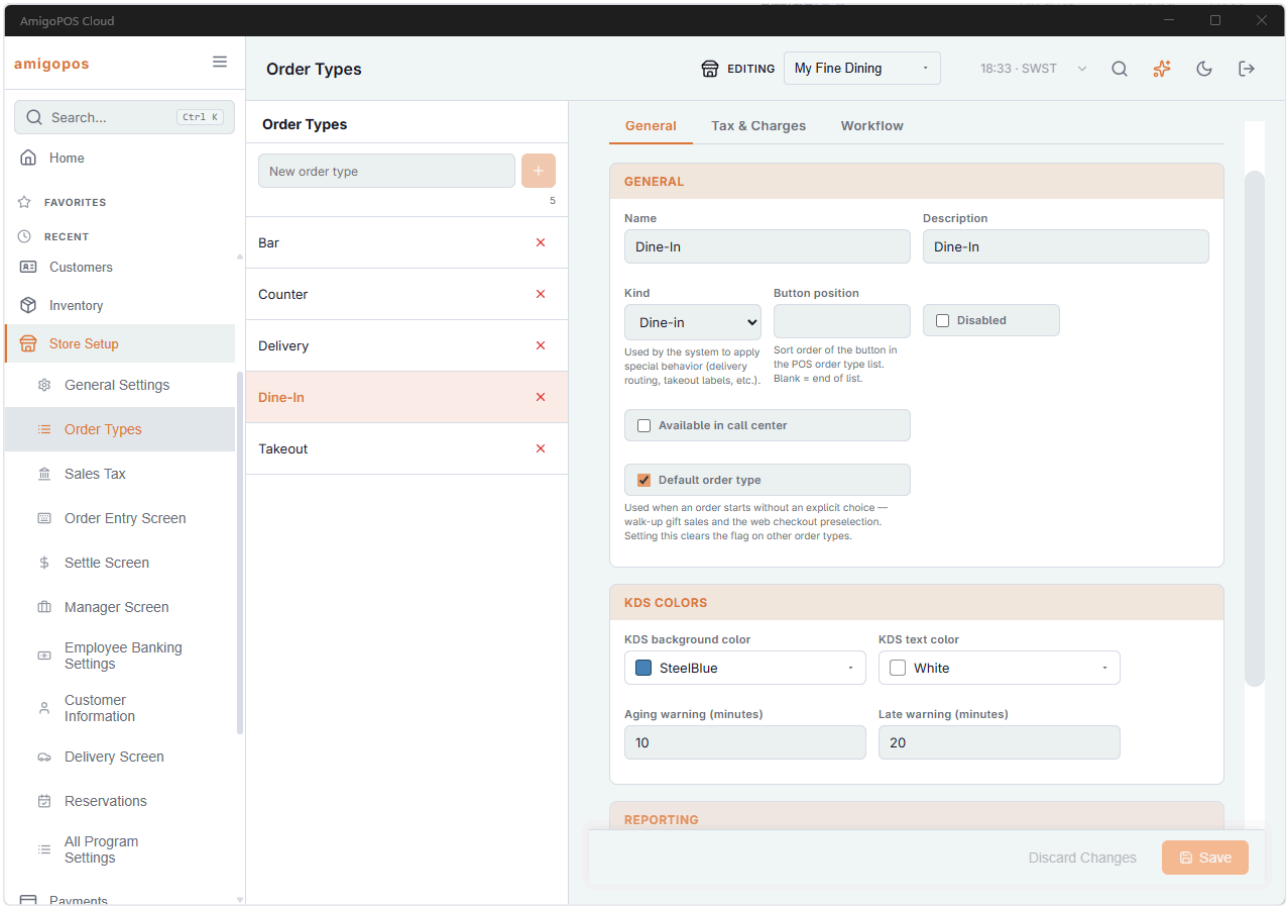
- They count from the moment the order was **sent** to the kitchen, measured on the server.
- They drive the timer pill colour on the card and the **Late only** filter.
- They also define *late* for the Kitchen Performance dashboard, so a store that changes them changes what its reports call late from that moment on.

Timer Colours

The same tab sets the colours: **Warning Background** and **Warning Text** (#f0ad4e on #1a1a1a to start), **Late Background** and **Late Text** (#c0392b and #ffffff). Each takes a hex value or a colour name. A new ticket uses a neutral grey.

> Set late to the time you would apologise to a guest for, not the time you would like to hit. A board that is always red teaches the kitchen to ignore red.





Per-display timers

A display can override these with its own **Warning After** and **Late After** minutes (under ⚙) — useful on a bar screen, where drinks should turn red in minutes. *Store Setting* keeps the rules on this page. Scheduled orders are timed from their kitchen time.

Setting up a bar screen

Kitchen Display (KDS)

View online ↗

A KDS display next to the bar POS: faster timers, recipes on screen, servers told when drinks are ready, calls from the floor and neglected tables first.

A tablet running the KDS next to the bar POS gives the bartender the drink orders the servers send. Route drinks to the bar's prep station as usual; these settings, all under ⚙ on that display, make it a bar screen.

Bar timers

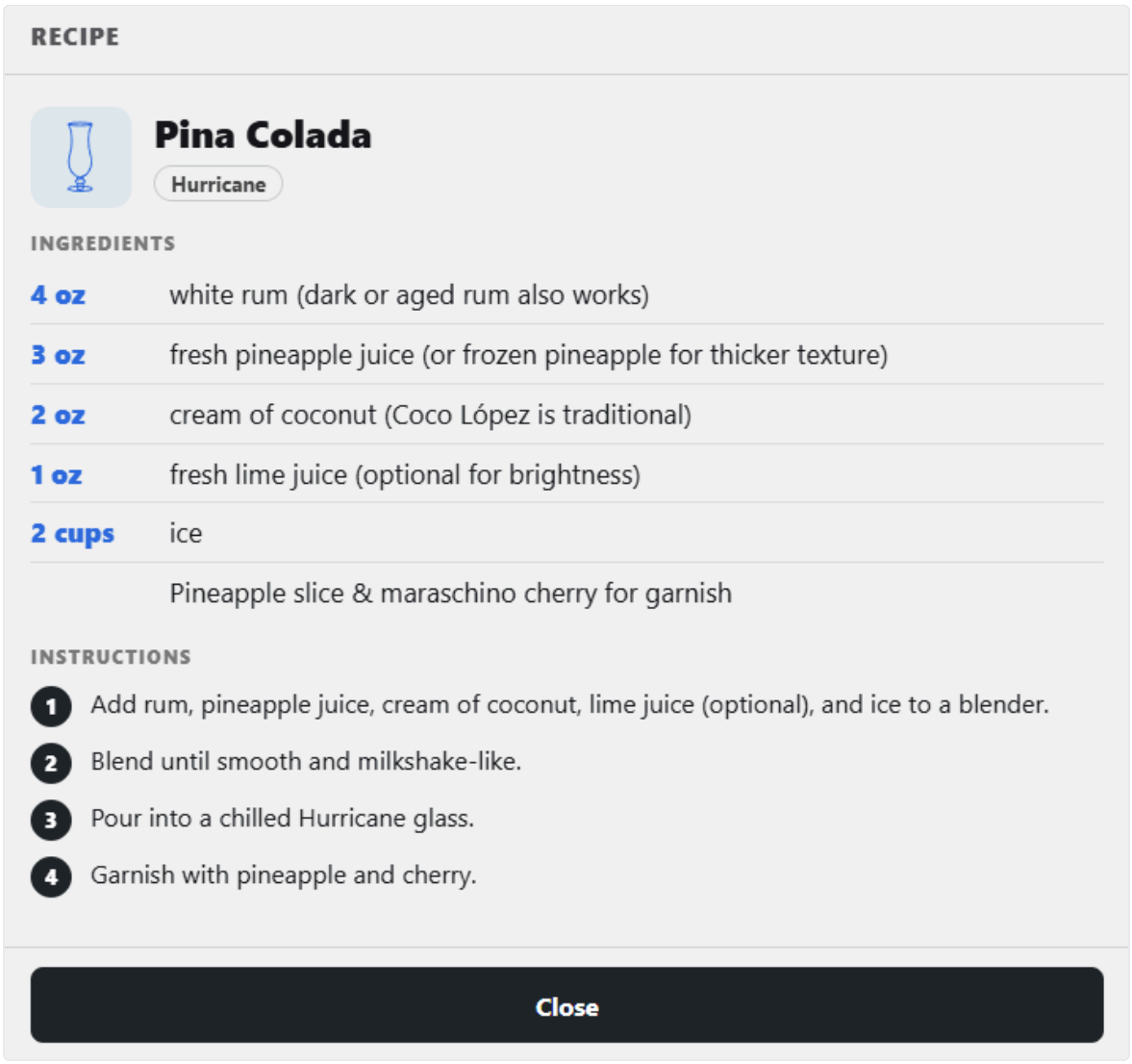
Warning After and **Late After** set this display's own timers — for example 3 and 5 minutes, so drinks turn red long before food would. *Store Setting* keeps the store's timers; see Timing thresholds.

Tell The Server When Bumped

With this on, bumping a ticket shows a message on the POS of the server who rang it — *Table 5 Ready At BAR*. The name after "at" is the display's label; without a label the message reads *Table 5 Is Ready*. Only that server sees it, while they are on the order screen.

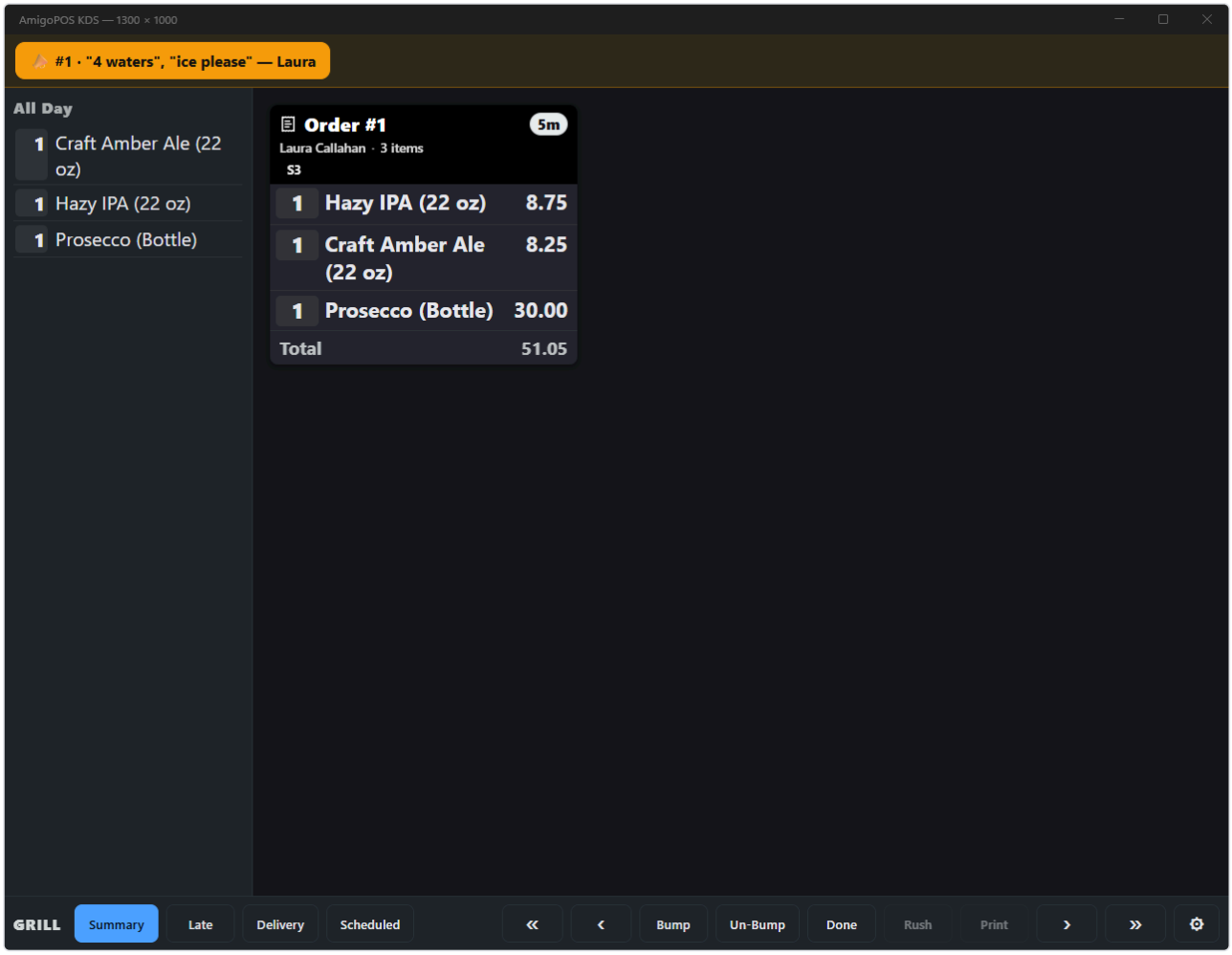
Recipe card

Turn on **Recipe** under **Toolbar Buttons** (it is hidden by default), or press `I`. It shows the build for each item on the selected ticket: the item's pour guide — ingredients, method and glass — or, for items without one, its inventory recipe.



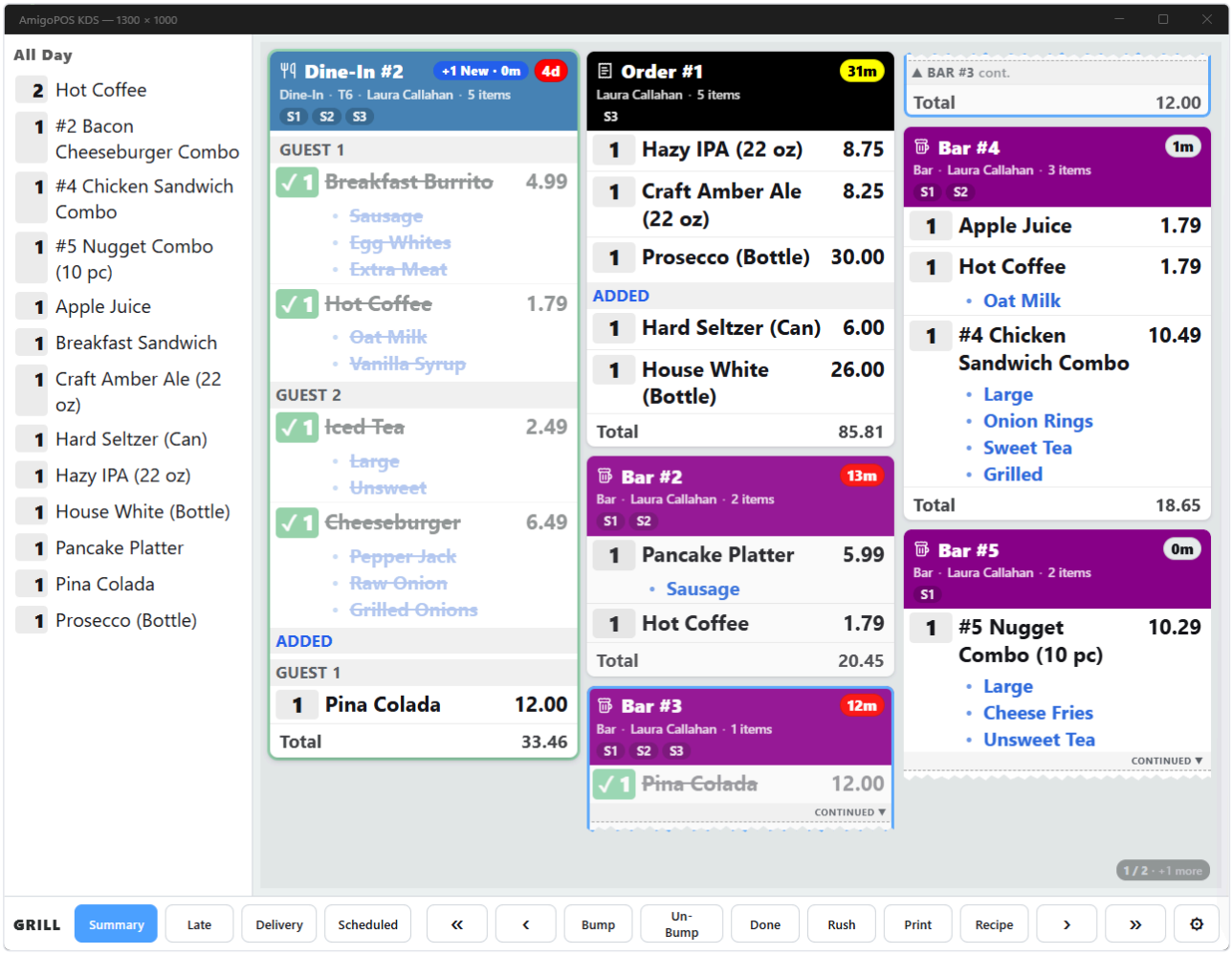
Show Server Calls

Servers can call the bar from the POS (**Call The Bar** in the More menu) — “two waters”. With **Show Server Calls** on, the call appears as an amber banner at the top of this display with the table and the server’s first name, and a bell rings; tap it to clear it. See Calling the bar. Calls need the display’s live connection.



Longest-waiting table first

Set **Ticket Order** to **Longest-Waiting Table First**: the table that has gone longest without anything bumped for it leads, and rush orders still come first. The display keeps track since it was last started.



Connecting a KDS display

Kitchen Display (KDS)

View online ↗

Activate the display with a code, name it, and choose its role and prep stations — in the app or in a browser.

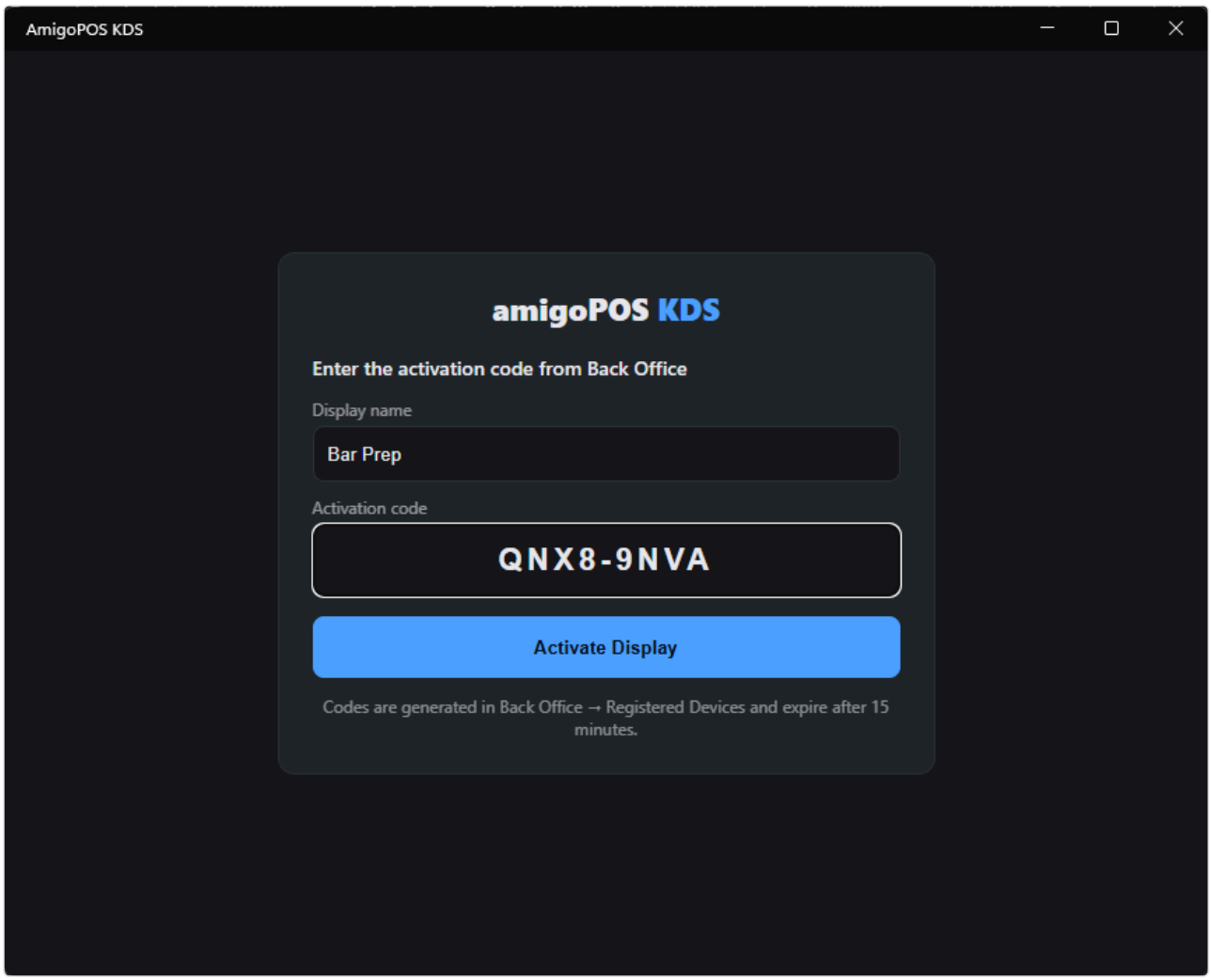
A KDS display joins the store with an activation code. There is no user login — the code already carries the merchant, the store and the role. The steps are the same in the The KDS app for Windows and Android and in a browser.

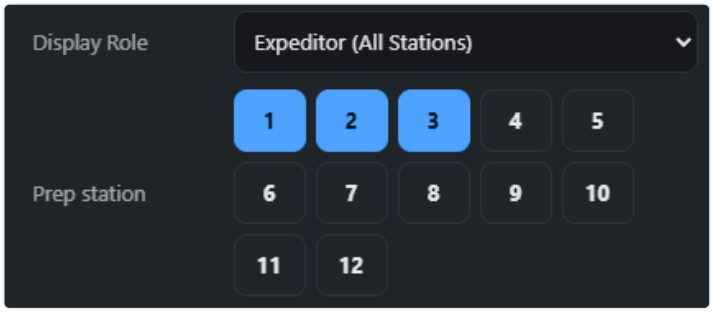
1. In **Back Office › Hardware & Printing › Registered Devices**, generate a code for the **Kitchen Display** role. Codes expire, so generate it when you are at the screen — or email or text it from the same page.
2. Open the KDS on the display. Give it a **name** — Kitchen, Bar, Expo — and enter the code.
3. Choose the **display role**: a *station* screen that shows the prep stations you pick, from 1 to 12, or an *expeditor* screen that shows everything. Other screens can show the same stations.

The board opens and stays activated. The code does not have to be re-entered when the screen restarts, and the app remembers it through updates.

> Which items reach which prep station is **print routing**, set in the back office. Picking station 3 here shows what routing sends to slot 3 — this screen does not decide what goes there.

> Name displays for where they are, not what they are. “Grill” and “Pass” beat “KDS 1” and “KDS 2” the first time something needs troubleshooting over the phone.





How many displays a store can have

A store can run as many kitchen displays as its plan includes, plus any that were added to it. Under the role list, Registered Devices shows the count — for example *Kitchen Displays 2 Of 3* — and the Kitchen Display entry is greyed, with **No Display Free** or **Not In Plan**, when there is no room. Displays that are already running are never affected. See Activation codes and device limits.

A display that is reinstalled or reset joins as a new one. Deactivate its old line in Registered Devices first, or it takes a second place.

When the display loses the server

Kitchen Display (KDS)

View online ↗

What stays on screen during a network drop, what happens to bumps made meanwhile, and how the display comes back.

Kitchen Wi-Fi drops. The display is built so that a drop costs the kitchen nothing: the board stays, work carries on, and everything done meanwhile catches up when the server is back.

During the drop

- The toolbar shows **Reconnecting**. The cards already on screen stay exactly as they were, timers included.
- Bumps, item strikes, un-bumps and rush flags all still work. They are **queued** on the display and replayed to the server, in order, the moment it is reachable again.
- New tickets rung during the drop cannot arrive, of course. They appear together when the connection returns, each with its true age — a ticket that waited five minutes arrives already five minutes old.

Coming back

The display tries again every ten seconds. On reconnect it pulls a fresh board from the server, replays its queue, and the toolbar goes back to normal. Nothing bumped during the drop comes back, and nothing rung during the drop is missed.

After a restart

The installed app keeps a copy of the last board it saw. If it starts while the server is unreachable — a power cut that took the router with it — it shows that copy straight away, so the kitchen can see what was open before the lights went out, and refreshes as soon as the server answers.

> A refresh that finds the server unreachable leaves the board alone. An empty board only ever means the server answered and there is nothing routed here.

> If a display reconnects several times a shift, the problem is the access point, not the display. Wall-mounted screens behind stainless steel are the first thing to lose signal in a kitchen.

Orders rung while the registers are offline

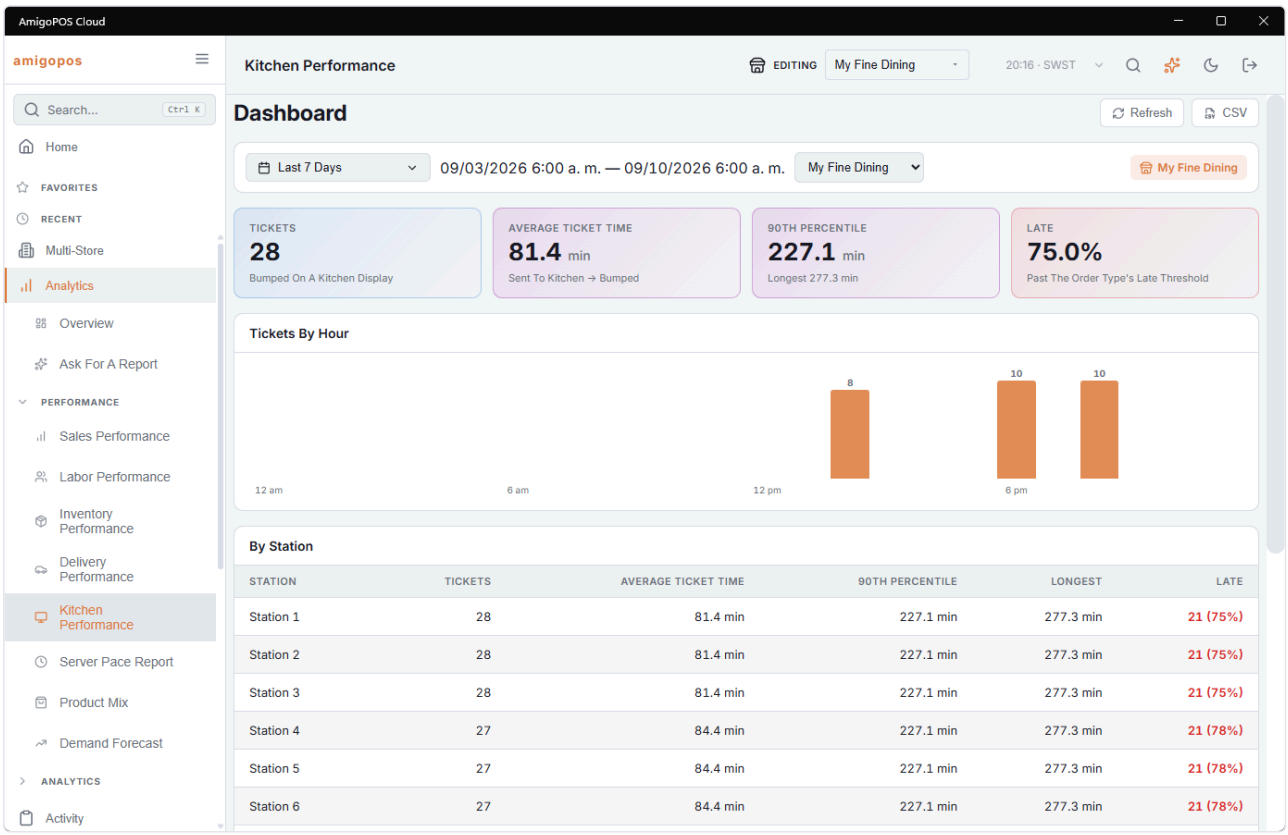
When the registers themselves have lost the server, a new order exists only on the register that took it. It cannot reach the display, and the display's banner says so. The order prints on the prep station's offline backup printer, if one is chosen, and appears on the display when the connection returns. See Kitchen tickets during an outage.

Kitchen Performance dashboard

Kitchen Display (KDS) View online ↗

Ticket times and late rates from the kitchen display, by hour, station, order type and day, in Back Office.

Back Office › Analytics › Performance › Kitchen Performance shows how fast the kitchen displays cleared their tickets: average and slowest times, the share that went late, and where in the day and on which station the kitchen fell behind. The page is offered on plans that include the kitchen display.



The toolbar

- **Date range** and **Store** work as on Sales performance. The page opens on Last 7 Days and on the store you are working in; **All Stores** adds every store you can see together.
- **Refresh** loads new figures.
- **CSV** downloads the By Station table, with the times in seconds.

There is no Day / Week / Month choice, PDF or Schedule on this page.

What is measured

Every time a kitchen display bumps an order, the time is recorded. A ticket's time runs from when its first lines were sent to that station to the bump. A scheduled order is timed from the time it was released to the kitchen. A display that sends the same bump twice is recorded once.

A ticket is **late** when its time reached the late minutes of its order type, or the store's **Late After (Minutes)** when the order type has none. Whether a ticket was late is decided when it is bumped, so changing the thresholds changes only later tickets. See Aging and late thresholds.

> The figures start on the day the displays began recording bumps. A range with no bumps shows **No Kitchen Display Activity**, not zeros.

Which bumps count

- A ticket counts once for **each station** that bumped it. An order that went to the grill and the fryer is two tickets with two times. This is a kitchen measure, not an order count.
- Bumps on displays that follow every station — expeditor, bagging and order status screens, including tapping an order off the status screen — are left out, so they do not inflate the stations.
- In a kitchen with only an all-station screen, each order counts once, at its first bump.
- A display that covers several stations counts once in the totals and once in each of its stations' rows.
- Item strikes are not timed on their own; the time stops when the card is bumped.

Cards

- **Tickets** — tickets bumped on a kitchen display.
- **Average Ticket Time** — from sent to the kitchen to bumped, in minutes.
- **90th Percentile** — nine tickets in ten were done within this time. The line under it gives the longest ticket.
- **Late** — the share of tickets past their late threshold. Green up to 5%, amber up to 15%, red above.

Tables

- **Tickets By Hour** — one bar per hour of the day, by the hour of the bump. Hover over a bar for its tickets, average time and late count. A bar where half or more of the tickets were late is marked.
- **By Station** — one row per station, named **Station 1**, **Station 2** and so on: **Tickets**, **Average Ticket Time**, **90th Percentile**, **Longest** and **Late** (count and share). The slowest station is the one to look at first.
- **By Order Type** — tickets, average time and late per order type, each judged against its own threshold.
- **By Day** — tickets, average time and late per business day. Shown when the range has more than one day with bumps.

By Station

STATION	TICKETS	AVERAGE TICKET TIME	90TH PERCENTILE	LONGEST	LATE
Station 1	28	81.4 min	227.1 min	277.3 min	21 (75%)
Station 2	28	81.4 min	227.1 min	277.3 min	21 (75%)
Station 3	28	81.4 min	227.1 min	277.3 min	21 (75%)
Station 4	27	84.4 min	227.1 min	277.3 min	21 (78%)
Station 5	27	84.4 min	227.1 min	277.3 min	21 (78%)
Station 6	27	84.4 min	227.1 min	277.3 min	21 (78%)
Station 7	27	84.4 min	227.1 min	277.3 min	21 (78%)
Station 8	27	84.4 min	227.1 min	277.3 min	21 (78%)
Station 9	27	84.4 min	227.1 min	277.3 min	21 (78%)
Station 10	27	84.4 min	227.1 min	277.3 min	21 (78%)
Station 11	27	84.4 min	227.1 min	277.3 min	21 (78%)
Station 12	27	84.4 min	227.1 min	277.3 min	21 (78%)

By Order Type

ORDER TYPE	TICKETS	AVERAGE TICKET TIME	LATE
Counter	16	79.4 min	10 (63%)
Bar	7	105.9 min	7 (100%)
Dine-In	5	53.8 min	4 (80%)

Related: Bumping, item bumps and the Done tray, The expeditor display.

KDS troubleshooting

Kitchen Display (KDS)

View online ↗

Nothing arriving, the wrong things arriving, no sound, a screen that says reconnecting, or an app that will not update.

The screen says reconnecting

It lost the live feed and is trying to get it back every ten seconds. Cards on screen stay readable while it does, and anything bumped is queued — see When the display loses the server. If it does not recover, check the display's network; the same Wi-Fi problems that hit tablets hit wall-mounted screens, and kitchens are hard on signal.

Nothing is arriving

1. Is anything routed here? Check the **prep stations** selected in KDS settings against what **print routing** sends to those slots. An expeditor screen receives everything and needs no stations.
2. Are the items assigned to that prep slot at all? An item with no slot goes nowhere.
3. Is the order actually sent? Items on hold, and courses not yet fired, are not work yet.
4. Has someone left a **filter** on? Late-only, delivery-only or scheduled-only hides everything else, and a quiet board looks identical to a broken one.
5. Is **auto-bump after N minutes** switched on by mistake? Tickets would arrive and clear themselves before anyone saw them; the Done tray will show them.

The wrong tickets are arriving

That is routing, not the display. Two screens showing the same prep station both get the same orders, which is sometimes intended and sometimes a leftover from setting up the second screen.

A ticket came back after it was bumped

Working as designed — the order changed after the bump, so it re-surfaced with the new lines in bold. Read the bold lines and bump it again.

No chime

Check **Sound** is on in settings. In a browser, a page that has not been touched since it loaded is not allowed to play sound — tap anywhere on the board once. On a smart TV or an Android box check the volume and that the audio output is not set to a disconnected device. The chime only plays for a genuinely new ticket, never for a refresh.

Colours look wrong

Ages are measured against server time rather than the display's own clock, so a wrong clock is not the cause. Check the aging and late thresholds, including any set on the order type.

The app will not update

It updates only after ten quiet minutes; a busy kitchen delays it, never blocks it. Use **Check for updates** in settings to see the version and force a check. On an ordinary Android device the install needs your confirmation; on a managed device it is silent.

The Android bars are gone and I need them

Open settings and turn **Android bars** on. They hide again on the next start.

> Before raising a ticket, note the display name, its role and prep stations, the version from Check for updates, and an order number that should have appeared and did not. That is usually enough to find it.

No sound until someone touches the screen

Current versions of the app play the new-order sound on a screen nobody has touched yet, such as after a morning start or an automatic update. If a display stays silent until the first tap, update the app.

Closing the app

Use **Close App** in the settings footer (two taps). On Android the back gesture does not close the kitchen screen, by design.

A card flashed Cancelled and disappeared

The order was voided at the register while it was on the board. The red band shows for 15 seconds, then the card goes. If the order was combined or split by guest instead, the original simply disappears and the new orders arrive as new cards.

A modifier shows in red

It is set to **Show as alert on kitchen display**, on the modifier itself or on its group. Change it in Food modifiers, groups, and levels. A change shows on the next update of the card, or when the board refreshes; cards already on screen are not redrawn by themselves.

CHAPTER 8

QR Table Ordering

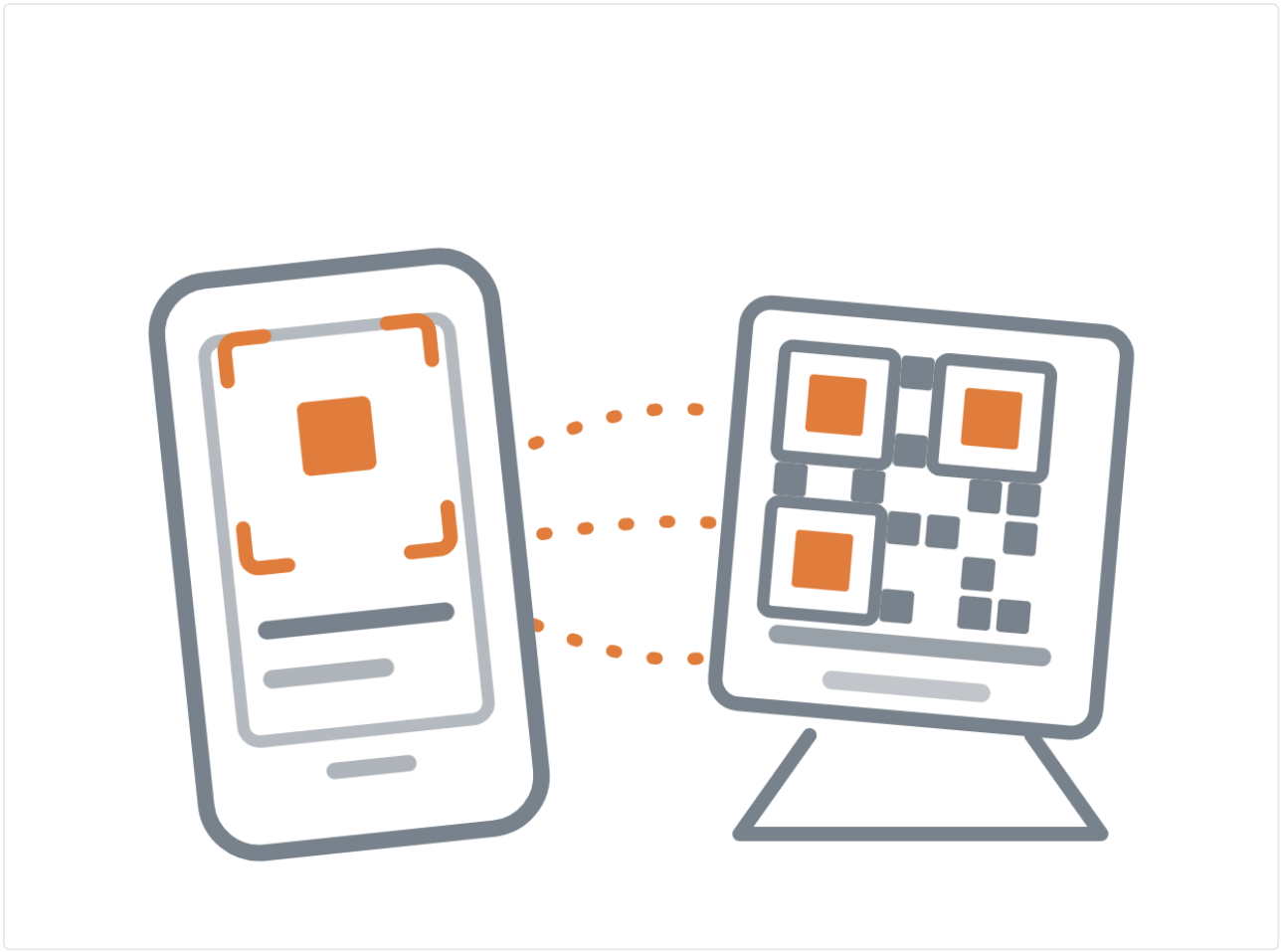
QR table ordering — overview

QR Table Ordering

View online ↗

How dine-in guests scan a table QR code, order from their own phone, and have the order land on the check — and what you need before you switch it on.

QR table ordering puts a small printed QR code on each dine-in table. A guest scans it with their phone camera, your online ordering menu opens in the browser — no app, no sign-in — and what they order goes to that table at the POS. It is set up at **Back Office › Web Orders › QR Table Ordering**.



Why use it

- **Faster rounds.** Guests order the next drink or extra side themselves instead of waiting to catch a server's eye.
- **Fewer keying errors.** The guest chooses their own modifiers; nothing is repeated down the line.
- **Servers cover more tables.** Order taking moves to the guest, so staff focus on running food and looking after people.
- **No new hardware.** The guest's own phone is the terminal. You print table cards, nothing more.

How an order travels

1. The guest scans the code on their table. The code holds only a link — a long random web address unique to that table.
2. Their browser opens your online ordering site and remembers which table they are at for the next four hours.
3. They browse the same menu, categories and modifiers your online ordering site already shows.

4. At the cart they send the order to the table — or, when the table pays online, pay for it by card first. There is no pickup or delivery step.
5. The order arrives at the POS on that table. Depending on the settings, it goes straight to the kitchen or waits for a server to approve it.
6. Kitchen tickets and labels print for the new items only. Earlier rounds are never reprinted.

Order handling

- **Send to kitchen immediately** — the order is sent the moment the guest taps send. Fastest for bars, taprooms, food halls and casual counters.
- **Hold for server approval** — the order waits until a server accepts or declines it at the POS. Slower, but nothing reaches the line unseen. Best for table service, alcohol, and rooms where you want a person in the loop.

You can change it at any time in Back Office; it applies from the next order, and the printed codes never need reprinting.

Paying

The **Payment** setting decides when the guest pays:

- **Pay At The Table (POS)** — order now, pay later. Every round goes on the table's check, and the server settles it at the POS at the end of the meal. To let the guest pay that check from their phone too, print it with the QR pay at table code.
- **Pay Online Before Sending To Kitchen** — the guest pays by card on the phone, and the order reaches the kitchen only once the payment goes through. Each paid order is its own check. An order left unpaid is cancelled after the time you set.

What you need before switching it on

- **A published online ordering site** with a public `https://` address. The guest's phone reaches it over the internet, not your local network.
- **A seating chart with named tables.** Codes are made per table from the seating chart, and the table names on the guest's screen come from it. Walls, plants and other decorations get no code.
- **A dine-in order type** for QR orders, so taxes, kitchen routing and reports behave as dine-in should.
- **Stripe card payments**, if guests are to pay online.
- **Guest Wi-Fi or a decent mobile signal** in the dining room.

> Nothing else about your service changes. Servers can still ring items in at the POS for the same table at the same time; QR rounds join the same open check.

Next steps

1. Set it up — see Setting up QR table ordering.
2. Make and print the table codes — see Generating and printing table QR codes.
3. Walk your staff through what guests see and what happens at the POS — see What the guest sees and QR orders at the POS and in the kitchen.

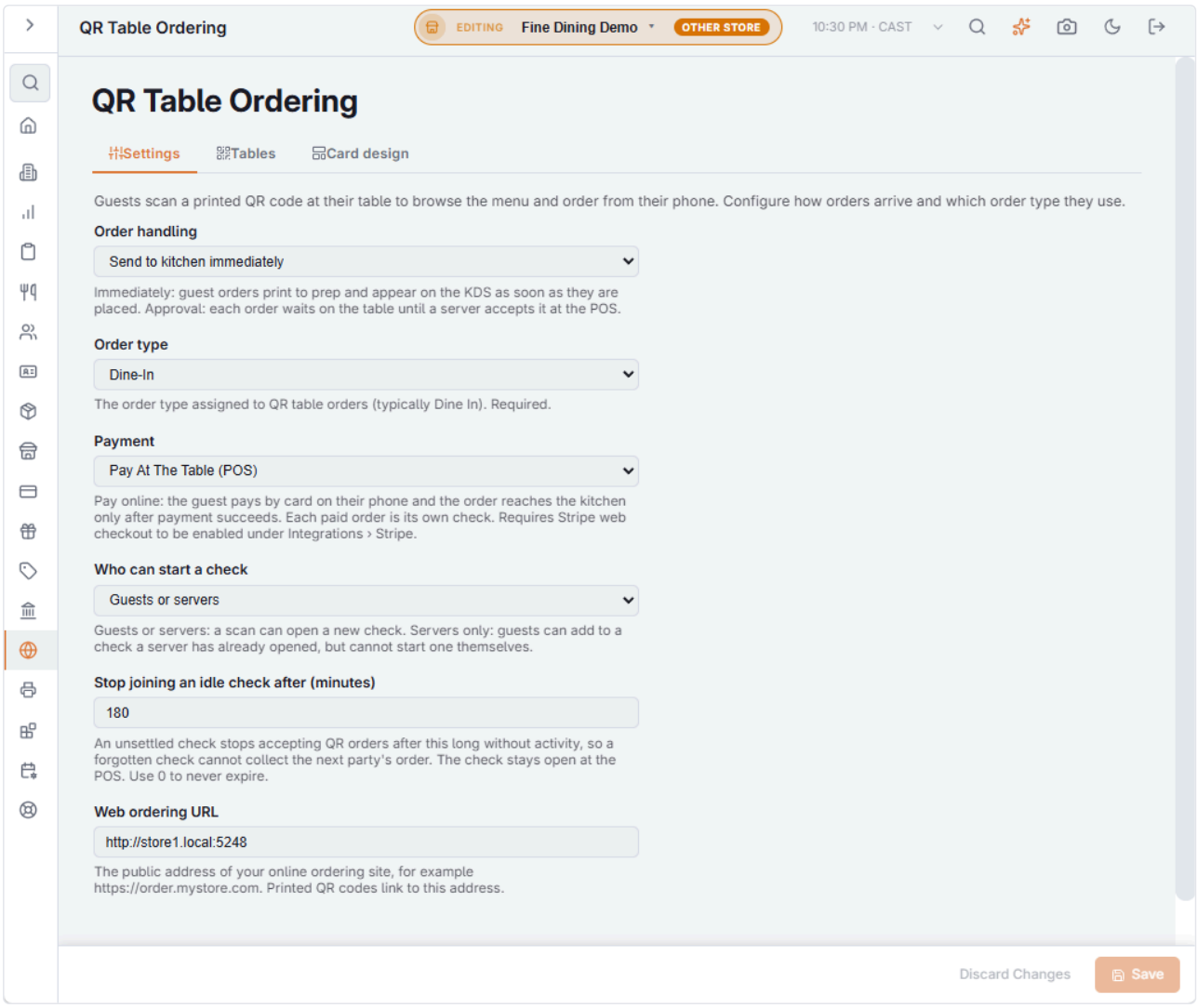
Setting up QR table ordering

QR Table Ordering

View online ↗

Step-by-step setup in Back Office: prerequisites, the storefront address, ordering mode, who may start a check, and the dine-in order type.

All QR table ordering settings live on one page: **Back Office › Web Orders › QR Table Ordering**. Guests scan a printed code at their table to browse the menu and order from their phone; this page decides how those orders arrive.



The page has three tabs. **Settings** holds the store-wide options covered here. **Tables** is where the codes are made and printed, and **Card design** lays out the printed card — see Generating and printing table QR codes and Designing the printable table card.

Before you start

1. A reachable online ordering site

QR ordering serves the guest your online ordering menu. If the site is not set up yet, start with **Web Orders › Basic Info**, **Business Hours** and **Theme & Design**. Check that it opens from a phone on mobile data, not only from a computer inside the restaurant.

> The site must be served over `https://`. On a plain `http://` address the guest's browser does not keep the table, so every order arrives as an ordinary web order.

2. A seating chart with the tables to code

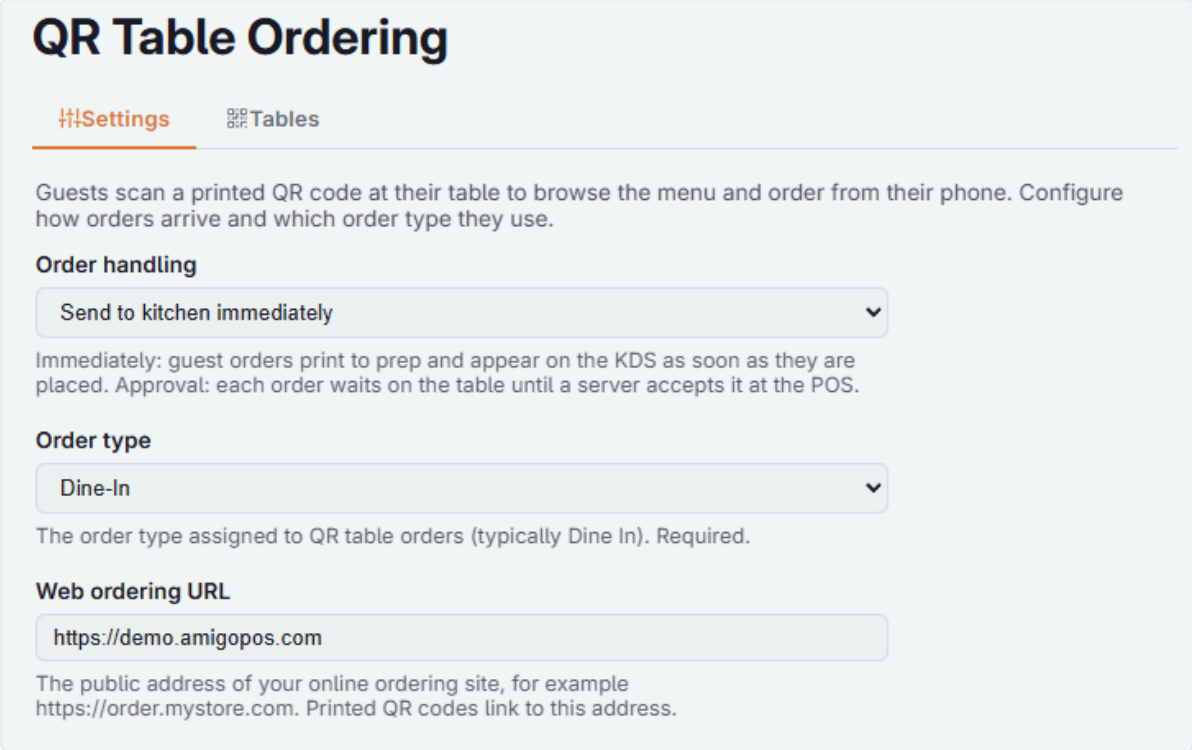
Codes are made from a seating chart, one per table. Make sure every table that should get a code exists in the floor plan and has a clear, guest-friendly name: the name shows on the guest's phone and on the printed card, so *Patio 4* reads better than *T-P04*. Decorations get no code. See The seating designer.

3. A dine-in order type

Every QR order carries one order type. At **Back Office › Store Setup › Order Types**, check the dine-in type is set up the way you want QR orders treated: tax, kitchen tickets, receipts, gratuity and reports all follow it. See Order types and workflow.

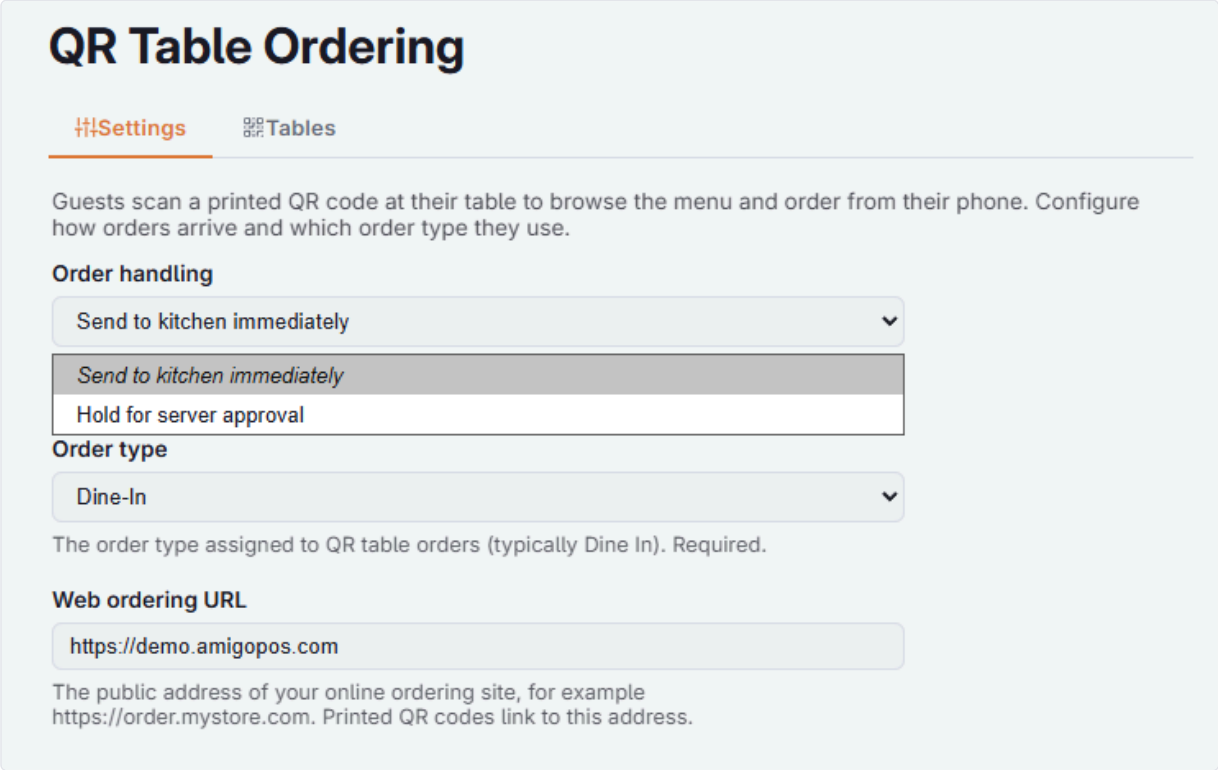
> Do not use a delivery or pickup order type. Delivery charges, address prompts and takeout tax rules would then apply to guests sitting in your dining room.

The Settings tab



Changes stay on screen until you select **Save**; *Unsaved changes* shows meanwhile, and the discard button puts back what was saved. While the order type or the web ordering URL is missing, a banner says *QR ordering is inactive: choose an order type and enter the web ordering URL below.*

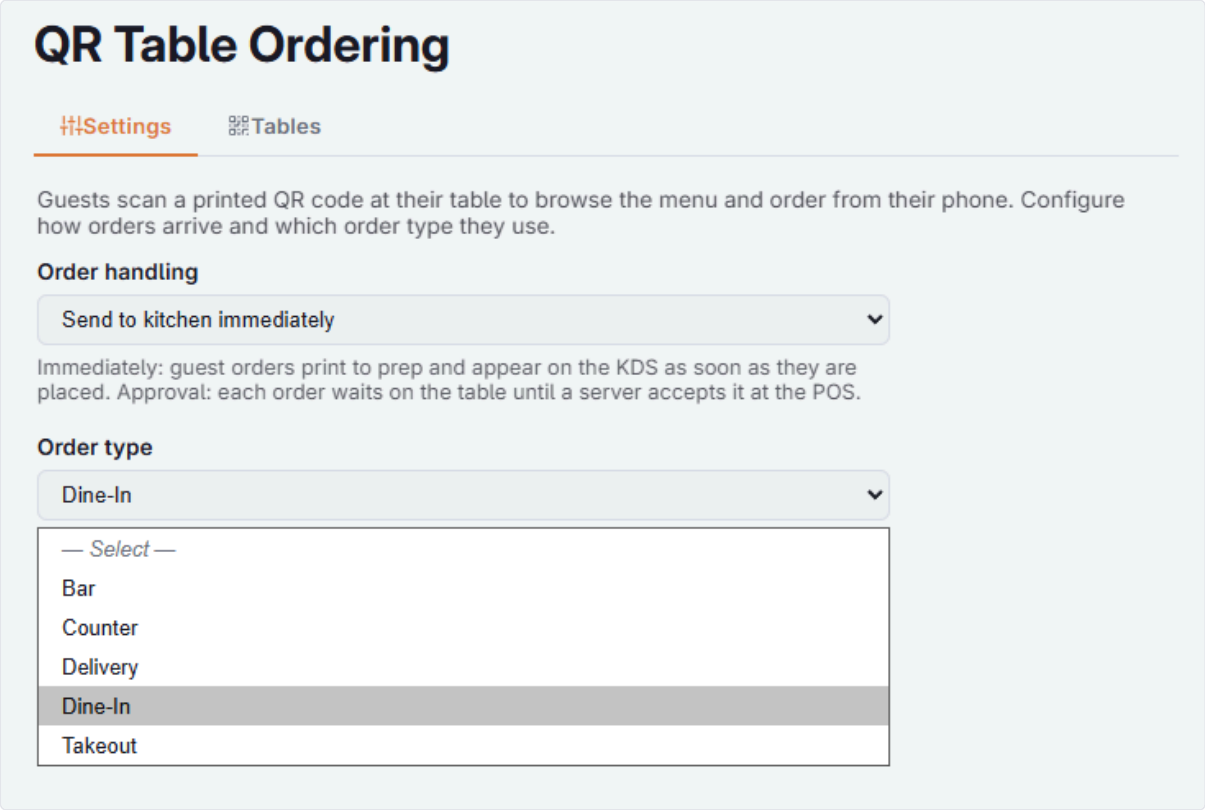
Order handling



- **Send to kitchen immediately** — the guest's order prints to the kitchen and shows on the kitchen display as soon as it is placed.
- **Hold for server approval** — each order waits on the table's check until a server accepts it at the POS. Until then it does not print, does not reach the kitchen display and does not count in the check total.

Starting on **Hold for server approval** for the first week lets the team see what guests send before anything reaches the line. With payment set to pay online, orders reach the kitchen once paid, whichever is chosen here.

Order type



The order type every QR order carries — the dine-in type from the checklist above. Required.

Payment

- **Pay At The Table (POS)** — the guest orders from the phone and pays the server at the end, as usual. Orders are added to the table's check.
- **Pay Online Before Sending To Kitchen** — the guest pays by card on the phone, and the order reaches the kitchen only after the payment succeeds. Each paid order is its own check. Card payments must be set up with Stripe at **Back Office › Integrations › Stripe**; see Payment integrations for web orders.

With **Pay Online Before Sending To Kitchen**, **Cancel Unpaid Orders After (Minutes)** appears: an order not paid within that time is cancelled and any item counters it used are given back. The default is 20; 0 never cancels. The same time applies to every online order paid by card, and the same setting is also on **Back Office › Web Orders › Checkout**, in the **Online Payment** section (Checkout settings).

Who can start a check

Shown with **Pay At The Table (POS)**.

- **Guests or servers** — a guest scanning a table with no open check starts one. The default, and the right choice for bars, taprooms and counters.
- **Servers only** — a guest can add to a check a server has already opened, but cannot start one. Until a server opens the check, the guest can browse but not send, and is told to ask their server. For table service where someone greets the table first.

Stop joining an idle check after (minutes)

Shown with **Pay At The Table (POS)**. Defaults to 180. An unsettled check stops accepting QR orders after this long with no activity, so a check nobody closed cannot collect the next party's order. The check stays open at the POS; only QR ordering lets go of it, and the next guest to scan starts fresh. 0 never expires.

> Match it roughly to your longest table turn. Too short and a slow table is split across two checks; too long and an uncleared table can take the next party's first round.

Web ordering URL

The public address of your online ordering site, for example `https://order.mystore.com`. Each printed code is this address followed by `/t/` and the table's own key. Printing is refused until it is set.

> Get it right before you print. The address is inside every printed code, so changing it later means reprinting every card. Use the address guests reach from the internet, with `https://`.

> Test it on a phone with Wi-Fi off. If the menu loads, guests will be fine; if it times out or shows a certificate warning, fix that first.

Checking the setup

1. The Settings tab is filled in, saved, and the banner is gone.
2. The Tables tab lists your tables when you pick a seating chart.
3. Make a code for one test table, open its link on a phone and check that the menu loads with the table name at the top.
4. Send a small test order and check that it lands on the POS at the right table.

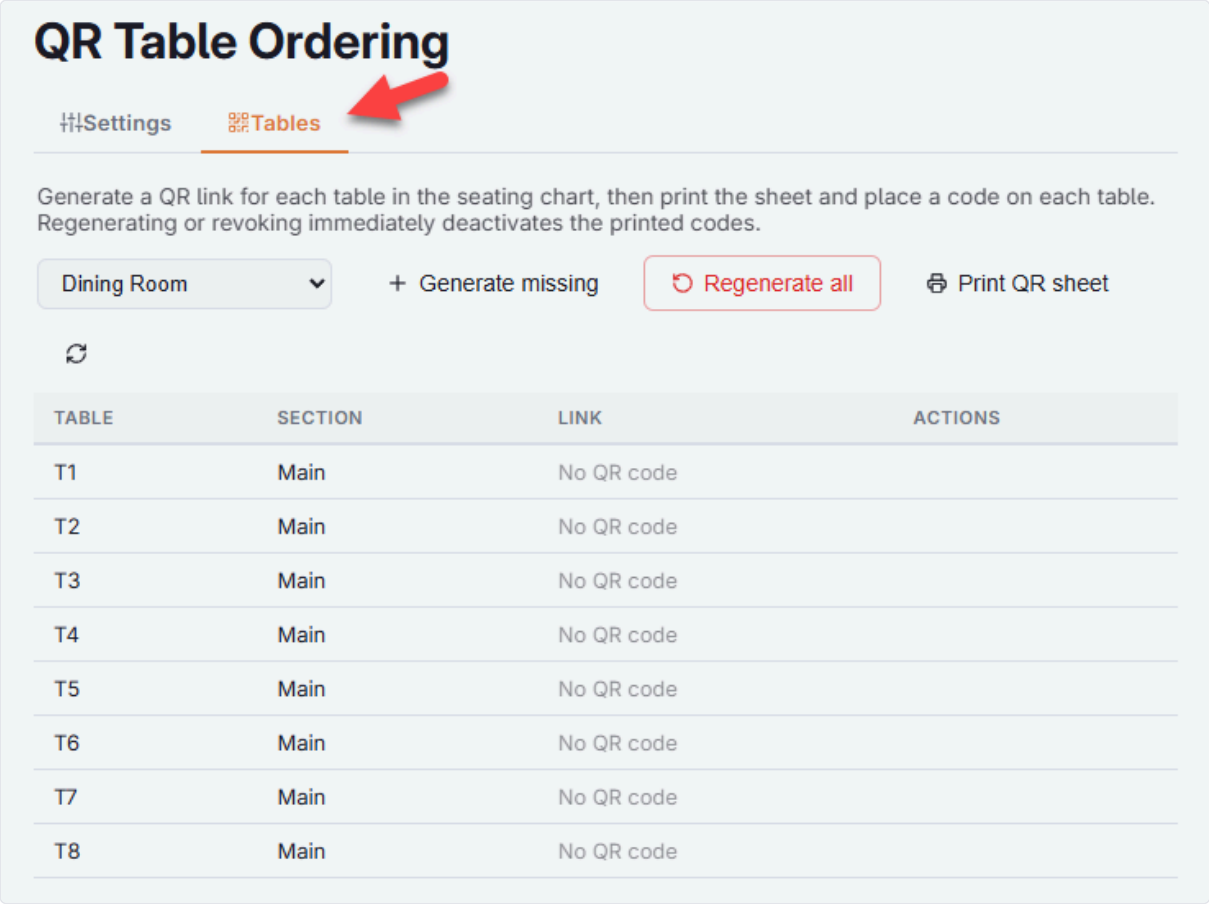
Generating and printing table QR codes

QR Table Ordering

View online ↗

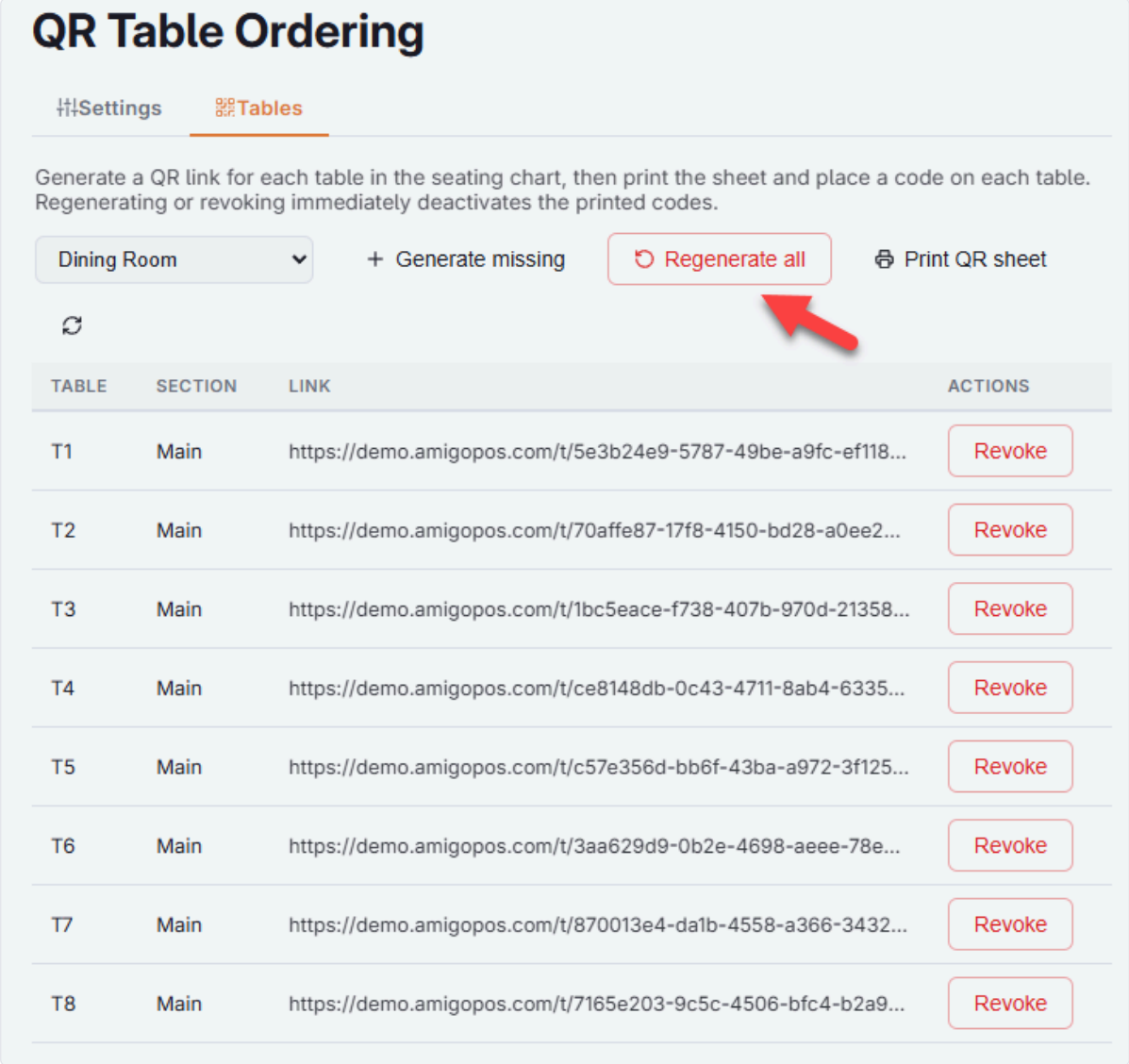
Create codes per seating chart, print the ready-made QR sheet, and revoke or regenerate codes when a table changes.

Table codes are managed on the **Tables** tab of **Back Office › Web Orders › QR Table Ordering**. Each code belongs to one table on one seating chart and never expires on its own — a printed card keeps working until you revoke or regenerate its code. Code actions on this tab take effect at once; they do not wait for Save.



Generating codes

1. Pick a seating chart in the drop-down at the left of the toolbar. The grid fills with every table on that chart; decorations are left out.
2. Select **Generate missing**. Every table without a code gets one; tables that already have a code are left alone, so it is always safe to press. *QR codes updated.* confirms it.
3. The **Link** column fills with each table's address — what the printed code opens.
4. Repeat for each seating chart.



What the grid shows

- **Table** — the table name from the seating chart, which the guest sees on their phone.
- **Section** — the seating-chart section, useful when sorting printed cards by area.
- **Link** — the full address the code opens: the **Web ordering URL** from the Settings tab, `/t/` and the table's key. A table without a code shows *No QR code*.
- **Actions** — **Copy link**, **Print this table's card** and **Revoke**.

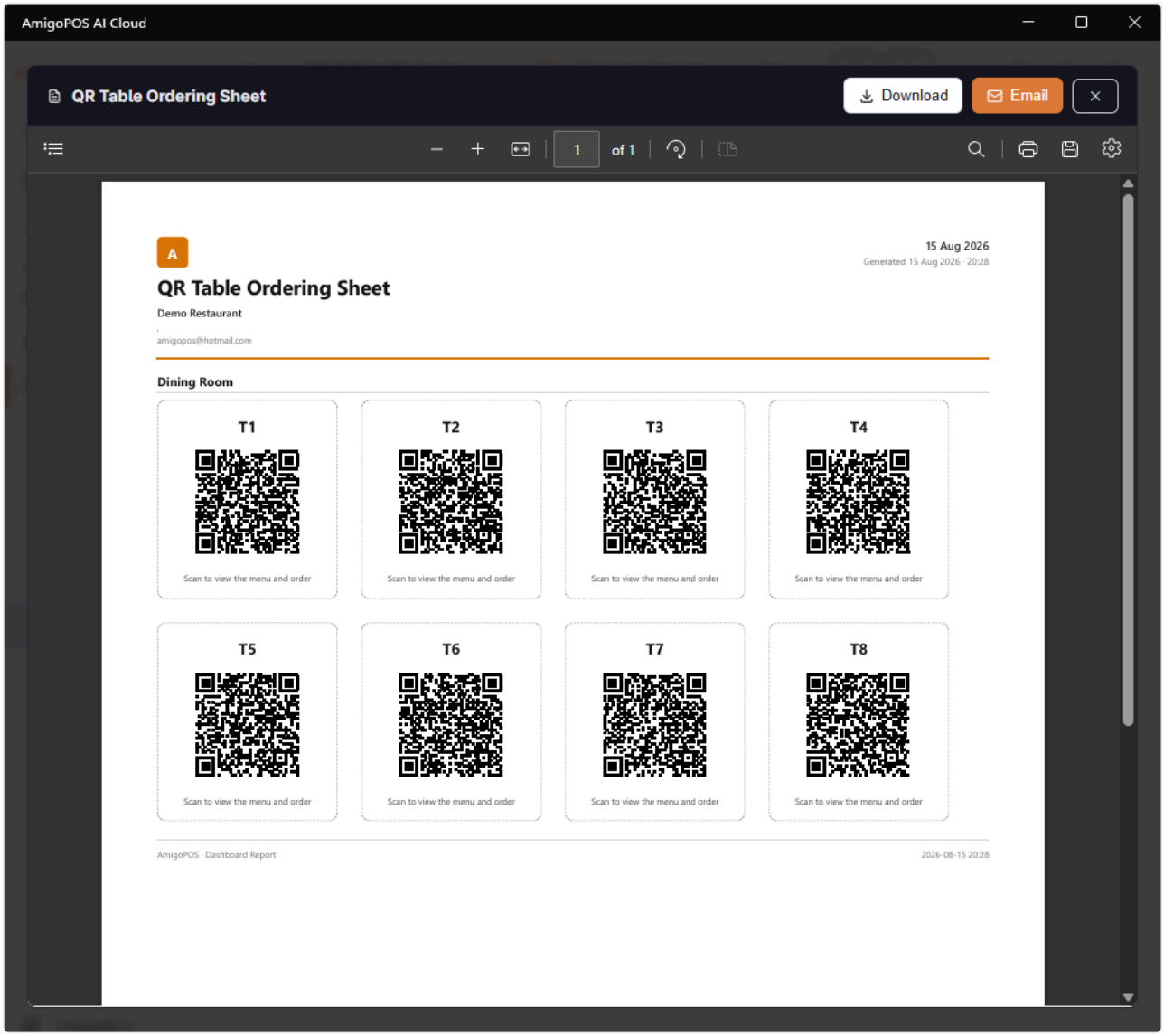
The refresh button at the end of the toolbar reloads the grid, for example after adding a table to the chart.

> The link is long and random on purpose: it is the only thing between a passer-by and your ordering page for that table. Treat printed codes like table numbers, not secrets — but do not publish the list anywhere public.

Printing

- **Print cards** — the designed table cards for every coded table on the chart picked in the toolbar, laid out as set on the **Card design** tab. See Designing the printable table card.
- **Print this table's card** — on a row, the same card for that one table, for replacing a lost or damaged card.
- **Print QR sheet** — a plain sheet of every coded table's code with its name, across all charts, for reference rather than for the tables.

Each opens in the usual preview window, where you can print, download or email it.



> Printing needs the **Web ordering URL** on the Settings tab, saved. Without it the page says *Enter the web ordering URL in Settings before printing.*; with unsaved changes it says *Unsaved changes* — save first, because the printouts are built from the saved settings.

> Print on card stock and slide the cards into small acrylic stands, or print on adhesive label stock and stick them to the table edge. Cards in the middle of the table get scanned more than cards tucked behind the condiments.

Revoking one code

Revoke switches off one table's code at once, after *Deactivate the QR code for this table? The printed code will stop working.* Anyone scanning that card from then on sees a "table not available" page instead of the menu. Use it when a card is stolen, photographed and shared, or a table is taken out of service. Press **Generate missing** to give the table a new code, and print its card when ready.

Regenerating a whole chart

Regenerate all replaces every code on the selected chart in one step, after *Replace every QR code in this seating chart? All previously printed codes will stop working.*

> Every printed card for that chart stops working the moment you regenerate. Do it only when you are ready to reprint and swap the cards on the floor — before opening, never mid-service.

Reasons to regenerate:

- A batch of cards was photographed, copied or otherwise leaked.
- You rebuilt or heavily rearranged the seating chart.

Changing the **Web ordering URL** does not need new codes: reprint the cards, and the new printouts carry the new address.

When tables change

- **You add a table to the chart** — press **Generate missing** and print the one new card. Nothing else is disturbed.
- **You rename a table** — the code keeps working and the new name shows on the guest's phone. Reprint only if the name is on the printed card.
- **You delete a table from the chart** — its code stops working on its own. Throw the card away.

Guest cards for pool tables and lanes

Timed tables can also carry a **guest table card** that shows the running game and the check so far, printed from **Back Office › Activity › Orders › Table Time › Guest QR Cards**. It uses the same table code as QR ordering: generating the cards creates a code for tables that have none, and revoking a table's code here also retires its guest card. See The guest table page and QR cards.

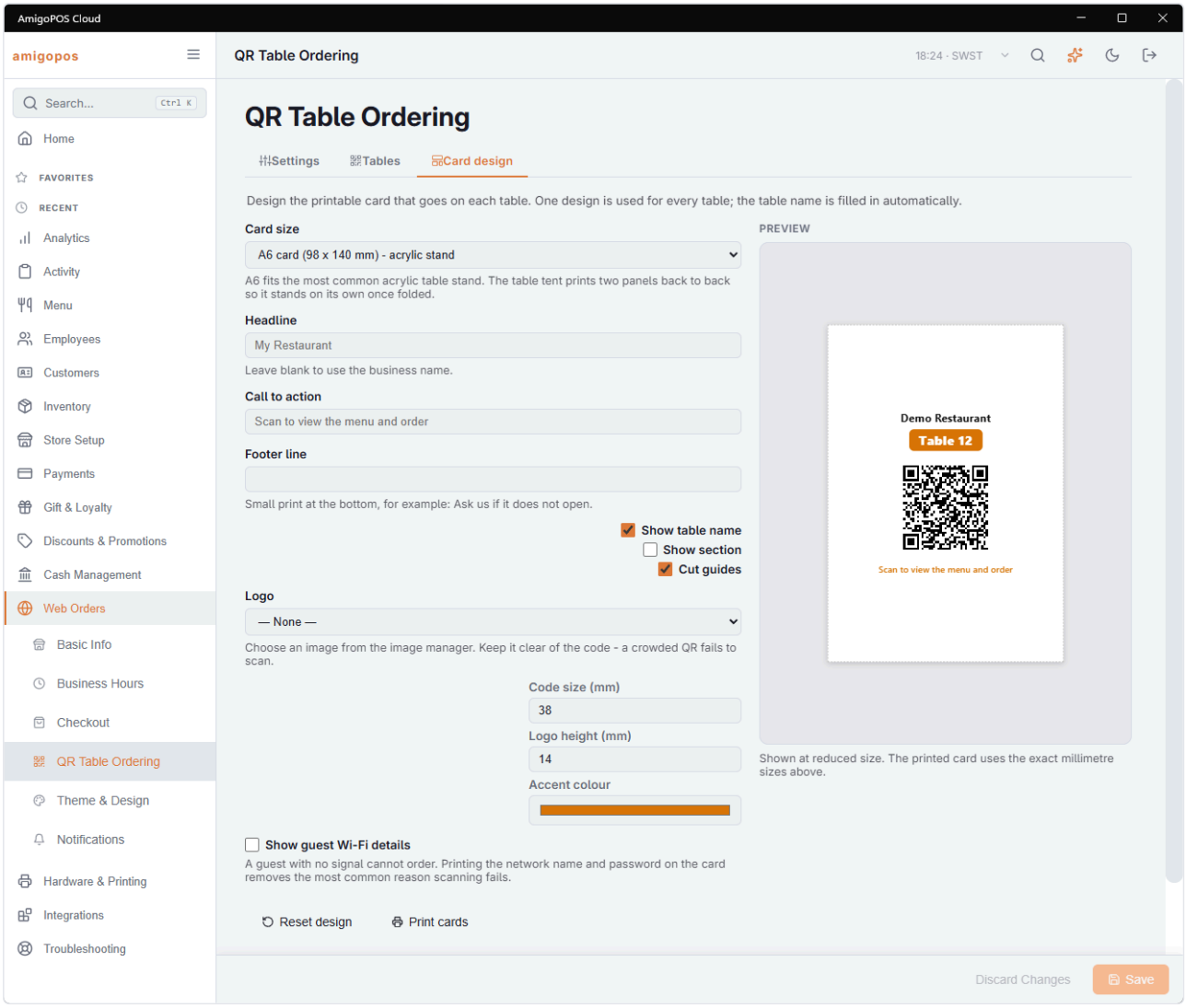
Designing the printable table card

QR Table Ordering

View online ↗

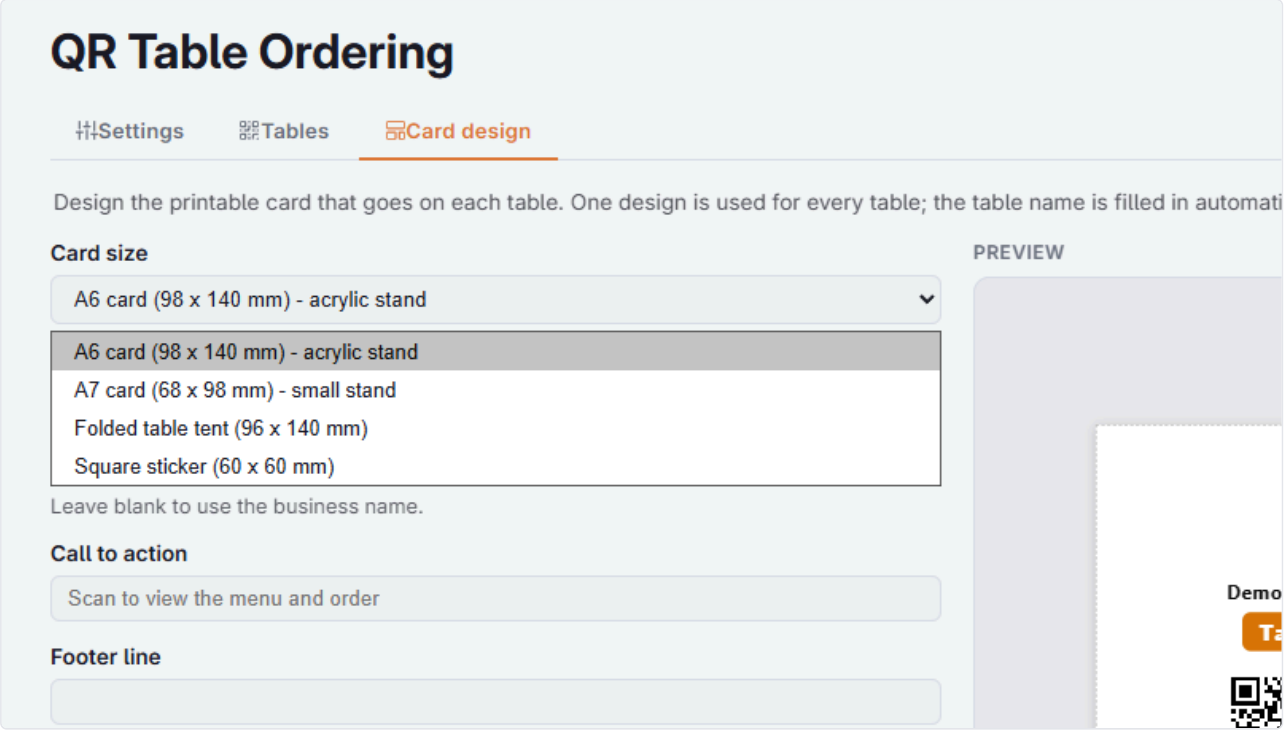
Lay out the card that sits on each table — size, branding, logo, Wi-Fi details — and print a sheet ready to cut and laminate.

The **Card design** tab of **Back Office › Web Orders › QR Table Ordering** controls what the printed table card actually looks like. One design is used for every table; the table name is filled in automatically from the seating chart, so you lay the card out once and print the whole floor from it.



This is separate from the plain *QR sheet* on the Tables tab. The sheet is a contact sheet — every code on as few pages as possible, useful for reference and for checking your work. The cards are the finished article you cut out and put on tables.

Choosing a card size



- **A6 card (98 × 140 mm)** — fits the standard clear acrylic table stand, which is what most restaurants use. Cheap, swappable, and the card can be reprinted without replacing the stand. Start here unless you have a reason not to.
- **A7 card (68 × 98 mm)** — the same idea in a smaller stand. Good for two-tops and crowded tables where an A6 stand is in the way of the food.
- **Folded table tent (96 × 140 mm)** — prints two panels back to back, one inverted, so the card stands up on its own once folded down the middle and reads from either side of the table. No stand to buy, but it gets greasy and you will reprint more often.
- **Square sticker (60 × 60 mm)** — for sticking flat to the tabletop. Can't be knocked over, stolen, or shuffled between tables, which makes it the usual choice for bars, breweries, beer gardens, and food halls. Print on adhesive label stock.

The fields

Everything updates the preview as you type. Click **Save** when you are happy; **Reset design** returns every field to its default after a confirmation.

Text

- **Headline** — the big line at the top. Leave it blank to use your business name.
- **Call to action** — the line under the code. Blank gives you “Scan to view the menu and order”. Keep it short and imperative.
- **Footer line** — small print at the bottom. A line like *Ask us if it doesn’t open* saves a guest waving at a passing server when something goes wrong.

What to show

- **Show table name** — leave this on. It is how staff and guests both verify the guest is ordering to the table they are actually sitting at, and it is how you catch cards that got swapped when the tables were wiped down.
- **Show section** — adds the seating-chart section under the table name. Handy when you are sorting a stack of freshly printed cards by area.
- **Cut guides** — dashed lines around each card so you know where to trim. Turn them off if you are printing on pre-cut stock.

Branding

- **Logo** — pick any image from the image manager.
- **Logo height** — 6 to 30 mm.
- **Accent colour** — used for the table-name chip and the call to action.

Code size

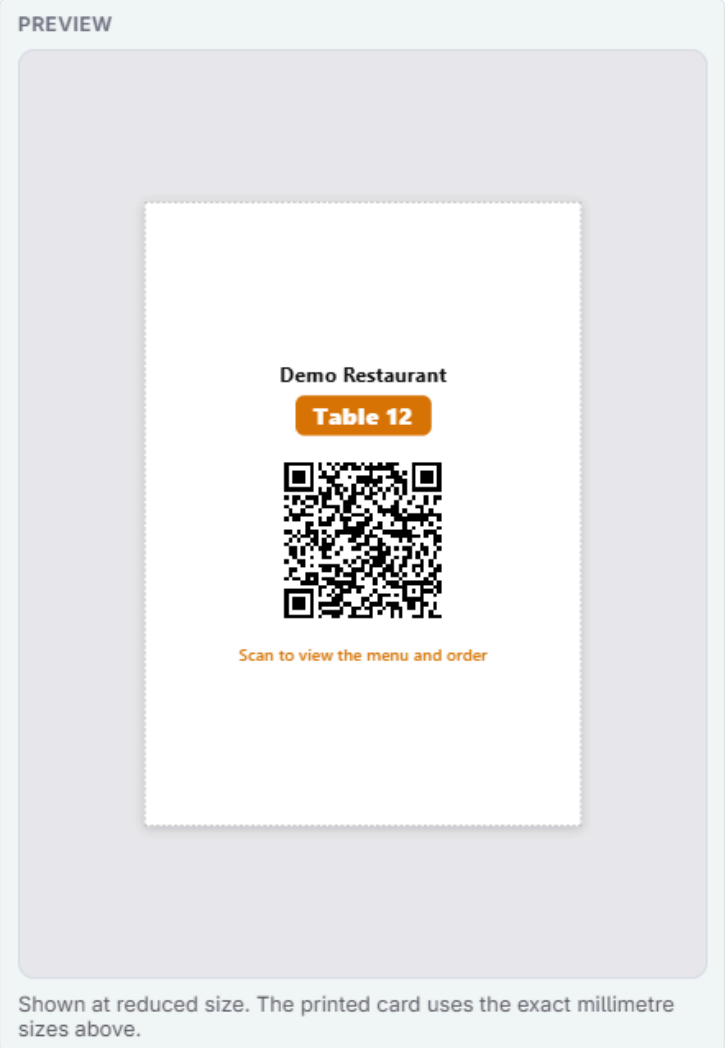
25 to 60 mm, defaulting to 38. Around 30 mm is the practical floor for a phone held at arm's length; below that you start losing scans in dim rooms and with older phone cameras. Larger is more forgiving and costs you nothing but card space.

> The white margin around the code is set automatically and can't be overridden. Scanners need that clear border to find the code at all, so no amount of design pressure should tempt you to crowd it — which is why the layout won't let you.

Guest Wi-Fi

Tick **Show guest Wi-Fi details** to print the network name and password on the card. Worth doing: a guest with no signal cannot order at all, so this removes the single most common reason scanning appears to "not work". The values come from the guest Wi-Fi settings, so they stay in step with the Wi-Fi slip and anywhere else they appear.

The preview

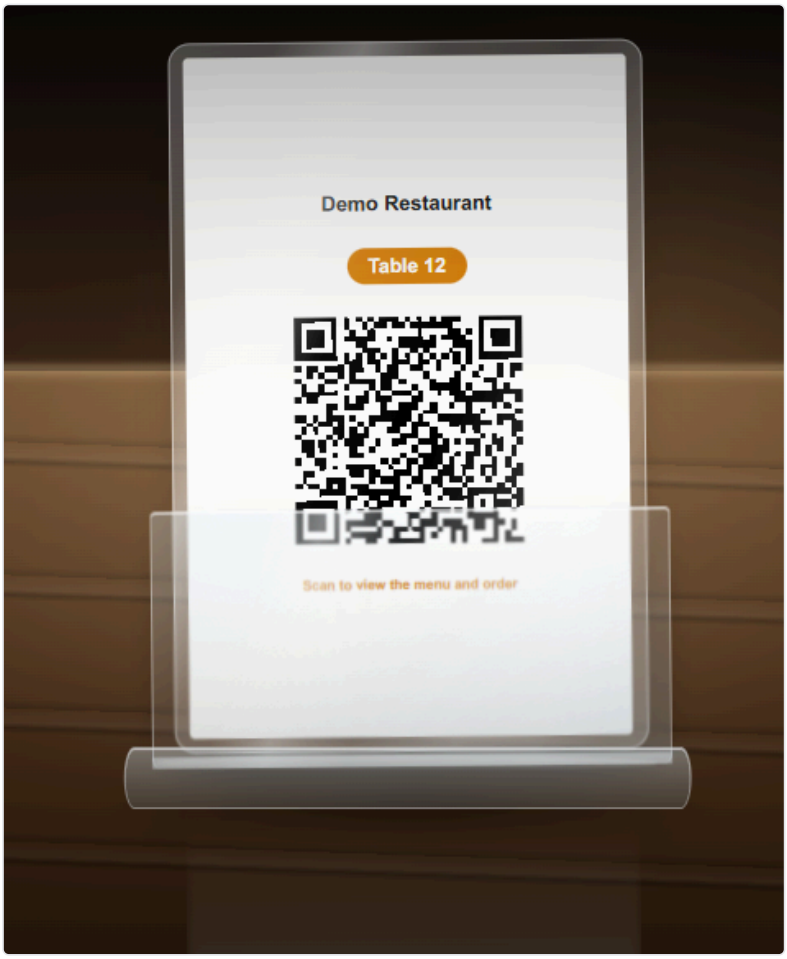


The preview is built by the same engine that produces the PDF, so what you see is what prints. It is shown at reduced size to fit the panel — the printed card uses the exact millimetre dimensions listed against each card size.

Printing

1. Click **Print cards**. From the Card design tab this prints every coded table; from the Tables tab it prints the selected seating chart.
2. The document opens in the usual preview window — print it, save it as a PDF, or email it exactly like any other report.
3. To reprint a single table — after adding one table, or replacing one damaged card — use the small print button on that table's row in the Tables grid rather than reprinting the whole chart.

Use matte lamination, not gloss. Gloss reflects overhead downlights straight back into the phone camera, and a card that scans perfectly on your desk can be unusable under the lights above table 12. This is the most common cause of a card that “works sometimes”.



Print on card stock, laminate, and slide into acrylic stands. Before doing the whole floor, print one card, laminate it, and scan it at the actual table under the actual lights — at arm’s length, not from six inches away. Fixing the design after printing eighty cards is a bad afternoon.

When you change the design

The design is stored separately from the codes themselves, so changing the layout, logo, or colours does **not** invalidate anything. Existing printed cards keep working; you simply reprint when you want the new look on the floor. Only regenerating codes on the Tables tab kills printed cards.

What the guest sees

QR Table Ordering

View online ↗

The guest journey end to end: scanning, the table header, browsing, sending the order, watching it be confirmed, and adding another round.

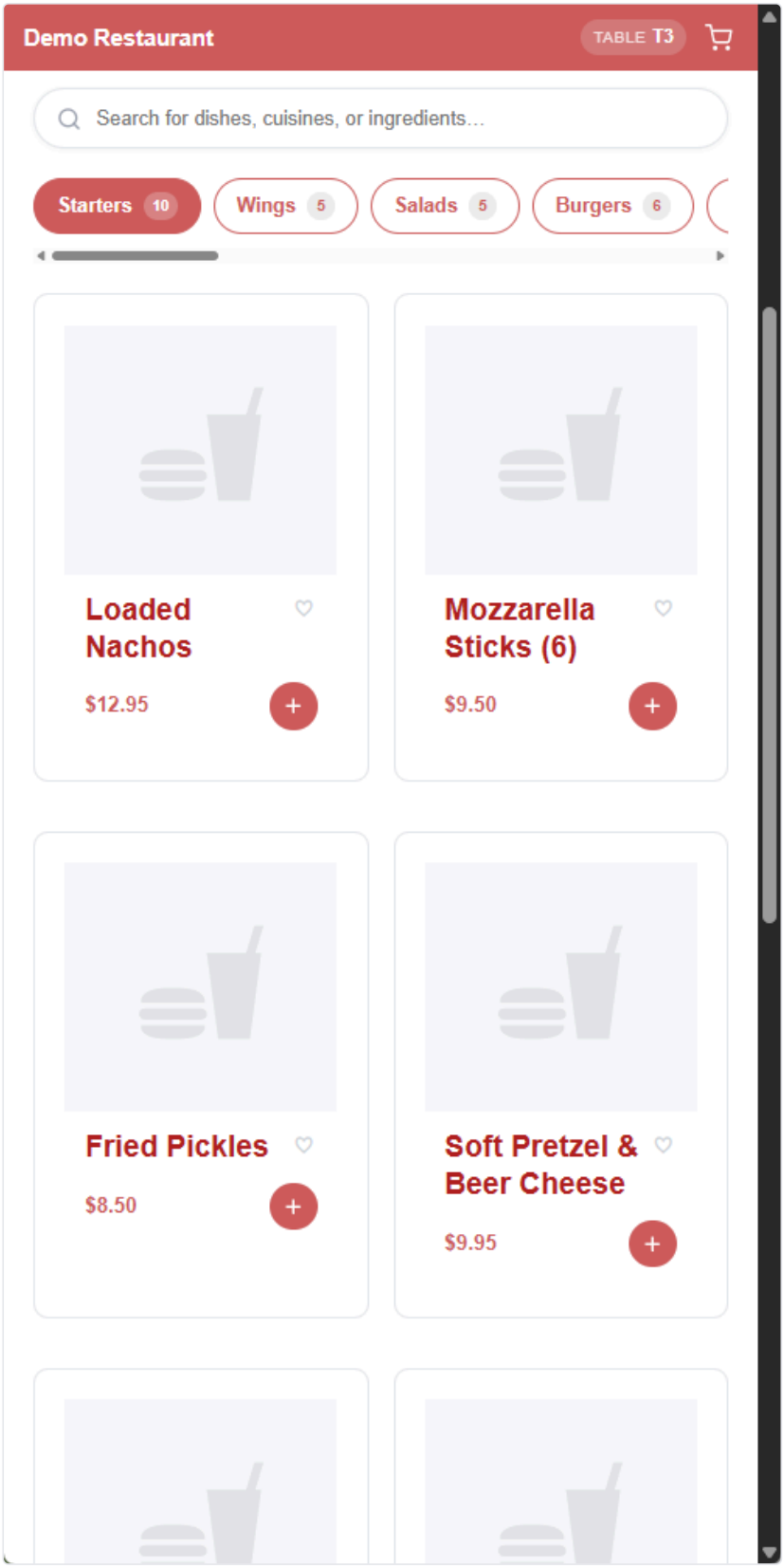
What a guest sees after scanning a table code, step by step. It is worth walking through once yourself on a real phone before you brief the floor — it is the fastest way to answer the questions guests actually ask.

1. Scanning

The guest points their phone camera at the card. No app is needed; the built-in camera on both iPhone and Android recognises the code and offers to open the link. Tapping it opens your storefront in their normal browser.

2. The table is remembered

The moment the link opens, the browser records which table this guest is at. The page header changes to a stripped-down version carrying just three things: your business name, the table, and the cart. The usual navigation is deliberately gone — a seated guest is not shopping, and Home, Favourites, and a sign-in prompt are all ways to lose someone mid-order.



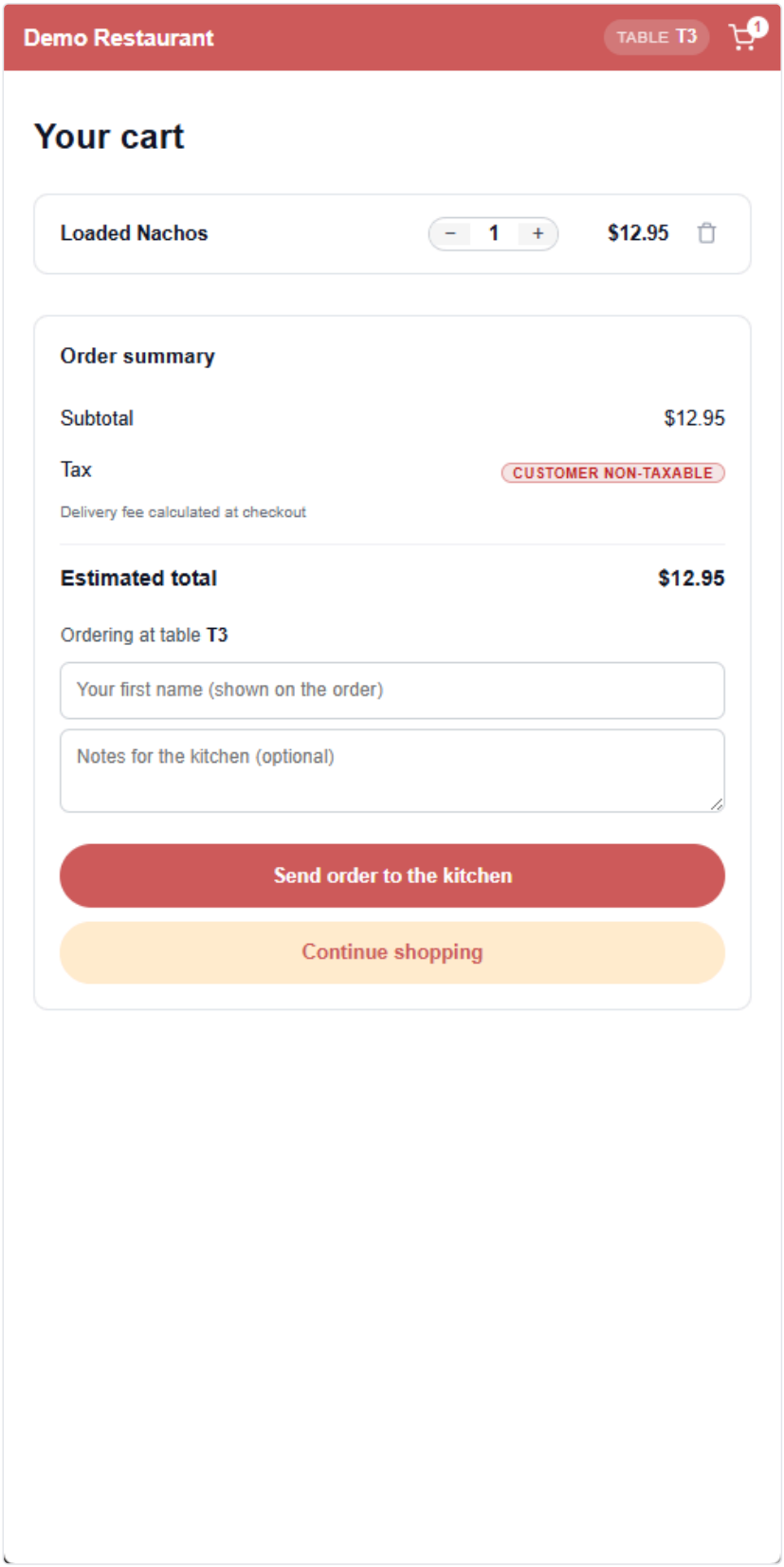
That memory lasts about four hours — long enough for any meal — and survives closing the browser, locking the phone, or wandering out for a phone call. It is per phone: everyone at the table can scan and each phone builds its own cart.

3. Browsing and building the cart

From here it is your ordinary online-ordering menu — the same categories, item photos, descriptions, modifiers, and prices. Nothing needs to be maintained twice.

4. Sending the order

The cart looks different for a QR guest. Instead of the usual checkout button leading to pickup or delivery options, the cart shows a short panel for the table.



- **Ordering at table** and the table name — so the guest can see they are ordering to the right table.
- **A first name** — so the kitchen and the server know whose plate is whose at a shared table. It rides along with the items.
- **Notes for the kitchen (optional)** — a short note for the kitchen, such as an allergy or a timing request.

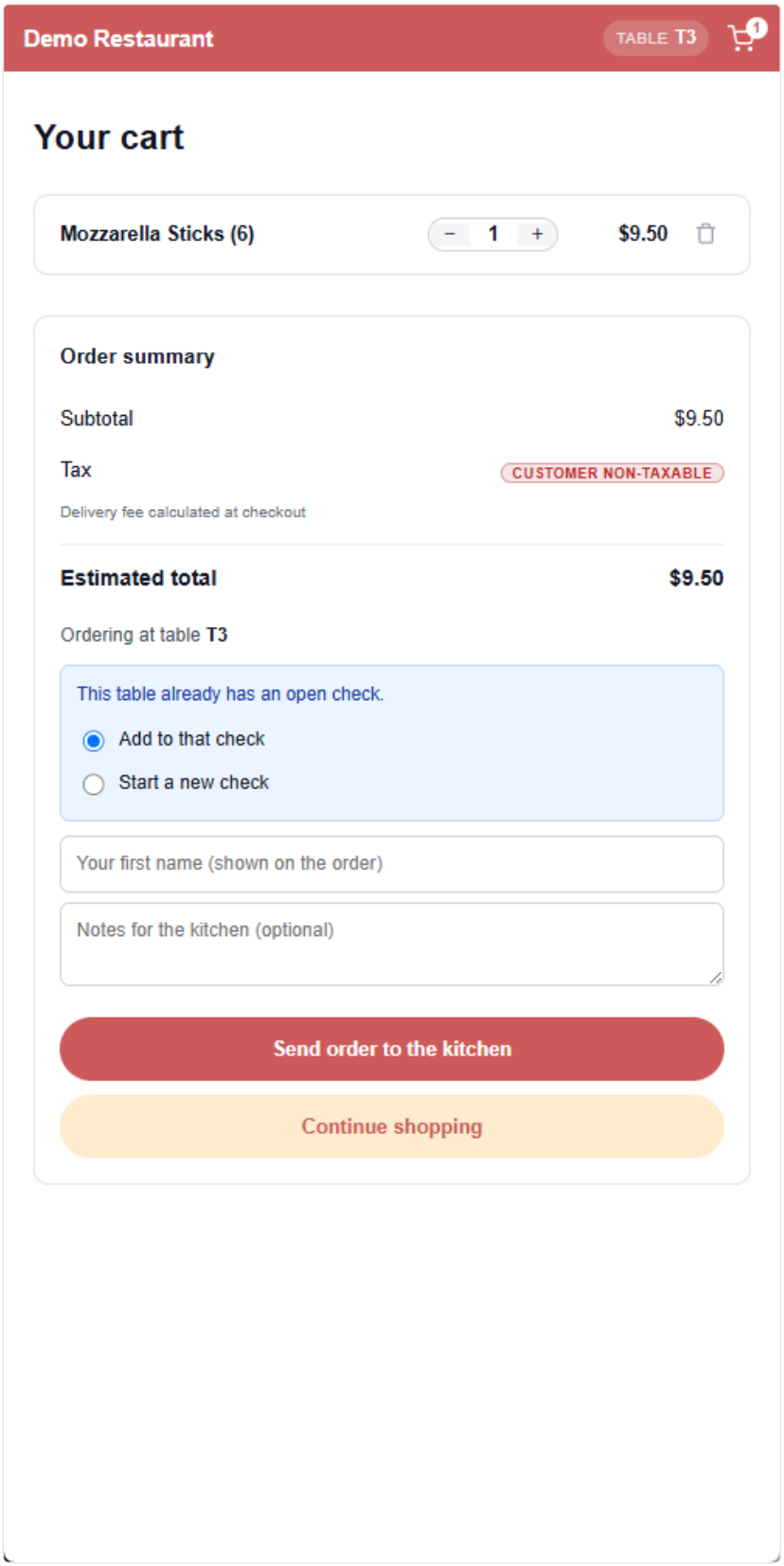
- **Send order to the kitchen** — submits the round.

There is no address step and no delivery fee. The button disables itself while the order is being sent, so an impatient double-tap cannot create a duplicate round.

When the table pays online

With **Pay Online Before Sending To Kitchen** chosen in Back Office, the cart says *This table pays online. Your order is sent to the kitchen as soon as the payment goes through.* and the button is **Pay And Send To Kitchen**. It opens the card payment page; once the payment succeeds, the order goes to the kitchen as its own check. A guest who leaves without paying sends nothing, and the unpaid order is cancelled after the time set in Back Office.

When someone else already has a check open



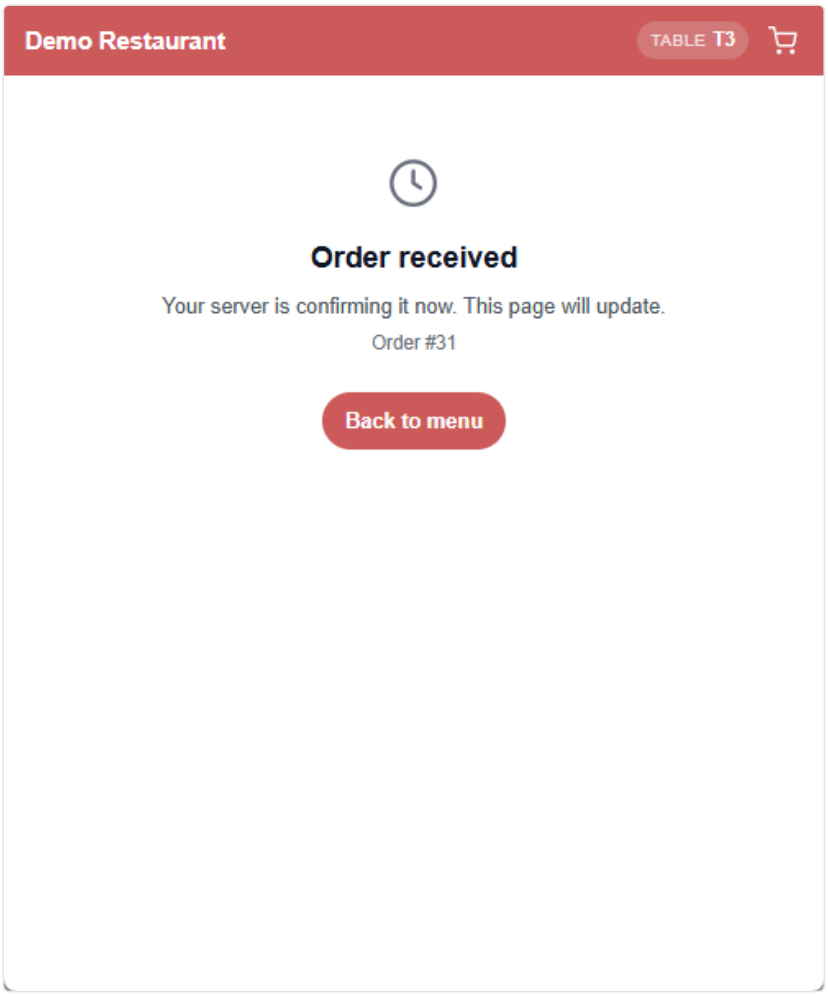
If another phone at the table already started the check, the second guest is asked rather than assumed. The panel shows who started it, with two choices: **Add to that check** or **Start a new check**.

This is what stops a newly seated party from landing on the previous party's bill when a check has been left open. A real table-mate taps *Add to that check* and everything merges; someone who does not recognise the name starts their own. Guests who are already on the check are never asked again — only a phone the check does not know about sees the prompt.

When only servers may start a check

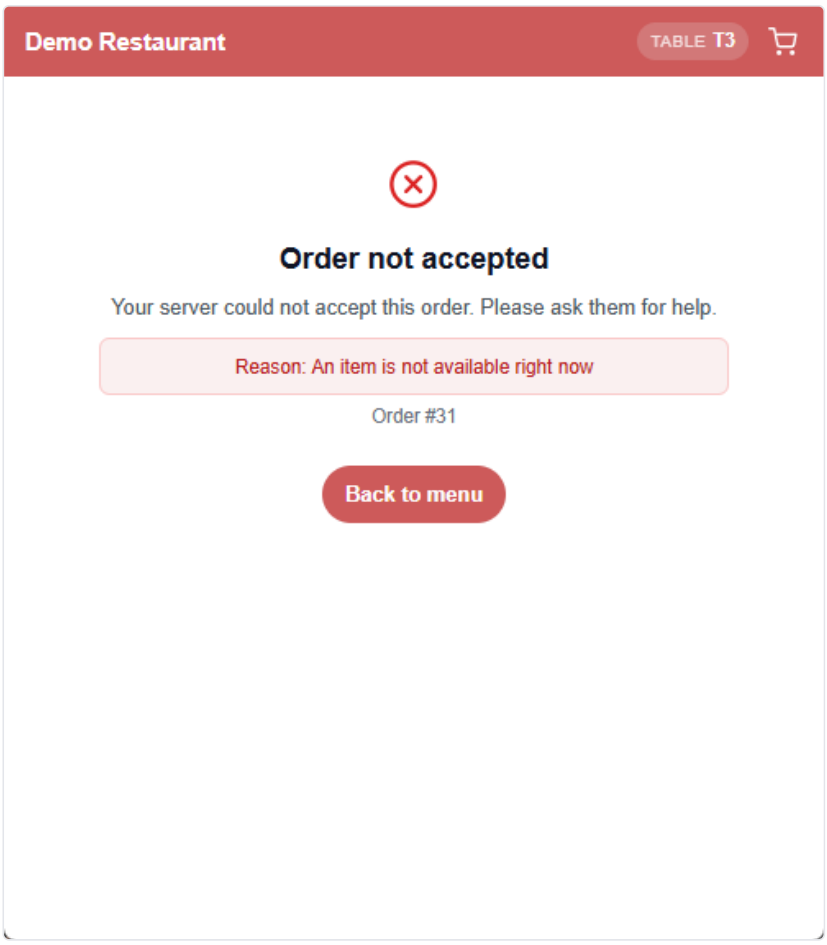
If you set **Who can start a check** to *Servers only*, a guest scanning a table with nothing open can browse the whole menu but cannot send. *Please ask your server to start your check before ordering.* shows, and the send button is greyed out. As soon as a server opens the check at the POS, the guest can send normally — no rescanning needed.

5. Confirmation, and what happens next



The guest sees a confirmation with their order number. With **Send to kitchen immediately** it reads *Order sent* and says the order is on its way.

With **Hold for server approval** the page keeps itself up to date. It starts with *Order received* and says the server will confirm it shortly, and then changes on its own — without the guest refreshing anything — to either **Confirmed** or **Order not accepted**, with the reason the server chose. That matters: a declined order that looked identical to a cooking one would leave a guest waiting indefinitely for food that is never coming.



Items that were not available

If the guest ordered something that has since been marked unavailable, the rest of the order still goes through and the confirmation page lists what was left off. Without that, a guest who ordered three things and received two would have no idea which one was missing or why.

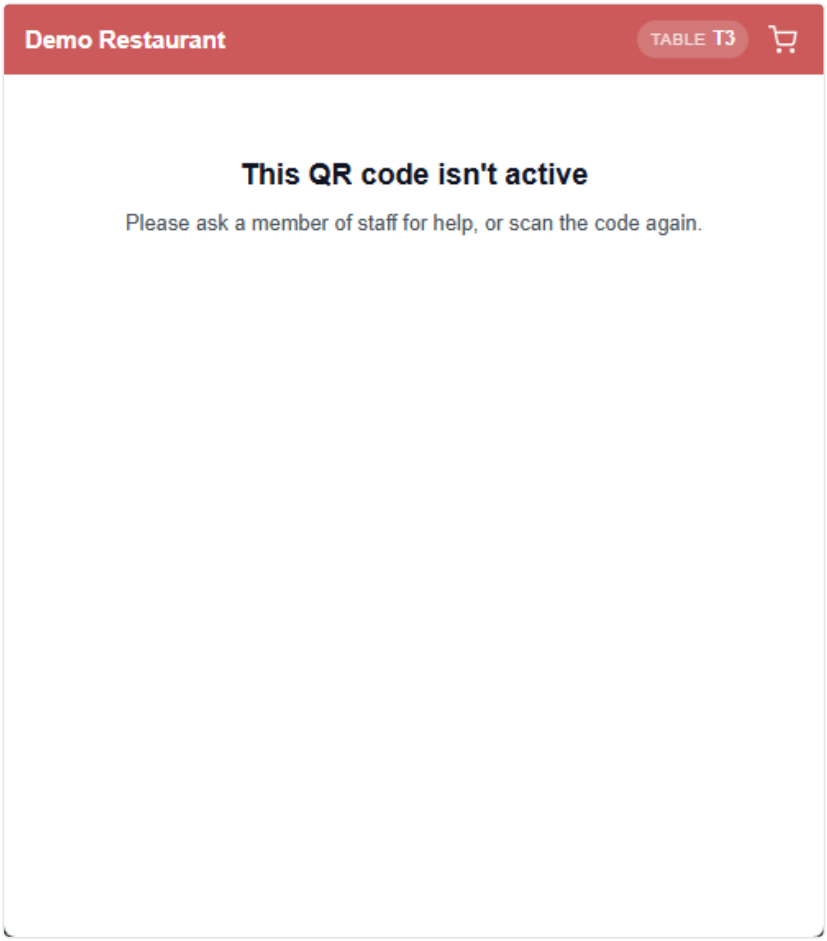
6. Ordering another round

The guest simply browses again and sends a second order. Because the table is still remembered, the new items are added to the same check as another round — the guest does not re-scan, and the server does not need to merge anything. The kitchen receives only the new items. In approval mode each round is approved on its own, and the table still ends the meal with one check. When the table pays online, each round is paid for and becomes a check of its own.

7. Paying

With **Pay At The Table (POS)**, the guest pays at the end of the meal as they always did — the server brings the check and settles it at the POS; ordering never asks for a card. If you also use QR pay at table, the printed check carries its own payment code. With **Pay Online Before Sending To Kitchen**, every order was paid when it was sent.

When something is wrong



A code that has been revoked, regenerated, or whose table no longer exists shows a short page asking the guest to check with a member of staff. Nothing is charged and nothing is sent.

> Print a one-line prompt on your table cards — *Scan to order · ask us if it doesn't open*. It sets the expectation and saves the guest waving at a passing server.

QR orders at the POS and in the kitchen

QR Table Ordering

View online ↗

How QR orders arrive, how rounds merge into one check, what prints, and how a server approves or declines a pending round.

A QR order is an ordinary order on an ordinary check. Servers can add to it, discount it, split it, transfer it, and settle it exactly as they would anything they rang in themselves. How QR orders arrive is set at **Back Office › Web Orders › QR Table Ordering**; see Setting up QR table ordering.

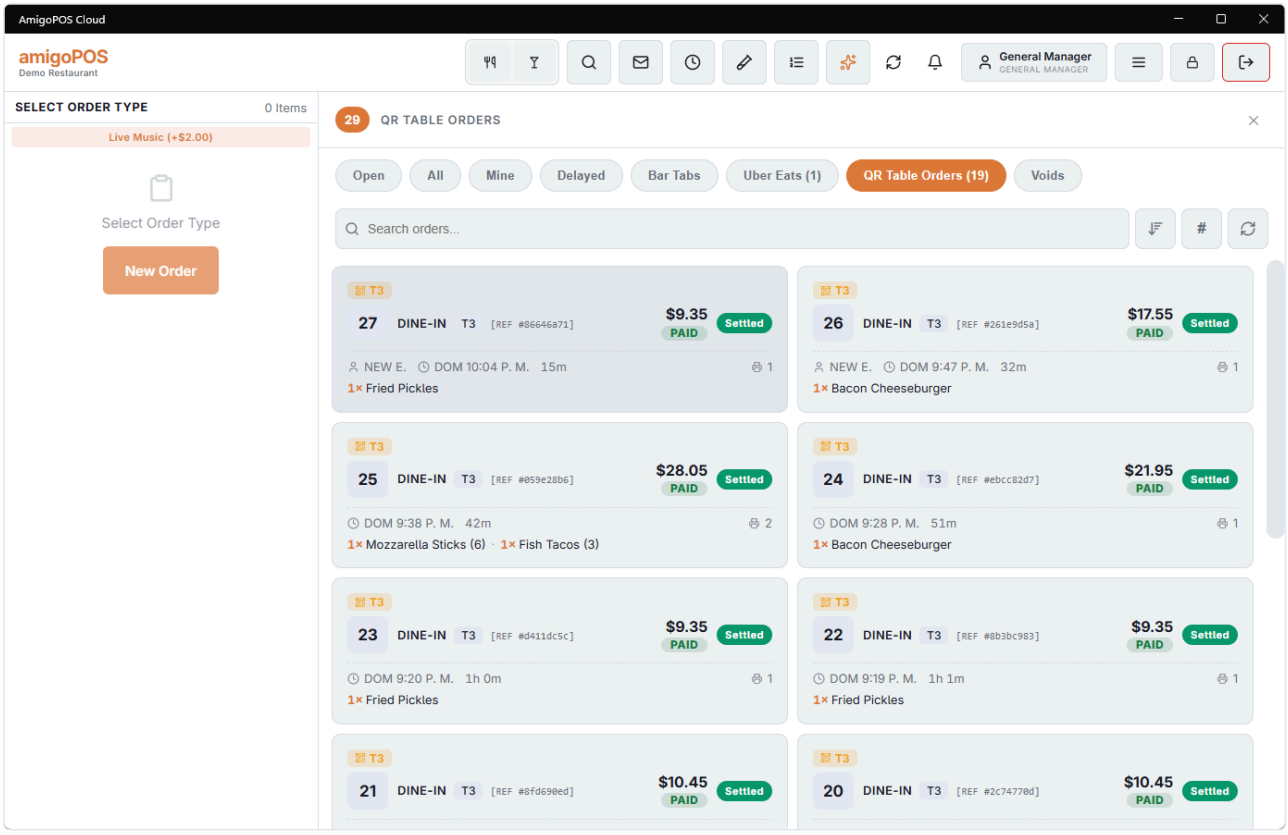
Where a QR order lands

With **Pay At The Table (POS)**, a table ends the meal with **one check**. Rounds are added to the check the guest already has rather than piling up as separate orders.

- **Send to kitchen immediately** — items are added to the table's open check, or a new check is started if there is none, and go to the kitchen right away.
- **Hold for server approval** — items are added to the same check but marked pending. They do not print, do not reach the kitchen display, and do not count toward the check total until a server accepts them.

With **Pay Online Before Sending To Kitchen**, each order is its own check, already paid. It reaches the kitchen once the guest's card payment succeeds, with no approval step; an order the guest never pays for is cancelled after the set time and never reaches the kitchen.

QR orders are easy to spot in the orders list: the card carries an amber badge showing the table name rather than the usual web-order globe.



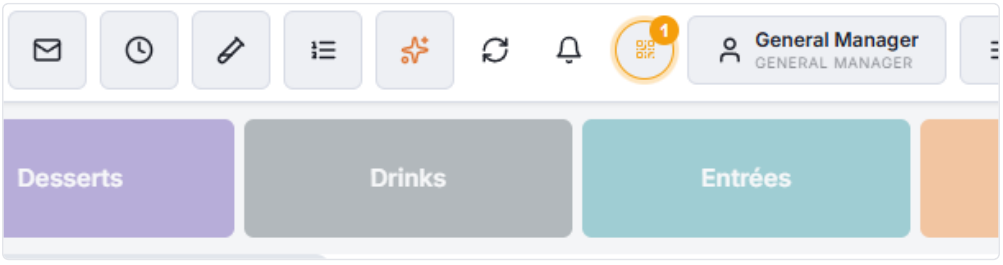
What prints

Prep tickets and labels print for the **new items only**. Each round is stamped as it is sent, so a second round never reprints the first. Your existing prep-station routing, label rules, and receipt settings all apply unchanged — there is nothing extra to configure for QR orders.

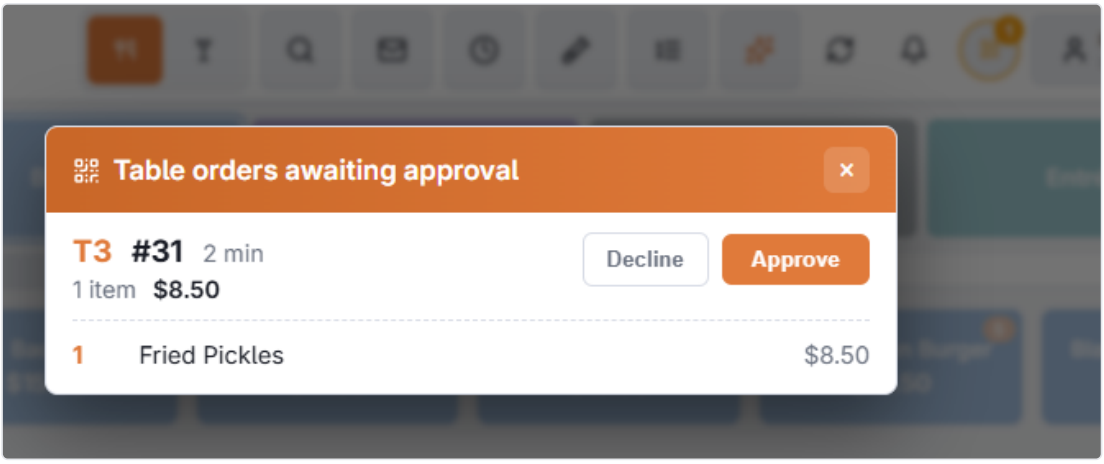
The guest's name rides along with the items so the line and the server can tell whose food is whose at a shared table.

Approval mode — approving and declining

When a round is waiting, an amber QR button appears in the POS top bar with the number of tables waiting. It only appears when there is something to deal with.



Tapping it opens the approval list. Each entry shows the table, the order number, how long the guest has been waiting, the name they gave, and every item they ordered with its modifiers — because the decision being made is whether to cook this, and a count and a total are not enough to decide on.



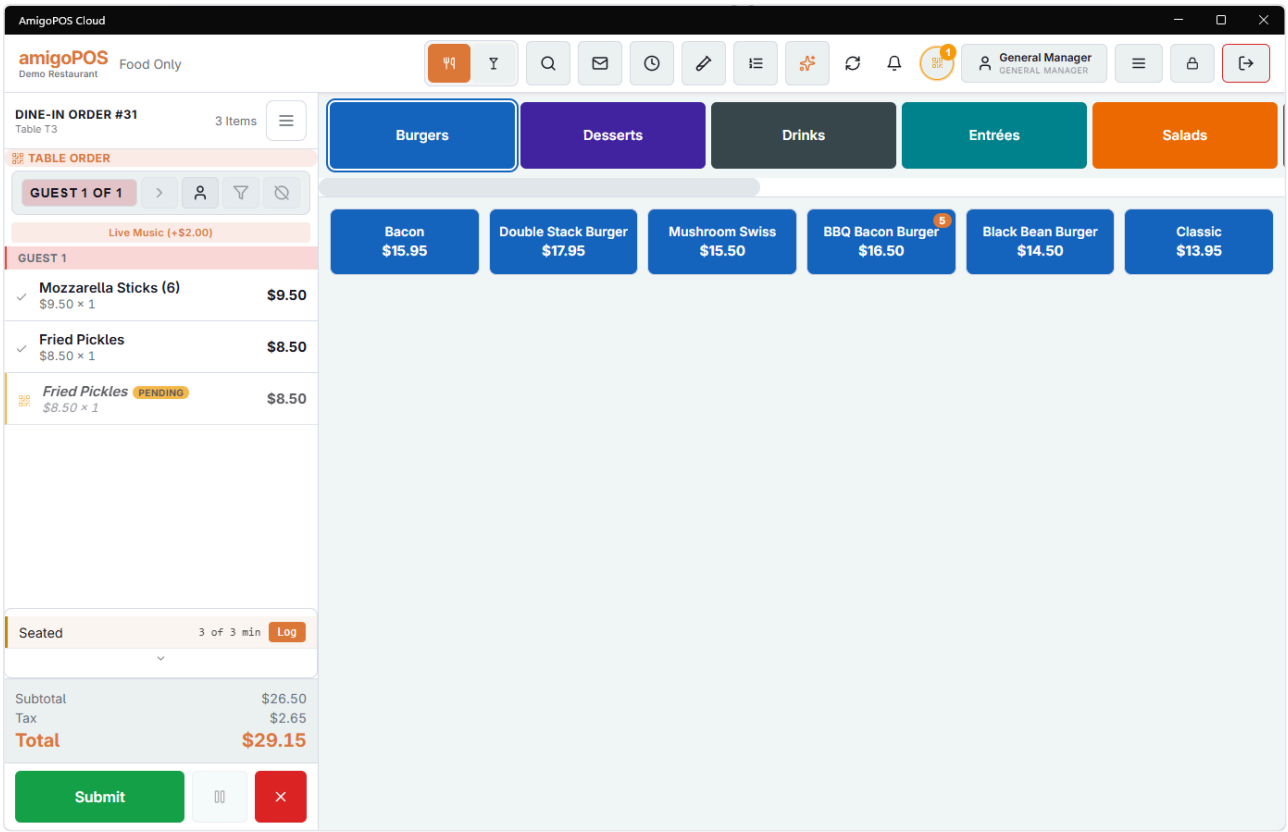
- **Approve** — the round is released. Prep tickets print, the kitchen display picks it up, and the items join the check total. Only the newly approved items are sent.
- **Decline** — the round is removed. The rest of the check is untouched, and nothing was ever sent to the kitchen or added to the total, so there is nothing to reverse.

Declining asks for a reason from a short list, plus an optional private note. **The reason you pick appears on the guest's phone**, which is why it is a list of guest-appropriate wording rather than a free-text box — staff shorthand belongs in the private note, which the guest never sees.

Everything updates on every station at once. A round approved on the bar terminal disappears from the server station's list immediately, so two people cannot approve the same round twice.

Pending items on the check

Recall a check with a pending round and those items are shown in amber italics with a *Pending* tag. They are on the check but not part of it yet: not printed, not on the kitchen display, not in the total. If a server voids a pending item before approving, it simply stops being pending and never reaches the kitchen or the bill.



> Review pending rounds quickly. A guest who tapped send and then waits several minutes with nothing happening will usually flag down a server anyway — which undoes the point of the feature. Agree a target with your team, something like “inside a minute”.

Good reasons to decline

- Alcohol ordered by a guest whose age you have not verified.
- An item that is 86’d and has not been marked unavailable yet.
- An obvious mis-tap — twelve of the same dessert on a two-top.
- The guest changed their mind before the round was approved.

The guest’s phone shows the reason you chose, but a word at the table is still worth it — especially for anything age-related.

Taxes and totals

Every round is taxed with the same rules as anything else on that order type, and the check total is recalculated as each round is accepted. The estimate the guest sees on their phone is exactly that — an estimate. The check at the POS is the authority, and it is what the guest pays.

Settling

With **Pay At The Table (POS)** nothing changes. The server prints the check and settles it at the POS with cash, card, gift card, or any other method you accept. If you want the guest to pay from their phone, print a check carrying the QR pay at table code. With **Pay Online Before Sending To Kitchen** the checks arrive paid, and there is nothing to settle.

Staff briefing checklist

1. Guests order from their own phone; rounds land on the table’s existing check automatically.
2. You can still ring items in yourself for the same table at the same time.
3. In approval mode, watch for the amber QR badge in the top bar and clear it promptly.
4. Read the items before approving — that is what the list is for.
5. Verify age before approving any round containing alcohol.
6. The decline reason you choose is shown to the guest; the private note is not.
7. Amber italic items on a check are pending and have not been cooked.
8. With pay at the table, the guest still settles with you; with pay online, QR checks arrive already paid.

QR table ordering — troubleshooting

QR Table Ordering

View online ↗

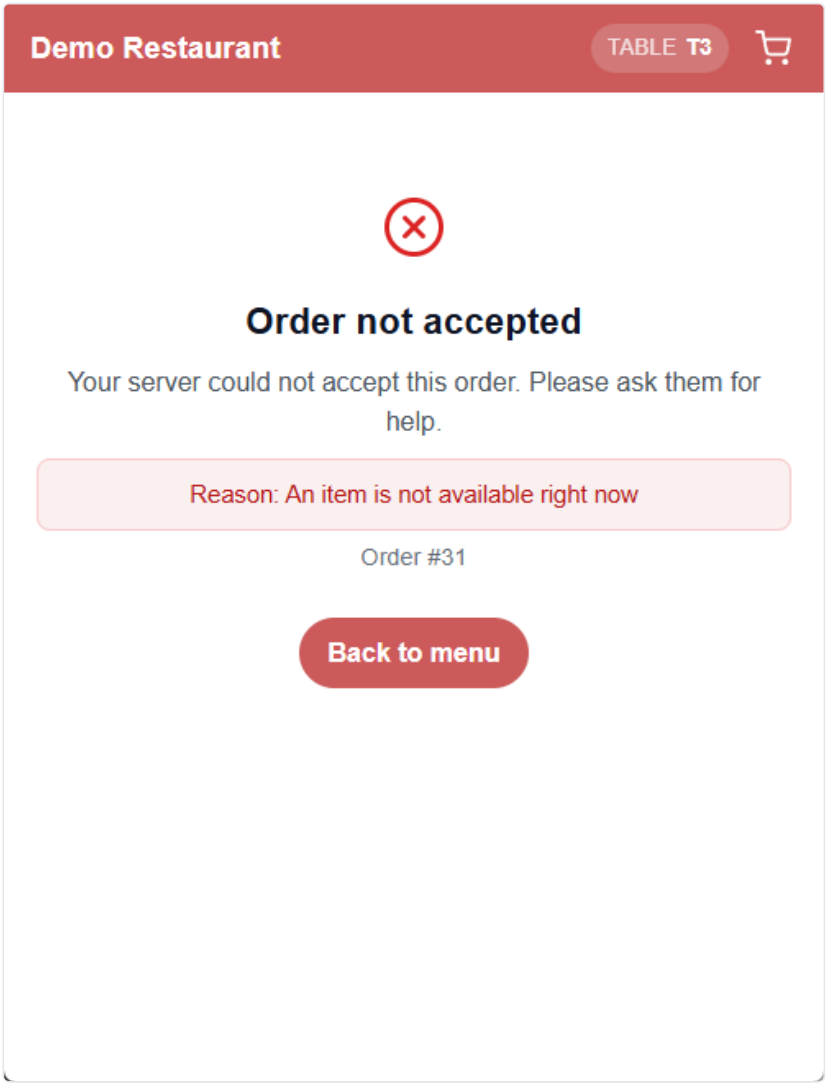
Fixes for the common problems: codes that will not open, orders landing on the wrong check, missing tables, and prep tickets that do not print.

Work through the symptom that matches. Most problems come down to the **Web ordering URL**, the seating chart, or the order type chosen on the Settings tab of **Back Office › Web Orders › QR Table Ordering**.

Scanning the code does nothing, or the browser cannot reach the page

- Check that the **Web ordering URL** on the Settings tab is the public address, spelled exactly, with `https://`.
- Open the address on a phone with Wi-Fi off. If it fails there but works on a computer inside the restaurant, the site cannot be reached from the internet — a local-network address never works for guests.
- If you changed the address after printing, the printed cards still point at the old one. Reprint the cards; the codes themselves do not need regenerating.
- Check the guest actually has a signal. Basement dining rooms and stone walls are the usual culprits; guest Wi-Fi solves it.

The guest sees “table not available”



The code opened but no longer points at a live table. One of these is true:

- The code was revoked on the Tables tab.
- The chart was regenerated and this is an old printed card.
- The table was deleted from the seating chart.

Check the table’s row on the Tables tab. If the link column shows *No QR code*, press **Generate missing** and print a replacement card.

A table is missing from the Tables grid

- You may be looking at another seating chart — check the picker.
- The element may be a decoration rather than a table. Only tables get a code; check it in the seating designer.
- The table may have been added after the page loaded. Press the refresh button in the toolbar.

The menu opens but the table is not remembered

The guest scans, your menu loads, and everything behaves like an ordinary web order — pickup and delivery options appear, and no table shows at the top.

Almost always the address is `http://` rather than `https://`. A browser does not keep the table on an insecure address, so every later page looks like a first visit. Fix the certificate, update the **Web ordering URL** on the Settings tab, save, and reprint the cards.

The order went to the wrong check

- The wrong card is on the table. Compare the table name on the guest's screen with where they are sitting; cards get swapped when tables are wiped down.
- A guest who moved tables mid-meal is still on the first table. Have them scan the new table's code — the newer scan wins.
- A guest joined a check they should not have. The prompt names whoever started it, so a guest who does not recognise the name should choose **Start a new check**. Ask the team to mention it when seating a table that has just turned.
- An uncleared table's check took the next party's order. Settle checks promptly, and shorten **Stop joining an idle check after (minutes)** on the Settings tab so a forgotten check stops accepting orders sooner.

A guest is not asked which check to join

That is correct for a phone already on the check — only a device the check does not know is asked. It is also what you see when testing with two tabs on one phone or two windows of the same private session, because they share one browser identity. To test the prompt, use another device, another browser, or a fresh private session with all other private windows closed first.

The guest says their order was refused

Their phone shows the reason a server picked when declining. If the wording seems wrong for what happened, check which reason staff are choosing — the list is written for guests, and the private note beside it is the place for anything internal.

Nothing printed in the kitchen

- With **Hold for server approval**, the round is waiting for a server. Look for the amber QR badge in the POS top bar; pending items also show in amber italics on the check. Nothing prints until they are approved.
- With **Pay Online Before Sending To Kitchen**, the order is sent only after the guest's payment succeeds. An order the guest did not finish paying is cancelled after the time set on the Settings tab.
- Check the order type on the Settings tab. Kitchen routing follows the order type, so a type with no routing prints nothing.
- Check the kitchen printer is online with your normal printer test.

A second round reprinted the whole check

It should not — each round is stamped as it prints and only new items go to the line. A full reprint is almost always a manual reprint of the whole order from the POS rather than the QR round itself.

Printing reports a missing address

Enter the web ordering URL in Settings before printing. means the **Web ordering URL** on the Settings tab is empty. The cards and the sheet cannot be built without it, because the codes would point nowhere. Fill it in, save, then print.

Prices or tax on the phone do not match the check

The phone shows an estimate. Time-based pricing, event pricing, discounts and per-check tax rules are applied at the POS, so the check is what counts. Large gaps usually mean the QR order type is not the dine-in type you intended — check the Settings tab.

Guests are ordering from outside the restaurant

A code is a link, so anyone with a photo of one can use it. If it becomes a problem, regenerate the affected chart and reprint, switch to **Hold for server approval** so a person sees every order (or to **Pay Online Before Sending To Kitchen**, so every order is paid first), and keep cards on the tables rather than in windows or on menus that leave the building.

> Still stuck? Note the table name, the time and what the guest saw on their phone before contacting support — those three details solve most cases at once.

CHAPTER 9

Manager Functions

AI assistant

Manager Functions

View online ↗

Where the assistant lives on the manager screen, who can open it, and what it can do.

The AI assistant lets you work by typing or speaking a plain request instead of navigating to the right editor — *86 the ribeye*, *raise all draft beers by 50 cents*, *what were yesterday's sales?*, *clock out*. It reads your store's live data, and it never applies a change without showing you a preview first.

Opening it

Open **More › Assistant** at the register. It follows manager permissions, so cashier-level sign-ins do not see it. Every time you open the assistant you start a fresh conversation — each request is answered from the store's current data, never from an earlier chat.

What it can do

- Answer questions about sales, labor, inventory and purchasing.
- Change menu and operational settings, with a preview and confirmation on every change.
- Work the open order — add items with modifiers, print, void with a reason, settle cash.
- Open screens and records by name, so *clock out* takes you to the time clock.
- Speak its replies, if the voice toggle in the assistant header is on.
- Email you the answer to a question on a schedule.

> Each of these has its own topic under **AI Assistant**, including a page of sample prompts worth reading once.

Opening the manager screen

Manager Functions

View online ↗

Where the manager tools live, who can see them, and how to choose which buttons appear.

The manager tools sit in the manager section of **More** at the register. Everything a manager does mid-service without leaving the floor is there: end of day, reports, drawer counts, banking, counters, price events and the logs.

Who sees it

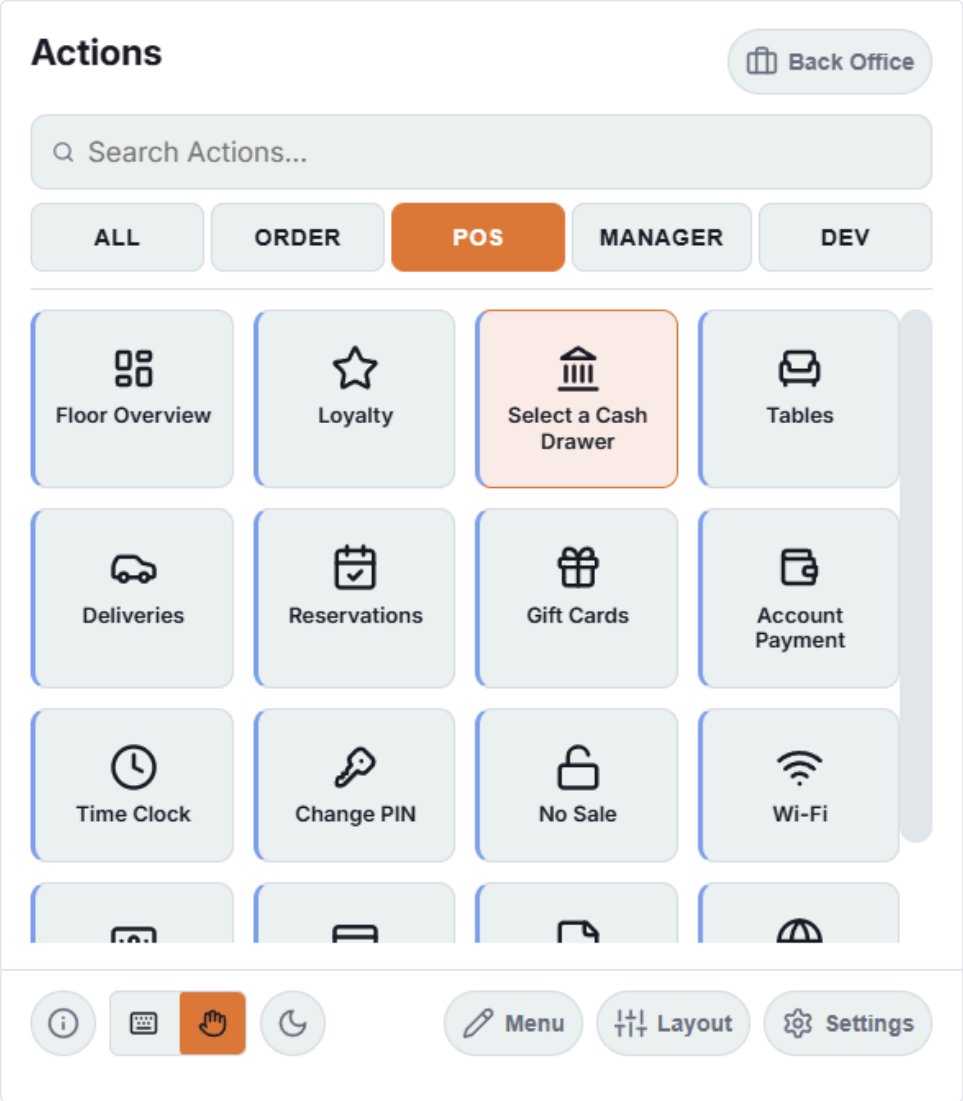
The section only appears for a signed-in user whose job carries the manager permission. It is not a separate login — you stay signed in as yourself, which is what makes the audit trail worth reading afterwards.

Some tools inside have a permission of their own on top of it: **End of Day**, **Reports**, **Reset Drawer**, **Cash Drops** and **Change Drawer Start Amount**. A job with the manager permission but without one of these is asked for another manager's approval for that tool. Money totals are gated separately too, so a shift lead can be given the manager screen for counters without being shown the day's takings. See Jobs, roles, and permissions.

Choosing the buttons

Back Office › Store Setup › Manager Screen › Buttons turns six of the buttons on or off for each station: Cash Drawers, End Of Day, Reports, Cash Drops, Employee Banking and Shut Down. Set them in Back Office on the register itself; other stations are not affected. A station that should never run End of Day, for example, is best without the button. See Manager screen and buttons.

> A manager function you expect and cannot see is nearly always one of two things: the button is switched off for this station, or the permission is on a job the user did not sign in under. See **Troubleshooting › A permission you enabled is not taking effect**.



Reports overlay (mini reports)

Manager Functions

View online ↗

Two dozen printable reports for the current business day or any date range, without leaving the register.

The reports overlay prints the operational reports a manager needs mid-shift on the receipt printer — the kind you sign and put in the drawer, not the kind you analyse.

Opening it from **More › Reports** needs the **Reports** permission (Manager Screen group); without it, a manager approves.

Using it

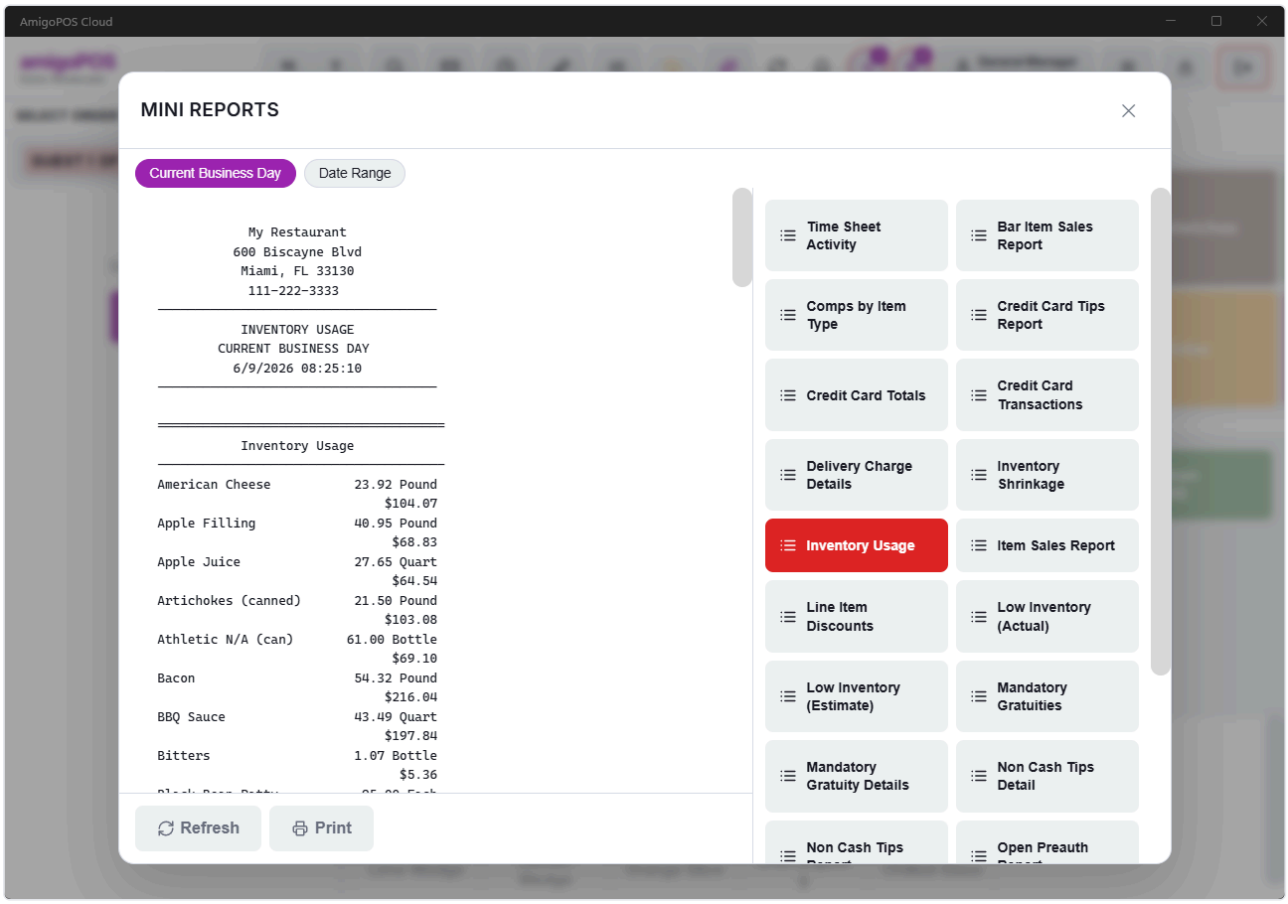
1. Pick a report from the list on the left.
2. Choose **Current business day** or switch to **Date range** and set the dates. Current business day follows the store's business day, so at 1am a late bar still gets tonight's trading, not an empty new day.
3. **Refresh** re-runs it; **Print** sends it to the receipt printer bound to this station.

What is available

Around two dozen reports, including credit card totals, transactions and tips; non-cash tips summary and detail; mandatory gratuities; order voids and refunds; comps, line-item discounts and price changes; permission overrides; item and bar item sales; delivery charges and surcharge details; open pre-authorisations; timesheet activity; and inventory usage, shrinkage and low-stock lists.

If Print reports that no printer is bound, this station has no receipt printer assigned — see **Hardware & Printing**. The report itself is fine; only the delivery failed.

These are printed summaries. For charts, comparisons and exports, use **Analytics** in the back office instead.



The pre-EOD summary

Manager Functions

View online ↗

A readiness check and a full picture of the day, run before you close so problems are still fixable.

The pre-EOD summary answers one question: is this day ready to close? Run it before you open end of day, while there is still time to fix what it finds.

Readiness

It runs the closing checks and shows either **ready**, with a shortcut straight into end of day, or **not ready** with what is outstanding. These are the same conditions that block the end-of-day button, surfaced early rather than at the moment you wanted to close.

The day in sections

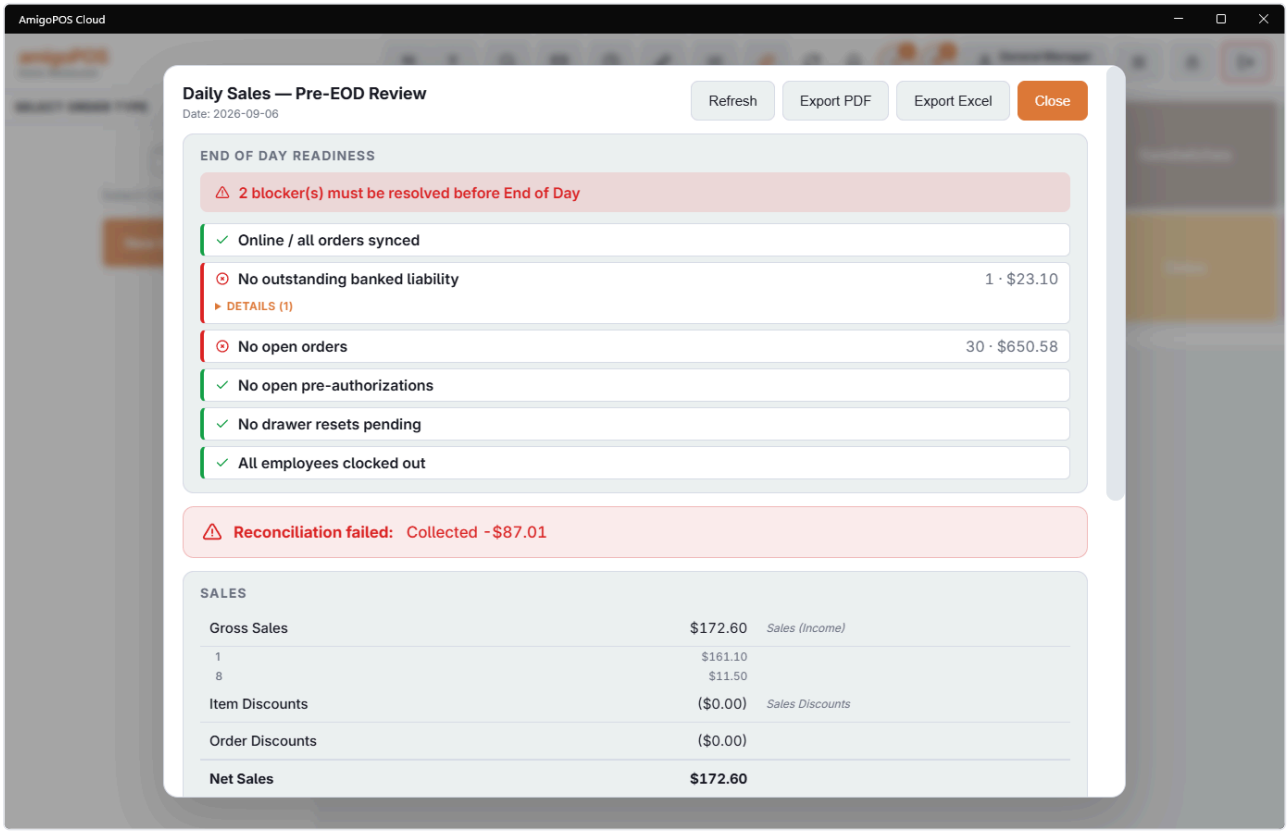
- **Sales** — the same waterfall the end-of-day report prints: gross sales by item type, item and order discounts, net sales, gift cards sold as a liability line, tax, gratuities, amount due, tips collected. Comped lines are shown but kept out of gross.
- **Payments** — the mix, with a breakdown per card terminal including batch, amount, tips and count. This is what you reconcile against the processor's batch report.
- **Cash reconciliation** — float, cash sales, payouts and drops, giving expected against counted and the variance. Payouts and house-account activity are itemised, so a variance usually explains itself here.
- **Notes** from the day.

The banner above the sections is the end-of-day report's own verdict on the day so far — *every check ties*, or the checks that fail with the order numbers behind them — so a line-versus-total problem on one order shows up here, an hour before the close, with the order to look at.

Taking it away

Export to **PDF** or **Excel** — the PDF for the folder or the owner, the spreadsheet when someone wants to check the arithmetic. Refresh re-runs it against the current moment.

> Make this the routine: pre-EOD summary, fix what it flags, then end of day. Almost every "we cannot close" call is something this screen would have shown an hour earlier.



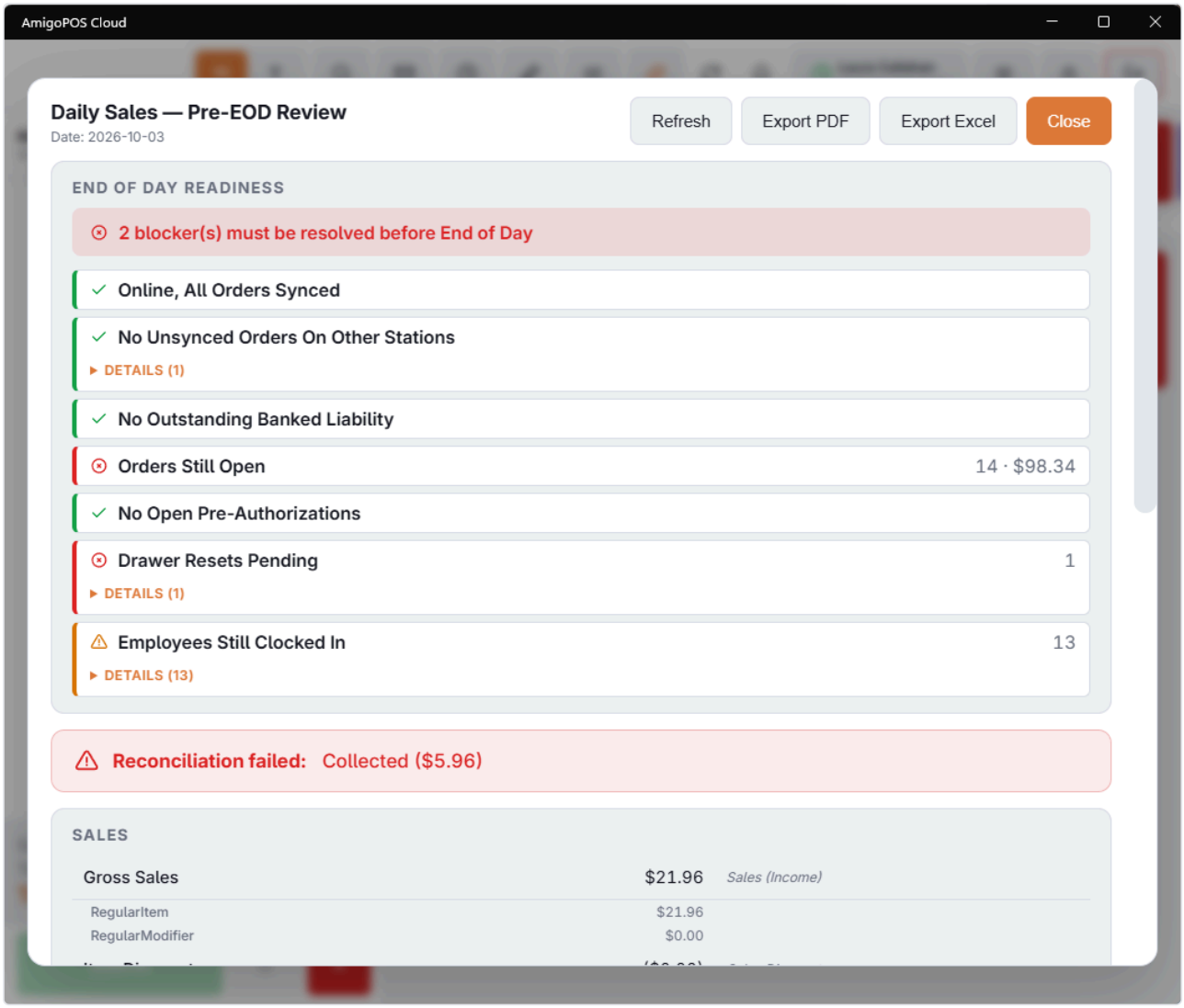
Same numbers as the close

The sales, payments and cash sections are built from the end-of-day report model for the day still open, so gross, net and the drawer's expected figure mean exactly what they will mean on the slip and in the stored report after the close. Refresh rebuilds them from the orders as they stand. The PDF and Excel exports on this screen come from the accounting view of the day — the one the QuickBooks transfer posts — whose gross includes gift cards sold and treats comps as discounts; the net agrees, the gross can differ by exactly those two items. See The end-of-day report for the definitions.

Reading the readiness rows

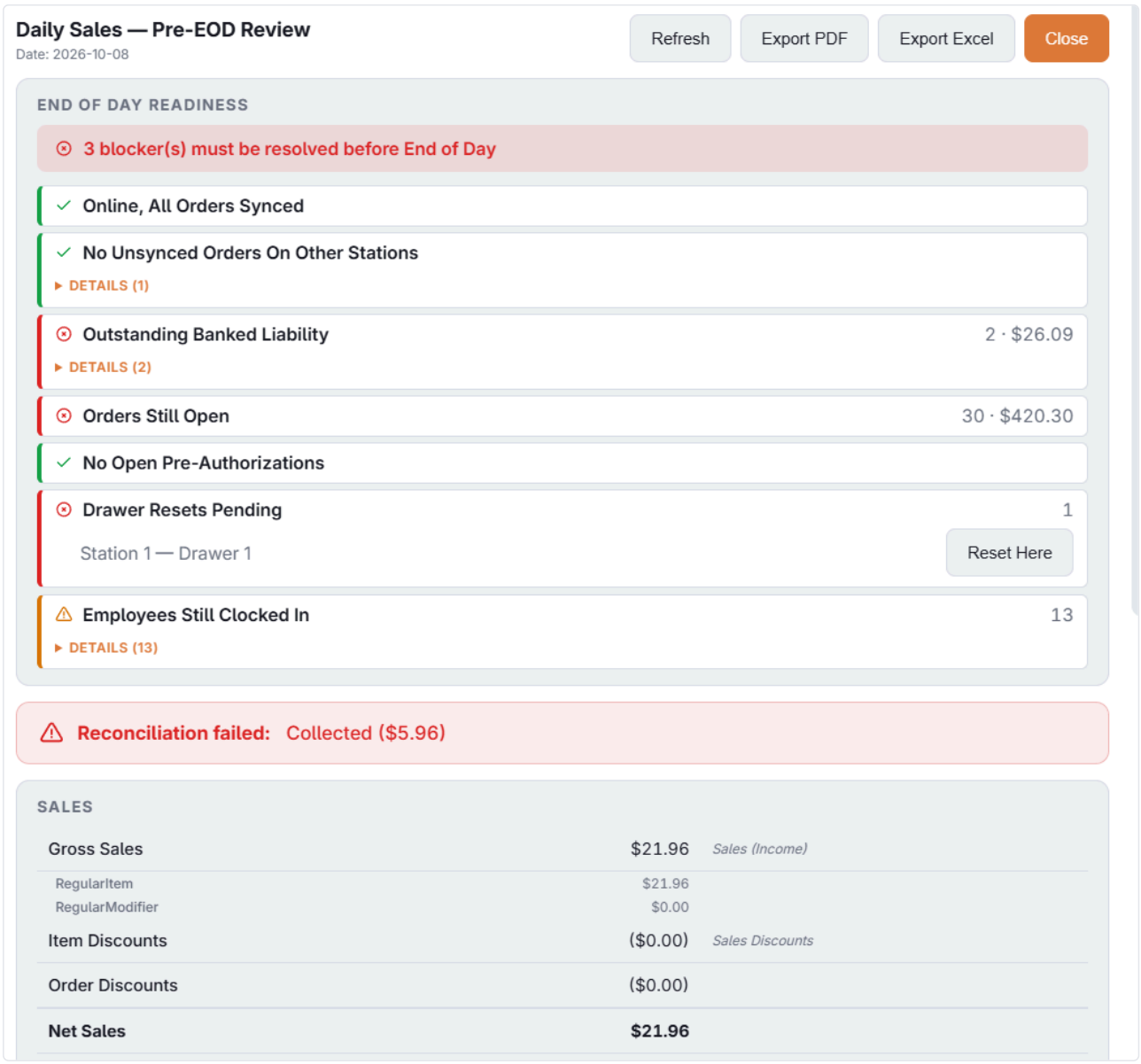
Each readiness row says what is true right now. When a check passes it shows the all-clear, with a green tick — **No Drawer Resets Pending**. When it doesn't, the row names the problem itself — **Drawer Resets Pending** — so the row never reads like good news while showing a problem.

- A **red circled X** blocks end of day. The banner above uses the same icon and says how many blockers there are.
- An **amber triangle** is worth checking but doesn't block — **Employees Still Clocked In**, for example.
- A station that is offline shows **This Station Is Offline**; orders it hasn't sent yet show **Unsynced Orders On This Station**.



Resetting a drawer from here

When **Drawer Resets Pending** shows, each drawer that is waiting is listed under it on a row of its own, with a **Reset Here** button. It closes the summary, opens Cash Drawers on exactly that drawer — also when the drawer belongs to another station — and brings you back to the summary afterwards, read again, so a drawer you have just reset is gone from the list.



This is how to clear a drawer whose own station is broken, switched off or gone. Count the cash that is in that drawer; only the screen you do it on is different.

Running end of day

Manager Functions

View online ↗

What end of day checks before it will run, what it asks for, and what it does when it does run.

End of day closes the trading day: it produces the end-of-day report, archives the day's orders, and writes the business day into the log. Open it from the manager section of **More**.

What it shows before you run it

The overlay opens on the day's position — the time of the last end of day, open orders and their value, open pre-authorisations, settled orders, transaction and void counts, then subtotal, tax, discounts, cash paid out, delivery charges, gratuities, surcharges and the grand total. Stores that would rather staff did not see takings can hide the totals and leave the button.

What blocks it

When the run button is missing, the overlay lists the reason in its place. Each of these is a setting, so a store can decide which are hard stops:

- **Open orders** — settle or void them first.
- **Open pre-authorisations** — bar tabs and similar that were authorised but never captured. Capture them, or the money never arrives.
- **A drawer still needs resetting** — the message names the station and drawer.
- **An employee still holds banked orders** — named, with the count and balance. They have to bank in before the day can close.

> Do not close the store around a blocked end of day. Every one of these blocks exists because running past it loses money — an uncaptured pre-authorisation or an unbanked server is cash that will not be there tomorrow.

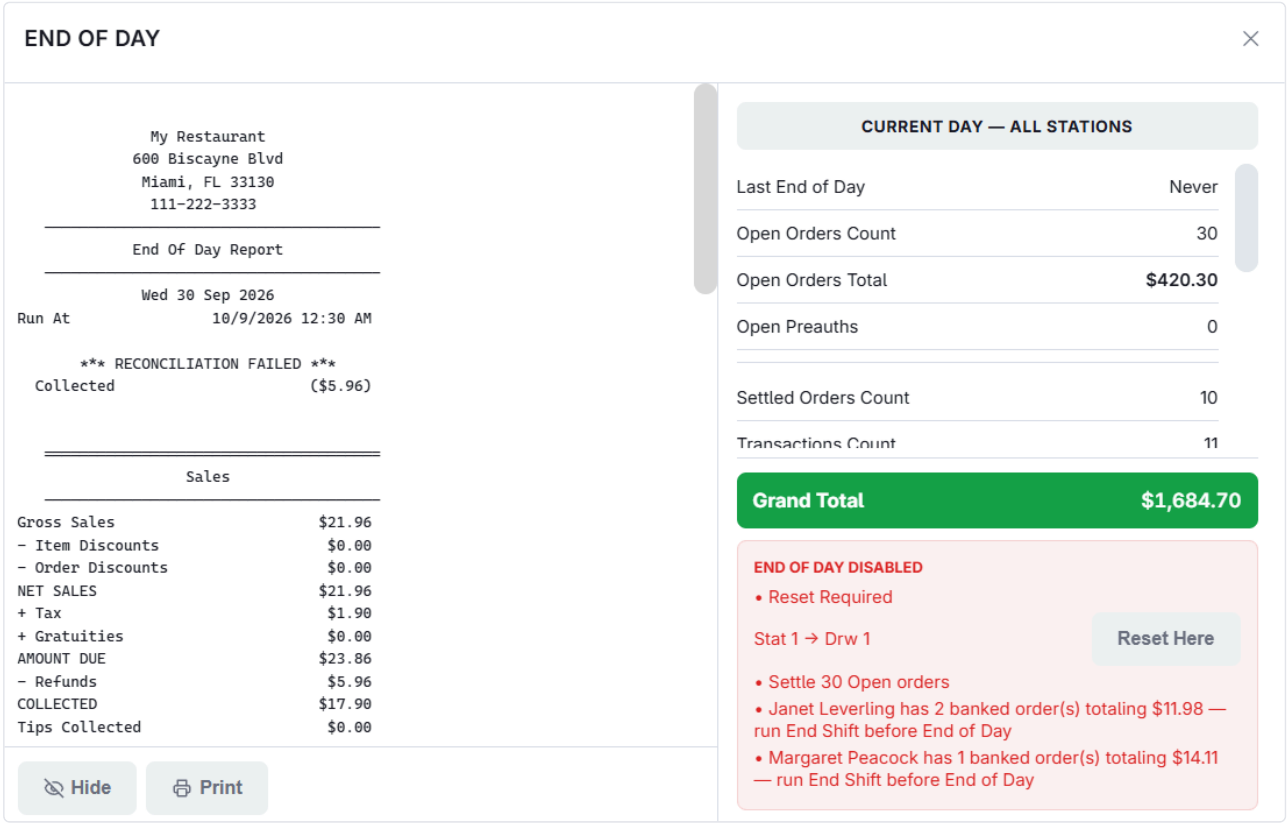
Running it

1. Optionally record the **weather**, the **temperature** and any **special event**. These sit alongside the day's figures and are what make a year-on-year comparison mean something.
2. Add **notes** — a power cut, a walkout, a coach party.
3. Confirm. The report is built and printed unless printing is suppressed, and can be emailed automatically; drawer reset reports can be included in either.

Running it needs the **End of Day** permission: without it, **Run End of Day** asks a manager to approve. Opening the overlay and reading its totals needs no approval.

> The number printed under the header is the store's consecutive end-of-day count, so a gap in the sequence means a day was never closed.

> Run **the pre-EOD summary** before this. It answers whether the day balances while you can still do something about it.



What prints and what is emailed

The slip that prints at the close is a **Z summary** of the store's end-of-day report: the verdict line first (*EVERY CHECK TIES*, or *DOES NOT TIE* with the orders that don't), then the sales waterfall from gross to collected, tax, tenders, cash and each drawer's expected, declared and over/short, discounts and other markdowns, sales by order type and by server, and an *Attention* block — refunds, hand-entered price changes, large discounts, manager overrides, staff still clocked in. It is the part of the full report a manager needs in hand tonight; everything else is in Back Office.

The end-of-day email now carries the full report as a **PDF attachment**, with the slip text in the message body so the headline numbers read on a phone. The recipients are the ones already set for end-of-day email; nothing to change.

> A store that wants the older 32-column text back can switch on **End Of Day Legacy Text Report** in All Program Settings. The new report is still stored either way.

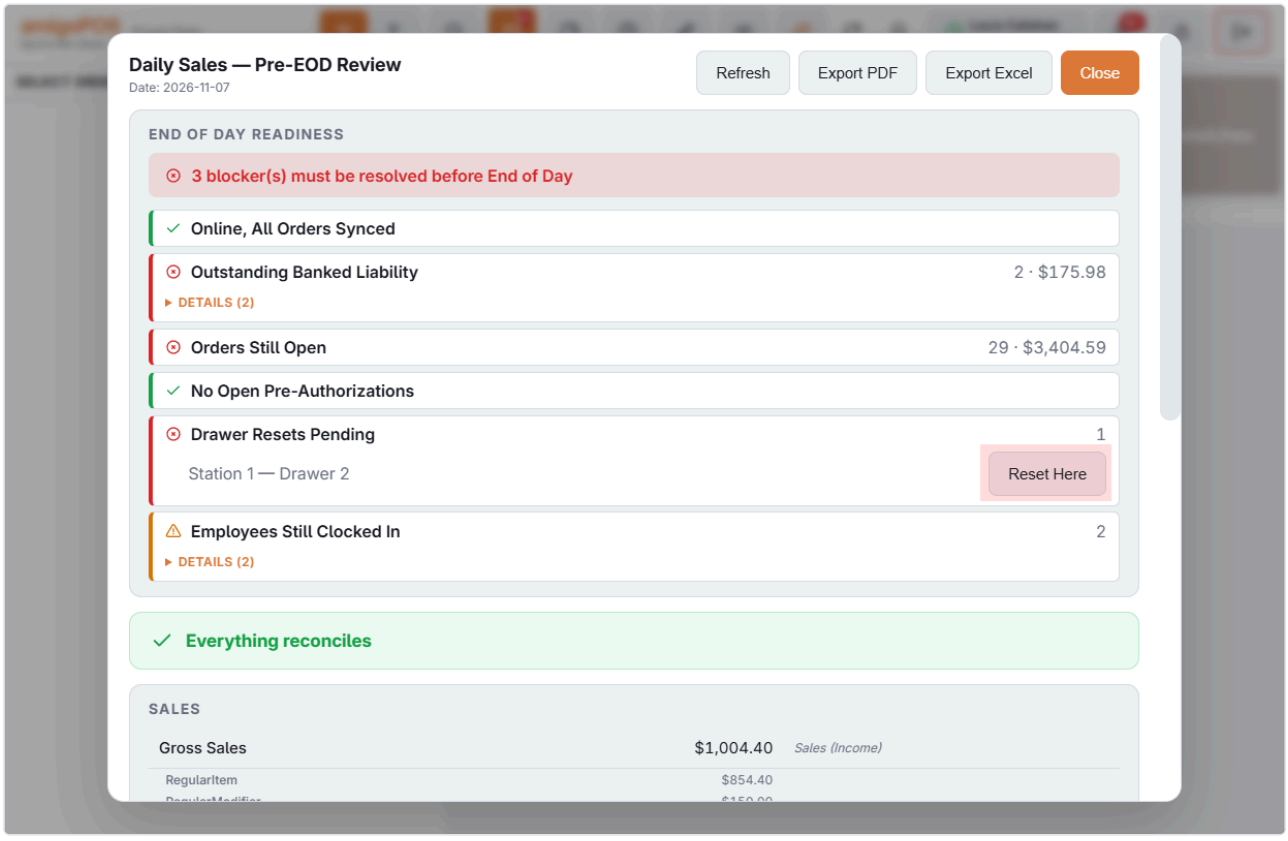
The close also stores the day's report. It never needs rebuilding; see The end-of-day report for reading it, the checks it runs on itself, and what to do when a day does not tie.

Card authorizations waiting for a tip

With DC Direct in pre-auth mode, card payments still **To Capture** count as open pre-authorisations here. Capture them on **More › Credit Cards** (**Enter Tips**) before running the day. See **Table service: authorize, then capture with the tip** in Integrations › DC Direct.

A drawer still needs a reset

When drawers are waiting for a reset, End Of Day lists each one on a row of its own with a **Reset Here** button — whether your store lets that block the close or only warns about it. Reset Here closes End Of Day, opens Cash Drawers on exactly that drawer, and returns to End Of Day when you close it. The reset needs the **Reset Drawer** permission, or a manager's approval.



The reset belongs to the drawer, not to the station, so the drawer of a station that is broken or gone can be counted and reset from the station you are closing on. The same button is on The pre-EOD summary.

The business day and when it rolls over

Manager Functions

View online ↗

Why a 1am sale belongs to yesterday, which setting controls it, and what it affects.

A restaurant day does not end at midnight. The **business day start** setting (**Back Office › Store Setup › General Settings**) is the time your day rolls over — set it to 04:00 and everything rung between midnight and 4am belongs to the day before.

What it affects

Nearly everything that says "today": the current-business-day mode in the reports overlay, the audit trail, the labor overlay, the pre-EOD summary, timesheets, and the back-office reports and dashboards. Set it once, correctly, and these agree with each other. Leave it at midnight in a late-night venue and every one of them splits your busiest hours across two days.

Choosing a time

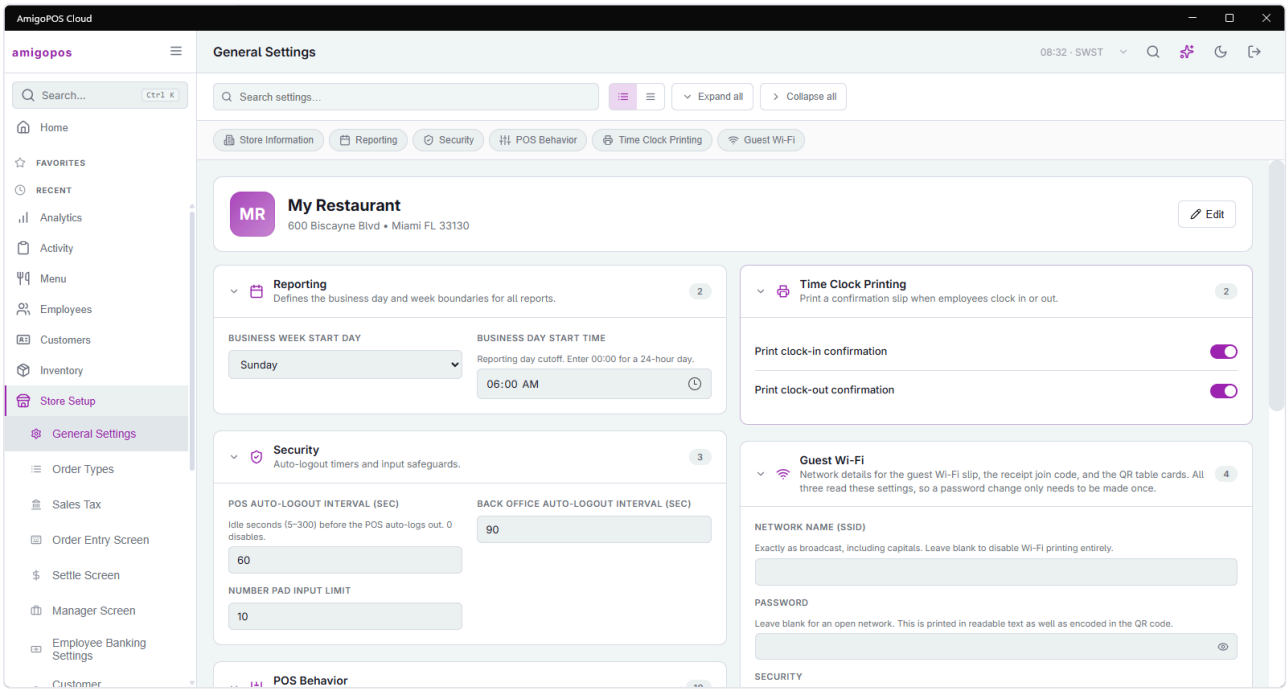
Pick a time when the store is reliably empty — an hour or so after the latest you ever serve. Too early and late trading lands on tomorrow; too late and an early delivery lands on yesterday.

> Changing this setting does not move sales that were already recorded. It changes how future days are grouped, so change it between days, never mid-service.

When end of day and a report disagree

End of day belongs to the business day it closes. Dashboards and summaries group by when each order was settled, shifted by the same business day start. That is the same boundary, so the two agree — as long as the report's range is the range you think it is. Dashboards and summaries show the exact window they cover; read it before concluding the numbers are wrong.

> A day that closed late — end of day run at 3am for a day that started at 4am the previous morning — is still one business day. It is the run time that looks odd, not the day.



Coupons log

Manager Functions

View online ↗

Every coupon presented today, and how to release one that was redeemed by mistake.

The coupons log lists the coupons presented on this business day: the order, the code, its description, the amount it took off and whether it is **redeemed** or still **active**.

Two actions

- **Unredeem** — releases a coupon so it can be used again. This is the fix when a coupon was scanned onto the wrong check, or the order it was used on was voided.
- **Disable** — kills a coupon permanently. Use it for a code that is being abused or was printed in error.

> Unredeeming does not put the discount back on the check. It only frees the coupon; the order is corrected separately.

> Coupons themselves — how they are created, printed and scanned — are covered under **Discounts & Promotions**.

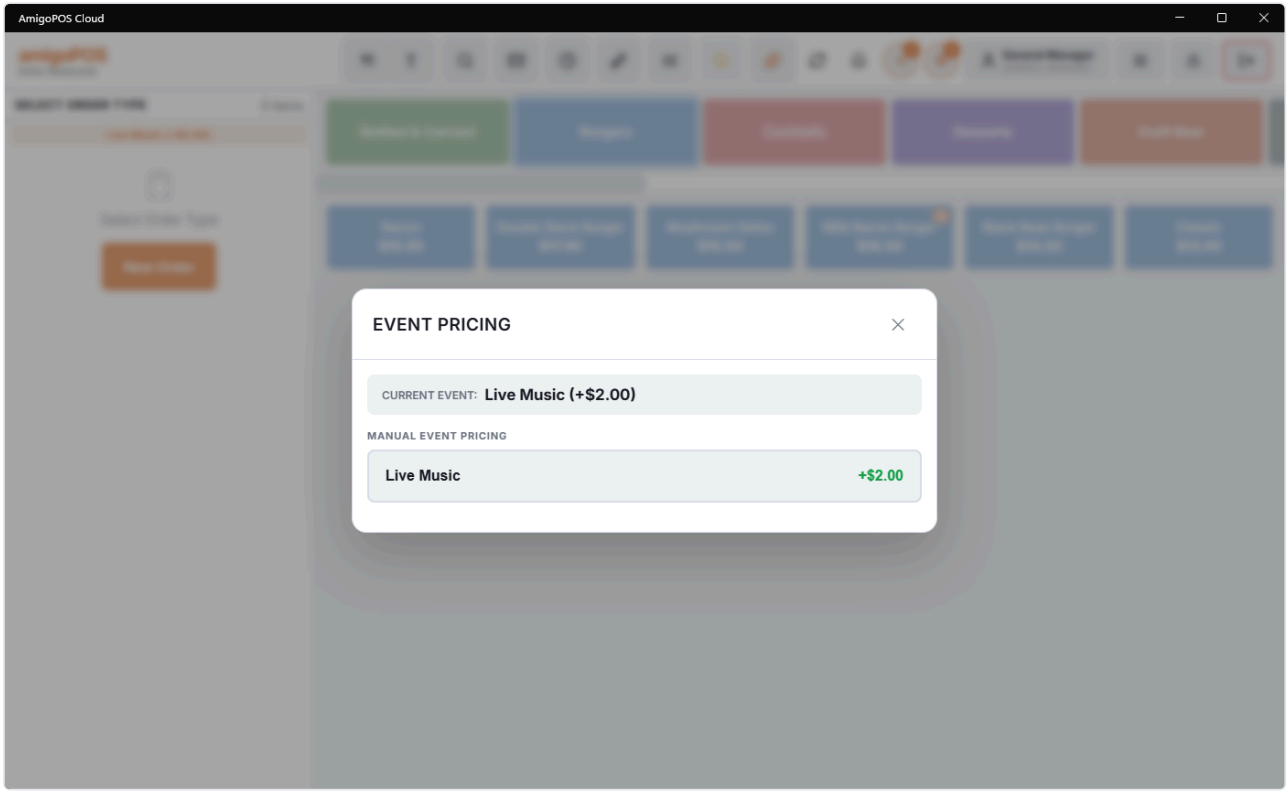
Event pricing overlay

Manager Functions

View online ↗

See and control the active price event from the POS.

The **event pricing overlay** (More › Event pricing, manager section) is the register-side switch for *manual* pricing events — the pre-configured bumps a manager turns on when the moment arrives.



Using it

The overlay lists the events configured to **show on the manager screen**, each with its amount, menu scope, and current state. Tap to activate; the bump applies to every subsequent order (items and categories excluded from event pricing excepted), and each affected line is labeled with the event so the price change explains itself on the check. Tap again to end it. Events flagged **disable at end of day** can't outlive the business day even if nobody remembers to turn them off.

Where it fits

- Automatic events (with time windows) run themselves — they don't need this overlay and typically don't appear on it.
- The classic manual uses: the band actually started, the game went to overtime, the cruise ship docked — moments a schedule can't predict but a manager can see.

- Configuration — creating events, amounts, scopes — is *Special and event pricing* in the back office; this overlay only arms and disarms.

Menu item counters overlay (86 from the register)

Manager Functions

View online ↗

Set how many of an item are left, and clear the counters at the end of service.

A counter is a countdown on a menu item: twelve specials, and the register keeps track as they go out. When the count reaches zero the item stops being sellable, so nobody rings the thirteenth.

Setting one

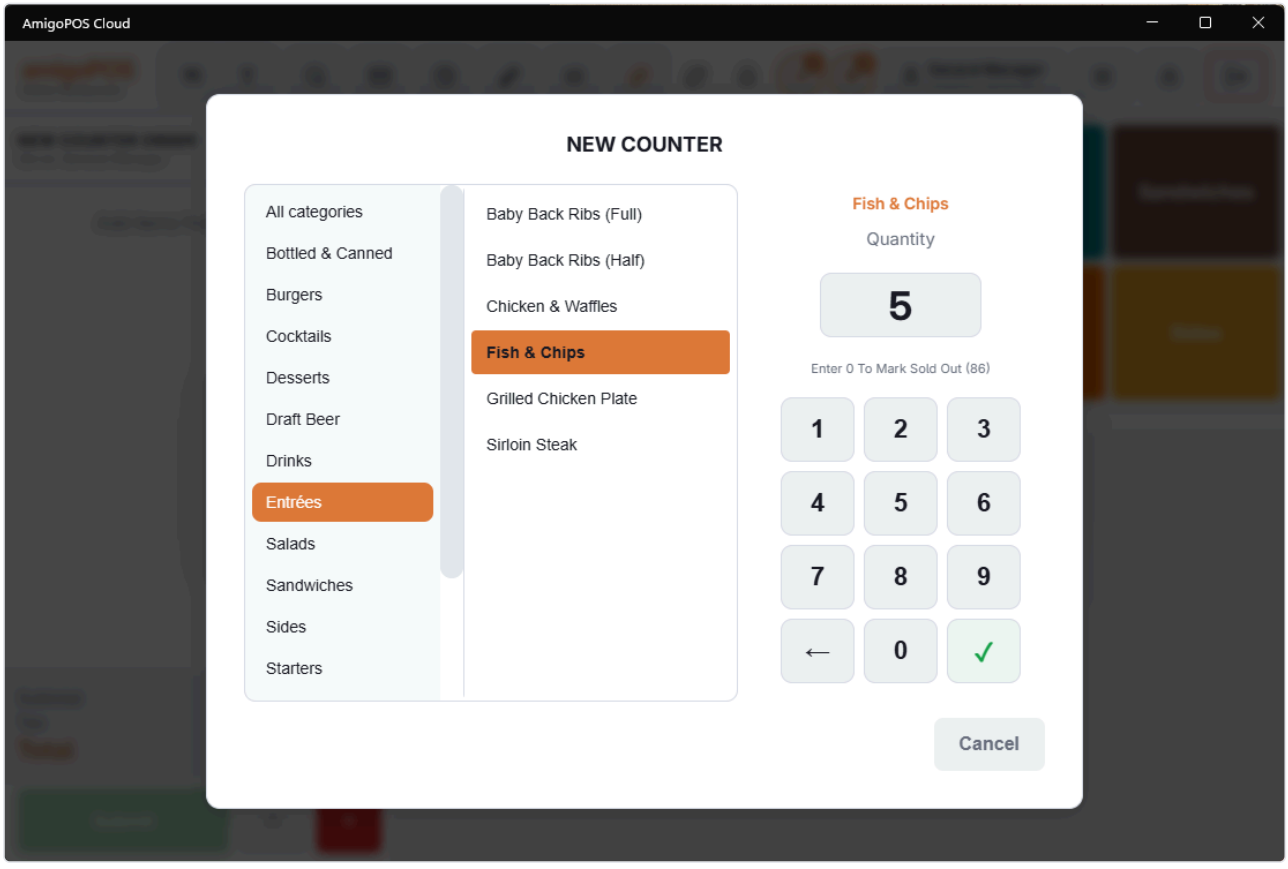
1. Open the counters overlay from the manager section of **More**.
2. **New**, then filter by category or search for the item.
3. Enter the quantity available and confirm.

The overlay lists everything currently counted, so it doubles as the answer to "what are we running low on?" mid-service. Tap a counter to change its remaining quantity; enter 0 to mark it sold out (86).

Clearing them

Clear all removes every counter at once, which is the normal end-of-service action — tomorrow starts with everything available. It asks for confirmation because there is no undo. With **Delete menu item counters at end of day** on (Store Setup › Order Entry Screen › Settings), End of Day clears them for you.

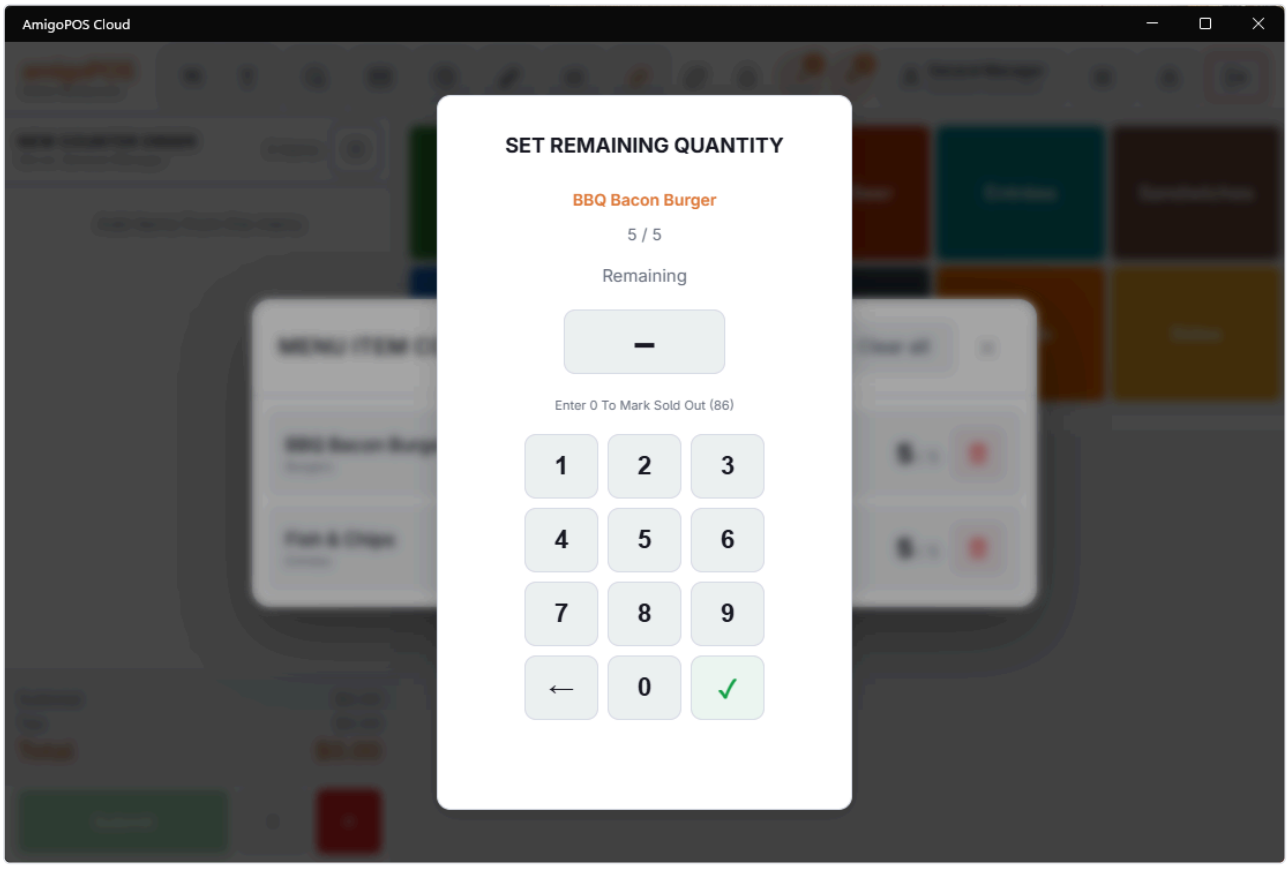
> A counter set to zero and a counter cleared are not the same thing. Zero means sold out; cleared means not being counted at all, which is unlimited.



Sold out, and the counters switch

Zero is a valid quantity. Entering 0 on a new counter creates it already sold out; entering 0 on an existing one 86s the item on the spot. Restocking above the original start raises the start too, so the button shows the new total.

Counters only take effect on the order screen while **Menu item counters enabled** is on in Back Office › Store Setup › Order Entry Screen. Counters created while it is off are kept but ignored: no badge on the button, no 86. The overlay shows a banner in that case with an **Enable** button, so a manager can switch it on from the register.



Labor efficiency overlay

Manager Functions

View online ↗

Labor cost against sales right now, per employee, so you can cut before the shift is over.

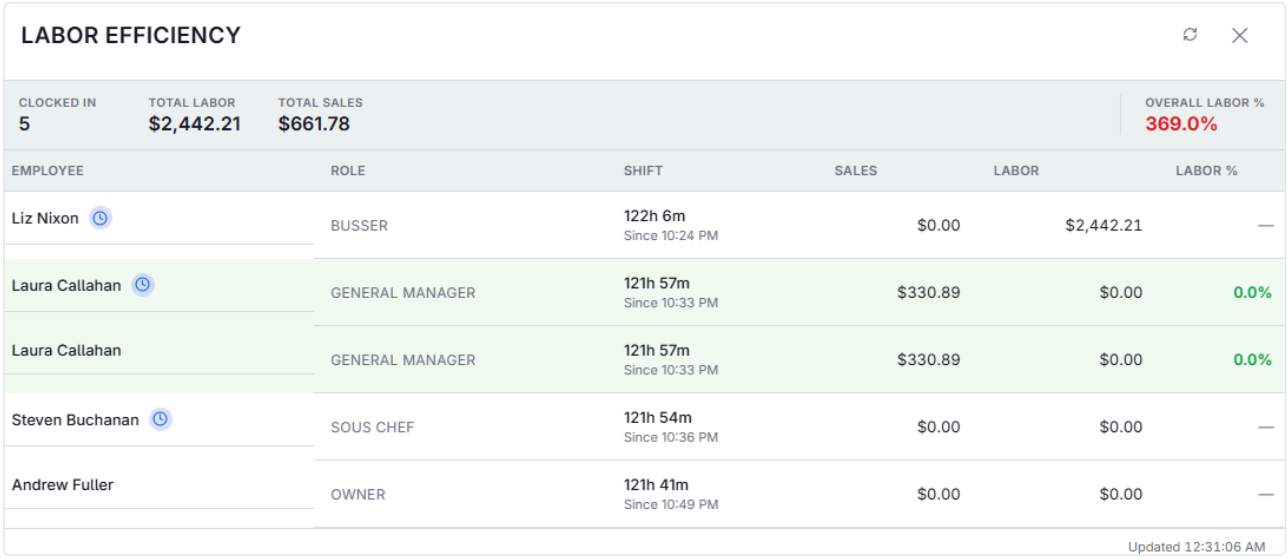
The labor overlay shows what the floor is costing against what it is taking, live. It answers the only staffing question that matters during service: can somebody go home yet?

What it shows

- **Clocked in**, **total labor**, **total sales** and the **overall labor percentage** for the business day so far.
- A count of employees **over the threshold** — the ones whose own labor percentage is out of line.
- A row per employee: role, shift length, sales attributed to them, labor cost, and their labor percentage.
- Flags for a **shift ending soon**, and for a shift too new to judge — someone twenty minutes into a shift has a meaningless percentage and is marked rather than counted against.

If the overlay says labor warnings are disabled, the thresholds have not been configured for this store. The figures still show; only the over-threshold flagging is off.

This is the live view. For labor across days, by role, against forecast, use **Analytics › Performance › Labor Performance**.



Prep printers overlay

Manager Functions

View online ↗

Point a prep slot at a different printer mid-service, without opening the back office.

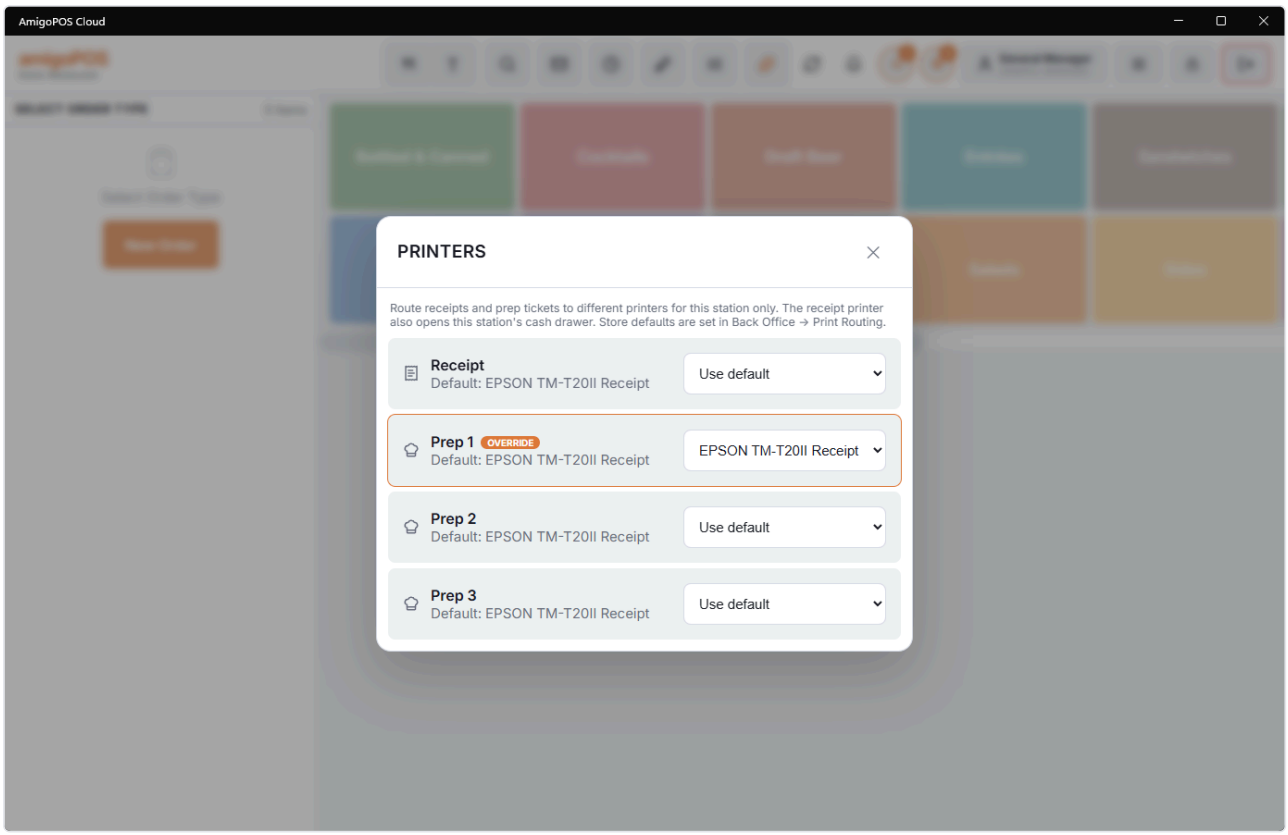
When a kitchen printer dies in the middle of service, this overlay is the fix. It lists the prep slots and lets you send any of them to a different printer, immediately, from the register.

Using it

1. Open **Prep printers** from the manager section of **More**.
2. Find the slot whose printer is down — the default printer for each slot is shown.
3. Choose the printer to use instead. Tickets for that slot go there from the next order on.
4. When the printer is back, set the slot to **use default**.

> An override is easy to forget. A slot left pointing at the bar printer the morning after is exactly how a kitchen ends up with no tickets and no explanation — put it back as soon as the original printer is working.

> This overrides where a slot prints. It does not change which items belong to which slot — that is routing, in **Back Office › Hardware & Printing › Print Routing**.



Manager override prompts

Manager Functions

View online ↗

What the override prompt is, who can approve one, and where approvals are recorded.

Some actions are not refused outright — they ask for a manager. The prompt names what is being authorised and why, and a manager approves it with their own PIN without the original user signing out.

When it appears

Wherever a store has decided the action needs a second pair of eyes: clocking in outside the scheduled shift, excluding a guest from a cover charge, and similar. If a user already holds the permission for the action, there is no prompt — they simply do it.

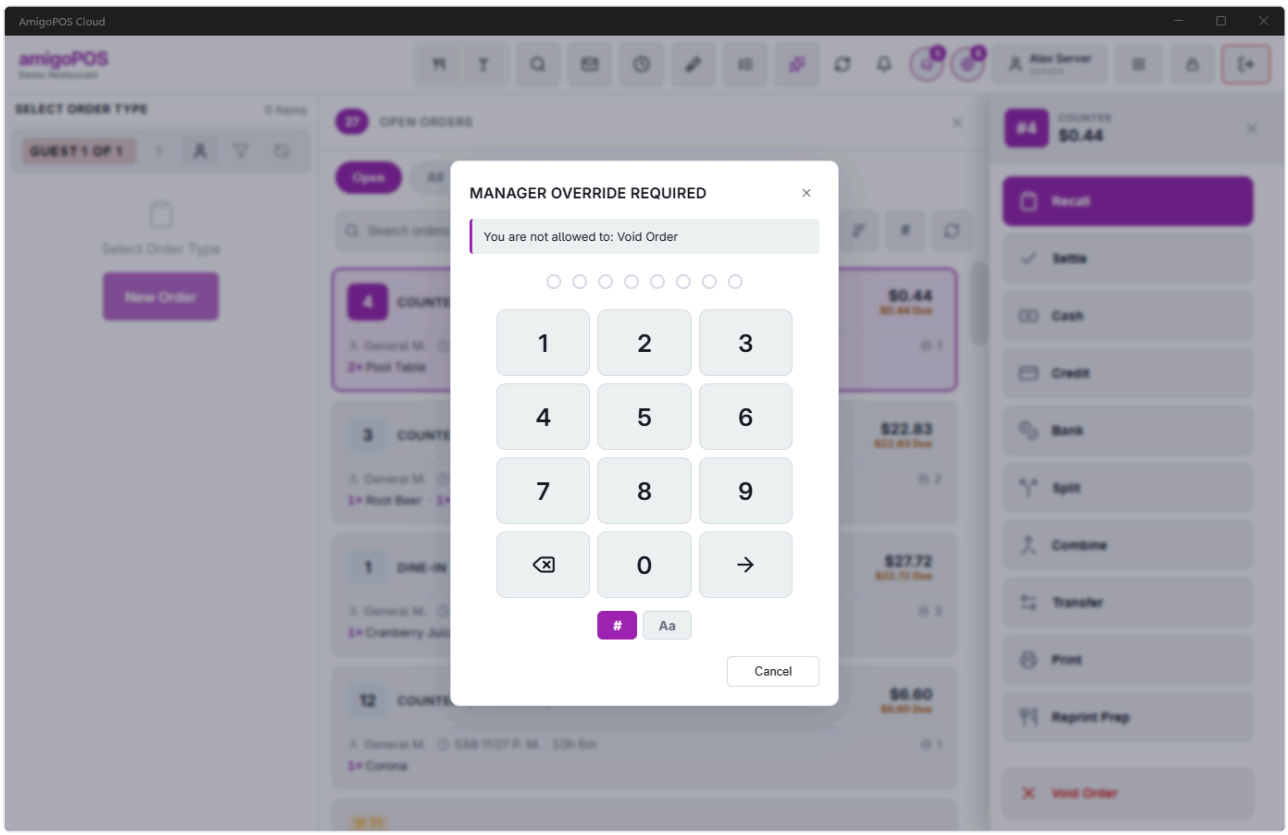
Who can approve

The approving manager needs the override permission *and* the permission for the specific action. A manager who cannot approve a particular prompt is missing the second one, not the first.

> Not everything that stops you is an override. Some rules are hard blocks — they show a message and no prompt, because no one on the floor can authorise past them.

Where it is recorded

Every approval is logged: which permission was overridden, for which employee, by which manager, and when. Read it in **Back Office › Activity › Audit › Permission Overrides Log**, or print the permission overrides mini report from the reports overlay.



Audit trail

Manager Functions

View online ↗

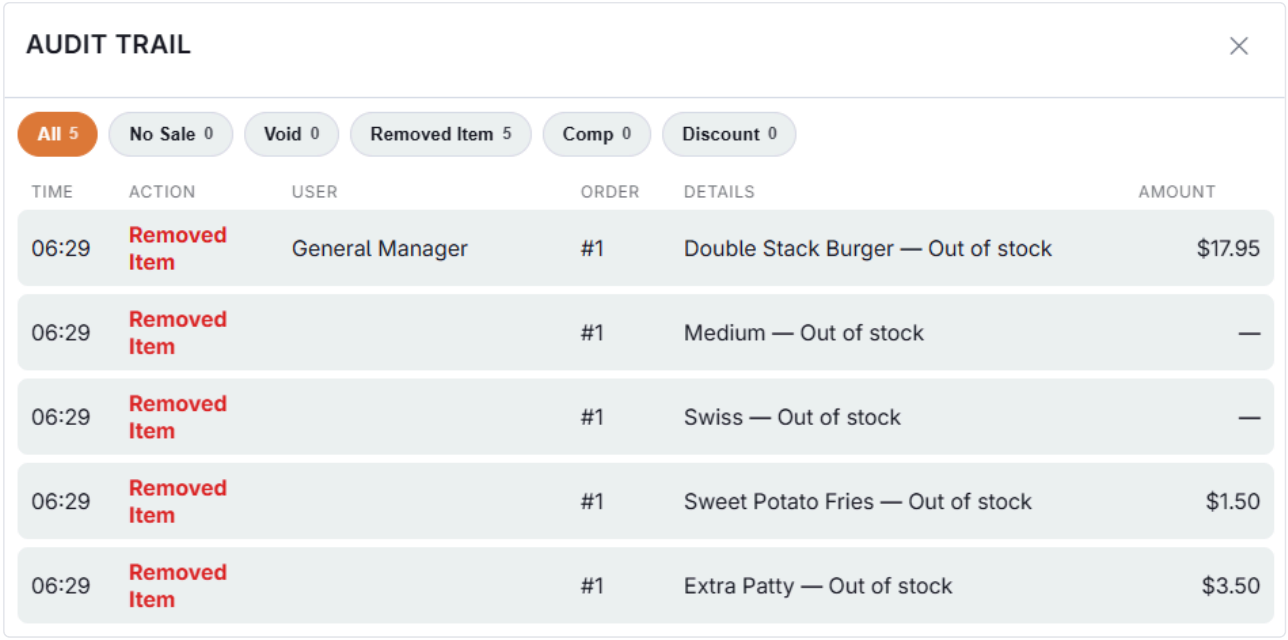
Today’s voids, removed items, comps and discounts in one list, with who did each one.

The audit trail is the current business day's adjustments in one place: **voids**, **removed items**, **comps** and **discounts**. Each row shows the time, the action, the user, the order, the amount and the detail behind it.

Read it before you close, not after. Patterns show up quickly here — the same reason on every void, comps that cluster on one server's tables, removed items just before a settle.

> It covers the current business day, so at 2am you are still looking at tonight. For any earlier day, use the back-office logs and analytics, which take a date range.

> Void and comp *reasons* are what make this list useful. Keeping the reason lists short and meaningful — **Store Setup › Order Entry Screen** — is what stops everything being logged as "other".



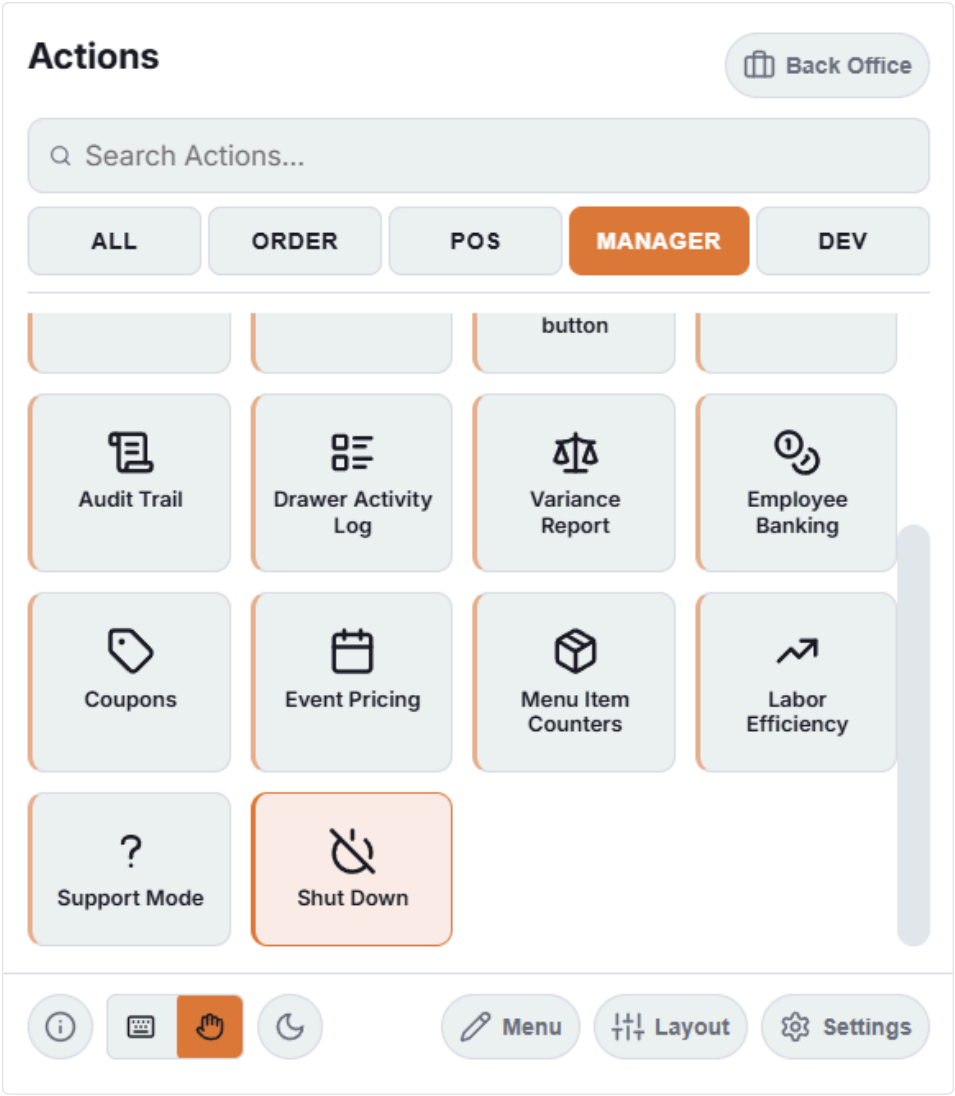
Shutting down the POS app

Manager Functions

View online ↗

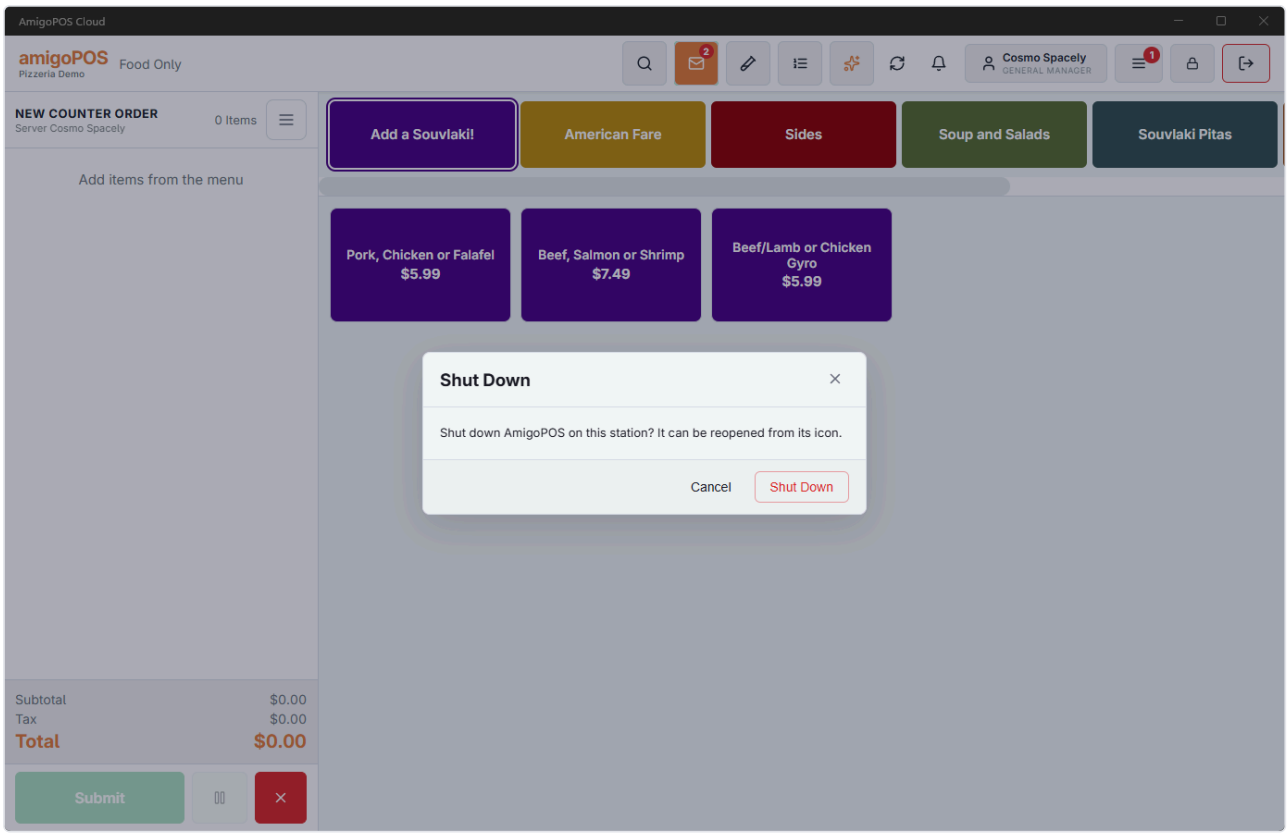
Close the register app cleanly from the Manager tab of the More menu, and what happens to open orders and offline orders.

Managers can close the register app from the station itself: **More › Manager › Shut Down**. Use it when a station needs to be restarted or put away for the night, instead of pulling the power or swiping the app away.



What happens

1. **The open order is checked.** If the current order has items, shut down is refused with a message: finish, hold or void the order first, so nothing is left half-taken.
2. **You confirm.** The dialog asks whether to shut the app down on this station. If orders taken while offline are still waiting to be sent, it says how many; they stay safely on the device and are sent the next time the app starts.
3. **You are signed out**, the same as signing out from the top bar.
4. **The app closes.** On Windows it closes exactly as the window's X button does, and if an update has already been downloaded it is installed on the way out. On Android the app closes completely and is removed from the recent-apps list, so nothing keeps running in the background.



To start again, open the app from its icon. The station is still registered, so it goes straight to the sign-in screen.

> Shut Down is only on the Manager tab, so sign-ins without manager functions do not see it. The AI assistant cannot shut a station down.

> A station does not need shutting down every night. Use it when something needs a clean restart, or before unplugging a tablet or register for a while.

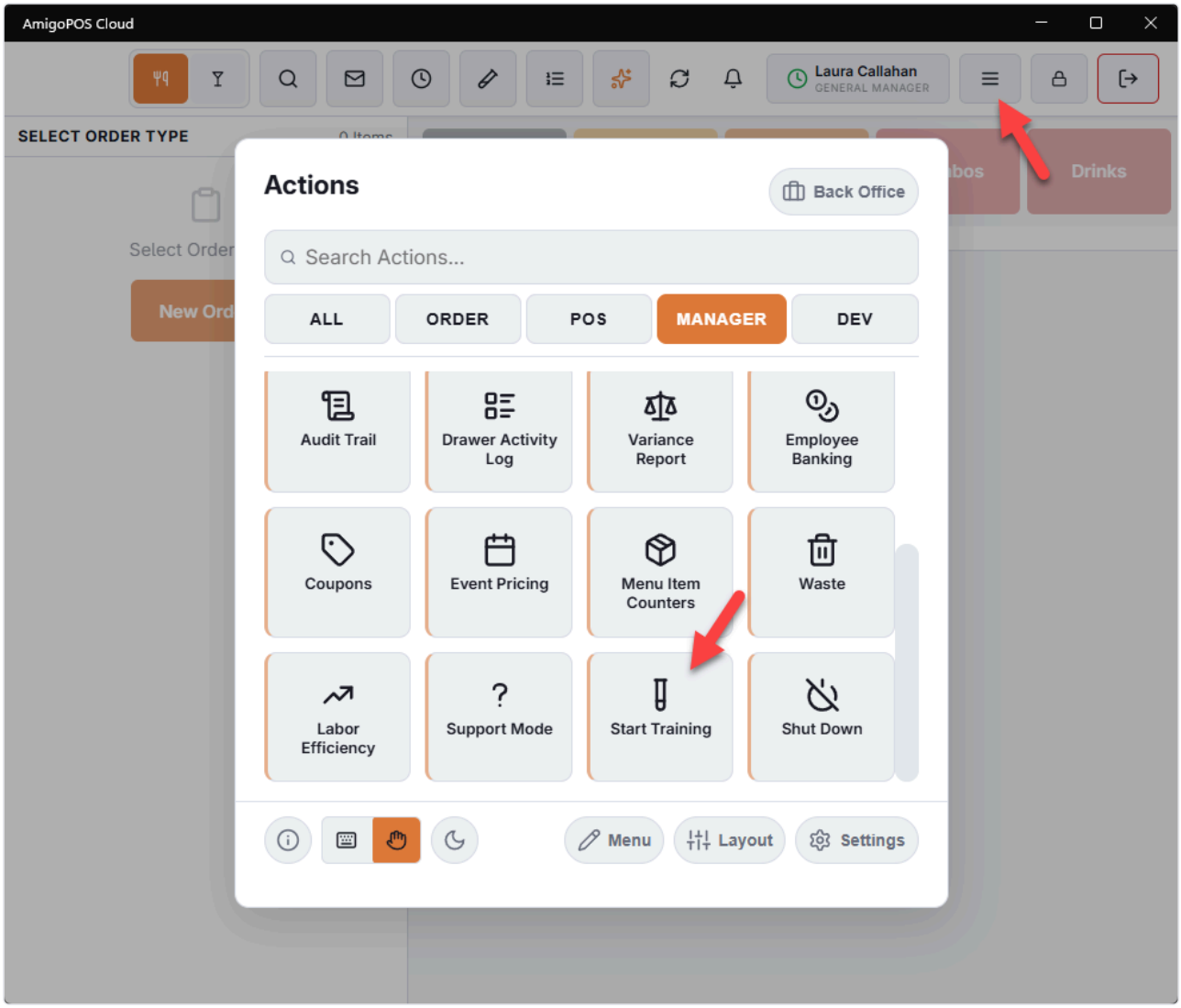
Training mode: a practice register

Manager Functions

View online ↗

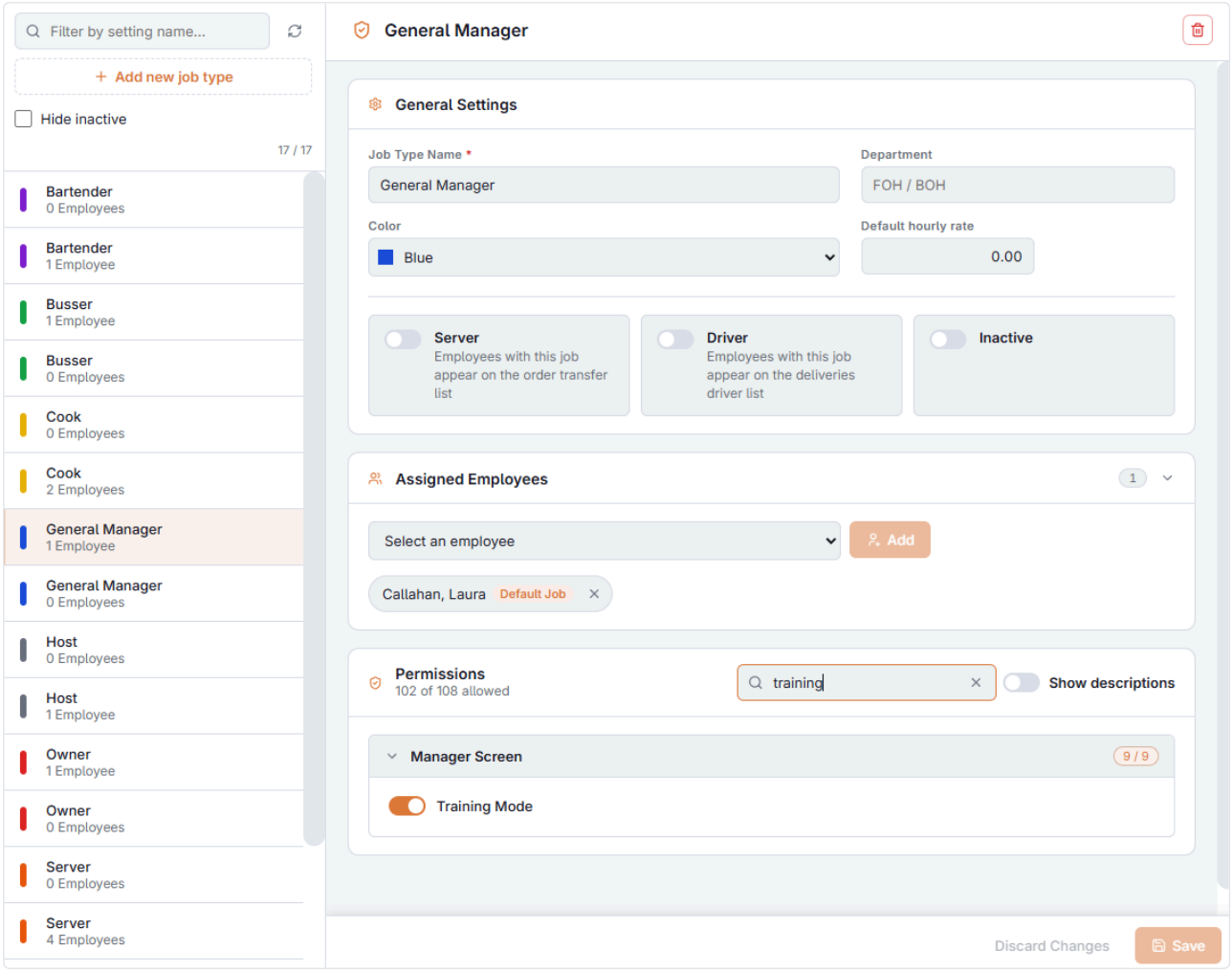
Put a register into training: a copy of the store for practice orders and payments that are wiped afterwards, with nothing real touched.

Training mode turns a register into a practice register. Everything a trainee does there — orders, payments, voids, drawer counts, even a practice end of day — lands in a hidden **training store**, a copy of your store's setup and menu, and is thrown away when training ends. The live store, its numbers, its reports and its order numbers are never touched. The training store is created automatically the first time a register starts training; a menu change is picked up with *Refresh Training Menu*.



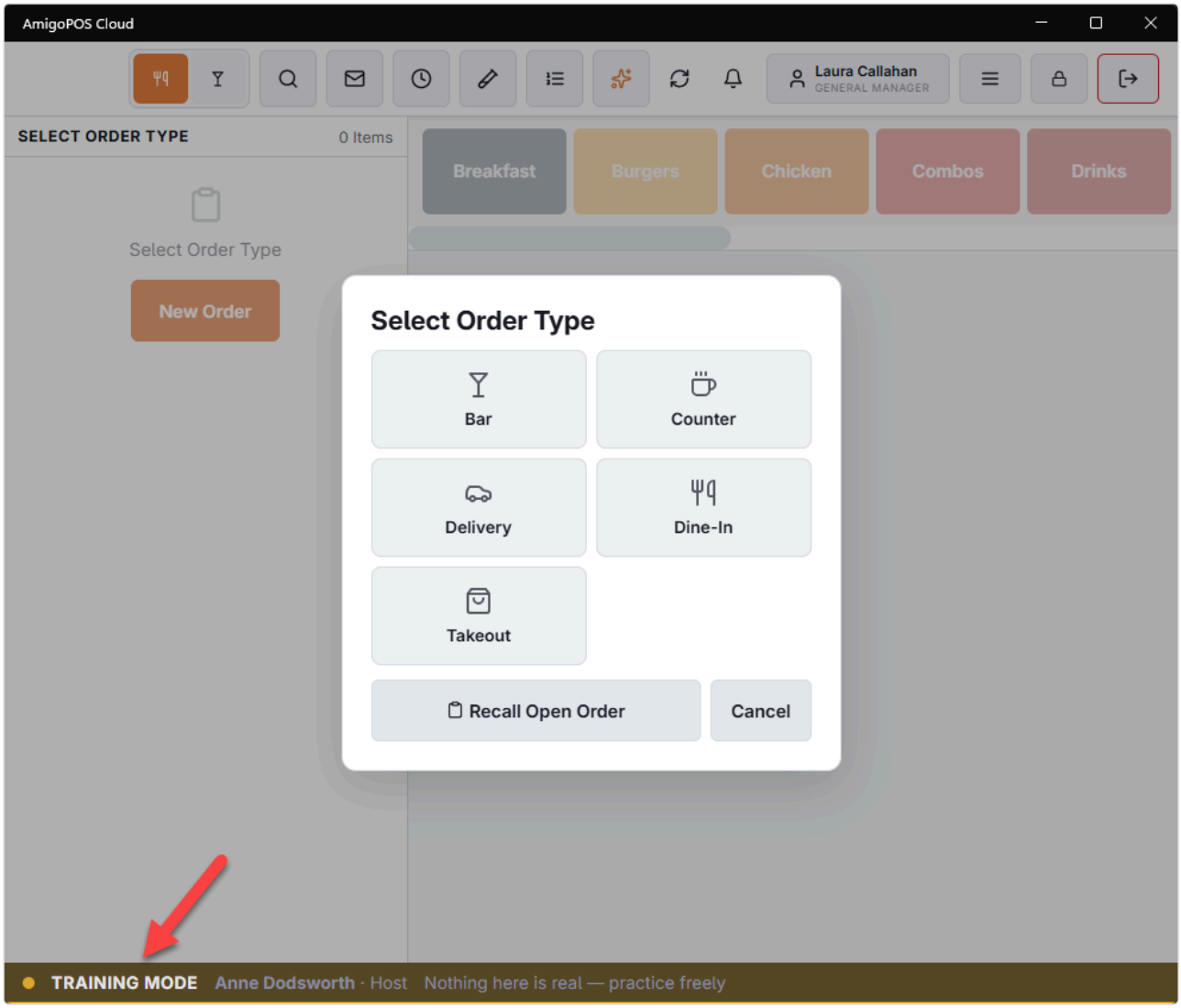
Who can start it

A job with **Training Mode** ticked in Jobs, roles, and permissions (Manager group). Managers do not get it automatically. Anyone signed in can *end* a session, so a register is never stuck in training when the manager has left.



Starting and ending

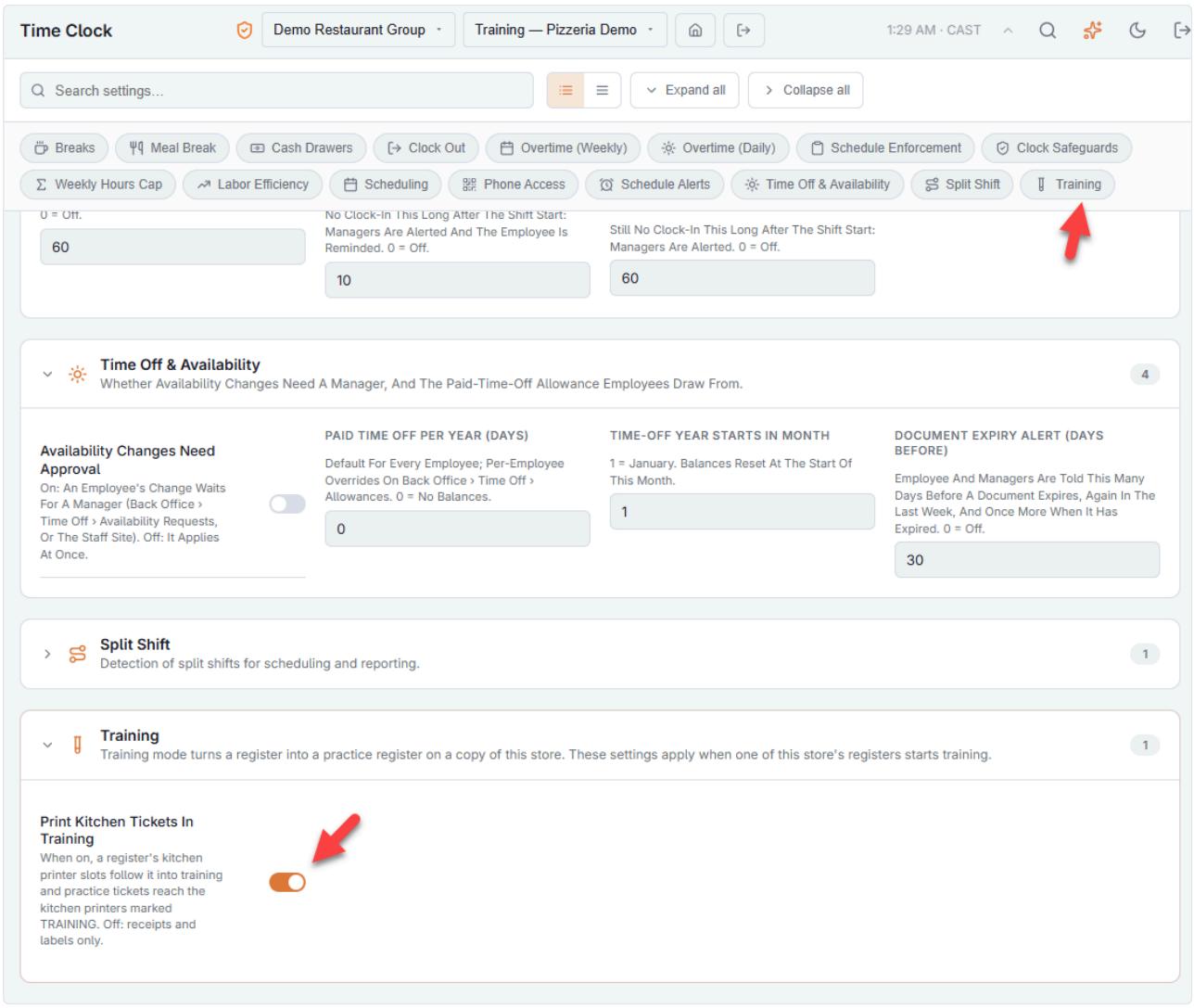
1. With no order open, open **More › Start Training** and confirm. The first time for a store this takes a few seconds while the training store is prepared.
2. The amber **Training Mode** strip stays across the top of every screen. Sign in with your usual PIN — employees and jobs are shared with the live store.
3. Practice. Receipts print on the station's receipt printer with ***** TRAINING ***** on top and *not a sale* in the address line, so a practice slip can never pass for a real one.
4. **More › End Training** brings the register back to the live store. When it was the last register in training, the practice orders and payments are wiped.



Two more manager actions appear while in training: **Reset Training** wipes the practice orders and keeps the register in training; **Refresh Training Menu** wipes them and copies the menu again from the live store after a menu change. A session left open is ended by itself after 12 hours; an idle training store is wiped on its own.

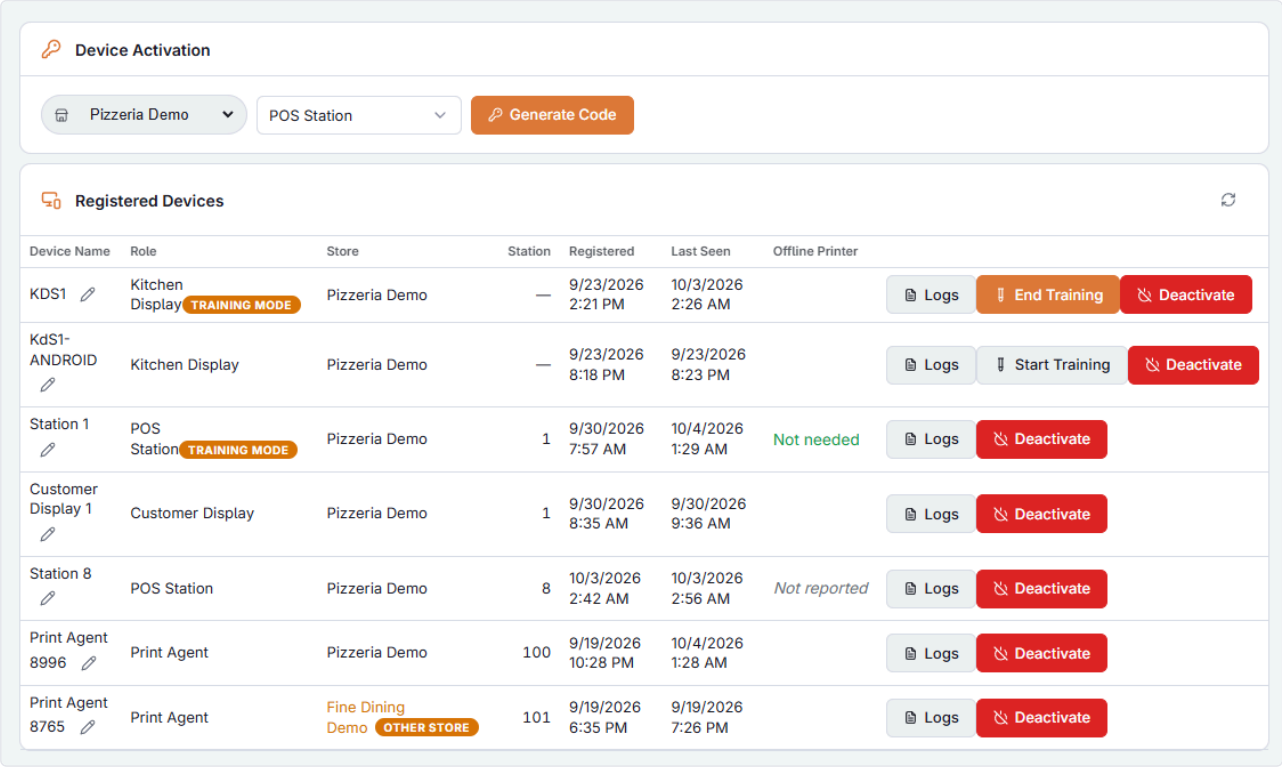
What is different in training

- **No money moves.** Card and gift card payments are not processed, loyalty and house accounts are hidden, nothing is sent to the customer by text or email, no fiscal document is issued, and nothing reaches accounting or delivery integrations. Practice card payments as manual card entries; practice gift cards cannot be used.
- **The time clock stays real.** A trainee is at work: clocking in and out happens on a live register (or the staff site on their phone), not on a register in training. Breaks too.
- **Inventory is not depleted** by practice sales.
- **Kitchen printing is off** unless the store switches it on: **Back Office › Employees › Scheduling › Time Clock › Training › Print Kitchen Tickets In Training**. When on, practice tickets reach the kitchen printers with the training marks — sensible outside service hours, confusing during them.
- **Offline pauses training.** A register that loses the connection shows *Training Paused* until it is back; nothing is rung up offline in training.
- Manager alerts, the End of Day email and the staff site's Today page ignore the training store. Nothing from training is counted, billed or forecast.



A kitchen display in training

To let a trainee see tickets bump, put a KDS screen into training from **Back Office › Hardware & Printing › Registered Devices**: the KDS row gets a **Start Training** button (Training Mode permission). Restart the screen after switching it either way so it reloads. A screen in training shows only practice tickets — take it out of training before service.



Good to know

- A manager who opens Back Office on a register in training is editing the training store's setup, not the live one — useful for its printer slots and drawers, otherwise leave Back Office for a live register.
- The training store copies the menu, modifiers, prices, taxes, order types and payment methods; it does not copy customers, gift cards, inventory or integrations.
- Franchise setups with the same menu in every store can create a training store at each location; each one mirrors its own live store.

> Training does not replace a clock-in. Hours spent training are paid hours — have the trainee clock in on a live register first.

Every session is somebody's

When you start training, the register asks **who is training**: pick the employee, and — if they hold more than one job — the job to practise. The trainee then signs in with their own PIN and gets that job for the whole session, whatever their usual default. Until training ends, only the trainee and a trainer (anyone with the Training Mode permission) can sign in on that register, so the practice log is the trainee's and nobody practises under someone else's PIN.

A new hire must exist as an employee with at least one job before they can train: if the name is not in the list, create them in **Back Office › Employees › People › Employees List**, assign the job they are learning, and start again. That is deliberate — the job they practise is the job they will hold.

The assistant in training

On a register in training the assistant can look things up and work the training order screen, but it makes no changes to the store — gift cards, loyalty, customers, accounting and the rest stay untouched.

CHAPTER 10

Manager Alerts

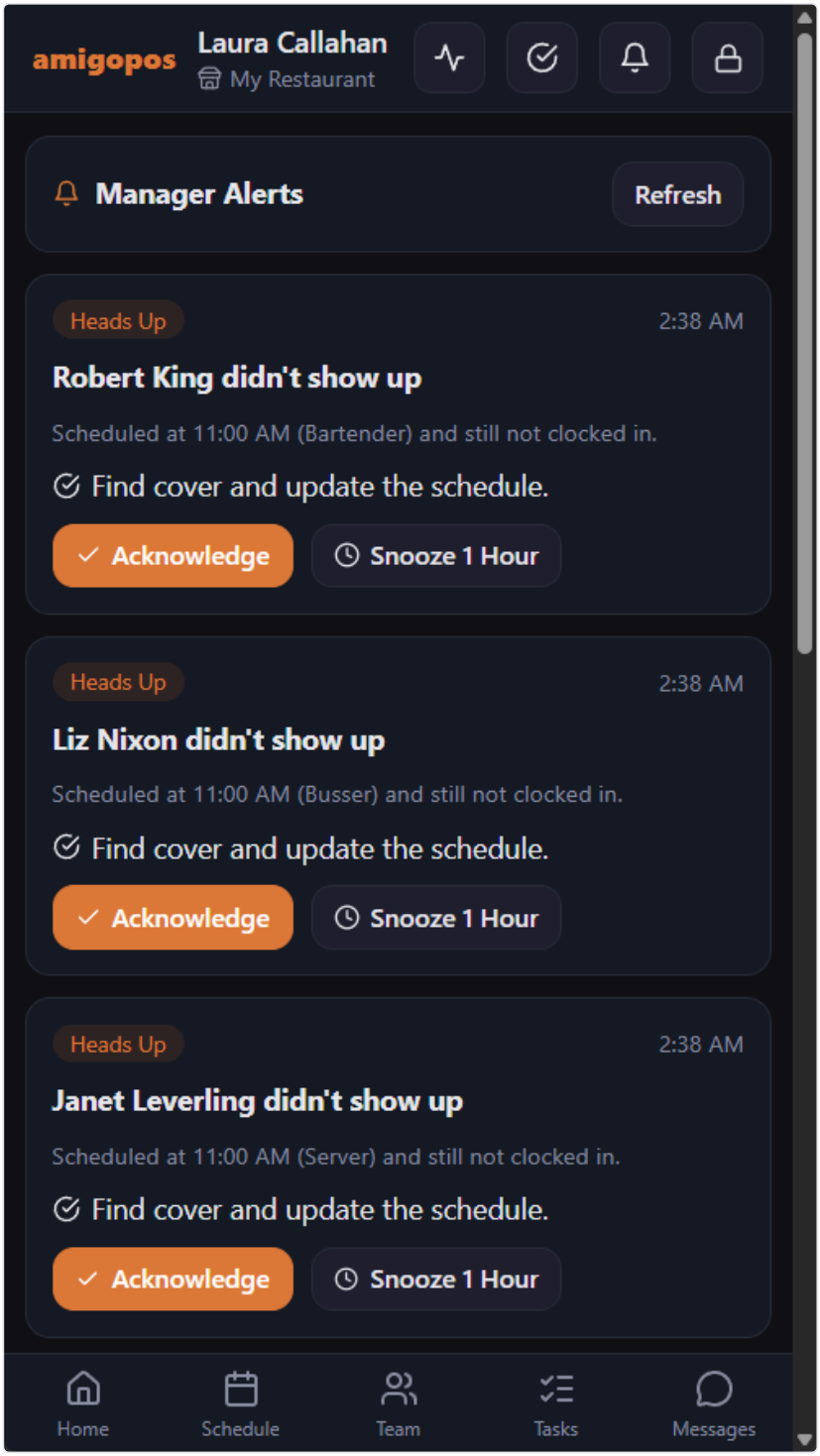
Manager alerts

Manager Alerts

View online ↗

Live alerts during the day — labor, sales, losses, stock — each with a suggested fix, on managers' phones, the register and Back Office.

Manager alerts watch the store while it trades and tell managers when something is costing money — labor running ahead of sales, someone heading into overtime, a cash void after a check was paid, an ingredient about to run out. Every alert says what is happening and what to do about it.



How it works

- Every 5 minutes, for every store with someone on the clock, the system checks the day so far against the store's thresholds.
- Each problem raises **one alert per day**. It only alerts again if it gets worse — labor crossing the next 5 points over target, for example.
- When the problem goes away, the alert closes itself and shows as **No Longer Happening**.
- **Acknowledge** tells the other managers you are on it — the alert closes for everyone and shows your name. **Snooze 1 Hour** hides it for an hour.

Where alerts show up

- As a **push notification** on managers' phones, through the staff site.

- On the staff site's **Alerts** page, behind the bell in the header.
- At the top of the staff site's **Today** page, with the day's figures — see Today: the manager's day on their phone.
- In the **bell** on the register's top bar, for managers.
- In **Back Office › Activity › Shifts & End of Day › Manager Alerts**, where you can also look back at earlier days.

See Getting and handling alerts.

What it watches

- Labor and staffing for the volume
- The time clock
- Sales and service
- Loss prevention
- Inventory and cost
- Cash drawers and the morning forecast

> Manager alerts are **off** until you turn them on for the store: Back Office › Activity › Shifts & End of Day › Manager Alerts › Settings. See Turning alerts on and setting the thresholds. Alerts are kept for 90 days.

Security alerts

Locked accounts, new devices, guessing and similar security events reach managers separately, as a quick alert in the register inbox. See Security alerts.

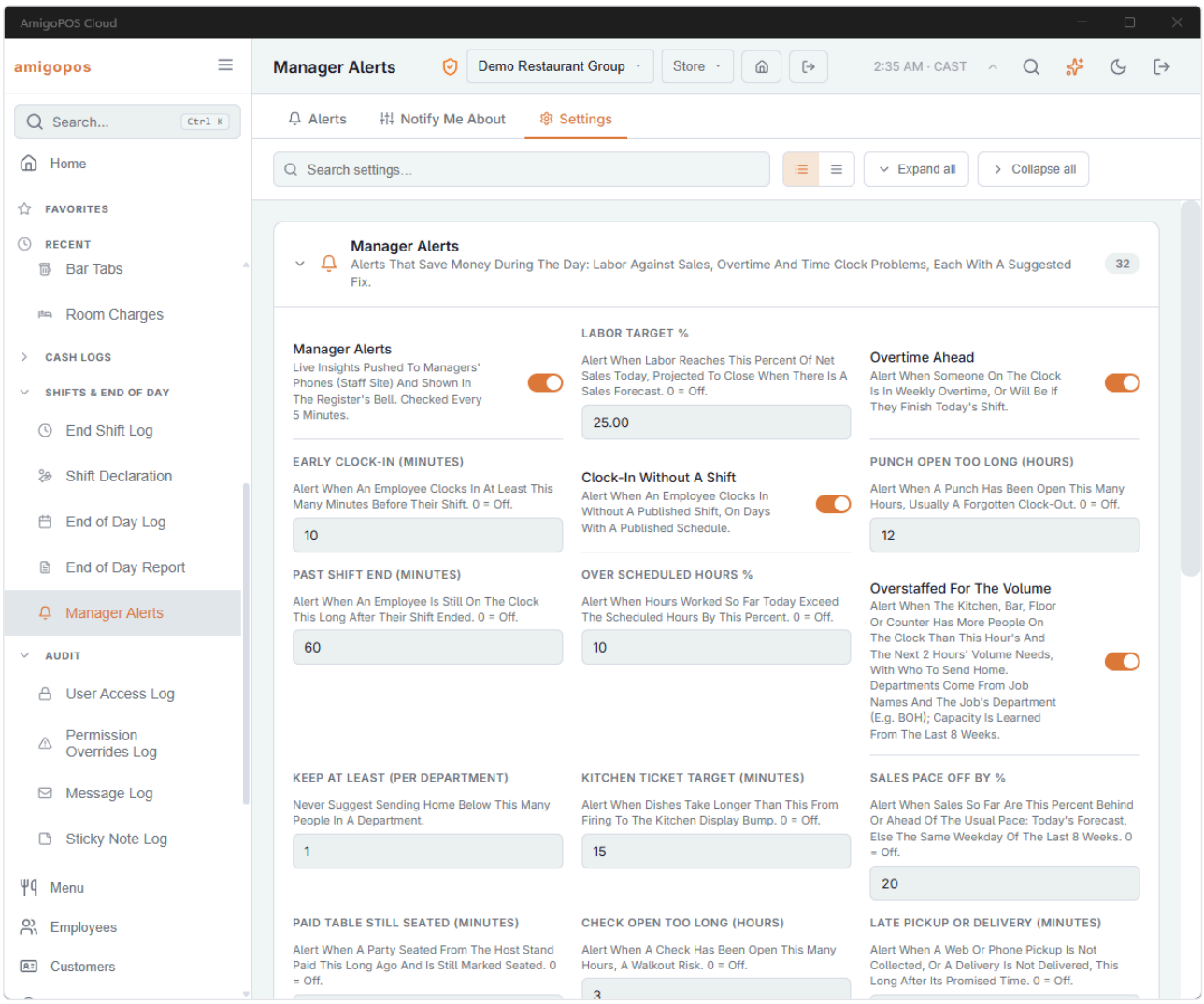
Turning alerts on and setting the thresholds

Manager Alerts

View online ↗

Switch manager alerts on for a store, choose who gets pushes and when, and tune each threshold.

All manager-alert settings are in **Back Office › Activity › Shifts & End of Day › Manager Alerts › Settings**. They are per store.



1. Turn on **Manager Alerts**. Nothing is checked or sent until you do.
2. Set **Labor Target %** to the labor percentage you run to.
3. Leave the other thresholds at their defaults for the first week, then tighten or loosen them.
4. Set **Quiet Hours Start** and **End** if managers should not be woken at night.

Who gets the pushes

Pushes go to the managers **clocked in at the store** — anyone on the clock under a job with manager access. When no manager is clocked in, every manager gets them. Turn on **Push To Every Manager** to always send to every manager. During quiet hours only urgent alerts are pushed; the rest still appear in the lists.

Each manager can also turn whole kinds of alerts off for themselves — see Getting and handling alerts.

The thresholds

For number settings, **0 turns that alert off**.

Setting	Default	Alerts when
Manager Alerts	Off	Turns the whole system on for this store.
Labor Target %	25	Labor cost as a percent of net sales today.
Overtime Ahead	On	Someone on the clock is in, or heading into, weekly overtime.
Early Clock-In (Minutes)	10	Clocked in this long before the shift.
Clock-In Without A Shift	On	Clocked in with no published shift.

Setting	Default	Alerts when
Punch Open Too Long (Hours)	12	A forgotten clock-out.
Past Shift End (Minutes)	60	Still on the clock after the shift ended.
Over Scheduled Hours %	10	Hours worked so far against hours scheduled so far.
Overstaffed For The Volume	On	More people on than the volume needs.
Keep At Least (Per Department)	1	Never suggest going below this.
Kitchen Ticket Target (Minutes)	15	Firing to kitchen display bump.
Sales Pace Off By %	20	Sales behind or ahead of the usual pace.
Paid Table Still Seated (Minutes)	15	Host-stand party paid and still seated.
Check Open Too Long (Hours)	3	Walkout risk.
Late Pickup Or Delivery (Minutes)	15	Past the promised time.
Average Check Drop %	15	Per guest, against the same weekday.
Call-Center Order Not Acknowledged (Minutes)	10	Sent by the call center, nobody here has acknowledged it.
Pay Link Unpaid (Minutes)	20	Held for a pay link the customer has not paid.
Missed Calls Today	3	Rings on the store's line nobody took.
Items Removed After Firing (× Usual)	3	Removals of food already made.
Discounts And Comps %	10	Of gross sales; twice this for one server.
Overrides For One Person	5	One manager, one employee, one day.
No-Sales, Price Cuts, Refunds (× Usual)	3	Against the employee's own normal.
Cash Refunds And Voids	On	Every cash refund and voided cash sale.
High Card Tip %	40	Tip as a percent of the sale.
Repeated Over/Short Amount	5	Three times in 14 days.
Weekly Loss Prevention Flags	On	Every Monday, one alert for each employee who picked up a new red cell on the loss prevention scorecard in the last seven days. See Loss prevention alerts.
May Run Out Before Close	On	Ingredients short for the rest of today.
Waste Spike (× Usual Day)	2	Today's waste cost.
Cost Of Goods Target %	32	Recipe cost against net sales.
Supplier Price Rise %	10	On receiving.
Below Reorder Level	On	Nothing on order.
Special Price Outside Its Hours	On	Happy hour ringing early or late.
Quiet Hours Start / End	Blank	Pushes pause, except urgent alerts.
Push To Every Manager	Off	Off: managers clocked in, or every manager when none is.

Call Center Message Unanswered (Minutes)

Default 15. How long a message this store sent the call center about an order (an issue, a change made at the register, a reply) may go without the call center resolving it before the manager is alerted. 0 turns the alert off.

Getting and handling alerts

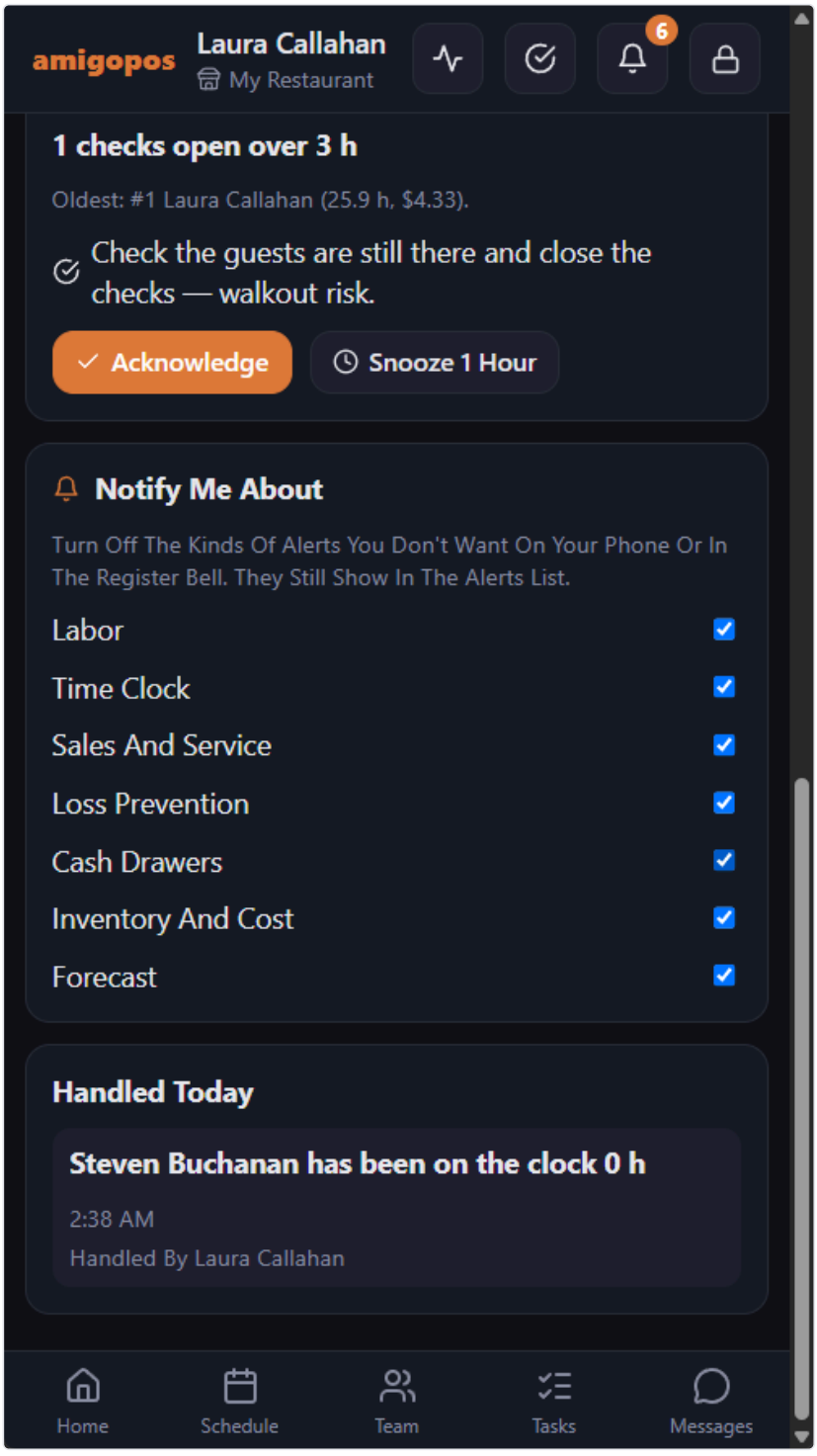
Manager Alerts

View online ↗

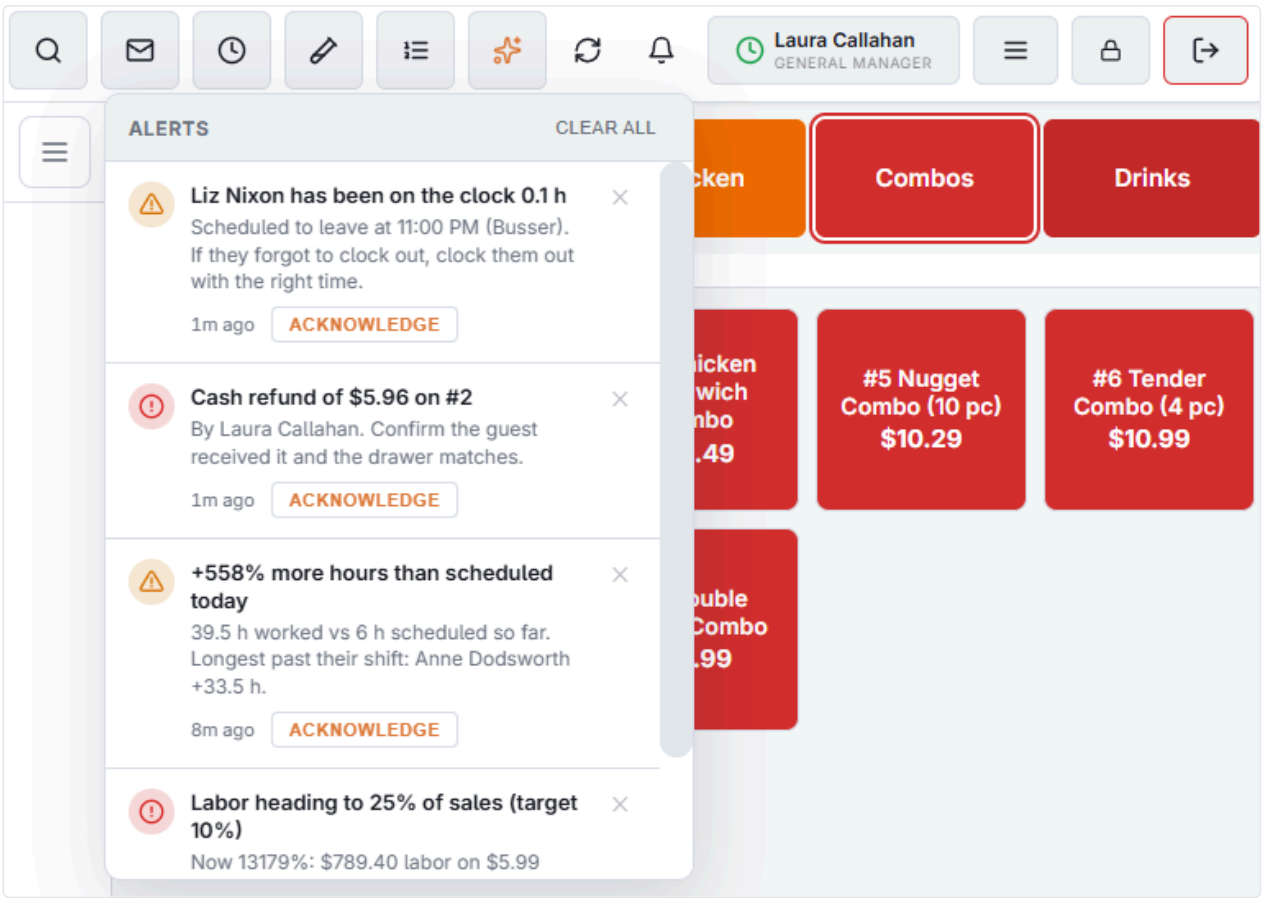
Phone pushes, the staff site Alerts page, the register bell and Back Office — and turning kinds of alerts off for yourself.

On your phone

Alerts arrive as push notifications from the staff site. Turn notifications on from the staff site's Home screen; on an iPhone, add the staff site to the Home Screen first. See Phone notifications and schedule alerts.



Tapping the notification opens the **Alerts** page. Managers also have a bell in the staff site header, with the number of open alerts.



The Alerts page

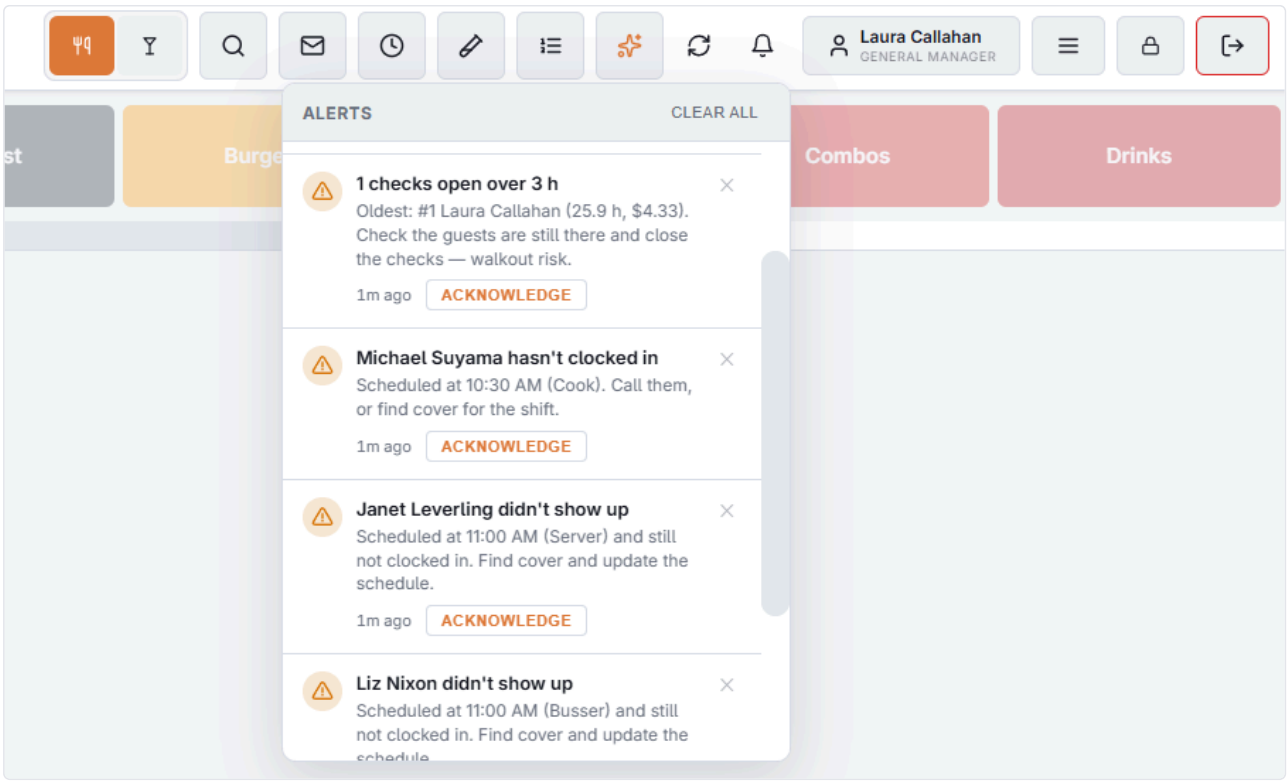
Open alerts are listed first, marked **Urgent** or **Heads Up**, each with what is happening and the suggested fix.

- **Acknowledge** — you are handling it. It closes for every manager and shows **Handled By** with your name.
- **Snooze 1 Hour** — hides it for an hour.

Below, **Handled Today** lists what was acknowledged, snoozed or is no longer happening.

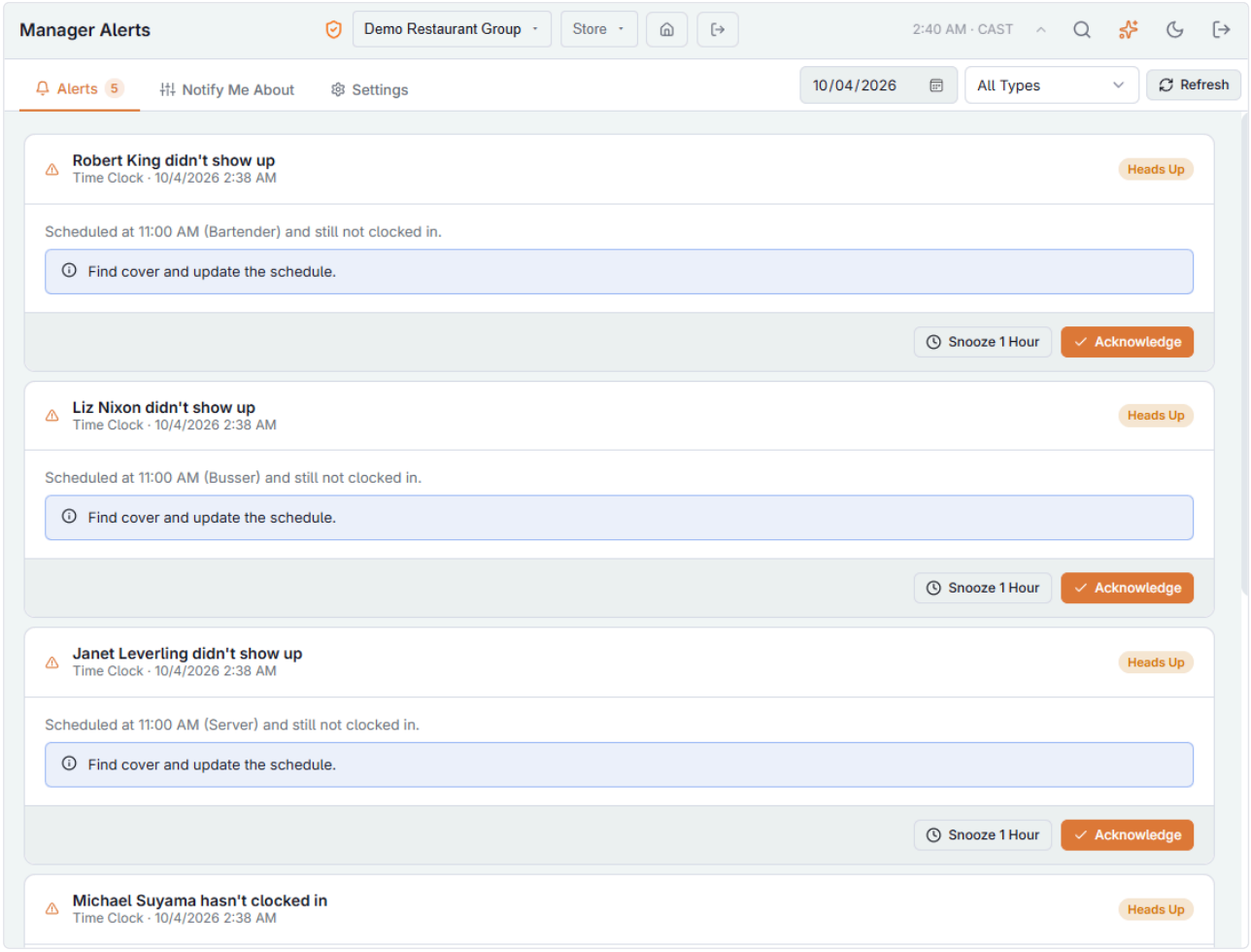
At the register

Managers see alerts in the bell on the top bar, and can acknowledge them there. An alert leaves the bell when it is handled anywhere — on a phone, in Back Office, or because it stopped happening.



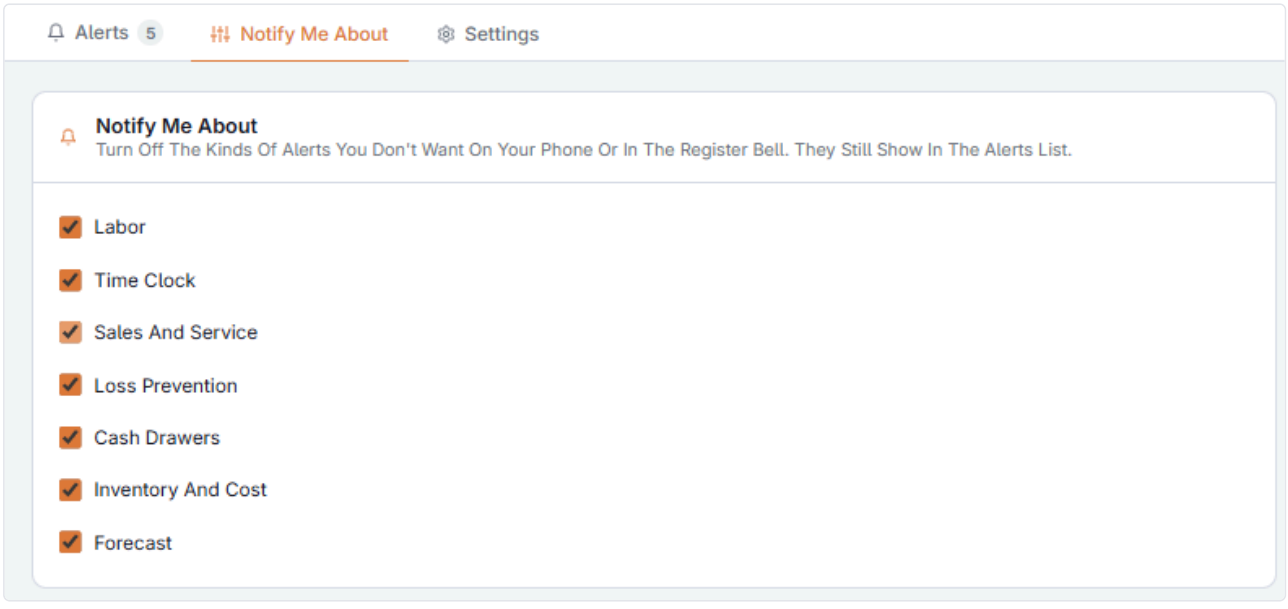
In Back Office

Back Office › Activity › Shifts & End of Day › Manager Alerts has the same list with a day picker and a type filter. Today's alerts can be acknowledged or snoozed; earlier days are history.



Turning kinds of alerts off for yourself

Notify Me About — on the staff site Alerts page, and as a tab in Back Office › Activity › Shifts & End of Day › Manager Alerts — lists the seven kinds of alerts: Labor, Time Clock, Sales And Service, Loss Prevention, Cash Drawers, Inventory And Cost, Forecast. Untick one and you stop getting its pushes and its alerts in your register bell. It still shows in the lists, marked **Turned Off For You**. The choice is yours alone and follows you to every store.



On the Today page

The staff site's **Today** page lists the three most urgent open alerts above the day's figures, and the briefing at its top repeats their suggested fixes. Tap the card to reach the Alerts page. See Today: the manager's day on their phone.

Labor alerts

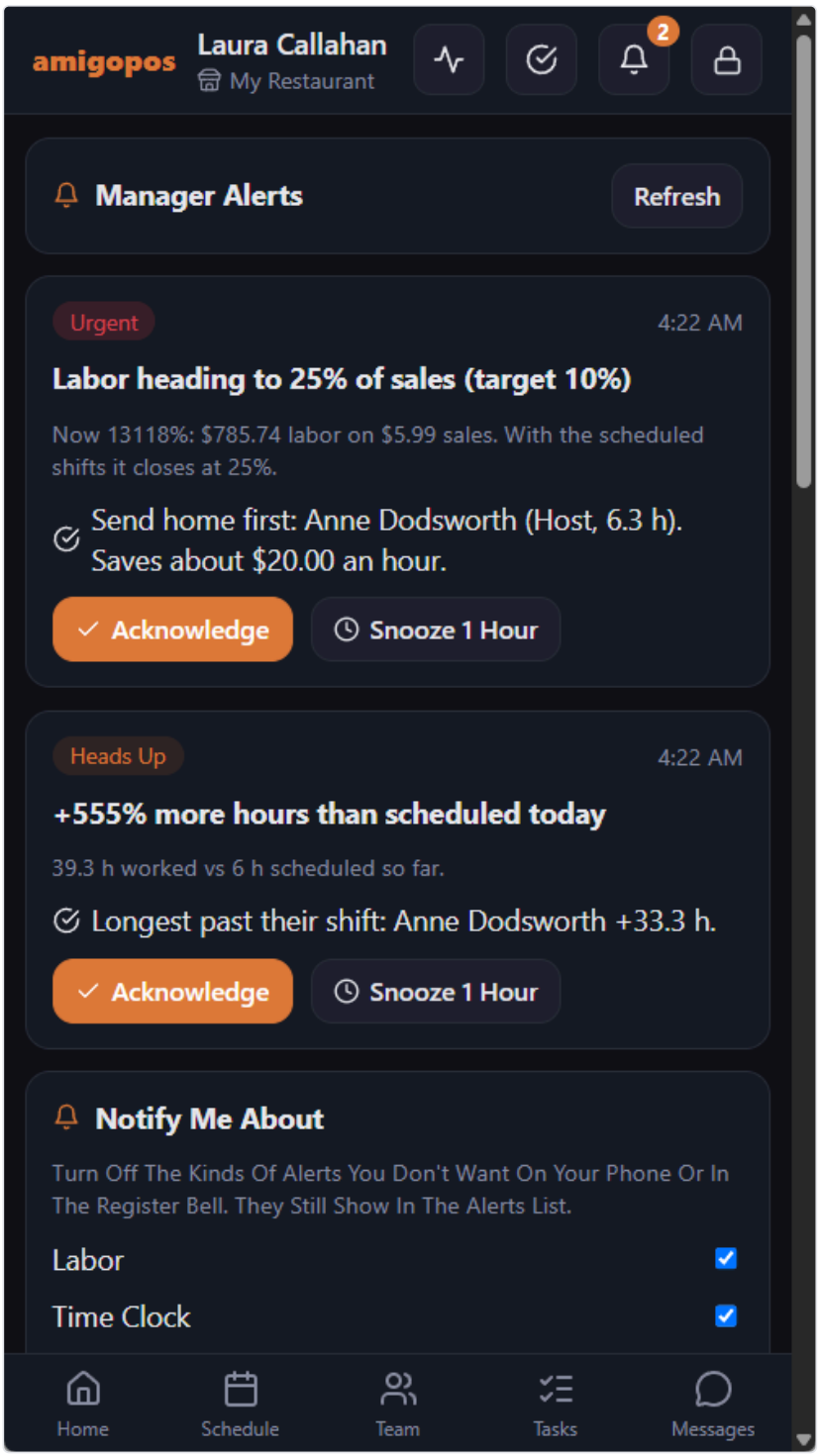
Manager Alerts

View online ↗

Labor percent against target with who to send home, overtime ahead, and more hours worked than scheduled.

Labor at or above target

Labor cost so far today against net sales so far (after discounts, without tax or gift cards sold). When the store has a sales forecast for today, the alert looks ahead instead: labor so far plus the rest of today's scheduled shifts, against the forecast — *Labor heading to 27% of sales*. It waits an hour into the day with a forecast and three hours without, so the first punches of the morning don't set it off.



The fix names who to send home first: hourly staff who are not managers and have been on at least an hour, closest to overtime first, then the highest rate — with what that saves an hour. When the staffing model finds people surplus to the volume, it names them instead (see Staffing for the volume). The alert turns urgent 10 points over target and alerts again for each further 5 points.

Overtime ahead

Someone on the clock is in weekly overtime, or will be if they finish today's scheduled shift. The alert gives the time they cross into overtime, so you can send them home before then or swap the rest of the shift. The weekly limit is **Overtime Hours** on the Time Clock settings, or 40 hours when it is not set.

More hours than scheduled

Hours worked so far today against hours scheduled so far, once at least 4 hours were scheduled and the difference is an hour or more. The fix lists who stayed longest past their shift.

> Labor cost here uses the same pay rates as the timesheet. Salaried punches count as zero, as they do on the dashboards.

Staffing for the volume

Manager Alerts

View online ↗

How alerts work out how many cooks, bartenders, servers and counter staff the current volume needs — and when the kitchen is falling behind.

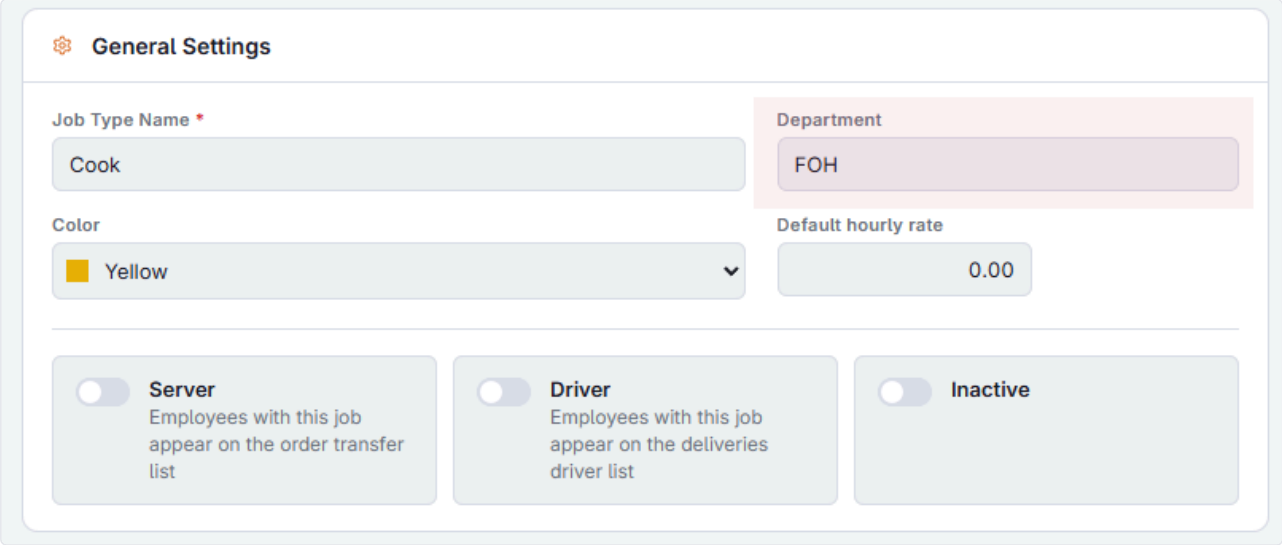
The staffing alerts compare who is on the clock in each **department** with what the volume needs right now and over the next two hours.

Departments

Each job belongs to a department, read from the job name first and then from the job's **Department** field in Back Office › Employees › People › Jobs & Permissions:

- **Kitchen** — cook, chef, line, prep, grill… or a Department of BOH or Kitchen.
- **Bar** — bartender, barback…
- **Floor** — server, runner, busser… or a Department of FOH.
- **Counter** — cashier, counter.

Managers, hosts, drivers and dishwashers are not counted. If a job lands in the wrong department, set its Department to Kitchen, Bar, Floor or Counter. See Jobs, roles and permissions.

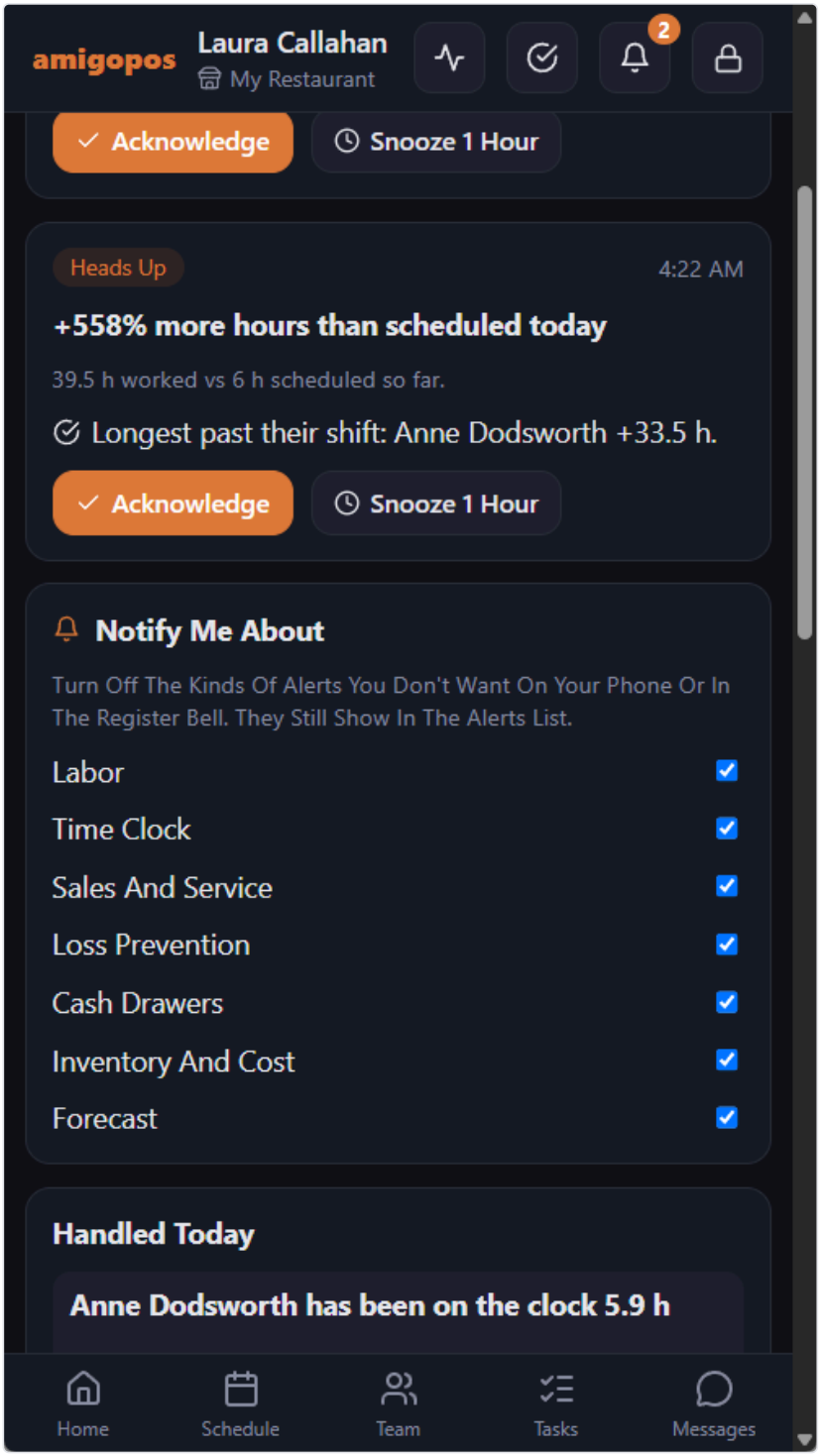


How much one person handles

The volume is measured per hour: dishes fired to the kitchen, drinks rung at the bar, dine-in guests seated on the floor, orders without a table at the counter. From the last 8 weeks the system learns what one person in each department handles in a busy hour. A department needs at least 20 hours of history before it is checked, so a new store gets these alerts after a few weeks of trading.

Overstaffed for the volume

Kitchen: 4 on, 3 cover the volume — the alert names who to send home, on at least an hour, closest to overtime first, and what that saves an hour. It never suggests going below **Keep At Least (Per Department)**, and it stays quiet for the first two hours after the day's first ticket, while prep and setup are work the tickets don't show.



Kitchen falling behind

Using the kitchen display, the alert looks at how long dishes took from firing to being bumped over the last 30 minutes, and at dishes still waiting. It fires when the typical dish takes longer than **Kitchen Ticket Target (Minutes)**, or when five or more are waiting longer than that. If the volume needs more cooks than are on, it says how many. Kitchens without the display never get this alert. See the kitchen display.

Time clock alerts

Manager Alerts

View online ↗

Early or unscheduled clock-ins, punches left open, and late or no-show employees.

Clocked in early

An employee clocked in at least **Early Clock-In (Minutes)** before their shift, and the shift hasn't started yet. The fix: clock out and back in at the shift start. The alert closes by itself when the shift starts.

On the clock without a shift

An employee clocked in with no published shift today. This only runs on days the store has a published schedule, so stores that don't schedule are not flooded with it.

Managers are left out of both of these.

Punch left open

A punch has been open for **Punch Open Too Long (Hours)**, or the employee is still on the clock **Past Shift End (Minutes)** after the shift ended — usually a forgotten clock-out. Correct it with the right time in the timesheet. This one includes managers.

Late and no-show

The late and no-show alerts from the schedule also appear here. Managers already get them as a message, so they are not pushed a second time. They disappear as soon as the employee clocks in.

Sales and service alerts

Manager Alerts

View online ↗

Sales behind or ahead of the usual pace, paid tables still seated, checks open too long, late pickups and deliveries, and a falling average check.

Sales behind or ahead of the usual pace

Sales so far against what the store usually has by this time of day: today's forecast times the share of the day's sales normally done by now, or — without a forecast — the average of the same weekday over the last 8 weeks. It only runs between a quarter and 90% of a typical day. Behind: cut labor early and prep less. Ahead: call someone in and prep more. When the forecast has items, the fix names the three running furthest off.

Paid tables still seated

Parties seated from the host stand whose check was paid this many minutes ago and who are still marked seated. Urgent when people are on the waitlist. Stores that don't seat through the host stand never get this alert.

Checks open too long

Checks with items open longer than **Check Open Too Long (Hours)** — a walkout risk. The alert lists the oldest with order number, table, server, hours open and amount. Pickup, delivery and future orders are left to the next two alerts. Orders a server or driver has banked are left out of this alert and of the late pickup and delivery alert.

Late pickups and deliveries

- **Pickups** — web and phone pickup orders not collected this many minutes after their promised time. An ASAP order is promised 30 minutes after it was placed.
- **Deliveries** — past their promised time, counted separately as not sent yet and out but not delivered.

Average check below usual

The average check per guest so far today against the same weekday of the last 4 weeks, up to the same time of day. It needs 20 guests and two hours of service first. If a suggestive-selling program is running, the fix names it.

Call-center orders and calls

For stores that take orders from the call center. The call center's own view of the same figures is Call Center dashboard.

- **Call-center orders not acknowledged** — orders the call center sent here that nobody has acknowledged this many minutes after they arrived, oldest first. Critical from three. The fix is Pending call-center orders at the store.

- **Orders waiting for the pay link** — orders parked on the call-center hold whose pay link went out this many minutes ago and is still unpaid: food waiting on a decision. Call the customer, or have the call center send it unpaid or cancel it.
- **Missed calls today** — this many calls on the store's line rang today and nobody took them (caller ID; test rings do not count). Critical at twice the number.

Call-center messages unanswered

Raised when a message this store sent the call center about an order — an issue it reported, a total it changed on recall, a void, a reply — has gone longer than the *Call Center Message Unanswered* threshold (default 15 minutes) without an operator resolving it. The alert names the oldest three orders with the time the message went out. The food, or the customer, is waiting on an answer nobody is giving: call the customer or the call center, and open the order in the orders list › Call Center to read the thread. See pending call-center orders.

Entreo deliveries

For stores that send delivery orders to Entreo. Neither alert has a threshold to set; both clear as soon as the order leaves with anyone.

- **Delivery orders Entreo did not take** — orders Entreo refused, or never received, in the last six hours that nobody has dispatched since. Critical. The alert names the code of the first one; send them again or dispatch your own driver.
- **Entreo deliveries without a driver** — orders Entreo has been searching for long enough to warn, and orders it cancelled because no driver accepted that are still unassigned. Critical once one was cancelled.

See Entreo troubleshooting.

Loss prevention alerts

Manager Alerts

View online ↗

Removals after firing, discounts and comps, overrides, no-sales, price cuts, refunds, cash voids, high card tips and repeated over/short.

These alerts point at things worth a second look. Most have an innocent explanation — the point is that someone looks while the shift is still on. "Usual" for an employee means their own daily average over the last 28 days, counting only days they clocked in.

Items removed after they were sent to the kitchen

Three or more items removed after firing, worth at least **× Usual** times the employee's usual. The food was already made.

Discounts and comps

- For the store, when discounts and comps reach **Discounts And Comps %** of gross sales today — with the three servers who have the most on their checks.
- For one server, when their own checks reach twice that, with at least three discounted checks.

Many overrides for one person

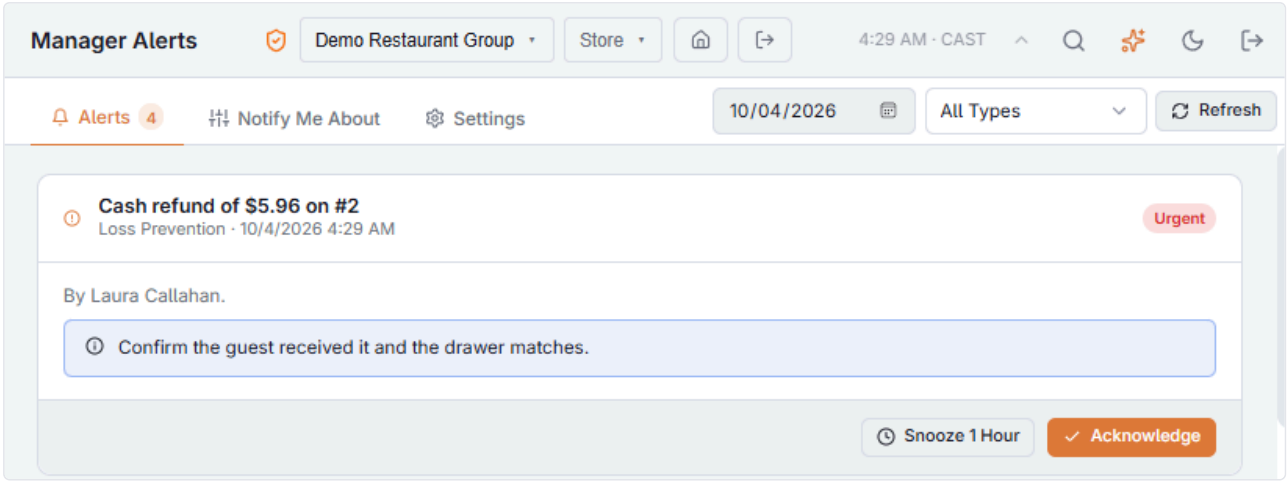
One manager approved **Overrides For One Person** or more overrides for the same employee today. The alert lists the permissions overridden most.

No-sales, price cuts and refunds

An employee's drawer openings without a sale (5 or more), prices lowered below the menu price (3 or more) or refunds (2 or more) today, at **× Usual** times their own normal.

Cash refunds and voided cash

- Every **cash refund** is urgent, with who made it and who approved it.
- An order that took cash and was then **voided** is urgent. Splits and combines are not counted.
- A cash payment voided on a check that is still settled is a warning — often just a tender correction.



Card tips far above normal

Card tips of at least **High Card Tip %** of the sale that are also at least twice the store's usual card tip. Compare them with the signed slips.

Repeated over/short

An employee was over or short by at least **Repeated Over/Short Amount** three or more times in 14 days, in their cash turn-in or in drawer closes they did. It only alerts on a day it happens again.

Weekly loss prevention flags

Every Monday, CloudPos runs the Loss Prevention scorecard for the last seven days and for the seven before. An employee who picked up a red cell they did not have the week before gets one alert, naming the measures (voids, comps, discounts…). A red cell that carries over from the week before does not alert again. Open the scorecard and look at the employee's events before talking to them. Turn it off with **Weekly Loss Prevention Flags** in the alert settings.

Inventory and cost alerts

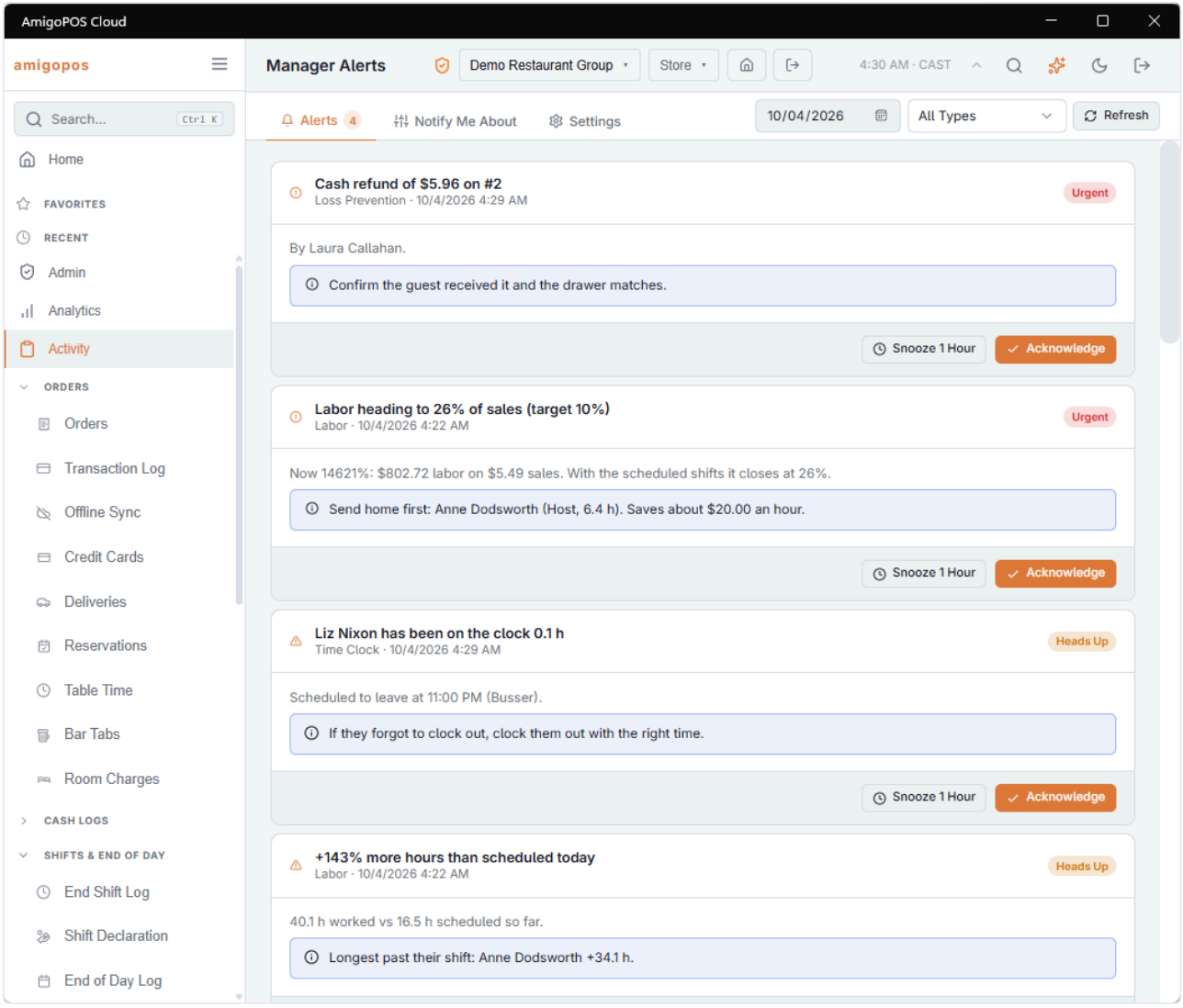
Manager Alerts

View online ↗

Ingredients that may run out before close, waste spikes, cost of goods over target, supplier price rises, low stock and special prices outside their hours.

May run out before close

The live version of the morning run-out forecast: the rest of today's forecast use against what is on hand plus deliveries due today. The alert lists what will be short and names dishes that use the worst one — 86 or limit them, switch prep, or buy more today.



Waste spike

Today's waste cost at **Waste Spike (× Usual Day)** times the usual day over the last 28 days, with the top three items. It waits until waste has been logged on at least 5 days.

Cost of goods over target

Today's recipe usage cost against net sales, with the dishes that have the highest cost share. It needs recipes on the menu items and 20 tickets in the day.

Supplier price rise

An item received at **Supplier Price Rise %** or more above its previous unit cost. The alert names the dishes that use it and, when the item has a second vendor, suggests buying from them.

Below reorder level

Items at or below their reorder level with no open purchase order. It reminds once a day while they stay low.

Special price outside its hours

Items rung at a special price whose price rule's hours — and days, when set — don't cover the time they were rung. A happy hour ringing early usually means a register clock or a rule window is wrong. Urgent at five items or more.

Cash drawer and forecast alerts

Manager Alerts

View online ↗

Drawer count and cash-drop alerts on managers' phones, and the morning forecast insights in the same list.

Cash drawers

When a drawer needs a count or a cash drop, the alert behind the drawer badge at the register now also reaches managers: it is pushed to their phones and listed with the drawer's name and the amount in it. It turns urgent at the drawer's red level and closes when the drawer alert is resolved. See The drawer alert badge.

The morning forecast

The forecast's morning insights — an item selling more or less than usual over the last two weeks, a busy day coming up — appear in the list as information. They are not pushed. The forecast's morning run-out warning is replaced by the live May run out before close alert.

Manager alerts: questions and fixes

Manager Alerts

View online ↗

Not getting alerts, too many alerts, no staffing alerts, and why the numbers may differ from the dashboard.

I'm not getting alerts on my phone

- Manager alerts are on for the store (Back Office › Activity › Shifts & End of Day › Manager Alerts › Settings).
- You hold a job with manager access, and notifications are on in the staff site. On an iPhone the staff site must be on the Home Screen.
- That kind of alert isn't unticked in your **Notify Me About**.
- It isn't quiet hours — only urgent alerts are pushed then.
- Another manager is clocked in: pushes go to the managers on the clock unless **Push To Every Manager** is on.

Too many alerts

Raise the thresholds, set a number to 0 to turn that alert off, untick kinds you don't need in Notify Me About, or set quiet hours. An alert only repeats when it gets worse.

No staffing alerts

The staffing model needs 8 weeks of history with at least 20 busy hours per department, and jobs it can place in a department. Kitchen-behind alerts need the kitchen display. See Staffing for the volume.

An alert stays open after it was fixed

Checks run every 5 minutes; it closes on the next one. Acknowledge it to close it straight away.

The same alert again tomorrow

Alerts belong to a business day. Things that are still true the next day — stock below reorder level, a pattern of over/short — come back the next day.

Labor or sales differ from the dashboard

Alerts use net sales after discounts and without tax or gift cards sold, which is the right base for labor and cost percentages. Dashboards can show different totals.

Can employees see alerts?

No — only people with a manager job.

CHAPTER 11

Multi-Store

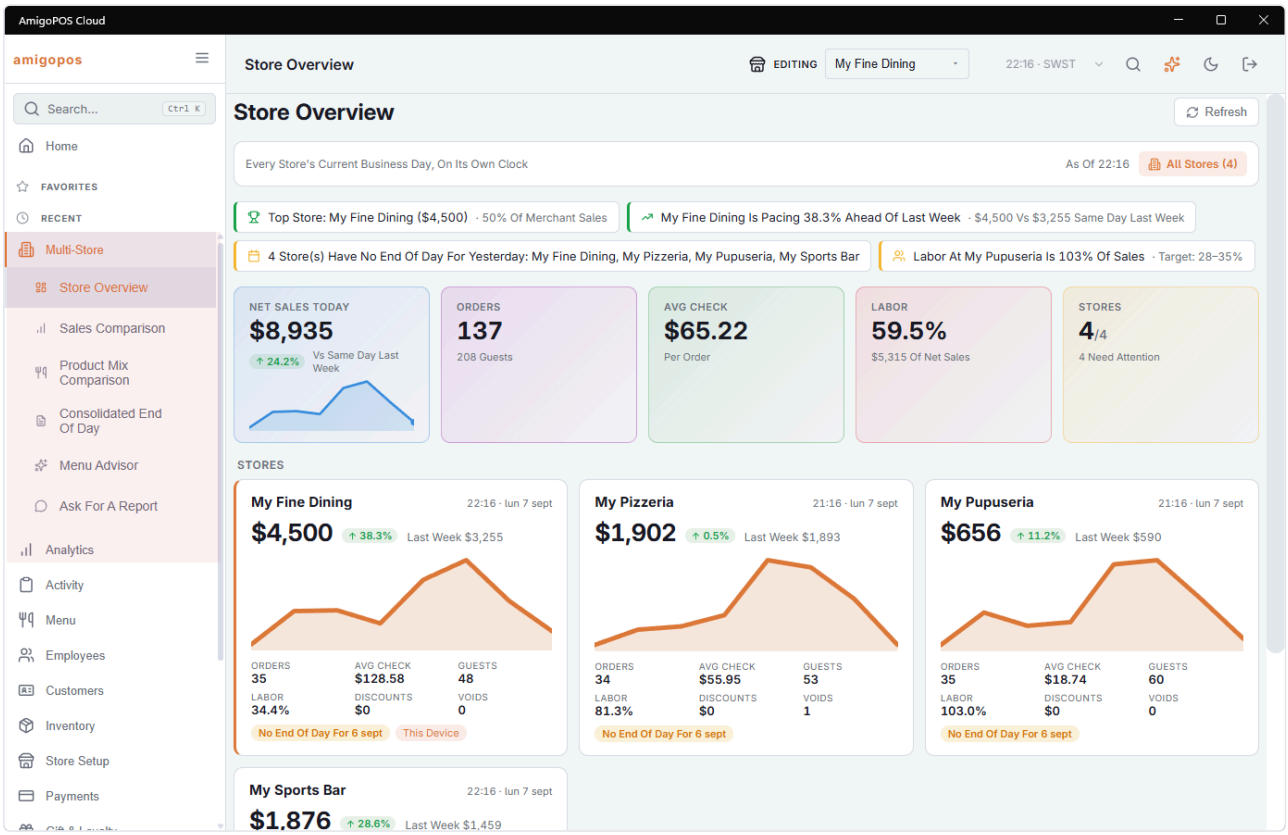
What Multi-Store adds

Multi-Store

View online ↗

The cross-store group in Back Office, how stores relate to each other, and why the register is never affected.

Back Office › Multi-Store is the section for working across all the stores of one business: dashboards that put every store side by side, and a store picker in the Back Office header that changes which store you are editing.



When the section appears

All four of these must be true:

- The store's plan includes Multi-Store.
- The account has more than one active store.
- Your job has **Allow All Stores**. See Giving a manager all-store access.
- Your job has the Back Office **Reports** permission.

The store picker in the header needs the first three. A single-store account never sees either.

How stores relate to each other

Every store owns its own menu, prices, settings, devices and drawers. There is no master menu pushed down from above: a change made in one store stays in that store. Staff are the exception — employees, jobs and permissions belong to the account, so one person works at any store with one PIN.

> The Multi-Store pages add stores together. Pages that edit still work on one store at a time: the one chosen in the store picker. See Switching the store you are editing.

The register is not affected

A station belongs to the store it was registered to. Pointing Back Office at another store does not change what the register rings up, what prints in the kitchen, or which store the day closes for. When you leave Back Office the station goes back to its own store.

What is in the section

- **Store Overview** — each store's current business day on a card. See Store Overview.
- **Sales Comparison** — one date range, store against store, and the all-stores sales tax return. See Sales Comparison.
- **Product Mix Comparison** — what each item sold in each store. See Product Mix Comparison.
- **Consolidated End Of Day** — one column per store for a business day, with a total. See Consolidated End Of Day.
- **Menu Advisor** — menu suggestions written by AI from your own sales. See Menu Advisor.
- **Ask For A Report** — a question in your own words, answered across every store. See Reports across all stores.

Two other pages that only exist for accounts with more than one store sit in their own sections: **Employees › People › Merge Duplicates** (Merging duplicate employees and jobs) and **Inventory › Operations › Transfers** (Moving stock between stores).

Starting a new store from an existing one

When you add a store (**Add Store** on the **Stores** card of the Subscription Manager; see Subscription Manager: plan, usage and stores), choose the store to copy from in **Copy From Store** and how much of it in **What To Copy**:

- **Menu Only** — the menu, with the order types its items use.
- **Menu And Setup** — the menu plus settings, taxes, order types, payment methods, discounts, price rules, suggestive selling, the floor plan, reservation setup, task templates, delivery zones, print and receipt templates, button layouts, customer display, reason lists, word filters, service pace rules, end-of-day and custom reports.
- **Menu, Setup And Inventory Catalog** — all of that plus the inventory items and recipes, with stock at zero.

The copy is made when the confirmation link is opened, into the new, empty store; the standard defaults then fill only what the source never had.

Nothing that identifies a place, a person or a processor is copied: addresses, phones, emails, coordinates, card processors, payment keys and the accounting, scheduling, delivery and messaging connections start empty, and payment methods arrive without their processor. Printers, devices, cash drawers and customers are not copied. Every copied menu item stays linked to the item it came from, so the product mix comparison lines the two up.

A Training mode: a practice register is made with the same copy.

Giving a manager all-store access

Multi-Store

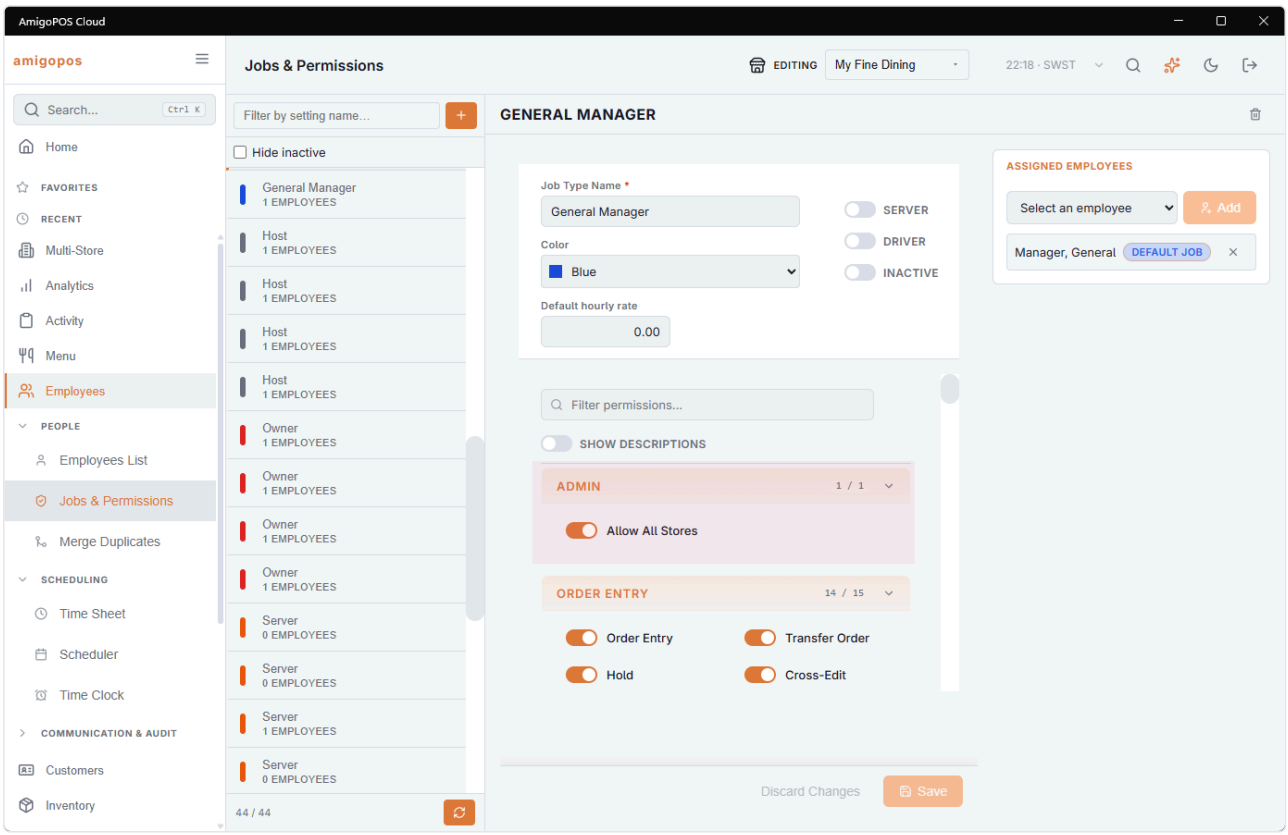
View online ↗

The permission that turns on the store picker and the Multi-Store group, and what call centre devices see.

Working across stores is a job permission, not a separate login. Give it to the people who manage more than one store; everyone else keeps working in their own store as before. It is set at **Back Office › Employees › People › Jobs & Permissions**.

Turning it on

1. Open **Employees › People › Jobs & Permissions** and select the job — owner, area manager, whichever fits.
2. In the **Admin** group, turn on **Allow All Stores**.
3. Keep **Reports** on in the **Back Office** group: the **Multi-Store** section needs it.
4. Save. The store picker and the Multi-Store section appear the next time that person opens Back Office.



> Both also need the store's plan to include Multi-Store and the account to have more than one active store. On any other plan Back Office behaves as for a single store, whatever the permission.

Jobs and permissions are shared by the whole account, so a job edited once applies in every store.

What it does not grant

Allow All Stores decides which stores you can look at and pick. It does not grant menu editing, voids, refunds or anything else — those are separate permissions, and they apply in whichever store you are pointed at.

Call center devices

A device registered as a call center seat gets a reduced Back Office: Analytics, Activity, Customers, Multi-Store and Troubleshooting, plus its own location's Registered Devices, Print Routing and Caller ID. Menu, inventory, drawers, employees and store setup are hidden, because a call center is often not a store at all. See POS station or call center seat.

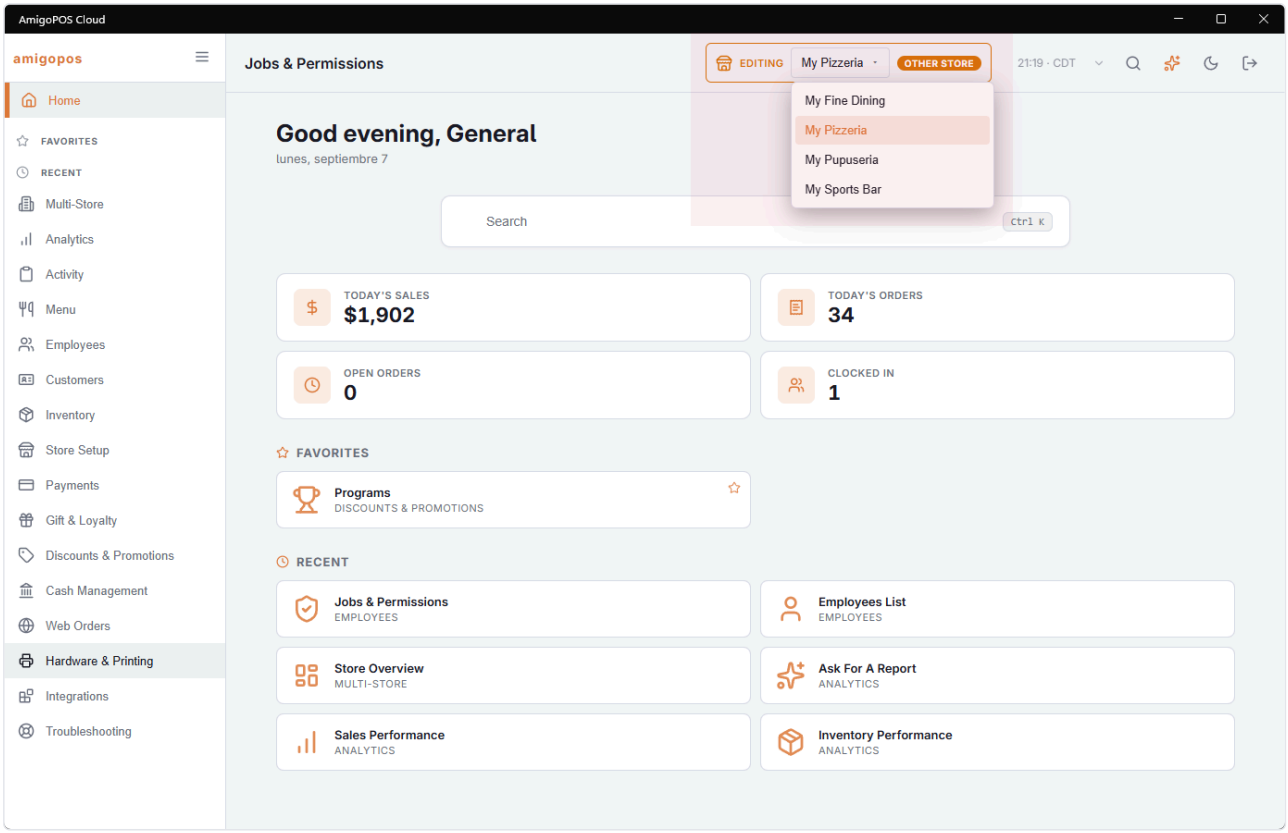
Switching the store you are editing

Multi-Store

View online ↗

The header store picker, the amber chip that says you are somewhere else, and what happens when you switch or leave.

With all-store access, the **Back Office** header carries a store picker: **Editing** followed by a drop-down of the account's stores. Choose a store and every Back Office page works on it — menu, prices, settings, devices, reports. It appears when the store's plan includes Multi-Store, your job has **Allow All Stores** and the account has more than one store; see Giving a manager all-store access.



Knowing where you are

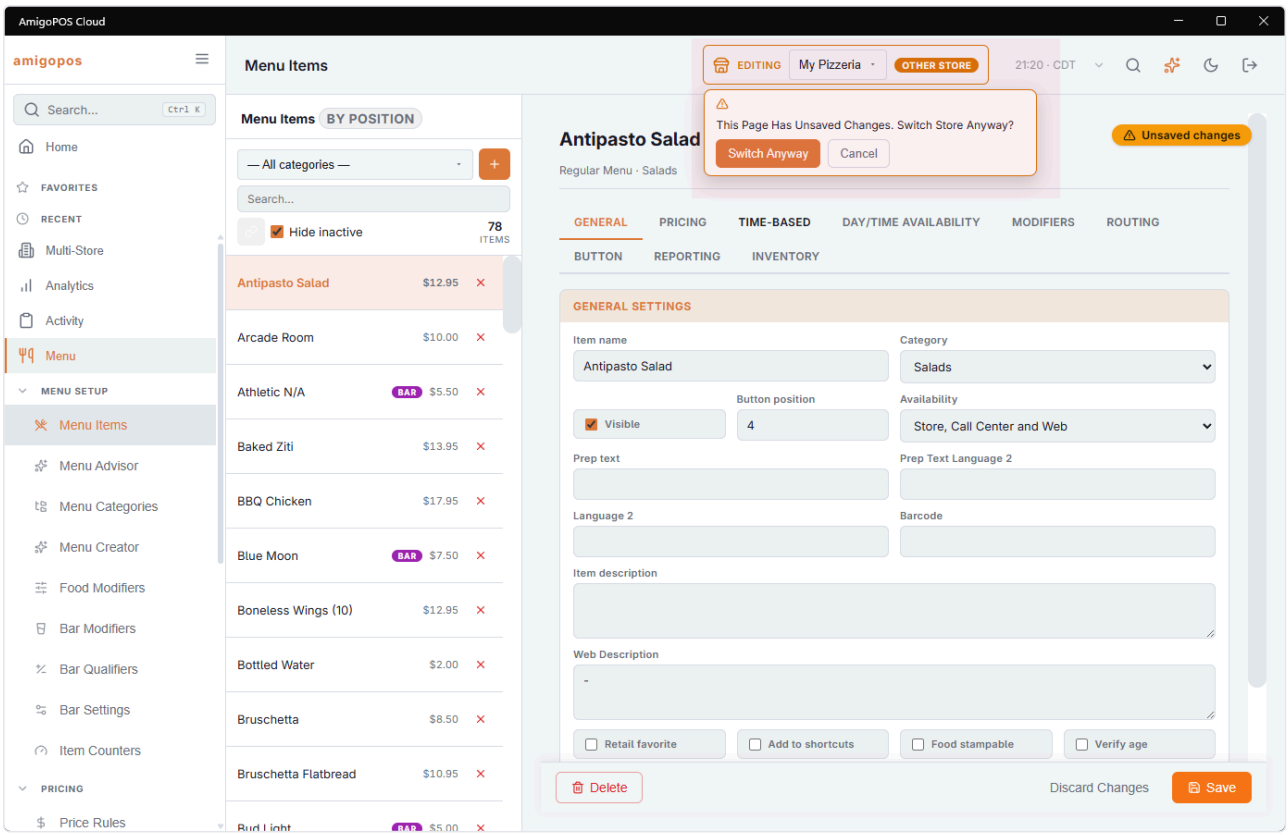
While the picker is on a store other than the one this station belongs to, the picker changes colour and shows the **Other Store** tag. Pointing at it reads *Back Office Is Editing A Different Store Than This Device Is Registered To*. The clock in the header then shows that store's time and name.

> A price changed in the wrong store is a correct save that nobody at the counter will see. Check the picker before you edit. Most "my change did not apply" and "these numbers are wrong" reports turn out to be the right answer for the wrong store.

Switching

Choose the store in the drop-down. *Loading* and the store's name show while everything Back Office keeps for a store is reloaded, so a page never shows one store's list with another store's prices. The page you were on then opens again for the new store. If the new store's plan does not include that page, it closes.

If the page has changes you have not saved, the picker asks first: *This Page Has Unsaved Changes. Switch Store Anyway?* **Switch Anyway** drops the changes and switches; **Cancel** keeps you where you are.



Leaving Back Office

Closing Back Office puts the station back on its own store and reloads it before the register shows again. Your last pick is remembered on this device, for you, for the next time you open Back Office. If that store has since been switched off, Back Office opens on the station's own store.

> While Back Office is pointed at another store, the station does not save that store's data for offline use; its offline copy stays its own store's.

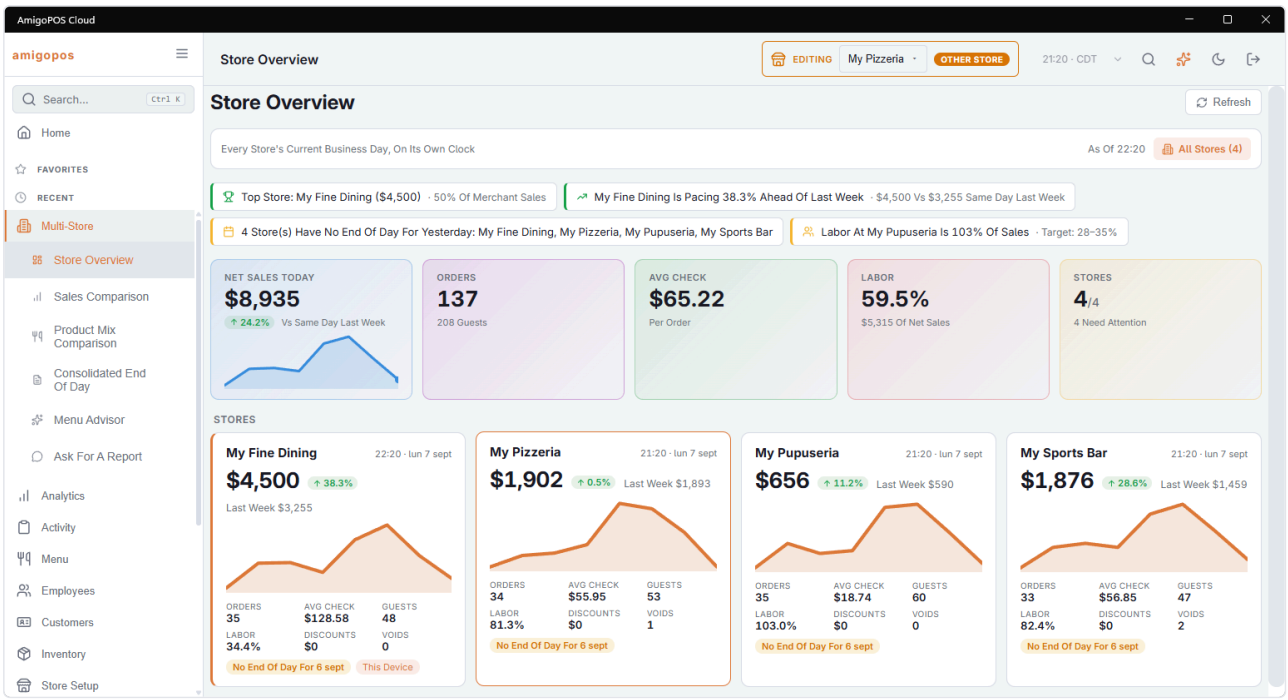
Store Overview

Multi-Store

View online ↗

One card per store for the period, with sparklines, exceptions, and a way straight into any store.

Back Office › Multi-Store › Store Overview shows every store's current business day at once: one card per store, each measured on its own clock, with the account's totals above them.



The header

- **Refresh** — loads the figures again. The page does not update by itself.
- The line under the title reads *Every Store's Current Business Day, On Its Own Clock*. Beside it, **As Of** gives the time the figures were worked out, and **All Stores (n)** how many stores are shown.

There is no date choice: the page always shows today. For other days use Sales Comparison or Consolidated End Of Day.

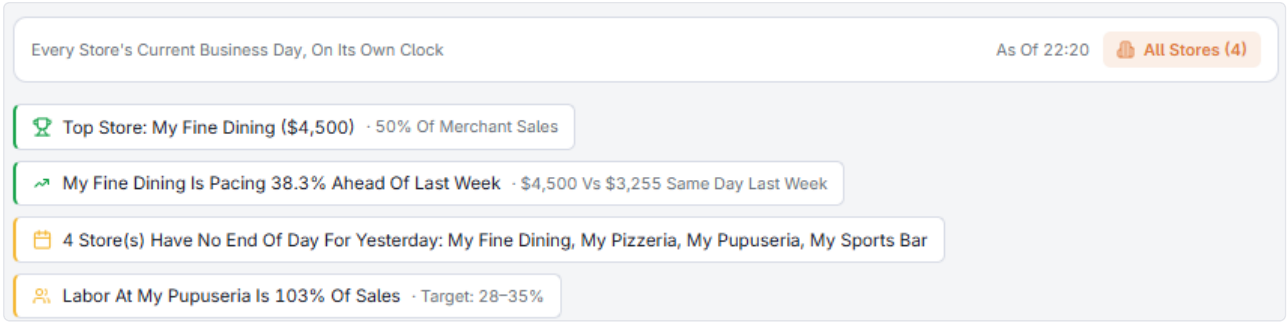
The totals

- **Net Sales Today** — all stores together, with the change against the same day last week up to the same time of day, and a line of the last eight days.
- **Orders** — with the number of guests.
- **Avg Check** — net sales per order.
- **Labor** — labor cost as a percentage of net sales, with the cost.
- **Stores** — how many stores reported out of how many, and either *All Clear* or *n Need Attention*. A store needs attention when its figures could not be read, when yesterday had sales but no end of day, or when it has items sold out.

The insights strip

Above the totals a strip calls out what stands out today:

- the top store, with its share of the account's sales;
- a store more than 10% behind, or more than 10% ahead of, the same day last week up to the same time of day;
- stores with no end of day for yesterday;
- a store whose labor is above 35% of its sales;
- items sold out, and in which stores.



The store cards

Cards are in store-name order. Each card shows:

- the store's local time and its business day;
- net sales so far, the change against the same day last week up to the same time of day, and last week's figure up to that time;
- a line of the last eight days;
- **Orders**, **Avg Check**, **Guests**, **Labor**, **Discounts** and **Voids** (voided orders);
- tags for *n Open* orders, *n Sold Out* items and *No End Of Day For* yesterday's date. The store this station belongs to is tagged *This Device*.

At 11:00 a store is compared with its own sales last week up to 11:00, on its own clock. The line of the last eight days uses whole days.

A store whose figures could not be read shows *This store's figures could not be read.* on its card instead.

> Each store counts its own business day: the day starts at that store's business day start time, in its own time zone. A store that has not closed yet keeps moving until it does. See The business day and when it rolls over.

Opening a store

Select a card to point Back Office at that store and open **Analytics › Overview** for it. The store picker in the header changes to that store; use it to come back. See Switching the store you are editing.

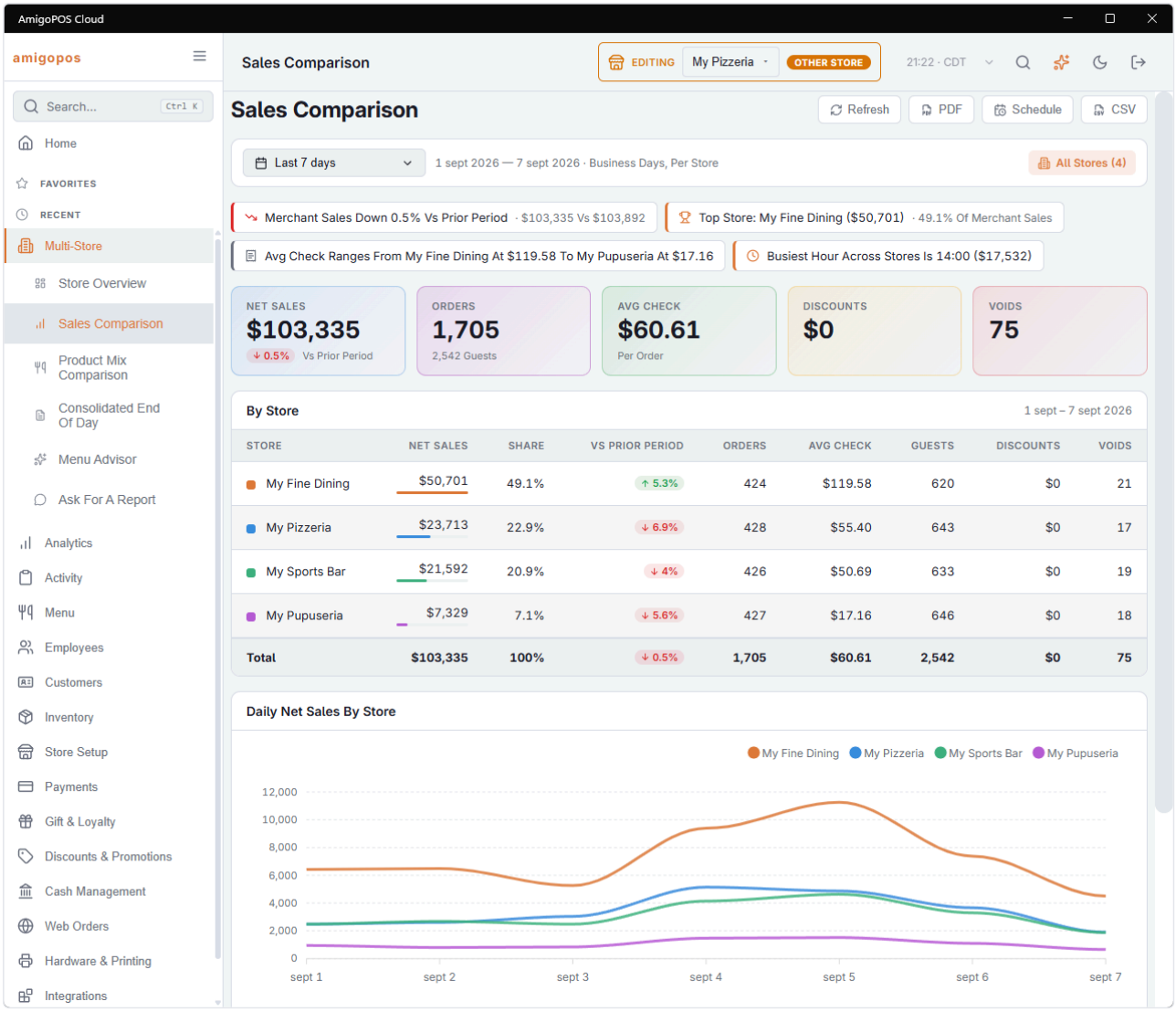
Sales Comparison

Multi-Store

View online ↗

Every store on the same period: the store table, the daily lines and the store by hour heat map.

Back Office › Multi-Store › Sales Comparison puts every store on the same dates, so the differences between them are the only thing left to look at. Each store is measured on its own business days.



Choosing the dates

The date button opens on **Last 7 days**. Pick **Today**, **Yesterday**, **Last 7 days**, **Last 30 days** or **Month To Date**, or type dates in **Start** and **End**; the button then reads **Custom Range**. The page reloads as soon as you choose. The note beside the button gives the dates and *Business Days, Per Store*: a late-closing store's night counts on the day it started. A range longer than a year is cut to the last 366 days.

Header buttons

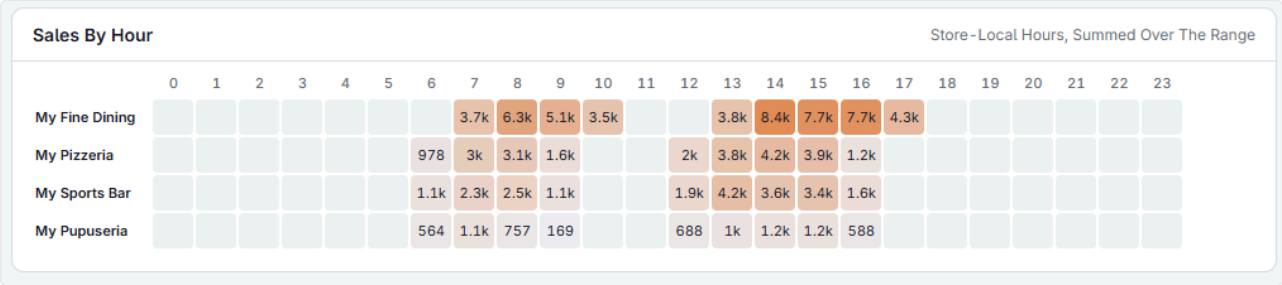
- **Refresh** — loads the figures again.
- **PDF** — the comparison as a document, for all stores.
- **Schedule** — emails that PDF on a schedule.
- **CSV** — the store table, the daily figures and the hourly figures in one file. The store table's columns are Store, Net Sales, Share %, Vs Prior Period %, Orders, Avg Check, Guests, Discounts and Voids, with the headings in the language Back Office is shown in.
- **Tax Return** and **Tax Return · Schedule** — the sales tax return for every store over the same dates; see below.

The PDF preview, emailing it and scheduling work as on the Analytics pages; see Exporting and PDF preview.

What is on the page

- **Insights** — the account's sales up or down against the period before; the top store and its share; the spread between the highest and lowest average check, when it is 25% or more; and the busiest hour across the stores.
- **Totals** — **Net Sales** with **Vs Prior Period** (the same number of days just before the range), **Orders** with guests, **Avg Check**, **Discounts** and **Voids** (voided orders).

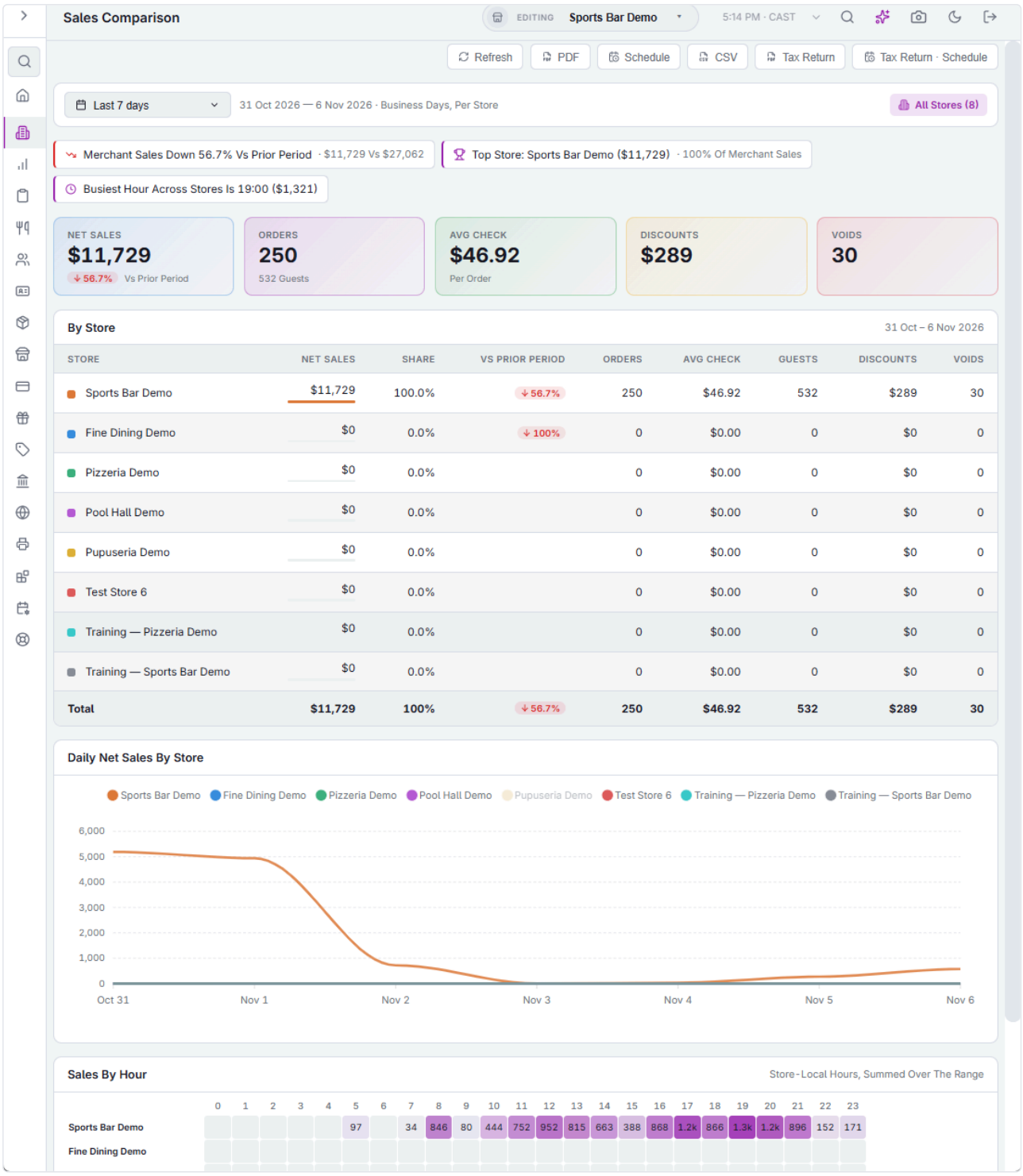
- **By Store** — one row per store, highest net sales first: **Net Sales** with a bar, **Share**, **Vs Prior Period**, **Orders**, **Avg Check**, **Guests**, **Discounts** and **Voids**, and a total row. A store that could not be read is marked with **!**.
- **Daily Net Sales By Store** — one line per store across the range, for finding the day something changed.
- **Sales By Hour** — a grid of stores against the hours 0–23, in each store's local time and added up over the range. Darker cells sold more; point at a cell for its sales and order count.



> Sales By Hour is the quickest way to see that two stores with the same total run different services — one lunch-led, one late-evening.

Sales tax return for all stores

Tax Return builds one PDF for the page's dates: the total for all stores first, then a section per store on its own clock. **Tax Return · Schedule** emails it on a schedule; monthly on the first suits most filings. See Filing your sales tax return.



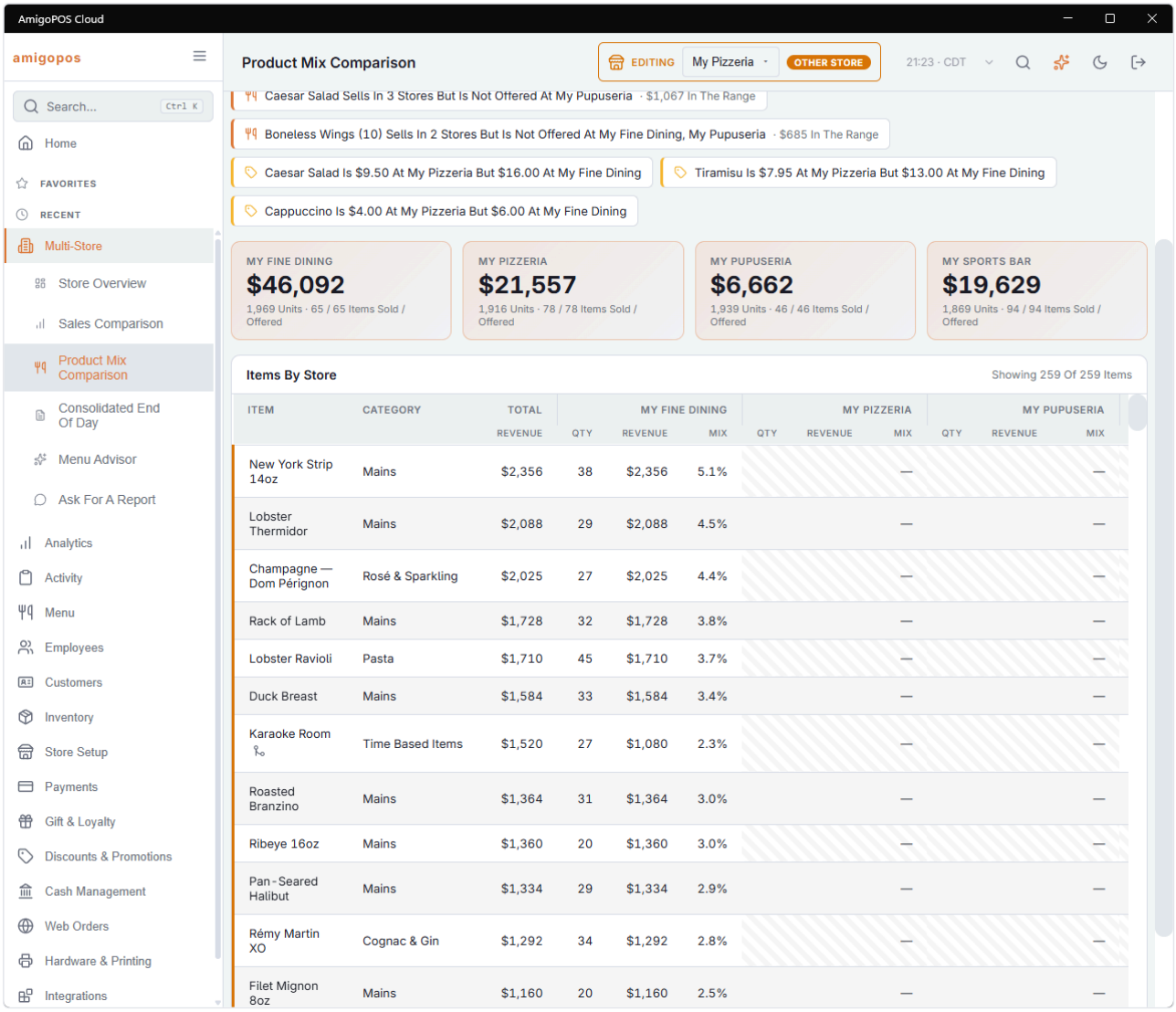
Product Mix Comparison

Multi-Store

View online ↗

An item by store matrix: gaps in a store's menu, price differences, and linking the same dish across stores.

Back Office › Multi-Store › Product Mix Comparison is an item-by-store table: for each item, what it sold in every store over the dates you choose, and where it is not on the menu at all.



The toolbar

- **Dates** — opens on **Last 7 days**; the choices are **Today**, **Yesterday**, **Last 7 days**, **Last 30 days**, **Month To Date** or your own **Start** and **End**. Each store counts its own business days.
- **Filter Items…** — type part of an item or category name to narrow the table.
- **Only Items Missing From A Store** — keeps the items that at least one store does not offer.
- **Refresh** and **CSV** in the header. The CSV has every matched item, whatever the filter, with each store's quantity, revenue, mix share, price and whether it is offered. Headings and the Yes/No cells are in the language Back Office is shown in.

The page

- **Insights** — up to three top sellers that sell in two or more stores but are missing from another; up to three items whose price differs by 10% or more between stores; and any store offering ten or more items that did not sell in the range.
- **A box per store** — its item revenue, units sold, and **Items Sold / Offered**.
- **Items By Store** — one row per item, highest total revenue first, with **Category** and the **Total** revenue, then **Qty**, **Revenue** and **Mix** (the item's share of that store's item revenue) for each store. Point at a store's revenue to see its menu price. The header says *Showing n Of n Items*.

Revenue here is the price of the item lines sold, without modifiers, from orders that were not voided.

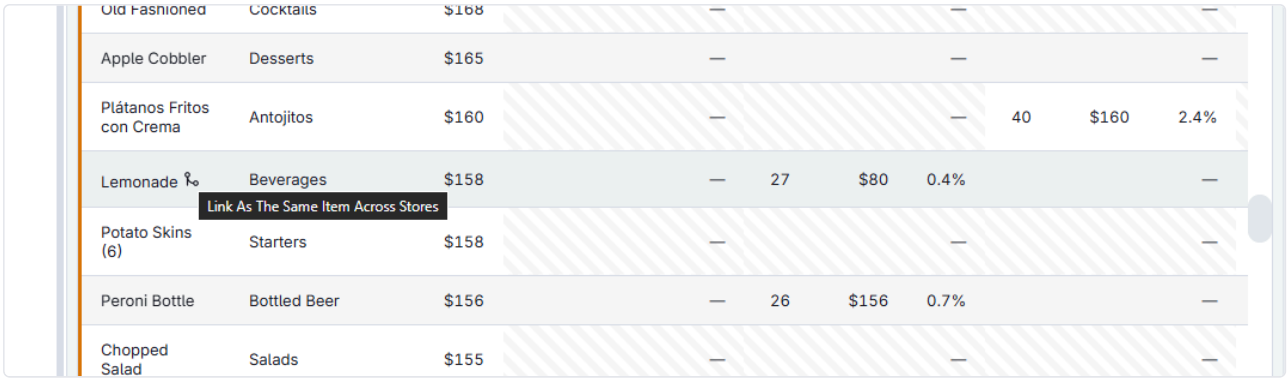
> A **0** means the store has the item on its menu but sold none. A dash across the three cells means the item is not on that store's menu (or is hidden there). Rows with a missing store are tinted.

How items are matched

Each store owns its own menu, so the same dish is a separate item in every store. Items linked across stores share one row. Items that are not linked are matched by name, ignoring case, spacing and punctuation.

Linking the same item across stores

A row matched only by name, present on two or more stores' menus, has a link button beside the name. Selecting it records that these items are the same dish; the row then shows the linked mark and stays together even if one store renames its item. Copies made when a store is created from another are linked already.



Link as you go. A dish renamed in one store otherwise splits into two rows, and the gap you see is not real.

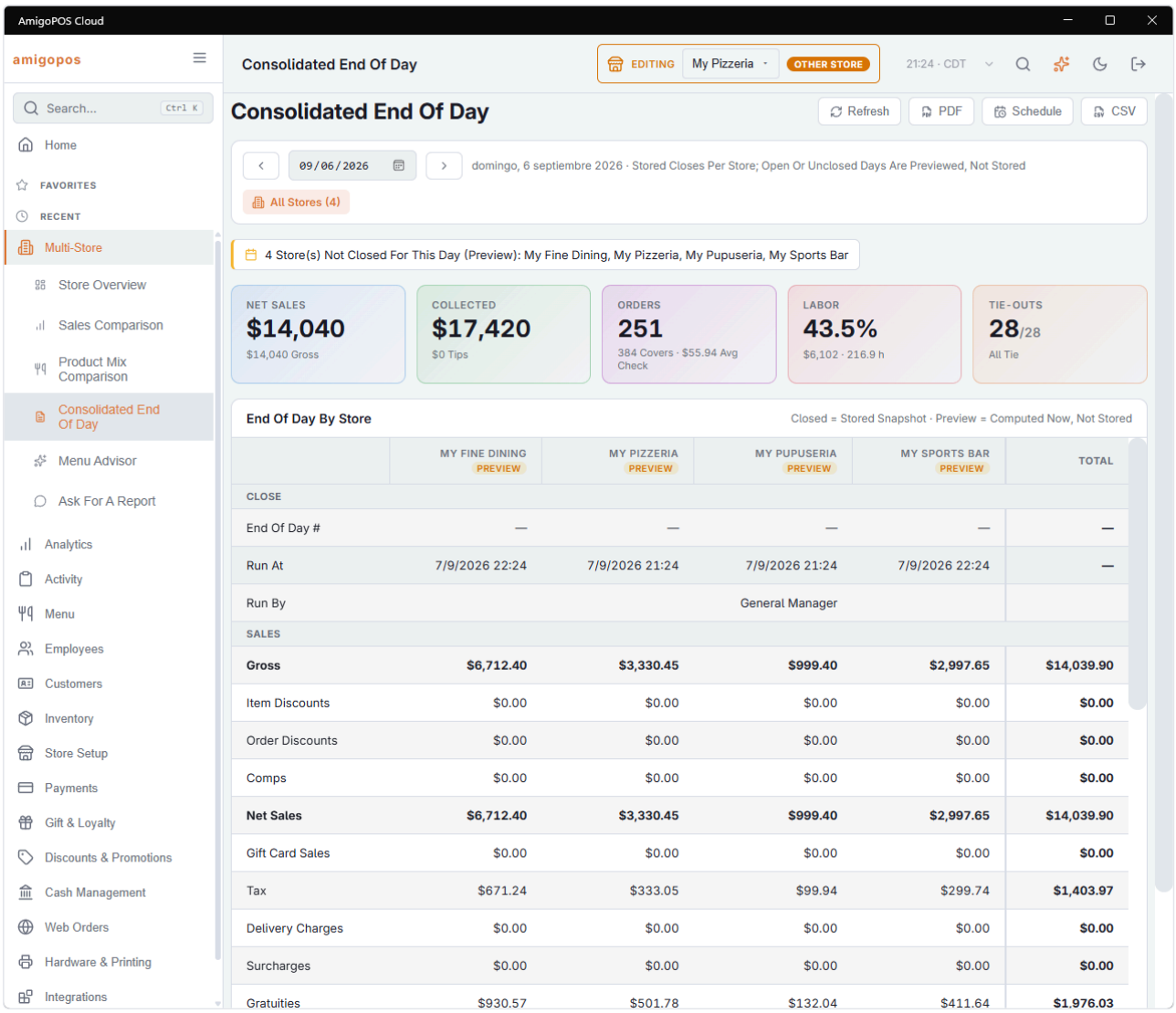
Consolidated End Of Day

Multi-Store

View online ↗

Every store's close side by side with an account total, and the difference between a stored close and a preview.

Back Office › Multi-Store › Consolidated End Of Day lays one business day of every store side by side, one column per store, with a **Total** column for the account.



Choosing the day

The page opens on yesterday. Use the arrows (**Previous Day**, **Next Day**) or type a date. **Refresh** loads the figures again.

Closed and Preview

Under each store name a tag says where its figures come from:

- **Closed** — the store ran its end of day for that date, and the column is the stored close, exactly as it was signed off.
- **Preview** — the store has not closed that date. The column is worked out now from the same figures; it is not stored, and it keeps changing until the store closes.
- **No Data** — that store's business day has not started yet. Its cells show a dash.
- **Error** — the store's figures could not be read.

The **Total** column adds every store that has a Closed or Preview column, so a total that includes a preview is provisional too. The insights strip names the stores still in preview.

> Hand an accountant stored closes only. Run the end of day in every store first, then take the figures from this page.

The figures

The top boxes give the account's **Net Sales** (with gross), **Collected** (with tips), **Orders** (with covers and average check), **Labor** (percentage, cost and hours) and **Tie-Outs** passed out of the total. The table below groups its rows:

- **Close** — **End Of Day #**, **Run At** and **Run By**.

- **Sales** — from **Gross** down through item and order discounts and comps to **Net Sales**, then gift card sales, tax, delivery charges, surcharges and gratuities to **Amount Due**, and refunds, tendered, tips, cash discounts and card fees to **Collected**.
- **Counts** — orders, covers, average check, voids and orders open at close.
- **Tenders** — one row per kind of tender any store took, named as on the Payment Methods page, in the language Back Office is shown in.
- **Cash** — cash sales, paid outs, drops, **Drawer Variance** and no sales.
- **Labor** — hours, labor cost and labor as a percentage of net.
- **Markdowns** — voided orders and removed items.
- **Tie-Outs** — how many of the end-of-day checks passed and how many failed.

The insights strip also lists failed tie-outs by store (or says all of them pass), drawer variances of 5 or more, and orders still open at close. What each line means is explained in The end-of-day report.

Taking it away

- **PDF** — the same table as a document.
- **Schedule** — emails the PDF on a schedule. Choose **Daily** with **Yesterday** to receive the previous day each morning.
- **CSV** — one row per line, one column per store, then the total.

The preview, email and schedule screens work as on the Analytics pages; see Exporting and PDF preview.

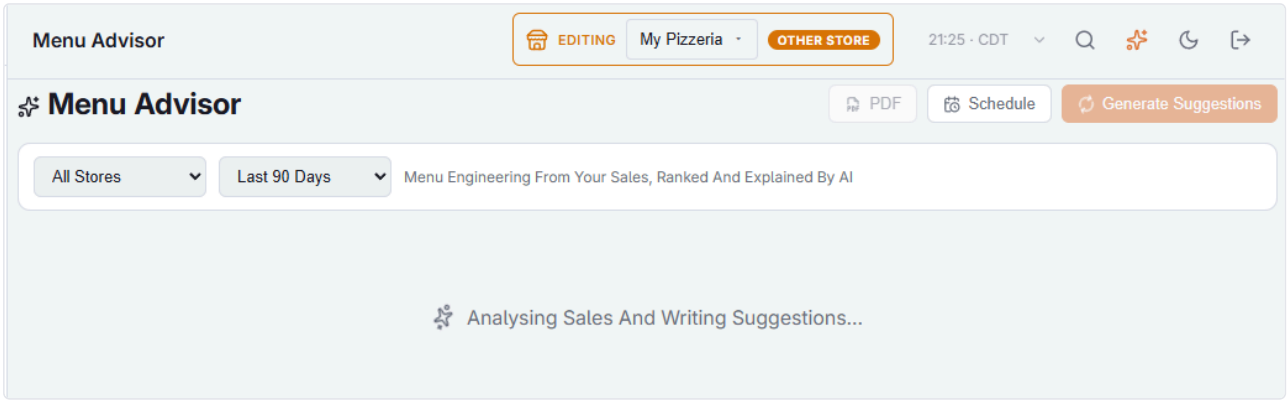
Menu Advisor

Multi-Store

View online ↗

AI suggestions for menu changes, built from your own sales, recipe costs, day parts and cross-store differences.

Back Office › Multi-Store › Menu Advisor reads your own sales and recipe costs and has AI suggest menu changes worth trying, each with the figures behind it. Nothing on the menu changes by itself.



Running it

1. Choose **All Stores** or one store.
2. Choose the range: **Last 14 Days**, **Last 28 Days** (the default), **Last 56 Days** or **Last 90 Days**. The range ends yesterday.
3. Select **Generate Suggestions**. *Analysing Sales And Writing Suggestions…* shows while it works.

A result is kept for up to 12 hours for the same stores and range. Opening the page shows the kept result for All Stores and 28 days, if there is one, with **Generated** and the time. **Generate Suggestions** on a page with nothing shown also uses a kept result for the stores and range you chose, without a new run. **Regenerate** always runs a fresh pass — use it after you have changed prices or recipes.

> Each run that writes new suggestions counts against the account's monthly AI allowance. A kept result does not. See AI usage, limits and your monthly allowance.

What it looks at

- Each item's popularity and margin, compared with the other items in its category, sorted into four groups: **Stars** (popular and profitable), **Plowhorses** (popular, low margin), **Puzzles** (profitable, not popular) and **Dogs** (neither).

- Recipe cost, where items have recipes built from inventory. Without recipes the price stands in for the margin, and the store's box shows **No Recipe Costs**.
- What sells at which time of day, what gets removed from orders, which items are ordered together, and what is sold out now.
- Across stores: items one store carries and another does not, and the same dish priced differently.

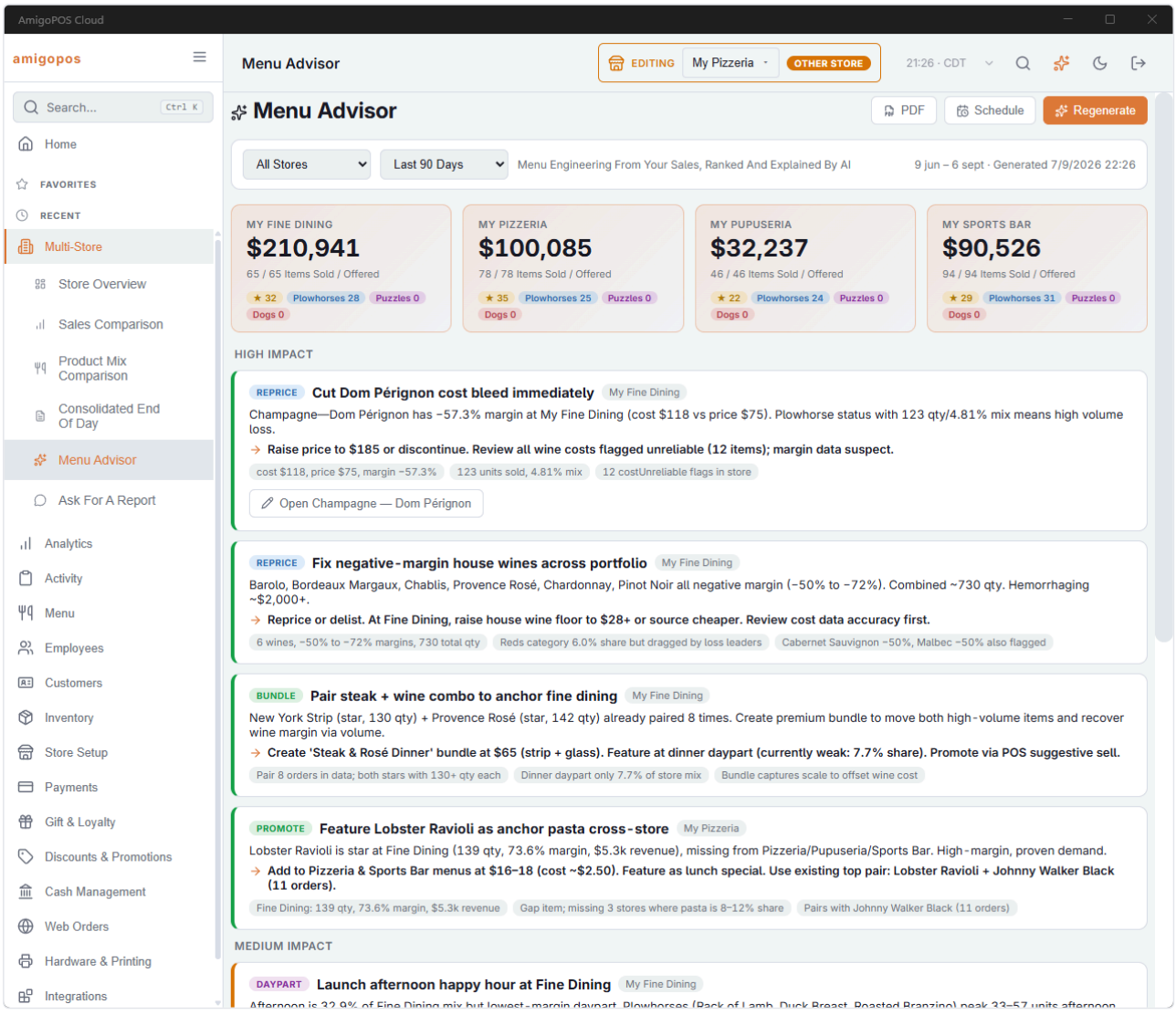
An item whose recipe cost is more than double its price is left out of the margin work: that is nearly always a unit or pack size entered wrongly.

Reading the result

A box per store gives its net sales for the range, **Items Sold / Offered** and how many items fall in each of the four groups.

Suggestions are grouped by **High Impact**, **Medium Impact** and **Low Impact**. Each one shows:

- a tag for the kind of change: **Promote**, **Reprice**, **Bundle**, **Remove**, **Add**, **Daypart**, **Upsell**, **Simplify**, **Cost** or **Idea**;
- the store it is about, when it is about one store;
- why, what to do, and the figures it is based on;
- **Open** and the item's name, which points Back Office at that store and opens the item.



> Advice is only as good as the recipes behind it. Fix recipe costs first, then regenerate.

PDF and schedule

PDF turns the current result into a document. **Schedule** emails the advice on a schedule for the stores and range on the page. Both work as on the Analytics pages; see Exporting and PDF preview.

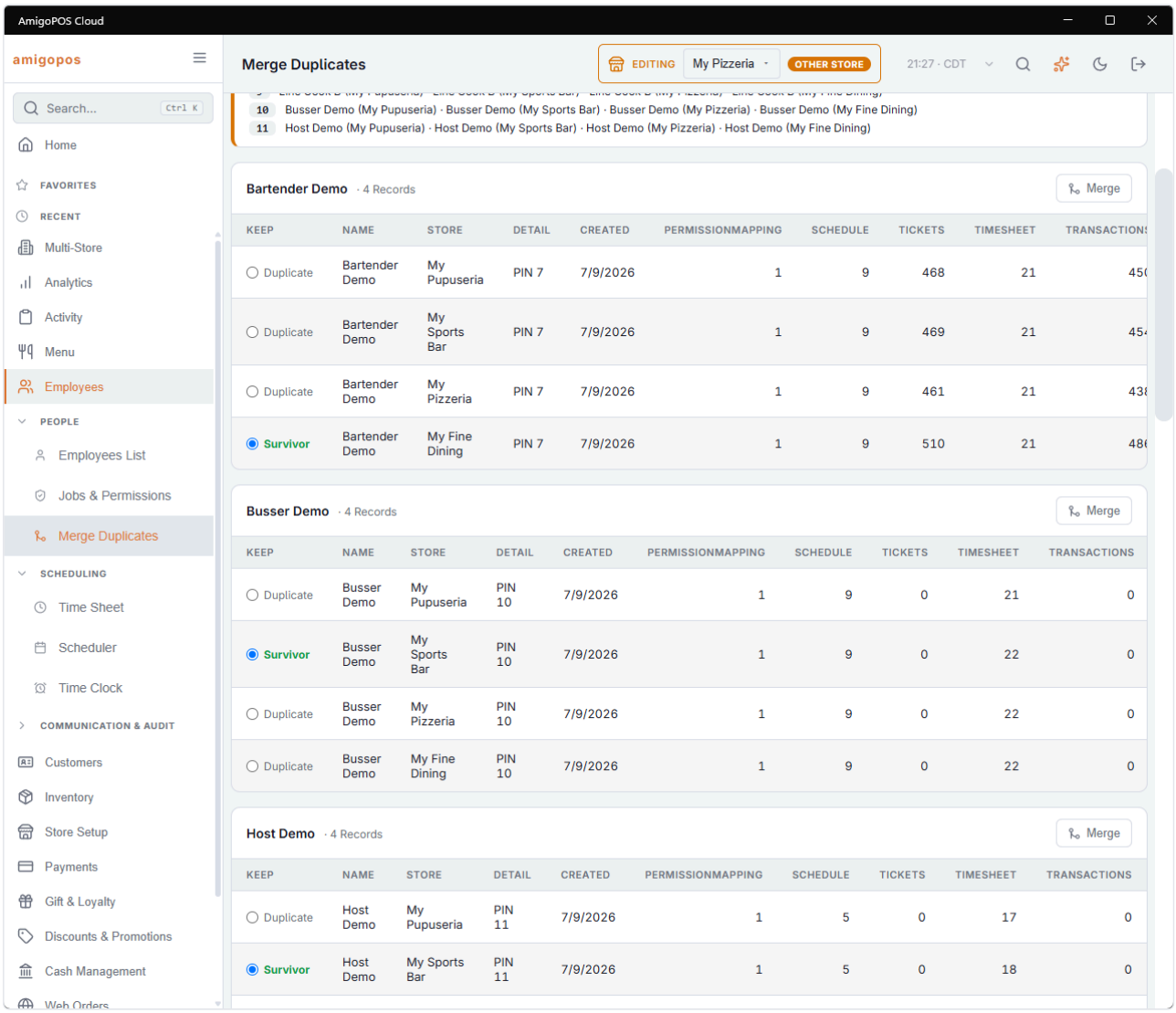
Merging duplicate employees and jobs

Multi-Store

View online ↗

Combining the same person hired twice, what merging moves, and the duplicate PIN panel.

Back Office › Employees › People › Merge Duplicates combines employees, or jobs, that exist twice. Employees and jobs belong to the account rather than to one store, so the same person hired separately in two stores, or the same job created in each store, can be listed twice. The page appears for accounts with more than one store, to jobs that have the **Edit Employees** permission.



What it finds

Choose **Employees** or **Jobs & Permissions** at the top. The page groups records whose names match once spaces, case and punctuation are ignored — first and last name for employees, the job name for jobs — and shows how many groups it found. **Refresh** looks again.

Each group is a card with the name and the number of records. Its table shows, per record:

- **Keep** — **Survivor** for the record that stays, **Duplicate** for the others. Pick another survivor with its button.
- **Name**, with **Disabled** for an inactive record, and the **Store** it was created in.

- **Detail** — jobs only: whether the job has All Stores or Manager access. The column appears only when a job in the group has one of them.
- **Created**, and a count for each kind of record that points at it: **Orders**, **Punches**, **Payments**, **Job Assignments** and **Scheduled Shifts** for an employee; **Job Assignments**, **Punches** and **Scheduled Shifts** for a job.

The record with the most history, the oldest first, is suggested as the survivor.

Merging

Press **Merge** on a group. The card asks **Merge {n} Record(s) Into {name}?**; press **Confirm Merge**, or **Cancel**. Then:

- Every reference to a duplicate is moved to the survivor, so shifts, sales and approvals stay with the person or the job.
- Job assignments that would now be doubled are combined into one.
- The duplicates are deleted and their PINs are released for reuse. They do not appear under **Show Deleted** on the Employees List and cannot be restored.

A line at the top reports the result: how many duplicates were removed, how many references were moved and how many job assignments were combined. If the merge fails, it reads **Merge failed** and nothing is changed.

> A merge cannot be undone. Check the survivor before you confirm, and merge one group at a time.

Duplicate PINs

A PIN signs a person in at every store of the account, so two active employees cannot share one. In the **Employees** view, a **Duplicate PINs** card lists any PIN active for more than one employee, with their names and stores — usually the same duplicate pair, solved by the merge itself. Otherwise change one of the PINs on the employee's profile.



> Merge before rolling out scheduling across stores. Reports and labor cost are only right once each person is one record.

PDFs and scheduled email for multi-store reports

Multi-Store

View online ↗

Producing a PDF now, or having Sales Comparison, the consolidated close and Menu Advisor arrive by email.

Three pages under **Back Office › Multi-Store** produce a PDF and can email it on a schedule: **Sales Comparison**, **Consolidated End Of Day** and **Menu Advisor**. Sales Comparison also produces the sales tax return for all stores. Each PDF covers every store.

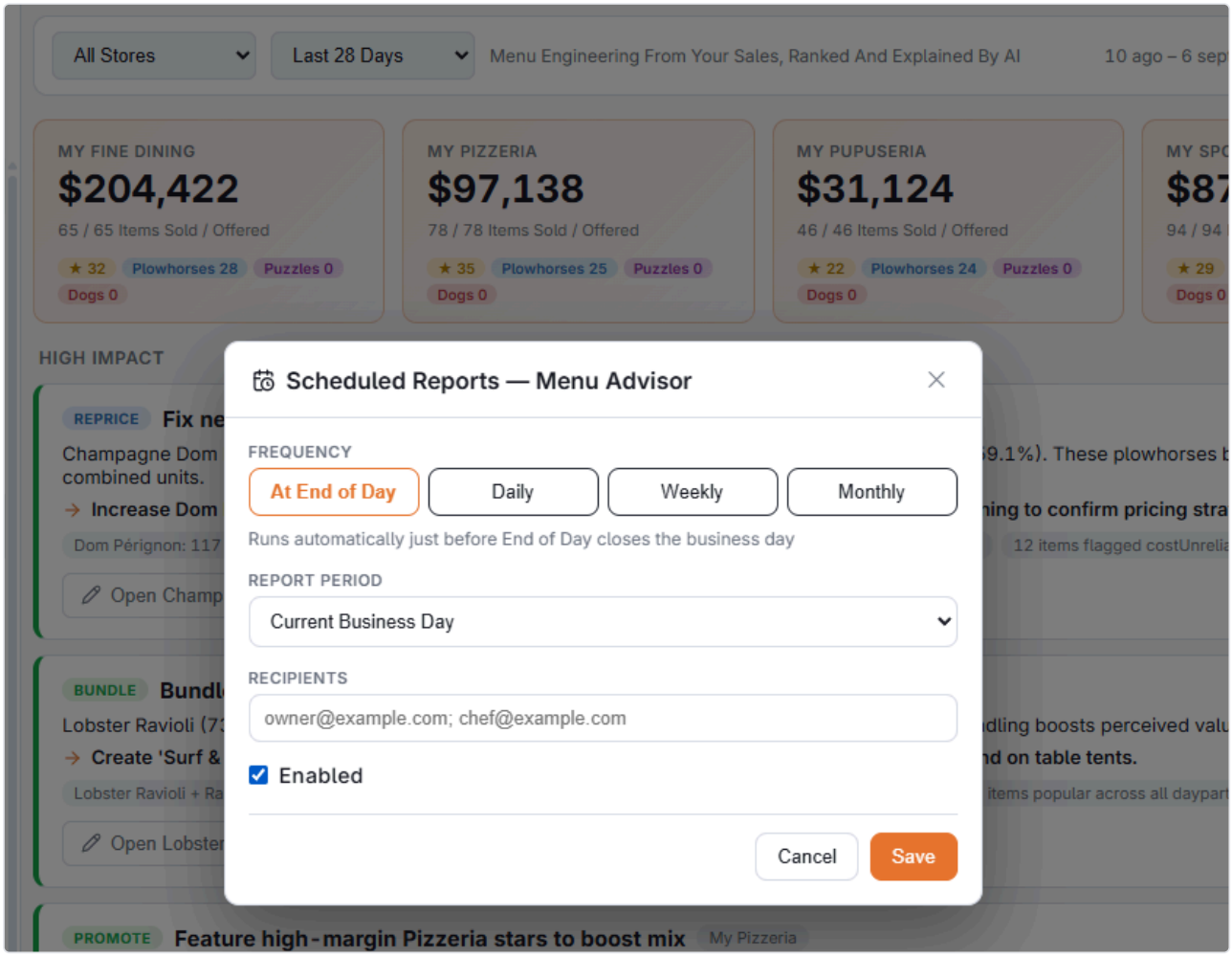
Page	Buttons
Sales Comparison	**PDF**, **Schedule**, **CSV**, **Tax Return**, **Tax Return · Schedule**
Product Mix Comparison	**CSV**
Consolidated End Of Day	**PDF**, **Schedule**, **CSV**
Menu Advisor	**PDF**, **Schedule**

PDF now

PDF opens a preview of the page as a document, for the dates or day on the page: the insights, the totals and the tables. From the preview you can download it or email it. See Exporting and PDF preview.

By email, on a schedule

1. Select **Schedule** on the page. **Scheduled Reports** opens with the schedules already saved for that report.
2. Select **+ Add Schedule**, then choose the **Frequency**, **Run at** and the **Report period**. A relative period such as **Yesterday** or **Last week** picks its own dates on every run.
3. Check the **Recipients** and **Save**.



The frequencies and the periods each one offers are listed in Exporting and PDF preview. Each saved schedule shows when it last sent or the last error, with **Send now**, **Edit** and **Delete**.

> For the Consolidated End Of Day, **Daily** with **Yesterday** sends the previous day each morning. For the tax return, **Monthly** on day 1 with **Last month** suits most filings.

> A schedule keeps running on its own. Check the recipient list when someone leaves the business.

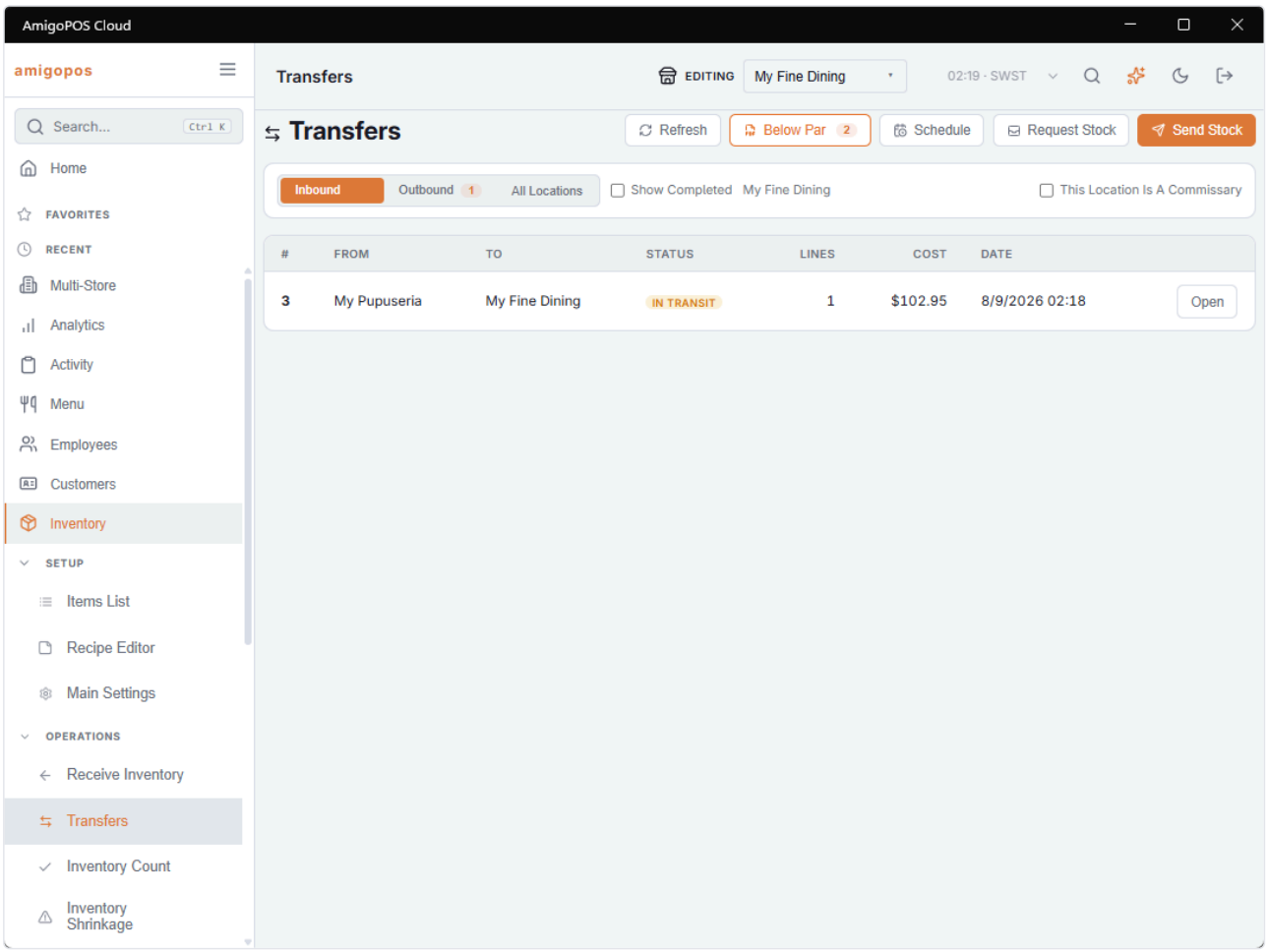
Moving stock between stores

Multi-Store

View online ↗

Requesting, sending and receiving stock between stores or from a central commissary, and what happens to quantity and cost.

Each store keeps its own stock, so nothing moves between stores on its own. **Back Office › Inventory › Operations › Transfers** moves it as a document you can follow from one end to the other: requested, sent, received.



> The page appears only when the account has more than one store and its plan includes Multi-Store, for jobs with the **Inventory Transfers** permission or users who work across all stores.

The page

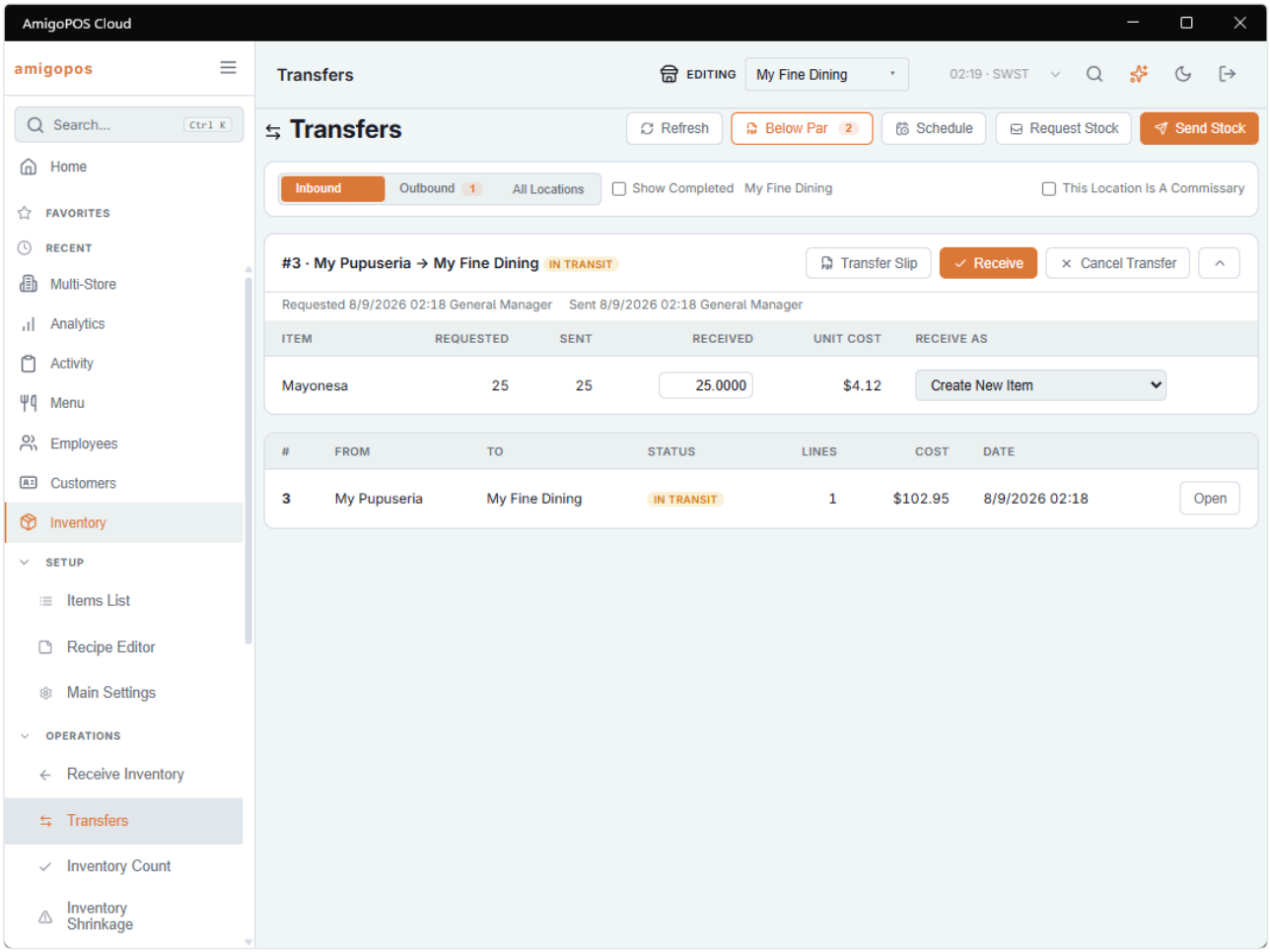
- **Inbound** and **Outbound** list the open transfers into and out of the store you are working in, with a count on each. Users with all-store access also get **All Locations**, the queue for the whole account. **Show Completed** adds received and cancelled transfers.
- Each row shows the transfer number, **From**, **To**, **Status** (**Requested**, **In Transit**, **Received** or **Cancelled**), **Lines**, **Cost** and the latest date. **Open** shows the transfer.
- **Request Stock** and **Send Stock** start a new transfer. **Below Par** and **Schedule** are covered below.

Direct transfers, and a central store

Any store can transfer to any other. An account that runs a central kitchen or warehouse can tick **This Location Is A Commissary** on that location's Transfers page (users with all-store access): a store that holds and distributes stock without a register. When you start a transfer, a commissary is selected first. Nothing assumes one exists — store-to-store transfers work the same either way.

The three steps

1. **Request stock** — the receiving store chooses **Request Stock**, picks **From**, adds **Notes** if needed, enters a **Qty** for each item it needs and chooses **Submit Request**. Nothing moves yet.
2. **Send stock** — the sending store opens the request, checks each line's **Sent** quantity and **Our Item** (matched by name), and chooses **Send Stock**. Stock leaves that store at this point, oldest cost first, and shows in its Shrinkage log as a transfer out. A store can also send without a request: **Send Stock** at the top, pick **To**, enter the quantities and choose **Send Now**.
3. **Receive** — the receiving store opens the transfer, enters what arrived in **Received**, checks **Receive As** and chooses **Receive**. It enters as a received lot at the cost it was sent at, with the transfer number as the invoice, and shows in the Received log.



The transfer shows who requested, sent and received it and when, and each line's **Requested**, **Sent** and **Received** quantity and **Unit Cost**.

> Sent and received quantities do not have to match the request, or each other. Enter what actually left and what actually arrived; the document keeps both, and the difference is visible afterwards.

Matching items on arrival

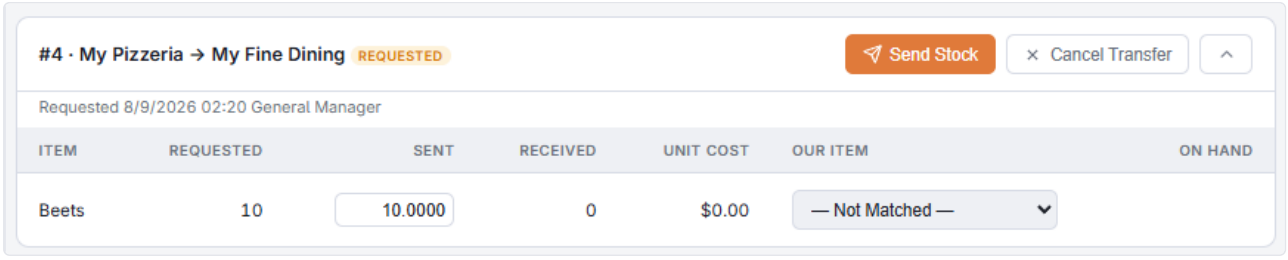
Because each store owns its own item list, arriving lines are matched to the receiving store's items by name. A line with no match starts on **Create New Item**, which copies the sending store's item (name, pack sizes, unit, cost and reorder level) into this store. A line left on **— Not Matched —**, or with a received quantity of 0, is not received.

Cancelling

Cancel Transfer, then **Confirm Cancel**. A request cancelled before it is sent moves nothing. Cancelling one that has already been sent returns the stock to the sending store; the returned stock is not listed as a delivery in the Received log.

Par levels and Below Par

Each item's reorder level and maximum quantity drive the request: the editor shows them as **Par** beside every item and marks the on-hand figure of items that are short. **Fill To Par (N Short)** sets each short item that has no quantity yet to what brings it up to its maximum (or its reorder level when no maximum is set). The **Below Par** button, with a count badge, opens a PDF of everything under its reorder level; **Schedule** emails that report on a schedule, so the list arrives before the day starts.



Paperwork

A sent or received transfer has a **Transfer Slip** PDF to travel with the goods. Transfers are also a subject in Ask For A Report, so a question such as what moved between two stores last month is answered there.

CHAPTER 12

Analytics & Activity

Performance

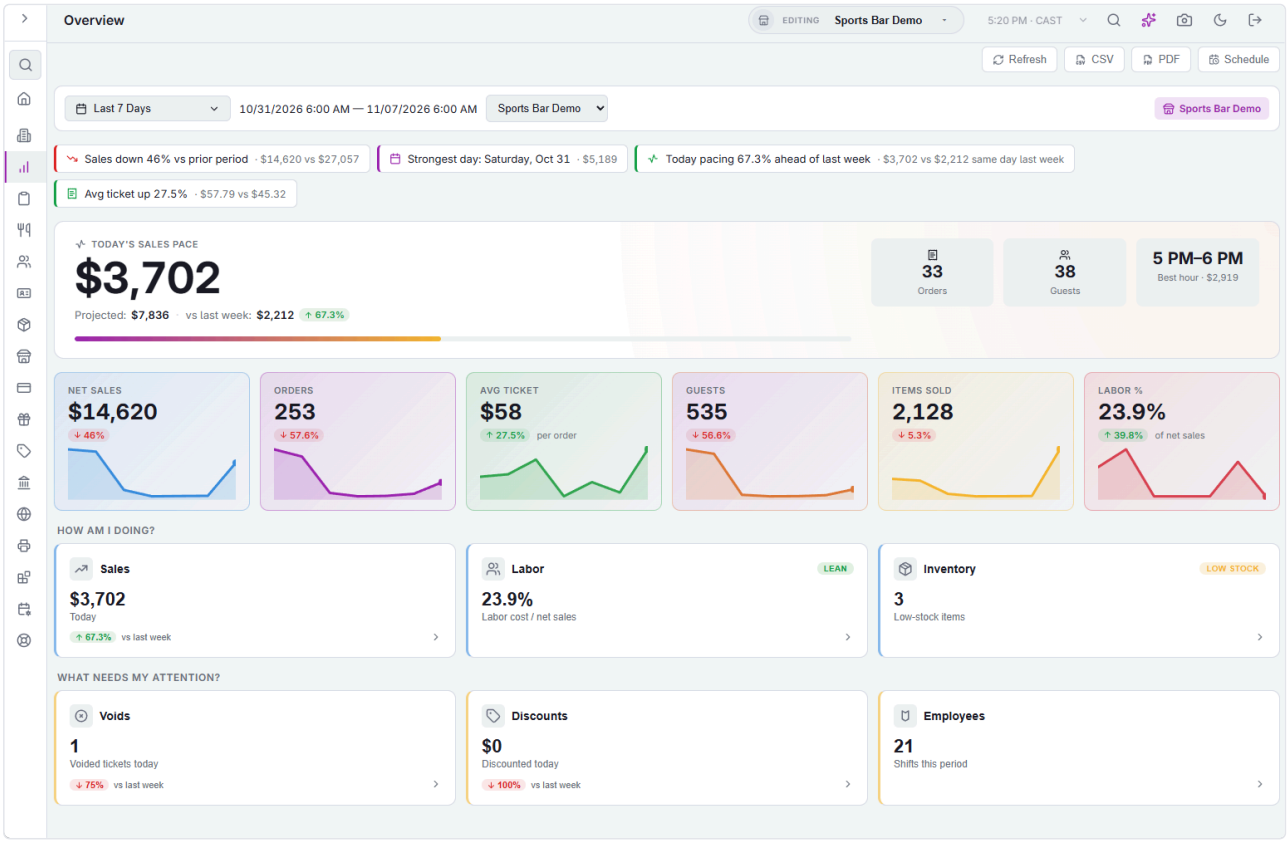
Overview and insights strip

Analytics & Activity › Performance

View online ↗

The dashboard home: today's numbers and automatic insights.

Back Office › Analytics › Overview is the first page of Analytics. It shows today’s sales so far, the main figures for the dates on the toolbar, and tiles that open the other reports.



The dates and store come from the toolbar; see Exporting and PDF preview. The dates change the insights, the KPI cards and the Labor and Employees tiles. The sales pace and the other tiles always show today’s business day.

Insights strip

Up to five short lines across the top. Each one shows only when its condition is met.

Insight	Shows when
Sales up / down vs prior period	Net sales for the dates differ by 3% or more from the same number of days just before them.
Strongest day	The dates include at least three days with sales; it names the day with the highest net sales.
Today pacing ahead of / behind last week	Today’s sales so far differ by 5% or more from the same weekday last week up to the same time of day.
Labor cost is …% of sales	Labor cost is above 40% of net sales for the dates (target 28–35%).
Labor cost is very lean	Labor cost is below 20% of net sales and there are more than 10 orders.
Avg ticket up / down	The average ticket differs by 5% or more from the period before.

Today's sales pace

- **Today's sales pace** — net sales of the current business day so far.
- **Projected** — today's sales so far scaled up to a full 24-hour business day at the same rate. Early in the day it is a rough figure.
- **vs last week** — net sales of the same weekday last week up to the same time of day, with the change against today in a badge. At 11:00 today is compared with last week's day up to 11:00.
- The bar under the figures shows how much of the 24-hour business day has passed; point at it to see the percentage.
- **Orders** and **Guests** today, and the **Best hour** so far with its sales.

KPI cards

Net Sales, **Orders**, **Avg Ticket** (per order), **Guests**, **Items Sold** and **Labor %** (of net sales) for the dates on the toolbar. Each card shows the change against the same number of days just before, and a small line of the daily values. A change under 0.5% shows as flat.

- Net sales count tickets that are not voided, after discounts and with tax, and leave out gift cards sold.
- Items Sold counts items, not modifiers.
- On **Labor %** the badge is reversed: an up arrow means labor took a smaller share of sales.

Tiles

Tiles sit in two groups, **How am I doing?** and **What needs my attention?**. Tap a tile to open its page. A tile whose page is hidden in your sidebar, because of your plan or your access, is not shown; for example, there is no Inventory tile on a plan without Inventory. On the tiles, last week means the same weekday last week up to the same time of day.

Tile	Shows	Opens
Sales	Today's net sales, with the change vs last week.	Sales performance
Gift card sales	Gift cards sold today, which the Sales tile leaves out. Shows only when gift cards were sold today or last week.	**Gift & Loyalty › Cards** (see The Cards overview: balances, activity and breakage). If that page is hidden for you, the tile does nothing.
Labor	Labor cost as a share of net sales for the dates: **Lean** under 28%, **Healthy** 28–35%, **Elevated** 35–40%, **High** above 40%.	Labor performance
Inventory	Items at or below their reorder level now. The tag reads **Stock OK** when there are none and **Low Stock** otherwise.	Inventory performance
Voids	Voided tickets today, with the change vs last week. The tag reads **No Voids** when there are none, and **Above Usual** when today has more than one and a half times last week's count.	Sales analytics
Discounts	The amount discounted today, with the change vs last week.	Discounts analytics
Employees	Shifts started during the dates on the toolbar.	Employee analytics

All Stores

With **All Stores** selected, the page adds up every store: the sales pace, the KPI cards, the tiles and the insights. **Avg Ticket** is worked out as the stores' net sales divided by their orders, and **Labor %** as their labor cost divided by their net sales. The tiles and insights follow the same rules as for one store, applied to the totals. The KPI cards show no change badge.

Export

CSV exports three sections: **Key Metrics** (each KPI card's label, value and change %), **Section Tiles** (the tiles shown, with value, detail, status and change %) and **Insights** (the text of each line). **PDF** opens the Overview Report: Today's Pace, Period KPIs, a Section Snapshot of the tiles, and the Insights. With All Stores and more than one store, pick a store first; see Exporting and PDF preview.

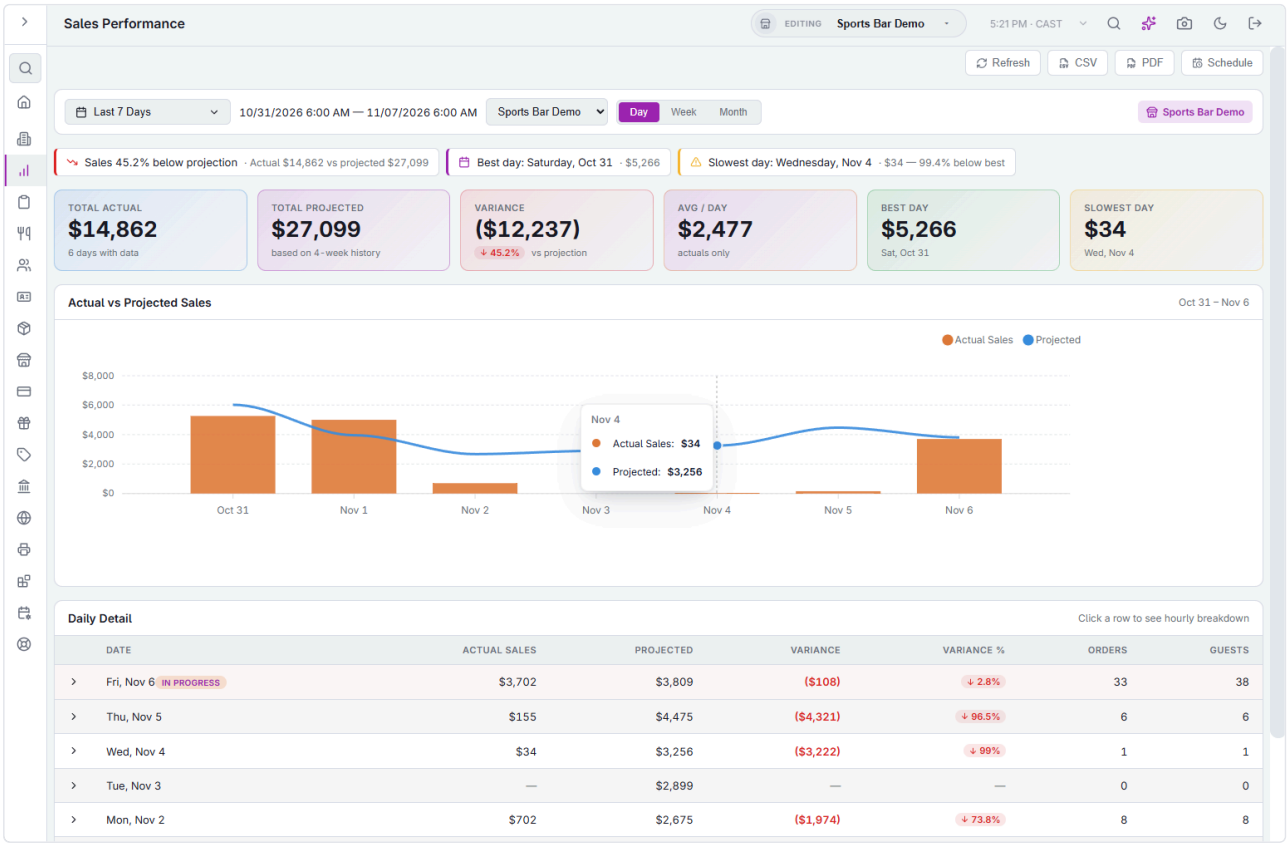
Sales performance

Analytics & Activity › Performance

View online ↗

Each day's sales against a projection from the store's own recent weeks, to see which days ran ahead or fell behind.

Back Office › Analytics › Performance › Sales Performance compares each day's sales with a projection built from the store's own recent history. Use it to see which days ran ahead of a normal week and which fell behind.



The toolbar

- **Date range** — the button opens the presets: **Today**, **Yesterday**, **This Week**, **Last Week**, **Last 7 Days**, **Last 30 Days**, **Month to Date**, **Last Month** and **Year to Date**, with **Start** and **End** boxes for a range of your own. The page opens on Last 7 Days. This Week and Last Week start on the store's Business Week Start Day (General settings), or on Sunday when it is not set.
- Next to it is the exact time window the figures cover. The days are business days: each one starts at the store's Business Day Start Time, so a range of one day runs from that time to the same time the next day. See The business day and when it rolls over.
- **Store** — one store, or **All Stores** to add up every store you can see. The page opens on the store you are working in.
- **Day** / **Week** / **Month** — groups the chart, the detail table, the CSV and the PDF by week or by calendar month. Weeks start on the store's Business Week Start Day. The cards above stay daily.
- **Refresh** (Ctrl+R) loads new figures. Without it, the figures for one store are kept for up to five minutes.
- **CSV** (Ctrl+E) downloads the detail table as it is grouped. **PDF** opens a preview you can download or email; **Schedule** emails the report on a schedule. A PDF covers one store, so with **All Stores** and more than one store the PDF button stays greyed out until you pick a store. See Exporting and PDF preview and Emailing the performance reports on a schedule.

Actual and projected sales

Actual sales are the totals of the business day's orders. Voided orders are left out.

A day's projection is the average sales of the same weekday in the four weeks before that day. For a Friday, that is the four Fridays just before it. Days with no sales are left out of the average, so a day the store was closed does not pull it down, and a day with no sales in all four weeks projects zero. Only finished days are used: today and later days never count, so a day ahead in the range is projected from the weeks that have already passed, and a day more than four weeks ahead is projected from the same weekday in the four weeks before today.

Today is marked **In Progress**. Its projection runs only up to the current time: the average of each hour so far on the same weekday over the last four weeks. Today's variance compares what the store has sold with what a normal day had sold by this hour.

Days after today show their projection and a dash for actual sales.

Total Projected and the variance count the projections up to today only. On This Week or any range that ends after today, the later days still show their projection in the table, but they are not in the totals, so the variance compares the days so far.

Cards

- **Total Actual** — the period's sales, with the number of days that had sales.
- **Total Projected** — the sum of the daily projections up to today.
- **Variance** — actual minus projected, in money and as a percentage. Green when sales are ahead, red when behind.
- **Avg / Day** — the average over the days that had sales.
- **Best Day** and **Slowest Day** — the days with the highest and lowest sales. Today is not ranked. Slowest Day is hidden when only one day qualifies.

Above the cards, a strip shows up to four notes: sales 3% or more above or below the projection, the best day, the slowest day when it is more than 30% below the best, and today pacing 10% or more ahead of or behind its projection.

Actual vs Projected Sales

The chart shows actual sales as bars and the projection as a line, one point per day, week or month.

All Stores

With **All Stores** selected, each day's actual and projected sales, orders and guests are added up over the stores. The cards, the best and slowest day and the notes are then worked out from those totals, with the same rules as for one store.

Detail table

The table is titled **Daily Detail**, **Weekly Detail** or **Monthly Detail**, newest first, with a **Total** row at the bottom.

Column	What it shows
Date / **Week** / **Month**	The day, or the first and last day of the week, or the month. The first and last weeks or months are cut to the range.
Actual Sales	Sales of the period. A dash means no sales yet.
Projected	The projection for the period.
Variance and **Variance %**	Actual minus projected. A shortfall shows in brackets.
Orders	Orders taken, voided orders left out.
Guests	The orders' guest counts. An order without a guest count counts as one guest.

In the Day view, click a row to open that day's hourly breakdown: each hour's sales, its projection (the average of that hour on the same weekday in the four weeks before that day), and the peak hour highlighted. Click the row again to close it. Weeks and months have no hourly breakdown.

Related: Labor performance, Product mix, Demand forecast.

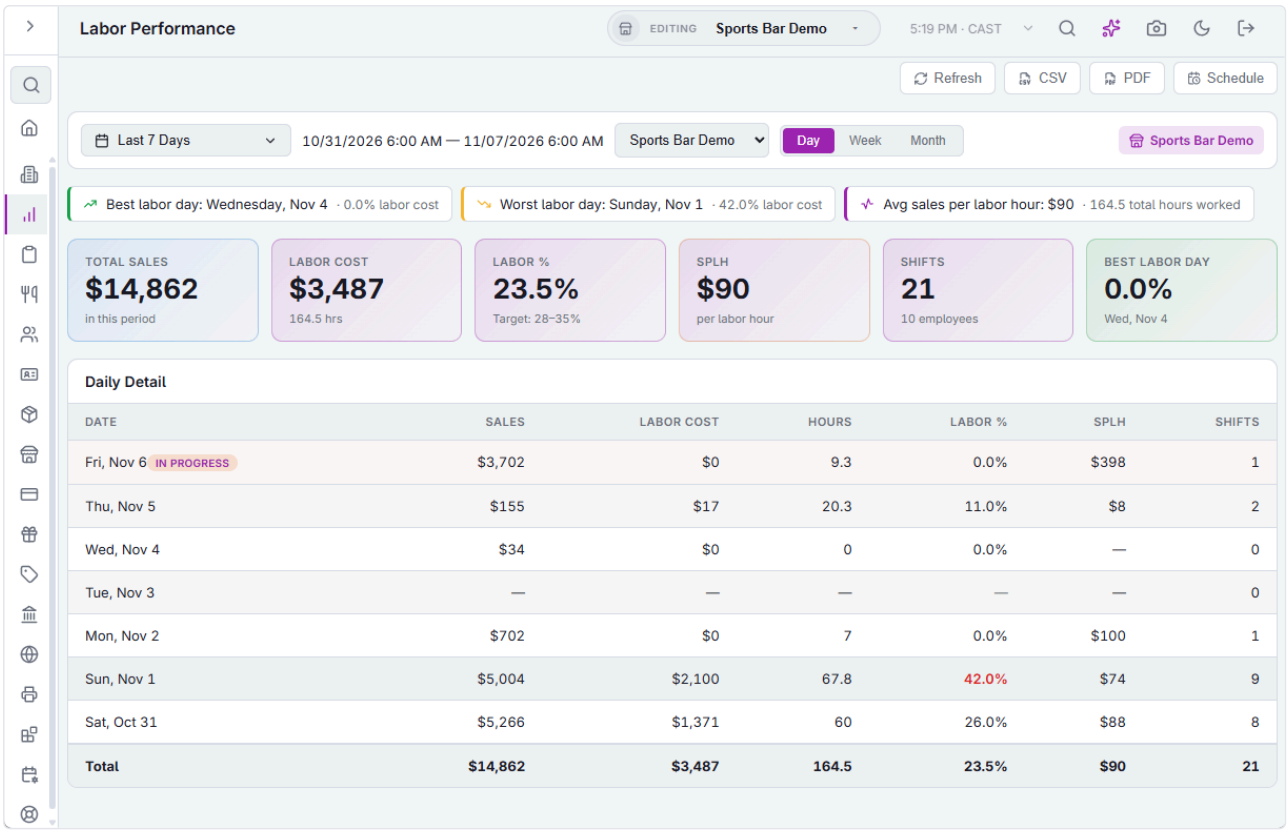
Labor performance

Analytics & Activity › Performance

View online ↗

Labor cost and hours from the time clock next to the sales of the same days, as a share of sales and sales per labor hour.

Back Office › Analytics › Performance › Labor Performance puts the labor cost and hours from the time clock next to the sales of the same days. It shows labor as a share of sales and the sales earned for each hour worked.



The toolbar

The toolbar works as on Sales performance: a date range (Last 7 Days to start), the exact business-day window, **Store** (one store or **All Stores**), **Day** / **Week** / **Month** for the table, **Refresh**, **CSV**, **PDF** and **Schedule**. The cards stay daily whichever grouping you choose.

Where the figures come from

- **Sales** are the totals of the business day's orders, voided orders left out.
- **Labor cost** is the cost recorded on the time cards.
- **Hours** run from clock-in to clock-out. A shift that is still clocked in counts up to now.
- Each shift counts on the business day it started, even when it ends after midnight.

> A forgotten clock-out keeps adding hours until someone closes the shift. Correct the time cards in Timesheets before you read a week's labor.

Cards

- **Total Sales** — the period's sales.
- **Labor Cost** — the period's labor cost, with the hours worked.
- **Labor %** — labor cost as a percentage of sales. The card is green from 28% to 35%, amber above 35% up to 40%, and red above 40%. Below 28% it stays neutral. The 28–35% target is fixed and is not a store setting.
- **SPLH** — sales per labor hour: sales divided by hours worked.
- **Shifts** — the number of time-card shifts, with the number of employees who clocked in.
- **Best Labor Day** — the day with the lowest labor %, among days with sales. Today is not ranked.

Above the cards, a strip shows up to four notes: labor above 40% of sales, labor below 20% with more than five shifts (which may mean understaffing), labor in the 28–35% range, the best labor day, the worst labor day when it is more than five points above the best, and the average sales per labor hour.

All Stores

With **All Stores** selected, each day's sales, labor cost, hours and shifts are added up over the stores. **Best Labor Day** and the notes are worked out from those totals. An employee who clocked in at more than one store counts once in the number under **Shifts**.

Detail table

The table is titled **Daily Detail**, **Weekly Detail** or **Monthly Detail**, newest first, with a **Total** row. Today is marked **In Progress**.

Column	What it shows
Date / Week / Month	The day, the week (first to last day) or the month.
Sales	Sales of the period.
Labor Cost	Labor cost of the shifts that started in the period.
Hours	Hours worked.
Labor %	Labor cost as a percentage of sales, colored as on the card. A dash when there were no sales.
SPLH	Sales divided by hours. A dash when no hours were worked.
Shifts	Shifts that started in the period.

A day with a high labor % is either a slow day with normal staffing or a normal day with too many hours. Compare its Sales and Hours with similar days to tell which.

Related: Staffing vs Demand: the right people at the right hour, Employee analytics, Time clock (punch in/out, breaks).

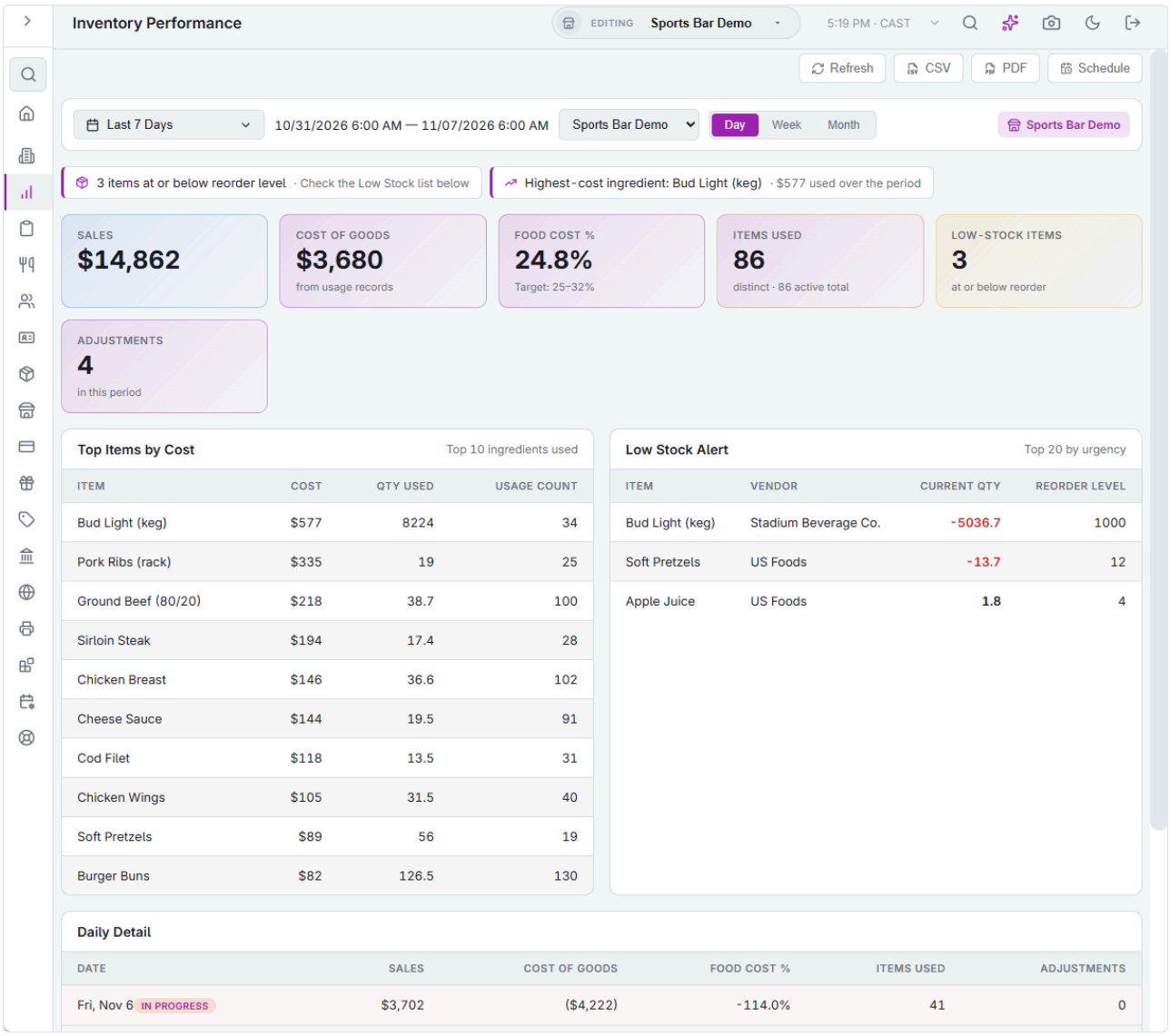
Inventory performance

Analytics & Activity › Performance

View online ↗

Ingredient cost next to sales, the ingredients that cost the most, and what is at or below its reorder level now.

Back Office › Analytics › Performance › Inventory Performance puts the cost of the ingredients used next to sales, lists the ingredients that cost the most, and shows what is at or below its reorder level right now. The page is offered on plans that include Inventory.



The toolbar

The toolbar works as on Sales performance: a date range (Last 7 Days to start), the exact business-day window, **Store** (one store or **All Stores**), **Day** / **Week** / **Month** for the detail table, **Refresh**, **CSV**, **PDF** and **Schedule**.

Where the figures come from

- **Sales** are the totals of the business day's orders, voided orders left out.
- **Cost of Goods** is the cost on the inventory usage records: the ingredients taken out by the recipes of the items sold, and waste entries. Stock given back, for example by a refund, is taken off. A menu item without a recipe adds no cost. See Recipes (yield, cost, ingredients).
- **Adjustments** count the entries in the inventory adjustment log. A waste entry writes one of these too.

Cards

- **Sales** — the period's sales.
- **Cost of Goods** — the cost of the ingredients used in the period.
- **Food Cost %** — cost of goods as a percentage of sales. The card is green from 25% to 32%, amber above 32% up to 35%, and red above 35%. Below 25% it stays neutral. The 25–32% target is fixed and is not a store setting.
- **Items Used** — how many different inventory items were used in the period, against the number of active items.
- **Low-stock items** — every item at or below its reorder level, checked the same way as the Low Stock Alert list. The list shows only the 20 most urgent, so the card can be higher than the number of rows. Green at none, amber from one to four, red at five or more.

- **Adjustments** — inventory adjustments in the period.

Above the cards, a strip shows up to four notes: food cost above 35%; food cost below 20% when cost of goods is over 100 (check for missing usage records); food cost in the 25–32% range; the number of low-stock items; more than 20 adjustments in the period; and the highest-cost ingredient.

Top Items by Cost

The ten ingredients whose usage cost the most in the period, with **Cost**, **Qty Used** and **Usage Count** (the number of usage records). These are the items where a price change from the vendor or a portion that runs heavy costs the most.

Low Stock Alert

Up to 20 items whose quantity on hand is at or below their reorder level, most urgent first (the lowest on hand compared with the reorder level). Columns: **Item**, **Vendor**, **Current Qty** and **Reorder Level**. A quantity of zero or less shows in red.

- The list shows the stock on hand now. It does not change with the date range.
- Only active items with a reorder level above zero are checked. An item without a reorder level never appears here.

Detail table

Daily Detail, **Weekly Detail** or **Monthly Detail**, newest first, with **Sales**, **Cost of Goods**, **Food Cost %**, **Items Used** and **Adjustments** for each period. In the Week and Month views each row is worked out over the whole week or month, so Items Used counts each item once per row. Today's row is marked **In Progress**.

> When one day shows a very high food cost %, look at that day in Inventory logs first. A large waste entry counts as cost of goods on the day it was recorded.

CSV

The CSV has four sections: the detail table, Top Items by Cost, Low Stock Alert and the notes from the strip, written out as text.

Related: How inventory works, Inventory counts, Daypart Prime Cost: food and labor by daypart.

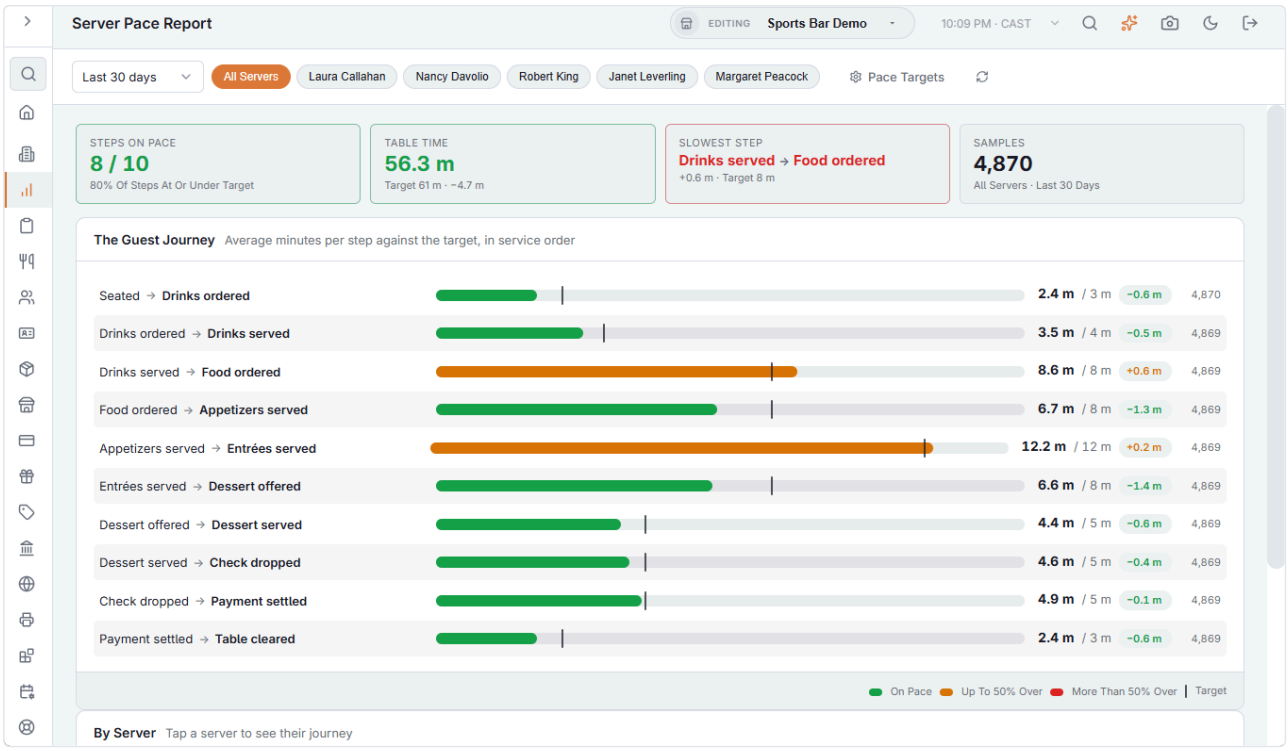
Server Pace Report

Analytics & Activity › Performance

View online ↗

How long each step of table service took on average, against your service pace rules, for all servers or one.

Back Office › Analytics › Performance › Server Pace Report shows how long each step of table service took on average, against the targets in the service pace rules, for all servers together or for one server. It covers the store you are working in.



Where the times come from

On a table-service order, the service pace panel on the order shows the next step of service, and the server taps **Log** when it happens: Seated, Drinks ordered, Food ordered and so on. See The service-pace panel and its colours.

- Only steps that have an active rule in this store are measured; a deleted rule no longer counts. A rule times the gap from its **From Event** to its **Next Event** on the same order; see Service-pace rules.
- A step counts only when both of its events were logged on the order. Steps nobody tapped are missing, not zero.
- Each order belongs to the server who owns it. Orders with no server are grouped as **(unattributed)**.

The toolbar

- **Last 7 days**, **Last 30 days** or **Last 90 days** — orders started in that many days back from now. The page opens on Last 30 days.
- Server buttons — **All Servers** and one button per server, shown when the period has more than one server. Pick a server to see only their orders.
- **Pace Targets** opens the **Service Pace Rules** tab of **Back Office › Store Setup › Order Entry Screen**, where the targets are set.
- **Refresh** loads new figures.

The page has no store choice, CSV, PDF or Schedule.

Tiles

- **Steps On Pace** — how many steps averaged at or under their target, out of all the steps measured.
- **Table Time** — the step averages added up, against the targets added up, with the difference.
- **Slowest Step** — the step furthest over its target. When none is over, it reads **Every Step On Target**.
- **Samples** — the number of times the most-measured step was timed, for the server and days shown.

The Guest Journey

One bar per step, in service order. The bar is the average minutes; the mark on the track is the target. Beside it are the average, the target, the difference and the number of samples. Hover over a bar for the same figures.

Color	Meaning
On Pace	The average is at or under the target.
Up To 50% Over	The average is over the target by up to half the target.

Color	Meaning
More Than 50% Over	The average is over the target by more than half the target.

Only the rule's **Target** is used here. Its Warn and Late minutes color the live tables on the floor, not this report.

By Server

With All Servers chosen and more than one server in the period, a table ranks the servers by the share of their steps on pace: **Server**, **Steps On Pace**, **Table Time**, **Δ** (table time against the targets), **Slowest Step** and **Samples**. Tap a server to see their journey.

> Compare servers only over the same days. A server who works the busy dinners will look slower than one who works quiet lunches against the same targets.

Related: Floor overview overlay, Turn Times: how long parties really stay.

RevPASH: revenue per seat-hour

Analytics & Activity › Performance

View online ↗

How much each dining seat earns per hour: the RevPASH report in Back Office, its day-by-hour heatmap, which hours to fill and which to sell more in, and how the numbers are worked out.

Back Office › Analytics › Performance › RevPASH shows revenue per available seat-hour: how much each seat in your dining room earns for every hour you are open. It is the number full-service restaurants use to decide when to staff up, when to run a promotion and how long to hold a table for a reservation, because it shows which hours leave seats empty or under-used.

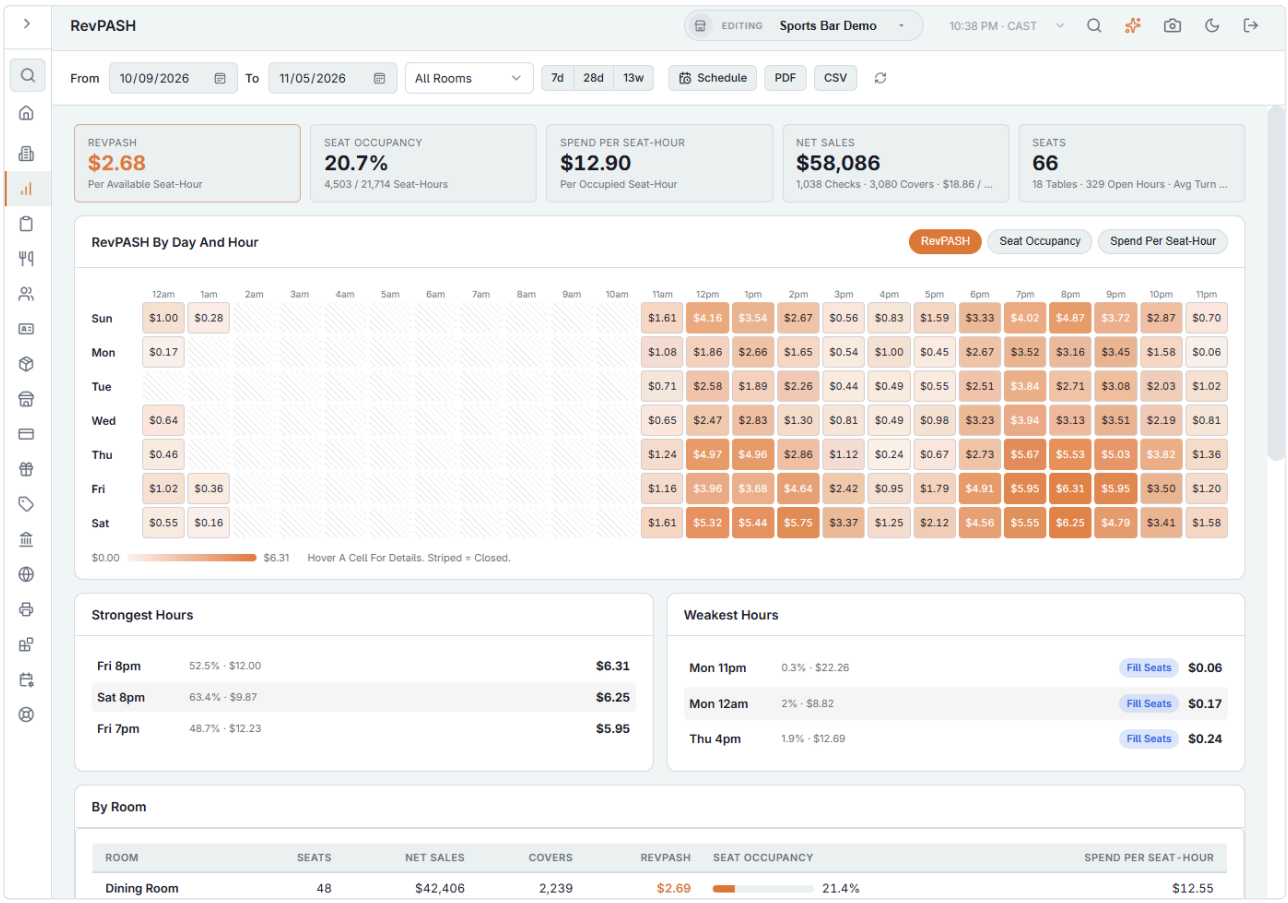
RevPASH is two things multiplied together: **how full the seats were** (seat occupancy) and **how much guests spent while they sat there** (spend per occupied seat-hour). The report shows all three, so for every slow hour you can see which one to work on.

Before you start

Seats are counted from your seating chart, so every table needs its **Max Guests** set in the seating chart designer (see Table properties explained). Pool tables, lanes and other timed tables are left out; a store without seats on its seating chart sees **No Seats On The Floor Plan** instead of the report.

Opening the report

The report opens on the last 28 business days, ending yesterday (today is not over yet).



- **From** / **To** — the business days to include. **7d**, **28d** and **13w** set the range in one tap.
- **Room picker** — shown when your seating chart has more than one room; pick one to see only its seats and sales, or **All Rooms**.
- **Schedule** — emails the report on a schedule, for the room you picked. See Emailing the performance reports on a schedule.
- **PDF** — preview, download or email the report. **CSV** exports every table of the report for a spreadsheet; it is greyed out when the range has no table sales. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

The five numbers

- **RevPASH** — net sales divided by the available seat-hours (seats × open hours).
- **Seat Occupancy** — the share of available seat-hours that had a guest in them, with both seat-hour figures.
- **Spend Per Seat-Hour** — net sales divided by the seat-hours guests actually sat. This is what a guest spends per hour at the table.
- **Net Sales** — with the number of checks, covers and the average sale per cover.
- **Seats** — with the number of tables, the open hours counted and the average time a table was held.

When no settled check was seated at a table in the range, the page shows the five numbers and **No Table Sales** in place of the rest.

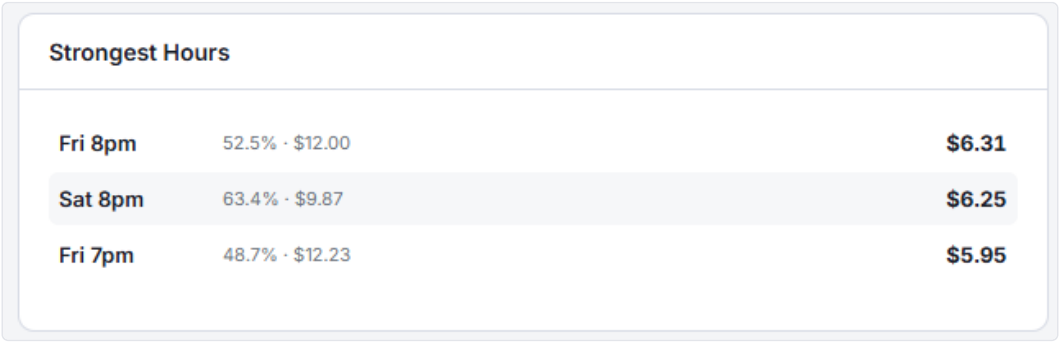
The heatmap

RevPASH By Day And Hour has a row per day of the week and a column per hour of the day; the darker the cell, the higher the number. Use the buttons at the top right of the card to switch between **RevPASH**, **Seat Occupancy** and **Spend Per Seat-Hour**. Hover a cell to see all three figures, its net sales and on how many days that hour was open. Striped cells are hours the store was never open in the range.



Strongest and weakest hours

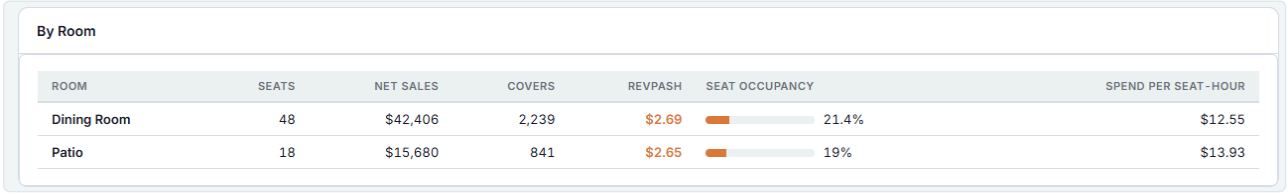
The three best and three worst hours by RevPASH, counting only hours open on at least two days so a single odd day can't top the list. The cards appear once there are at least four such hours. Each weak hour carries a tag telling you what to work on:



- **Fill Seats** — occupancy in that hour is below your average. The seats sit empty: bring in more guests with reservations, promotions, events or a happy hour.
- **Raise Spend** — the seats are filled but guests spend little. Work on suggestive selling, add-ons, desserts and drinks, or the prices of what sells in that hour.

Rooms and days

By Room (stores with two or more rooms) compares the rooms side by side, highest RevPASH first — a patio that is full at lunch and empty at dinner shows up here. Click a room to filter the whole report to it; click it again for all rooms. **By Day** lists every open business day with its open hours, net sales, covers, RevPASH and occupancy, so a holiday or a rainy evening is easy to spot.



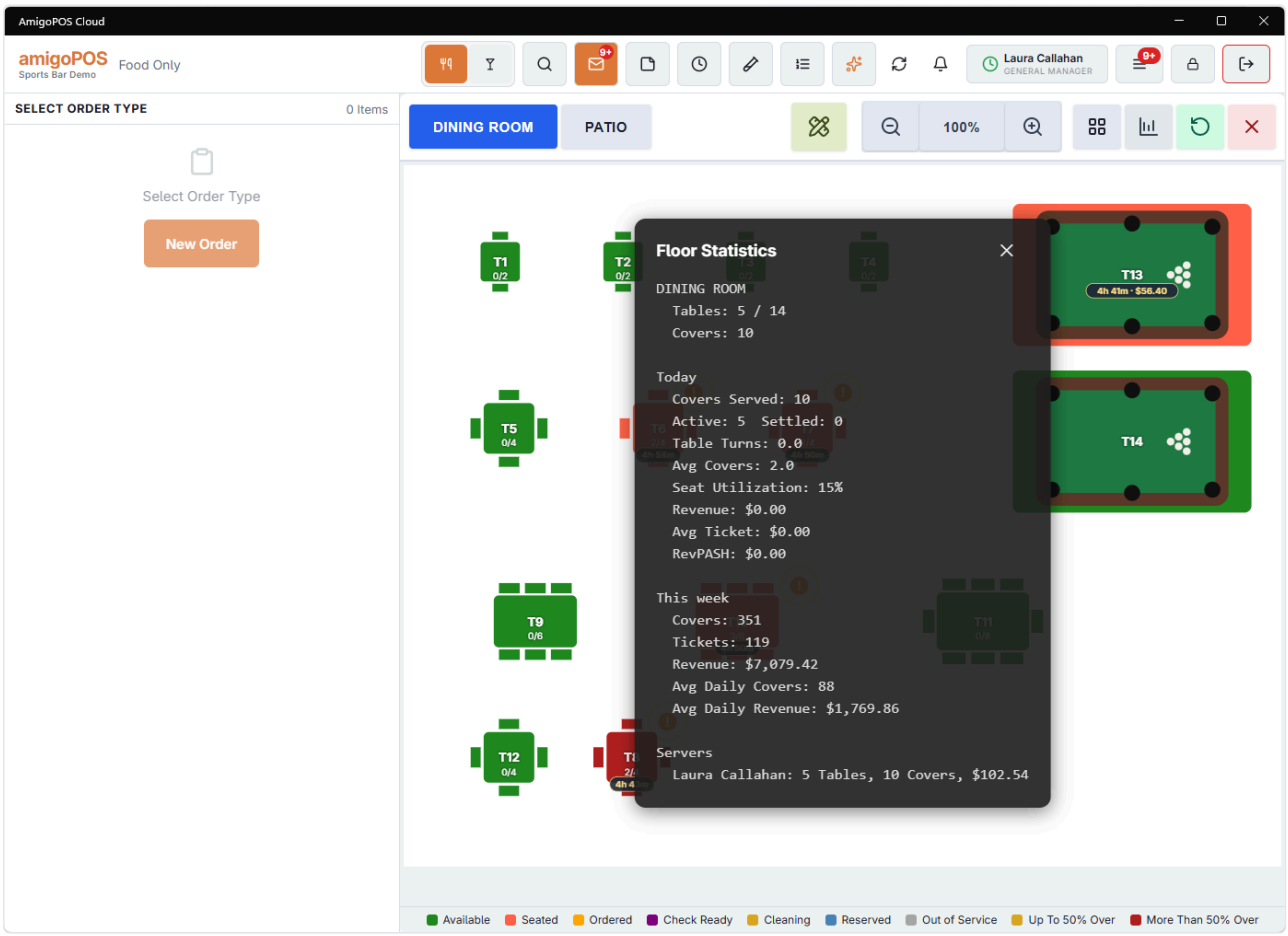
How the numbers are worked out

- **Net sales** are the check subtotal less discounts — no tax, tips, gratuity, surcharges or delivery charges. Only settled, non-void checks seated at a table count.
- A check holds its table from the moment it was started to its last payment, at least 10 minutes and at most 6 hours. A check with no payment counts as 60 minutes.
- Each check's sales and seat time are spread over the hours it held the table, so a dinner from 7:40 to 9:10 counts in the 7, 8 and 9 o'clock cells.
- Checks at the same table at the same time are one party, and a split check counts its party once, from when they sat down.
- **Seats** come from today's seating chart. If you rearranged tables during the range, the figures before the change are approximate — start the range after the change for an exact comparison.

- **Open hours** run each day from the first table seated to the last table cleared, in whole hours. Days with no table checks count as closed and don't pull the average down.
- Checks on tables that are no longer on the seating chart are left out; a note under the report says how many and their sales.

RevPASH on the register

The **Floor Stats** panel on the table screen shows today's RevPASH so far, worked out the same way, with the hours running from the first table seated until now.



Ask the assistant

The AI assistant can answer RevPASH questions too, for example "What was our RevPASH last month?", "Which hours are we filling seats worst?" or "How full is the dining room on Tuesday nights?"

> Compare like with like. A Tuesday lunch will never match a Saturday dinner; look at the same hour across several weeks, and use at least four weeks of data before changing staffing or prices.

Related: Server Pace Report, for how long each step of the meal takes.

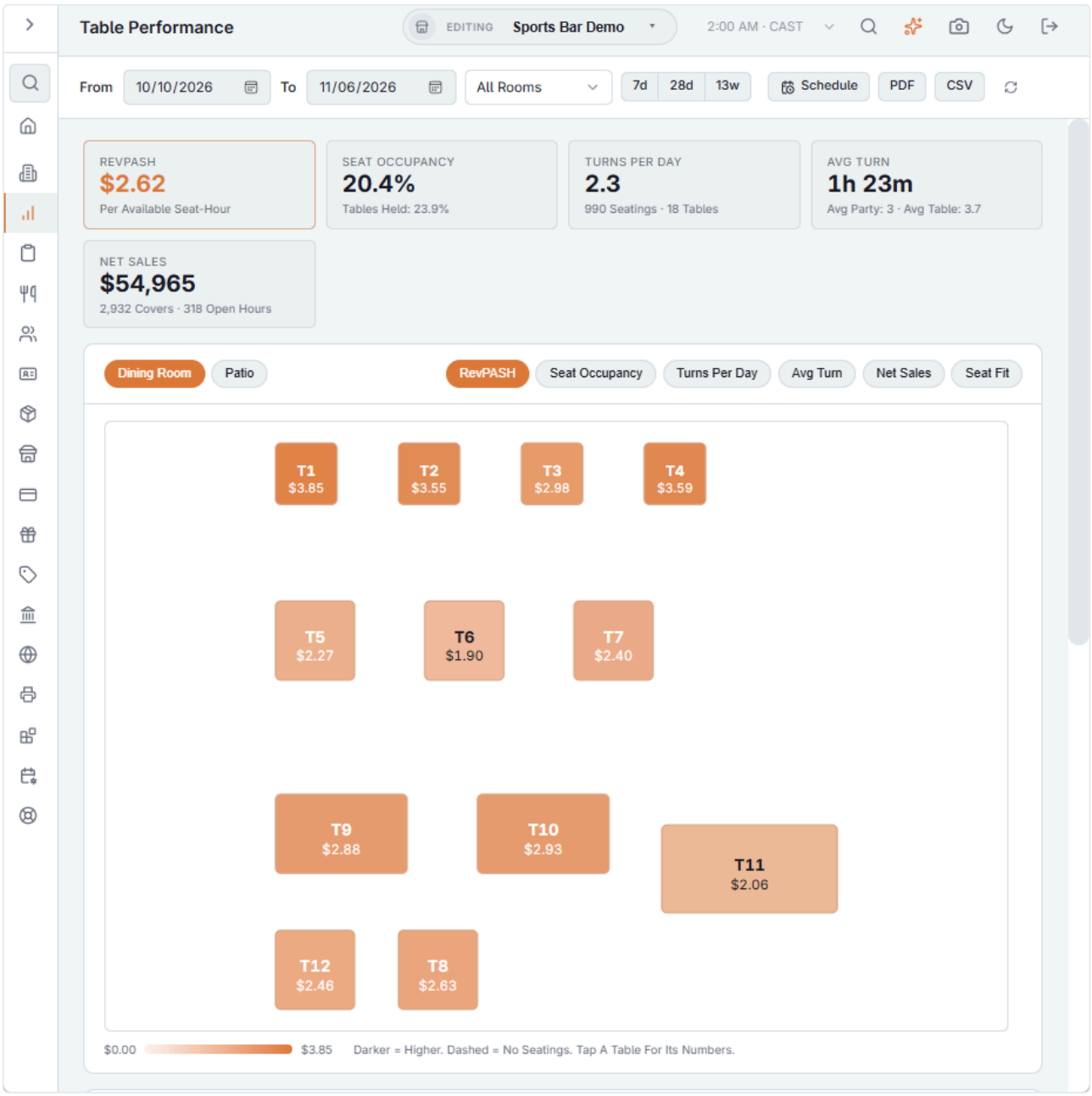
Table Performance: the floor plan by the numbers

Analytics & Activity › Performance

View online ↗

See every table on your floor plan coloured by what it earns, how full it runs, how often it turns and how well parties fit it — and open any table for its numbers.

Back Office › Analytics › Performance › Table Performance draws your seating chart with every table coloured by the number you pick, so the tables that earn their place — and the corner nobody wants to sit in — show at a glance. It opens on the last 28 business days, ending yesterday.



The toolbar

- **From** / **To** — the business days to include. **7d**, **28d** and **13w** set a range ending yesterday in one tap.
- **Room picker** — shown when your seating chart has more than one room; pick one to see only its tables, or **All Rooms**.
- **Schedule** — emails the report on a schedule, for the room you picked. See Emailing the performance reports on a schedule.
- **PDF** — preview, download or email the report. **CSV** downloads the summary and every table's figures; it is greyed out when the range has no seatings. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

The numbers at the top

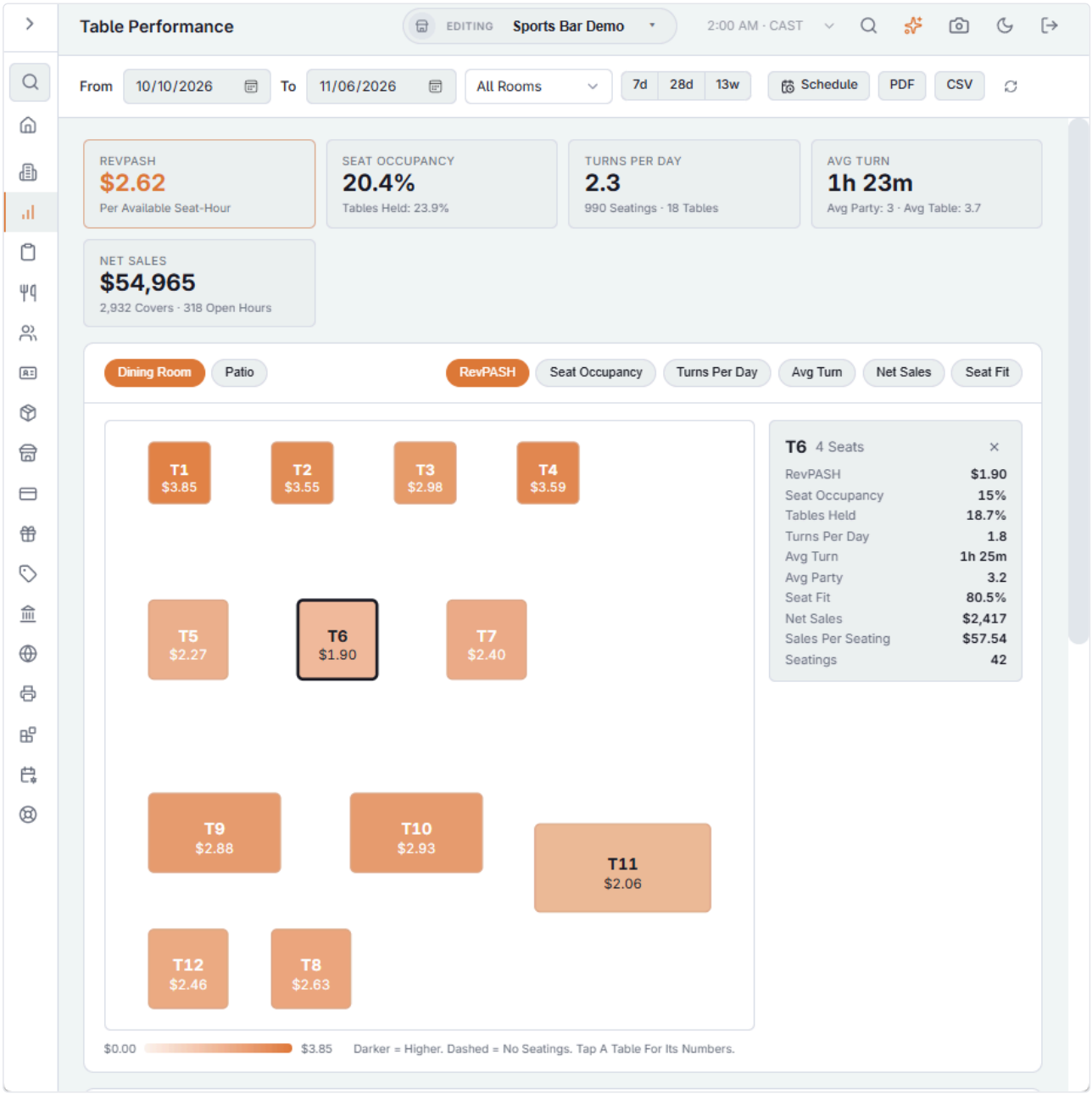
- **RevPASH** — net sales per available seat-hour for the whole floor (see RevPASH: revenue per seat-hour).
- **Seat Occupancy** — how much of the seat time had a guest in it; **Tables Held** is the same for whole tables.
- **Turns Per Day** — seatings per table per open day, with the number of seatings and tables.

- **Avg Turn** — how long a party holds a table, with the average party size next to the average table size.
- **Net Sales** — sales on the floor plan's tables, without tax, tips or delivery, with covers and open hours.

The floor plan

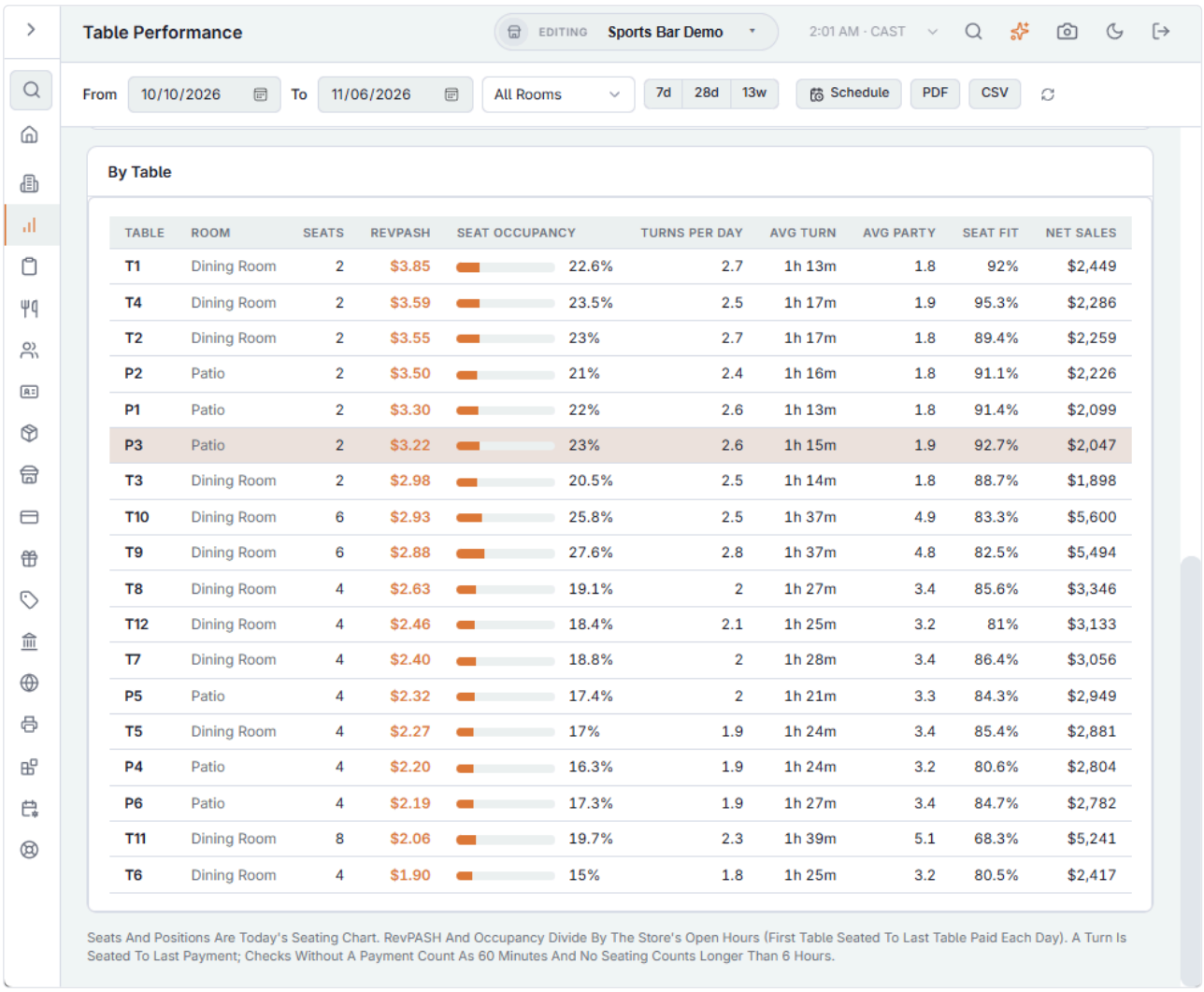
Use the buttons on the right of the card to colour the tables by **RevPASH**, **Seat Occupancy**, **Turns Per Day**, **Avg Turn**, **Net Sales** or **Seat Fit**. Each table shows its name and value. The darker the table, the higher the number; a dashed table had no seatings at all in the range. With more than one room, the room buttons on the left switch the plan.

Tap a table to open its card with all of its numbers: RevPASH, seat occupancy, tables held, turns per day, average turn, average party, seat fit, net sales, sales per seating and seatings. Tap it again (or the ×) to close it.



The table list

By Table, under the plan, lists every table best first by RevPASH, with its seats, RevPASH, occupancy, turns per day, average turn, average party, seat fit and net sales. With more than one room and no room picked, a column shows each table's room. Tap a row to find the table on the plan.



What to look for

- **A light table among dark ones** — guests avoid it (draft, kitchen door, no view) or hosts don't seat it. Move it, change it, or seat it first.
- **A big table with low seat fit** — small parties are sitting at it; see Table Fit: party sizes against table sizes.
- **A slow turn on one table** — check Turn Times: how long parties really stay for the slowest-turning tables.

> **Before you start:** seats come from the **Max Guests** of each table on your seating chart (see Table properties explained). Pool tables, lanes and other timed tables are left out. Positions and seats are today's chart, so if you rearranged the room during the range, start the range after the change. A turn runs from seating to the last payment; a check with no payment counts as 60 minutes, and no seating counts longer than 6 hours. **Avg Turn** uses only seatings that were paid.

The AI assistant can answer the same questions, for example "Which tables earn the most?"

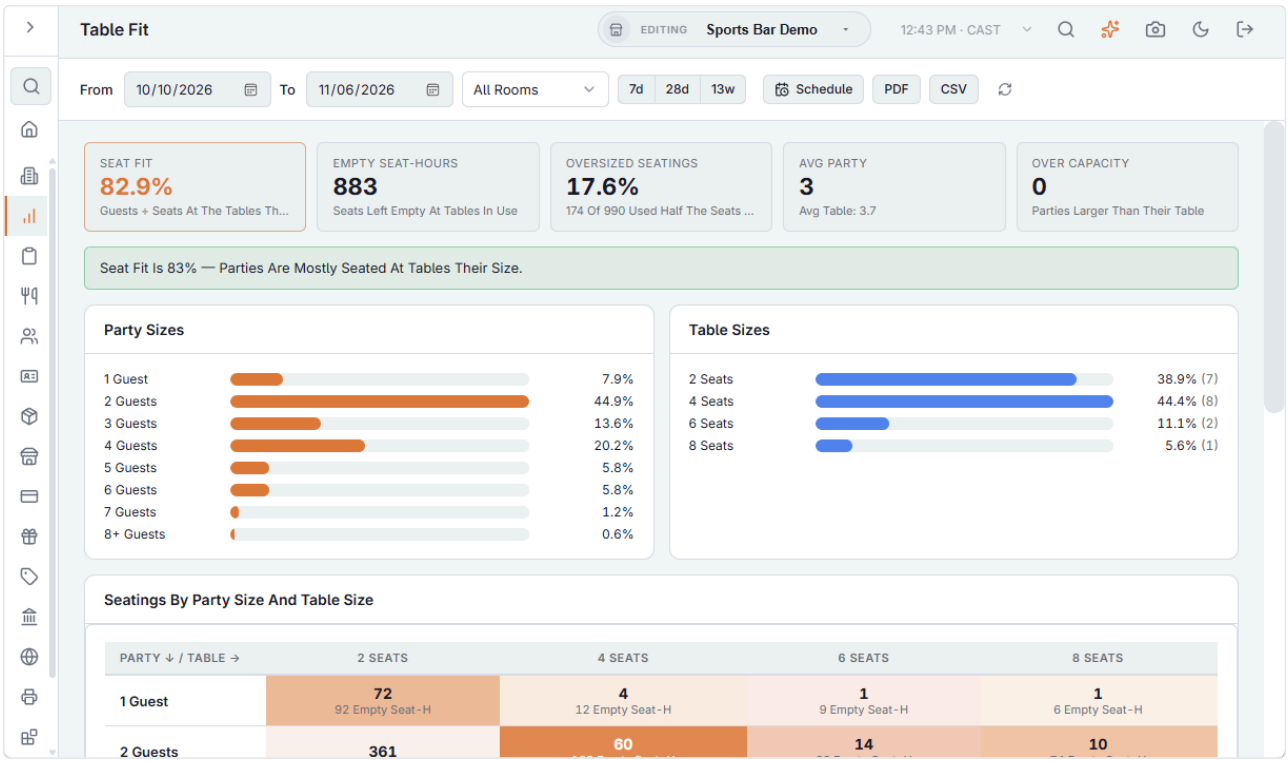
Table Fit: party sizes against table sizes

Analytics & Activity › Performance

View online ↗

How many seats sit empty because parties are seated at tables too big for them, which party and table sizes waste the most, and whether your floor has the right mix of tables.

Back Office › Analytics › Performance › Table Fit compares party sizes with table sizes. A couple at a six-top leaves four seats empty for the whole meal; the page shows how often that happens, which party and table sizes cause it, and whether your room has the tables your guests actually need. It opens on the last 28 business days, ending yesterday.



The toolbar

- **From** / **To** — the business days to include. **7d**, **28d** and **13w** set a range ending yesterday in one tap.
- **Room picker** — shown when your seating chart has more than one room; pick one to see only its tables, or **All Rooms**.
- **Schedule** — emails the report on a schedule, for the room you picked. See Emailing the performance reports on a schedule.
- **PDF** — preview, download or email the report. **CSV** downloads the summary, the party size × table size grid, the party and table mix and the hours. Both are greyed out when the range has no seatings. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

The numbers at the top

- **Seat Fit** — guests ÷ seats at the tables they held, over the time they held them. 100% means every seated table was full.
- **Empty Seat-Hours** — seats left empty at tables in use, in hours.
- **Oversized Seatings** — the share of seatings whose party used half the table's seats or fewer, with the count.
- **Avg Party** — next to the average table size.
- **Over Capacity** — parties bigger than their table (tables pushed together).

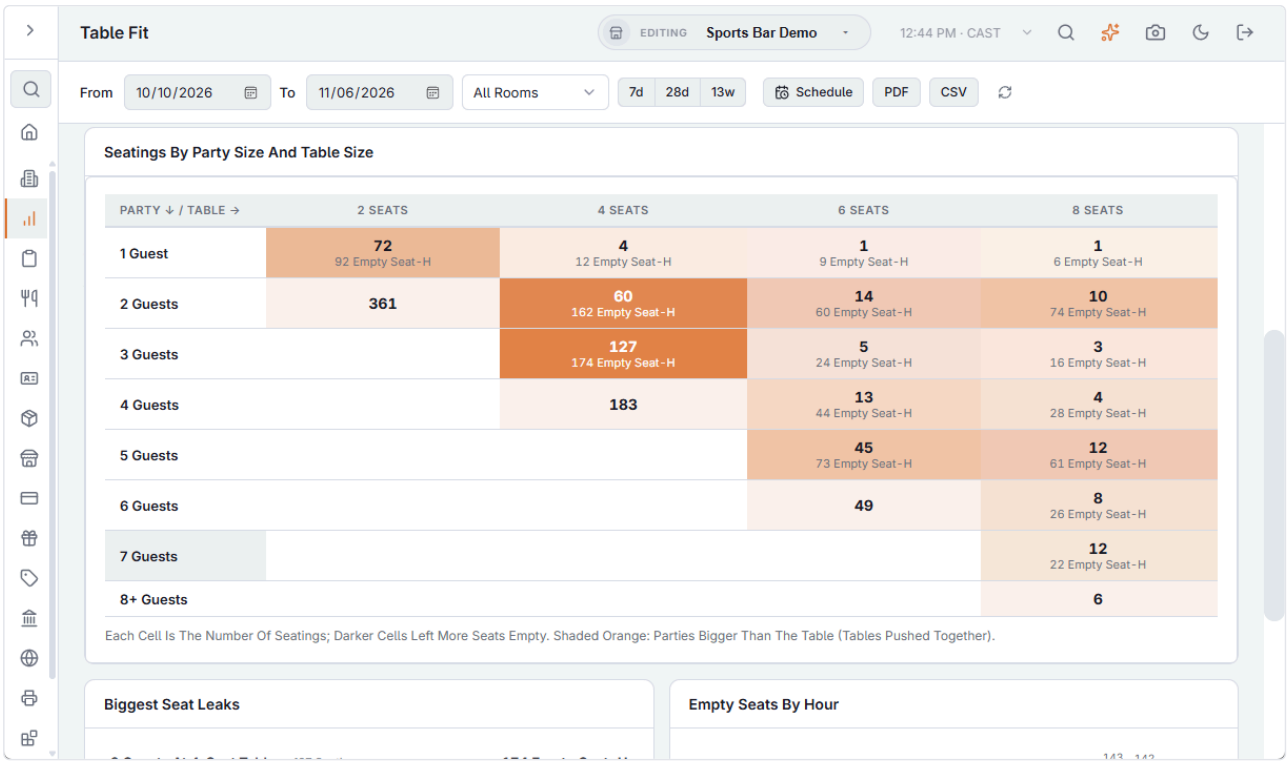
From 20 seatings, a note under the numbers can read the result for you: that most of your parties are one or two guests but few of your tables seat two, that many tables seat five or more but few parties are that big, or, in green, that seat fit is 75% or better.

Party sizes and table sizes

Party Sizes and **Table Sizes** side by side compare the share of seatings by party size with the share of tables by size (with the number of tables). If 60% of parties are couples and 15% of tables are two-tops, couples are filling your four-tops.

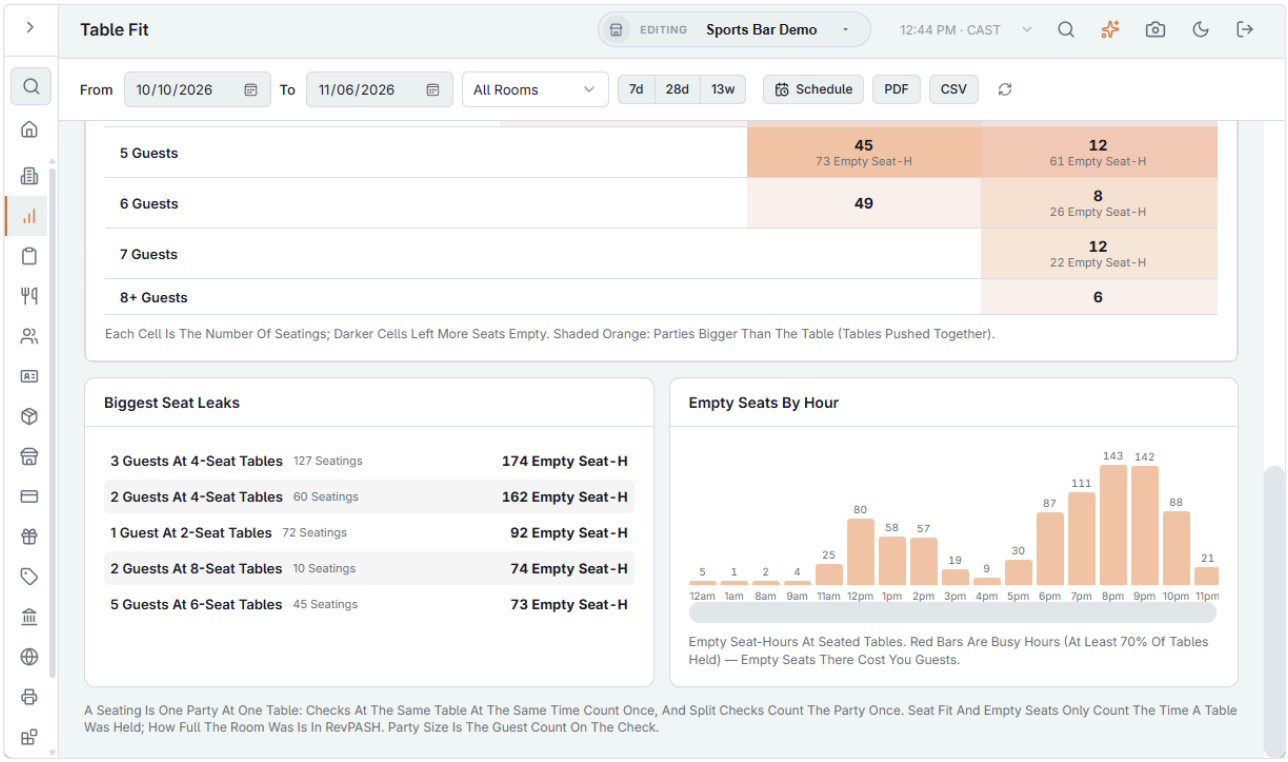
The matrix

In **Seatings By Party Size And Table Size**, each row is a party size (up to **8+ Guests**) and each column a table size; each cell is the number of seatings, with the empty seat-hours they left. The darker the cell, the more seats it left empty. Orange cells are parties bigger than the table. Hover a cell for its seatings, hours held, empty seats and sales.



Biggest seat leaks and empty seats by hour

Biggest Seat Leaks lists the five party/table pairs that left the most seats empty. **Empty Seats By Hour** shows when: red bars are busy hours, when at least 70% of tables were held — empty seats then cost you guests who are waiting. Empty seats at a quiet 3 pm cost nothing. Hover a bar for its empty seat-hours and the share of tables held.



What to do about it

- Split some four-tops into two-tops (or use tables that pull apart) when couples dominate the busy hours.

- Ask hosts to seat small parties at small tables first at peak times, and keep big tables for big parties.
- Set **Min Guests** on big tables in the seating chart so reservations don't put a couple there.

> A **seating** is one party at one table: checks at the same table at the same time count once, and a split check counts its party once, from when they sat down. Seat fit and empty seats only count the time a table was held; how full the room was is in RevPASH: revenue per seat-hour. Party size is the guest count on the check, so it is only as good as the guest count your staff enter.

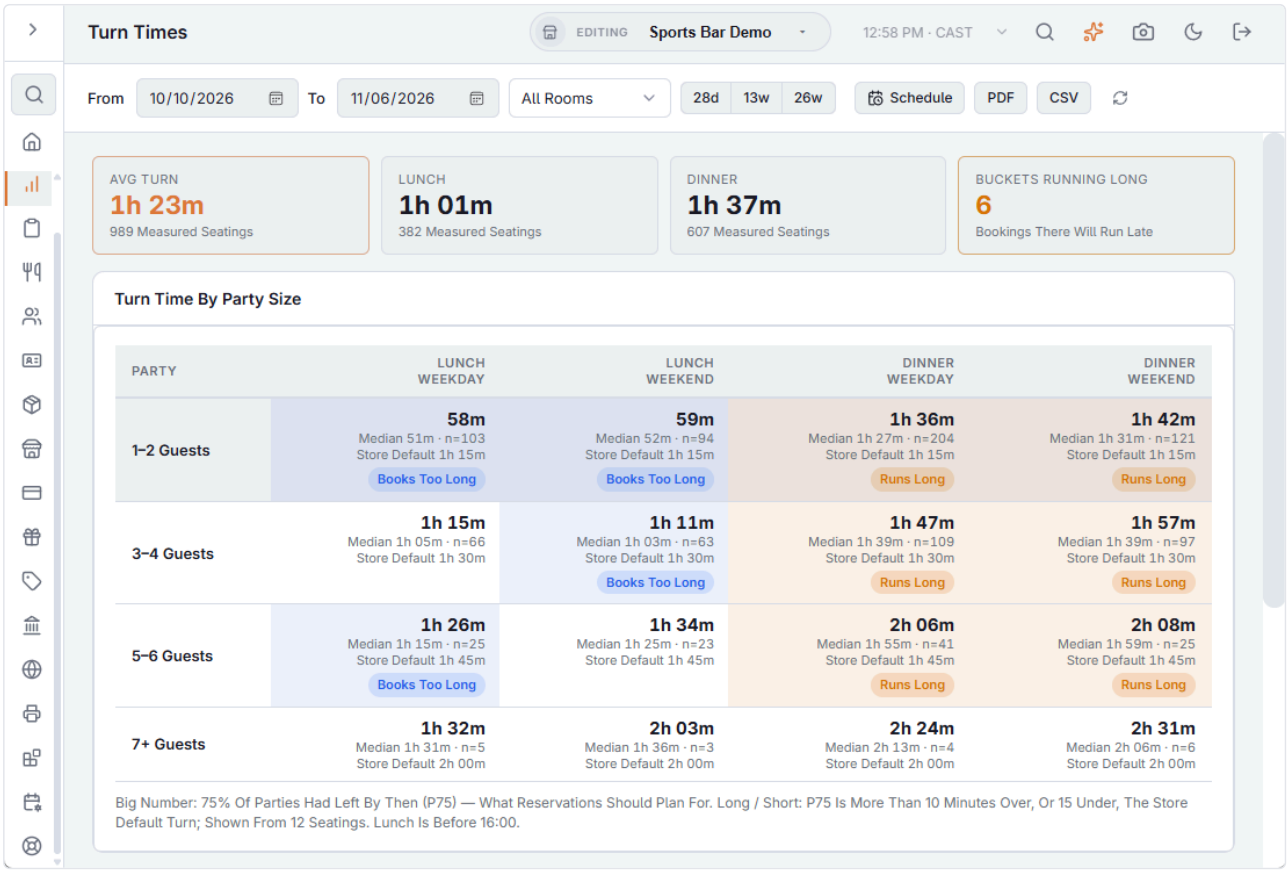
Turn Times: how long parties really stay

Analytics & Activity › Performance

View online ↗

How long a table is held, by party size, lunch or dinner and weekday or weekend, next to the turn time your reservations book — so bookings stop running late, or stop holding tables for nothing.

Back Office › Analytics › Performance › Turn Times shows how long parties really stay at a table. Reservations promise a table for a set time; this page lets you set those times from your own numbers. It opens on the last 28 business days, ending yesterday.



The toolbar

- **From / To** — the business days to include. Turn times need plenty of seatings to be reliable, so the quick buttons here are **28d**, **13w** and **26w**.
- **Room picker** — shown when your seating chart has more than one room; pick one to see only its tables, or **All Rooms**.
- **Schedule** — emails the report on a schedule, for the room you picked. See Emailing the performance reports on a schedule.
- **PDF** — preview, download or email the report. **CSV** downloads the grid, the turn lengths and each table's average turn. Both are greyed out when the range has no measured seatings. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

The numbers at the top

- **Avg Turn** — the average turn over all measured seatings, with how many were measured.
- **Lunch** and **Dinner** — the same for each part of the day.
- **Buckets Running Long** — how many cells of the grid below carry **Runs Long**: bookings there will run late.

The grid

In **Turn Time By Party Size**, rows are party sizes (1–2, 3–4, 5–6, 7+ guests) and columns are lunch and dinner on weekdays and weekends — the same buckets reservations use. Lunch is any seating before 16:00; the weekend is Saturday and Sunday. In each cell:

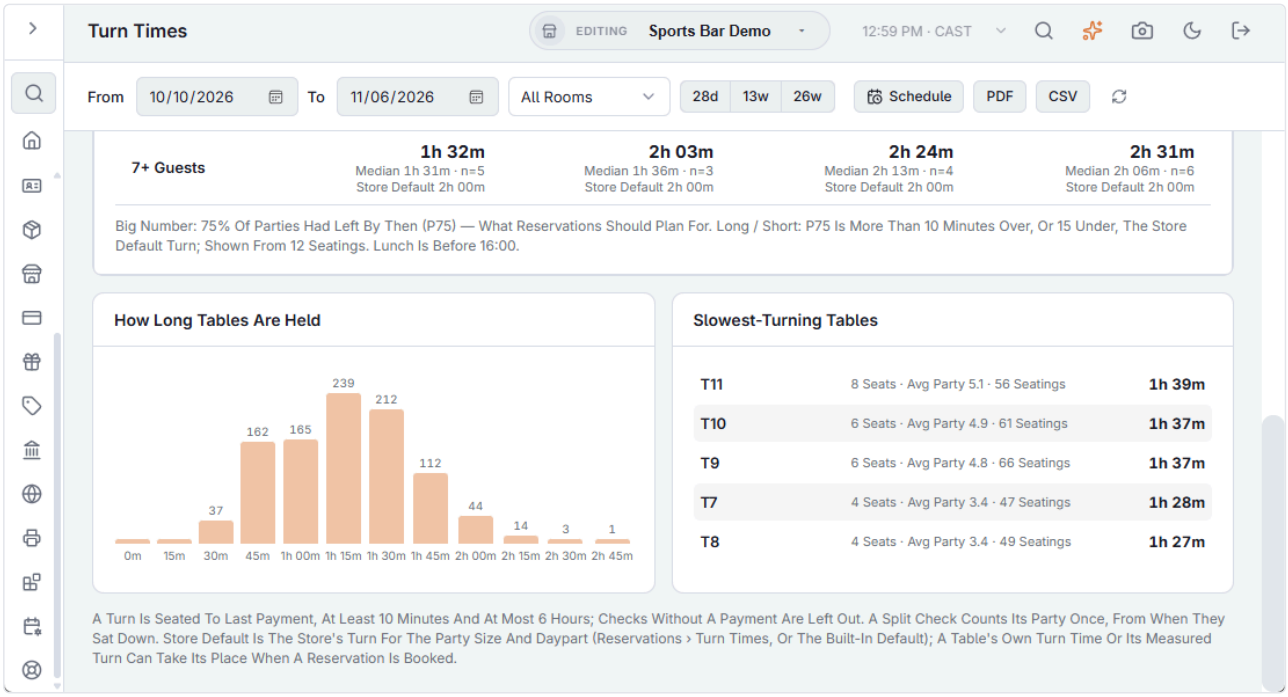
- The **big number is the P75**: 75% of parties had left by then. It is what a booking should plan for — plan on the average and half your bookings run late.
- **Median** — the middle party; **n** — how many seatings were measured. Hover the cell for the average too.
- **Store Default** — the store's turn time set for that party size and part of the day under **Turn Times** on **Back Office › Store Setup › Reservations**, or the built-in figure when none is set: 75, 90, 105 and 120 minutes for 1–2, 3–4, 5–6 and 7+ guests.
- **Runs Long** — the P75 is more than 10 minutes over the store default turn: bookings in that bucket will run into the next one. **Books Too Long** — more than 15 minutes under: you hold tables back that could take another party.

Flags only appear once a bucket has at least 12 measured seatings.

> A table with its own turn time in the seating chart designer, or with enough measured seatings of its own, is booked with that figure instead (see How times are offered). **Store Default** here is always the store-wide figure, on the page, in its tooltips, in the PDF and in the CSV.

How long tables are held, and the slowest tables

How Long Tables Are Held shows how many seatings lasted each 15-minute band, up to 4 hours and more; a long tail on the right is the campers. **Slowest-Turning Tables** lists the five tables with the longest average turn (at least five seatings), with their seats, average party and seatings — often the booths and the window tables.



What to do about it

- Where a bucket **runs long**, raise its turn time in your reservation settings, or work on the slow steps (see Server Pace Report).
- Where it **books too long**, lower the turn time to offer more booking slots.

A turn is from the moment the check was started to its last payment, at least 10 minutes and at most 6 hours. Checks with no payment are left out. A split check counts its party once, from when they sat down. Seats and tables are those on your seating chart with **Max Guests** set (see Table properties explained).

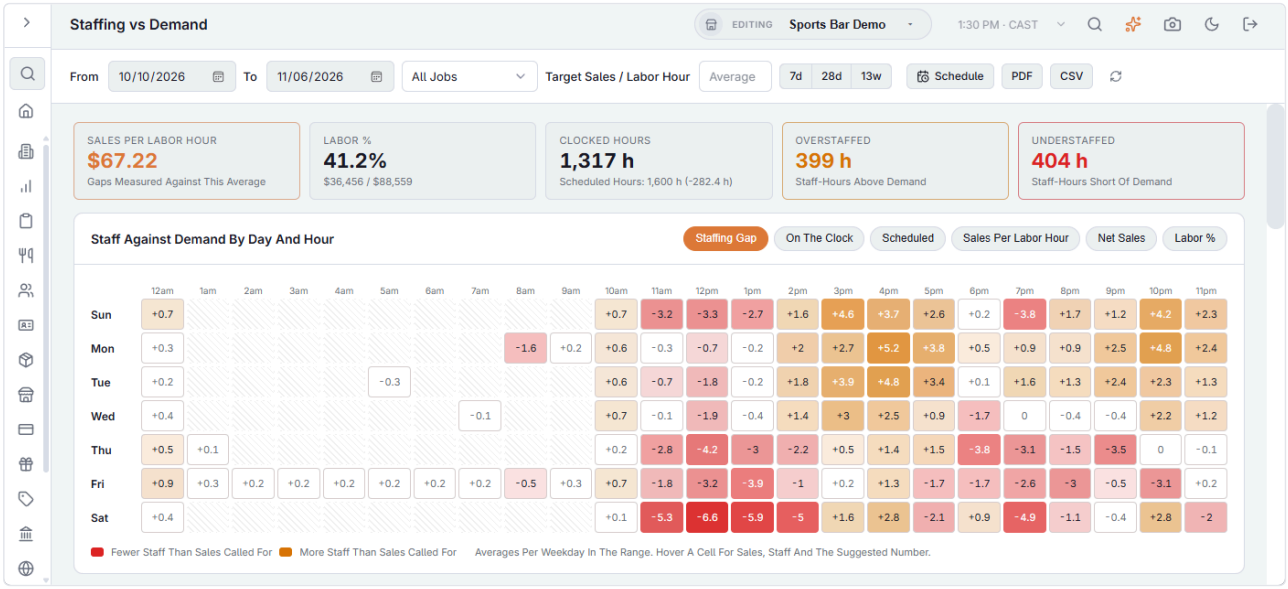
Staffing vs Demand: the right people at the right hour

Analytics & Activity › Performance

View online ↗

Scheduled and clocked staff next to sales by day of week and hour, with how many people the sales called for — so you can see which hours are overstaffed and which are short.

Back Office › Analytics › Performance › Staffing vs Demand lines up who was working with what came through the door, hour by hour, so the schedule can follow the sales instead of habit. It opens on the last 28 days, ending yesterday.



The toolbar

- **From** / **To** — the calendar days to include. **7d**, **28d** and **13w** set a range ending yesterday in one tap.
- **Job picker** — shown when more than one job has punches or shifts in the range. **All Jobs**, or one job (servers, cooks, bartenders…). Sales stay the same; only the staff side changes.
- **Target Sales / Labor Hour** — the sales one hour of work should bring in. Leave it blank (it shows **Average**) and the page uses your own average for the range, so it shows where you run above and below your usual pace. Enter a figure (for example your budget) to measure against that instead.
- **Schedule** — emails the report on a schedule, with the job and target you picked. See Emailing the performance reports on a schedule.
- **PDF** — preview, download or email the report. **CSV** downloads the summary, the day-and-hour averages, the jobs and the days. Both are greyed out when the range has no sales. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

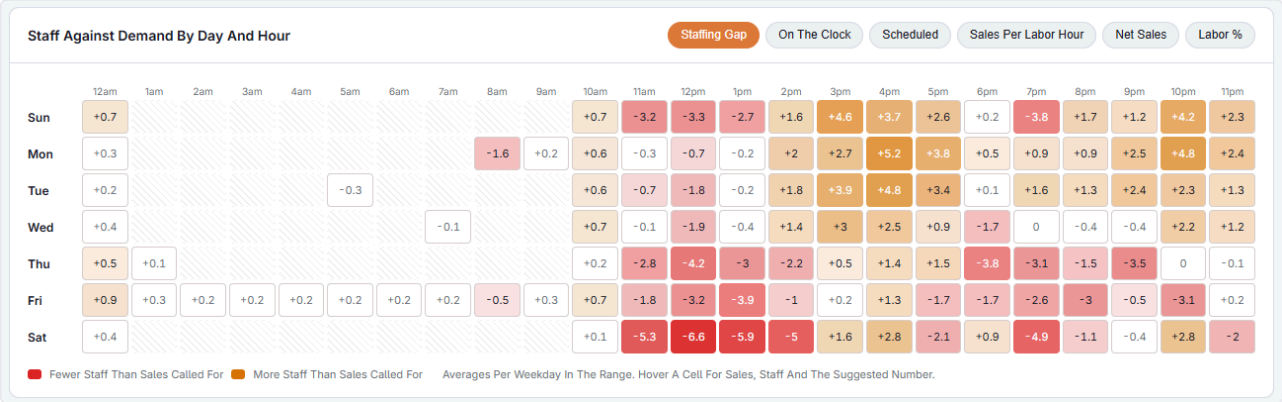
The numbers at the top

- **Sales Per Labor Hour** — net sales ÷ hours worked. Under it, the target in use, or **Gaps Measured Against This Average** when the target box is blank.
- **Labor %** — labor cost ÷ net sales, with both amounts.
- **Clocked Hours** — with scheduled hours and the difference.
- **Overstaffed** / **Understaffed** — staff-hours above or below what the sales called for, over the whole range.

The grid

Staff Against Demand By Day And Hour has a row per day of the week and a column per hour. Each cell is averaged over every such day in the range (four Mondays in 28 days, for example). Cells with no sales and no staff at all are striped.

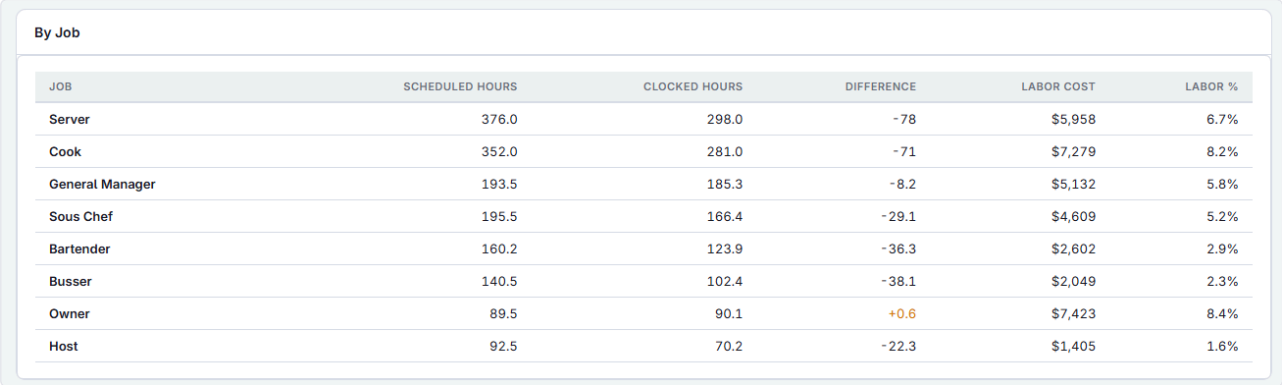
The **Staffing Gap** view is the one to act on: people on the clock minus the people the sales called for. **Amber** cells had more staff than needed; **red** cells had fewer. Gaps under half a person are left neutral. Hover a cell for its sales, checks, scheduled and clocked staff, the suggested number, sales per labor hour and labor %.



The other buttons colour the grid by **On The Clock**, **Scheduled**, **Sales Per Labor Hour**, **Net Sales** or **Labor %**.

By job and by day

By Job appears when more than one job worked and the page shows all jobs. It compares scheduled hours, clocked hours, the difference, labor cost and labor % per job; the labor % is the job's cost against the store's total net sales. Click a job to filter the page to it; click it again for all jobs.



By Day lists every day that had sales or hours, with its net sales, checks, scheduled and clocked hours, sales per labor hour and labor %.

What to do about it

- Trim or shorten shifts in the amber hours, starting with the job that shows the biggest gap.
- Add a shift, or start one earlier, in the red hours — those are the hours guests wait.
- Where clocked hours run well over scheduled, look at early clock-ins and late clock-outs in Timesheets.

> Staff is people actually on the clock, with breaks taken out; a punch still open counts up to now. Labor cost is the cost of each punch (overtime included) spread over its hours. Scheduled staff comes from published shifts in the Scheduler. Sales are settled, non-void checks of every order type, by the hour they were rung; net sales are the subtotal less discounts.

Daypart Prime Cost: food and labor by daypart

View online ↗

Prime cost — food cost plus labor as a share of net sales — for breakfast, lunch, afternoon, dinner and late night, against your targets, so you can see which part of the day pays its way.

Back Office › Analytics › Performance › Daypart Prime Cost splits prime cost by part of the day. **Prime cost** — what you spend on food and drink plus what you spend on labor — is the biggest cost a restaurant controls; a healthy restaurant usually keeps it near 60–65% of sales. Splitting it by daypart matters because a busy dinner can hide a lunch that loses money. The page opens on the last 28 days, ending yesterday.

The toolbar

- **From** / **To** — the calendar days to include. **7d**, **28d** and **13w** set a range ending yesterday in one tap.
- **Schedule** — emails the report on a schedule. See Emailing the performance reports on a schedule.
- **PDF** — preview, download or email the report. **CSV** downloads the summary, the dayparts, the weekday grid, the best sellers without a recipe cost and the days. Both are greyed out when the range has no sales. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

The numbers at the top

- **Prime Cost** — food cost plus labor as a % of net sales, next to your target and the amount.
- **Food Cost** and **Labor** — each against its target, with the amount. Targets come from Menu Costing: cost, margin and a recommended price for every item (target food cost % and labor %); the prime cost target is the two added together.
- **Net Sales** — with checks and labor hours.
- **Sales With Recipe Cost** — how much of your item sales has a recipe cost. Below 90% the food cost reads low, the card turns amber and a note above the daypart cards says so.

Green is at or under target, amber over, red more than 5 points over. The same colours are used on the KPI cards, the daypart cards, the weekday grid and the By Day list.

The daypart cards

One card per daypart that had sales or labor — **Breakfast** 5–11, **Lunch** 11–15, **Afternoon** 15–17, **Dinner** 17–22, **Late Night** 22–5 — with its prime cost, a bar split into food and labor, and a line at your prime cost target; the legend under the cards names the colours. Each card also shows food %, labor %, net sales, sales per labor hour and the average check. When less than 90% of a daypart's item sales has a recipe cost, the card shows that figure too.

By weekday and daypart

Prime Cost By Weekday And Daypart crosses weekdays with dayparts, so a slow Monday lunch or a heavy Sunday breakfast stands out. Each cell shows the prime cost and net sales; hover it for its sales, food and labor.

Best sellers without a recipe cost

Items without a recipe add nothing to food cost. This list shows the ten best sellers by sales that have none, with units sold and sales — add their recipes in the Recipes (yield, cost, ingredients) and the food cost becomes trustworthy. When every item sold has a recipe cost, the card says so.

By day

By Day lists every day that had sales or labor, with its net sales, food cost, labor and prime cost.

What to do about it

- A daypart high on **labor** — check Staffing vs Demand: the right people at the right hour for that part of the day.
- A daypart high on **food** — check the item mix sold then; a lunch special priced too low shows up here. Menu Costing: cost, margin and a recommended price for every item suggests prices.
- A daypart high on both with little in sales — consider shorter hours or a smaller menu for it.

Food cost is **theoretical**: units sold × recipe cost, comps included, removed and voided lines, waste and theft not. Compare it with your inventory counts to see the gap. Labor is every job's punches less breaks, with each punch's cost (overtime included) spread over its hours. Sales are settled, non-void checks of every order type, by the hour they were rung, without tax, tips or delivery.

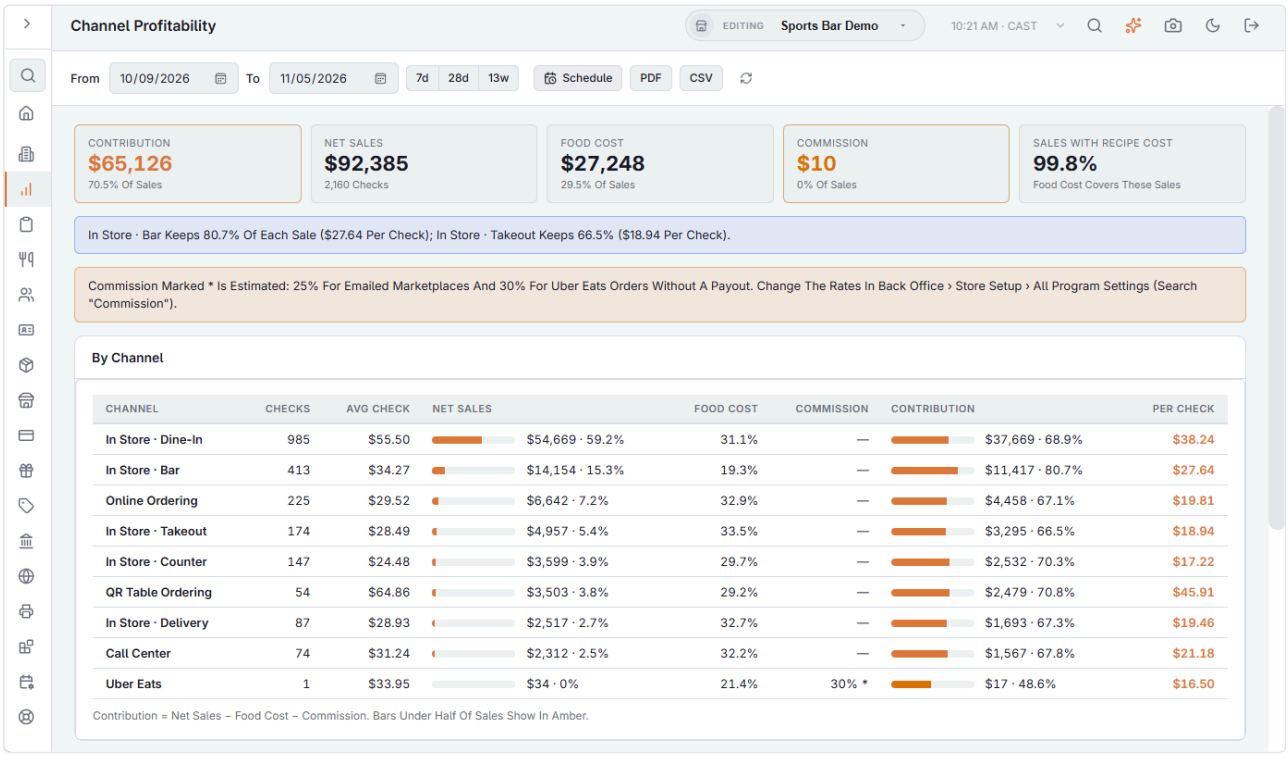
Channel Profitability: what each way of selling leaves you

Analytics & Activity › Performance

View online ↗

Net sales, food cost, delivery-app commission and what is left — for dine-in by order type, call center, online ordering, QR table ordering, Uber Eats and each delivery marketplace.

Back Office › Analytics › Performance › Channel Profitability shows what each way of selling leaves you. A $30 delivery order and a $30 dine-in check don't leave you the same money: the page takes each channel, subtracts the food cost and what the delivery apps keep, and shows what is left — per channel and per check. It opens on the last 28 days, ending yesterday.



The toolbar

- **From** / **To** — the business days to include. **7d**, **28d** and **13w** set a range ending yesterday in one tap.
- **Schedule** — emails the report on a schedule. See Emailing the performance reports on a schedule.
- **PDF** — preview, download or email the report. **CSV** downloads the summary, the channels (with covers, discounts and delivery fees as well) and the weekly mix. Both are greyed out when the range has no sales. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

The channels

Each settled check goes to one channel, first match wins: **Uber Eats**, an emailed marketplace (**DoorDash**, **Grubhub**… each on its own row), **QR Table Ordering**, **Online Ordering**, **Call Center**, and otherwise **In Store**, one row per order type (Dine In, Take Out, Bar…).

The numbers

The cards at the top show **Contribution** (with its share of sales), **Net Sales** (with checks), **Food Cost** and **Commission** (each with its share of sales) and **Sales With Recipe Cost**. The **By Channel** table has one row per channel, largest sales first:

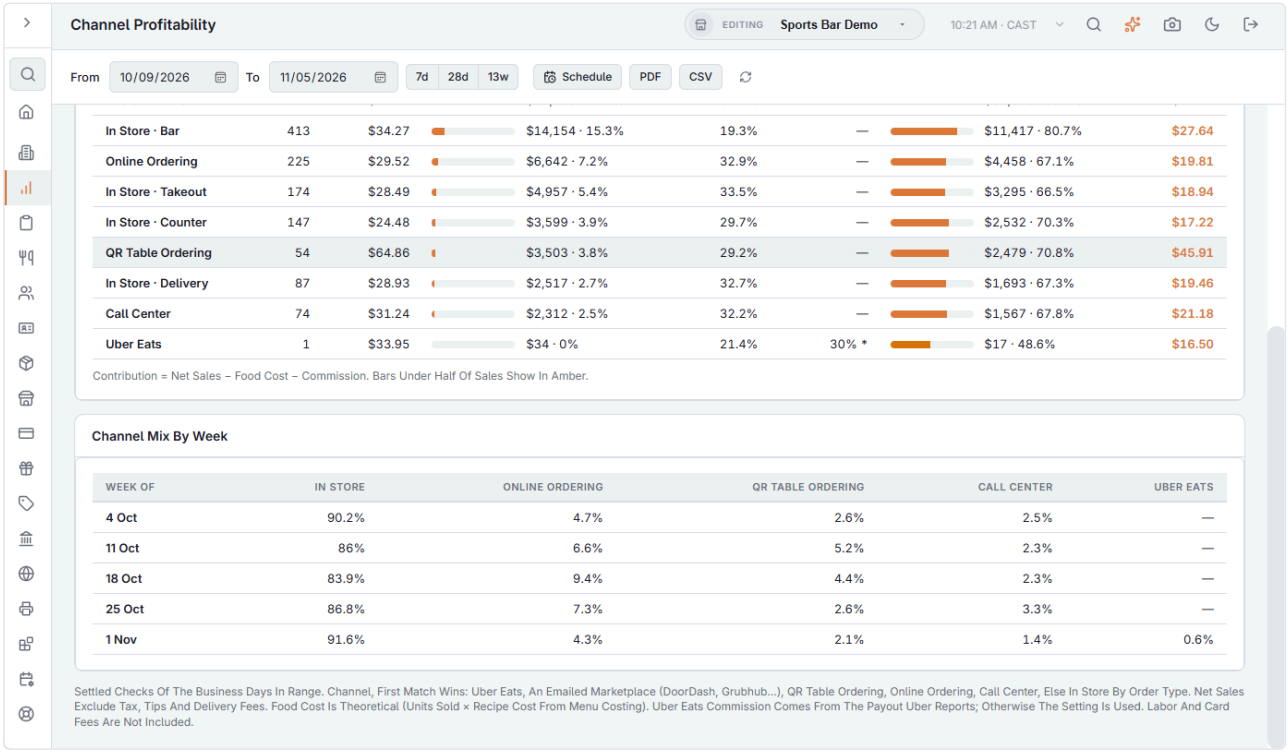
Column	What it shows
Checks, Avg Check	Settled checks in the channel and their average net sale.
Net Sales	Subtotal less discounts; no tax, tips or delivery fees. The bar shows the channel's share of all sales.
Food Cost	As a % of the channel's sales. Theoretical: units sold × recipe cost from Menu Costing: cost, margin and a recommended price for every item.
Commission	For Uber Eats, the share Uber kept on each order (order total less its payout), applied to net sales. For emailed marketplaces, and Uber orders without a payout, an estimate — marked *.
Contribution	Net sales − food cost − commission, with its share of sales. Bars under half of sales show in amber.
Per Check	Contribution per check.

Sales With Recipe Cost is how much of item sales has a recipe. Below 90% the food cost reads low; add recipes for the best sellers first.

The blue note under the cards compares the channel that keeps the most of each sale with the one that keeps the least, counting only channels with at least 10 checks. When any commission is estimated, an amber note gives the rates used and where to change them: **Back Office › Store Setup › All Program Settings**, searching for **Commission**.

Channel mix by week

When the range covers more than one week (each week starts on the store's **Business Week Start Day** from General settings, or on Sunday when it is not set), **Channel Mix By Week** shows each channel's share of sales for up to the last 13 weeks, so you can see delivery growing at the expense of dine-in — or the other way round.



Setting the commission rates

Two settings set the estimates: **Marketplace Commission Pct** (default 25%) for emailed marketplaces and **Uber Eats Commission Pct** (default 30%) for Uber orders without a payout. Change them in All program settings (search) (search for **Commission**) to match your contracts.

What to do with it

- **A delivery app far below dine-in per check** — raise the app's menu prices (Uber Eats can publish with a markup), trim the menu there to high-margin items, or push guests to your own online ordering.

- **An order type with high food cost** — check portions and packaging for takeout.

> Labor and card fees are not taken off — they are shared by all channels. Use Daypart Prime Cost: food and labor by daypart for food and labor together. The AI assistant can answer the same questions, for example “Is Uber Eats worth it for us?”

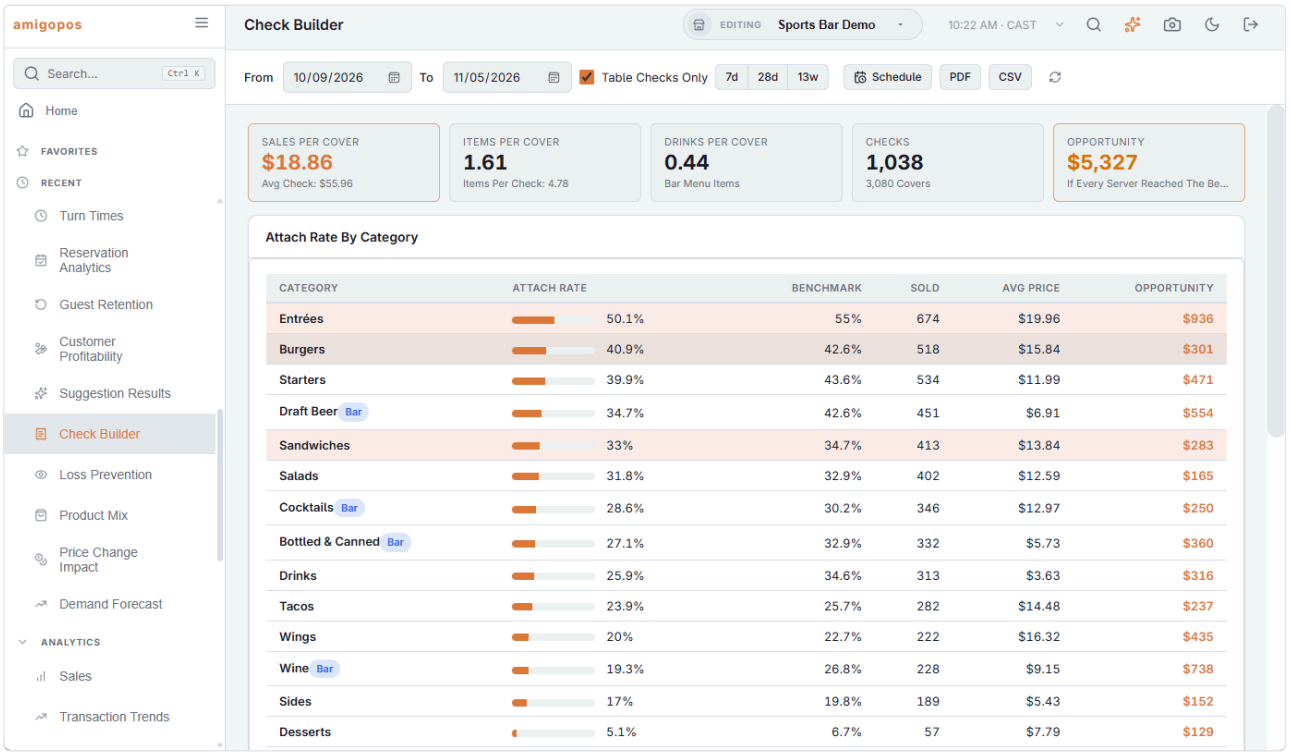
Check Builder: attach rates and upselling by server

Analytics & Activity › Performance

View online ↗

How often appetizers, desserts, drinks and every other category make it onto a check, which servers sell them best, and what closing the gap would be worth.

Back Office › Analytics › Performance › Check Builder shows how often each menu category lands on a check, which servers sell it best, and how much more you would sell if the rest of the team matched them. The average check grows one add-on at a time: a starter, a second drink, a dessert. The page is read-only.



The toolbar

- **From** and **To** — the business days to count. The page opens on the 28 days up to yesterday.
- **Table Checks Only** — leaves out takeout, delivery and bar tabs without a table; usually what you want when coaching servers.
- **7d**, **28d** and **13w** — the last 7 days, 28 days or 13 weeks, ending yesterday.
- **Schedule** — emails the report as a PDF on a recurrence; **Table Checks Only** and the categories you picked for the server table are saved with it. See Emailing the performance reports on a schedule.
- **PDF** (preview, download, email) and **CSV** — the same report as a file; the PDF shows the same server columns as the page. See Exporting and PDF preview. The file’s section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

The numbers at the top

- **Sales Per Cover** — net sales per guest, with the average check.
- **Items Per Cover** — menu items per guest, with items per check.

- **Drinks Per Cover** — bar menu items per guest.
- **Checks** — settled checks in the range, with their covers.
- **Opportunity** — extra sales if every server reached the benchmark in every category.

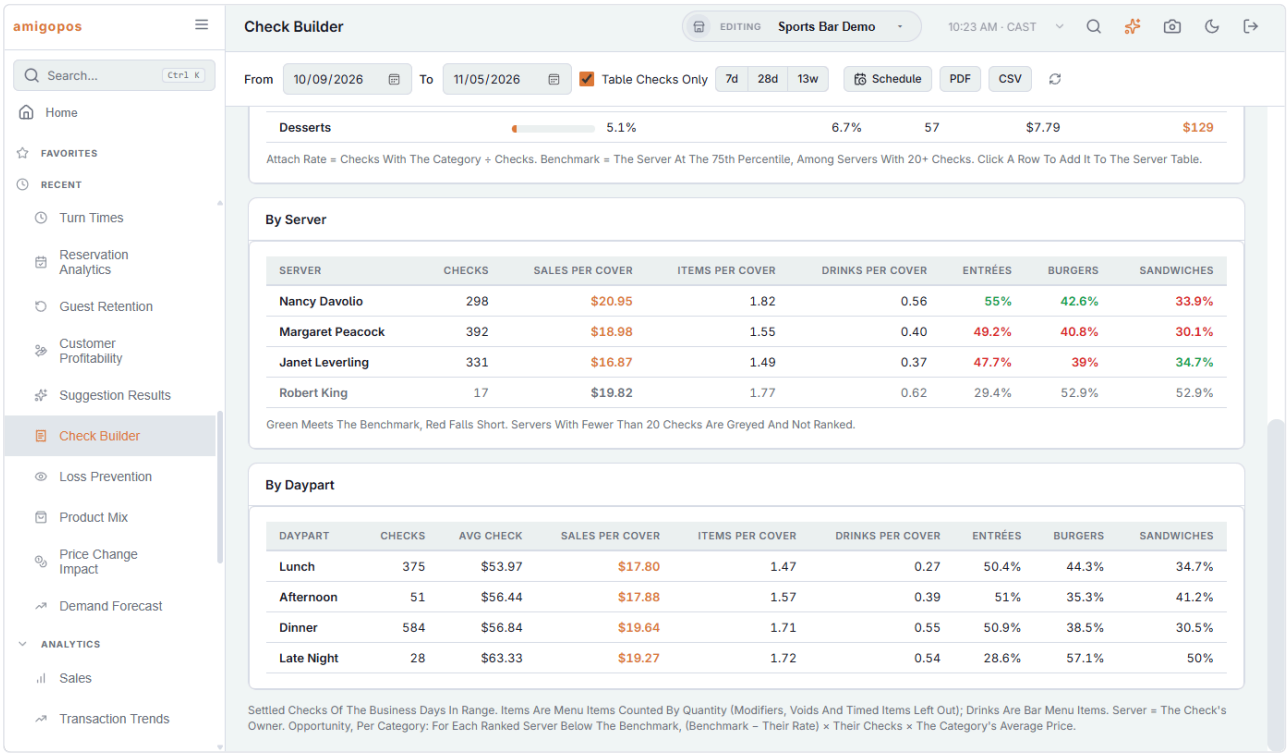
Attach rate by category

The **attach rate** is the share of checks with at least one item from the category: 30% for Desserts means three checks in ten had a dessert. Categories are listed by attach rate, up to 30, with a **Bar** badge on bar categories, the units sold and the average price. The **Benchmark** is the rate of the server at the 75th percentile among servers with 20 or more checks — a level a quarter of your team already beats, so it is reachable. It needs at least two such servers; otherwise the column shows a dash. **Opportunity** adds up, for every server below the benchmark, the checks they would need to reach it × the category's average price.

The three categories with the biggest opportunity are highlighted and shown as columns in the server and daypart tables. Click a category row to add it to or remove it from those tables (up to five).

By server

Each server's checks, sales, items and drinks per cover, and their attach rate in the highlighted categories: **green** meets the benchmark, **red** falls short. Servers with fewer than 20 checks are greyed and not ranked — too few checks to judge.



By daypart

The same per-cover numbers, the average check and the highlighted categories' attach rates for breakfast, lunch, afternoon, dinner and late night, so you can see, for example, that dessert sells at dinner but not at lunch.

What to do with it

- Pick one category with a big opportunity and coach the red servers on it for two weeks; pair them with a green one.
- Set up a Suggestive selling overview program for that category and pay a small reward per sale.
- Check again after the range and compare.

> Only settled checks count. Items are menu items counted by quantity; modifiers, voids, removed items and timed items are left out. The server is the owner of the check.

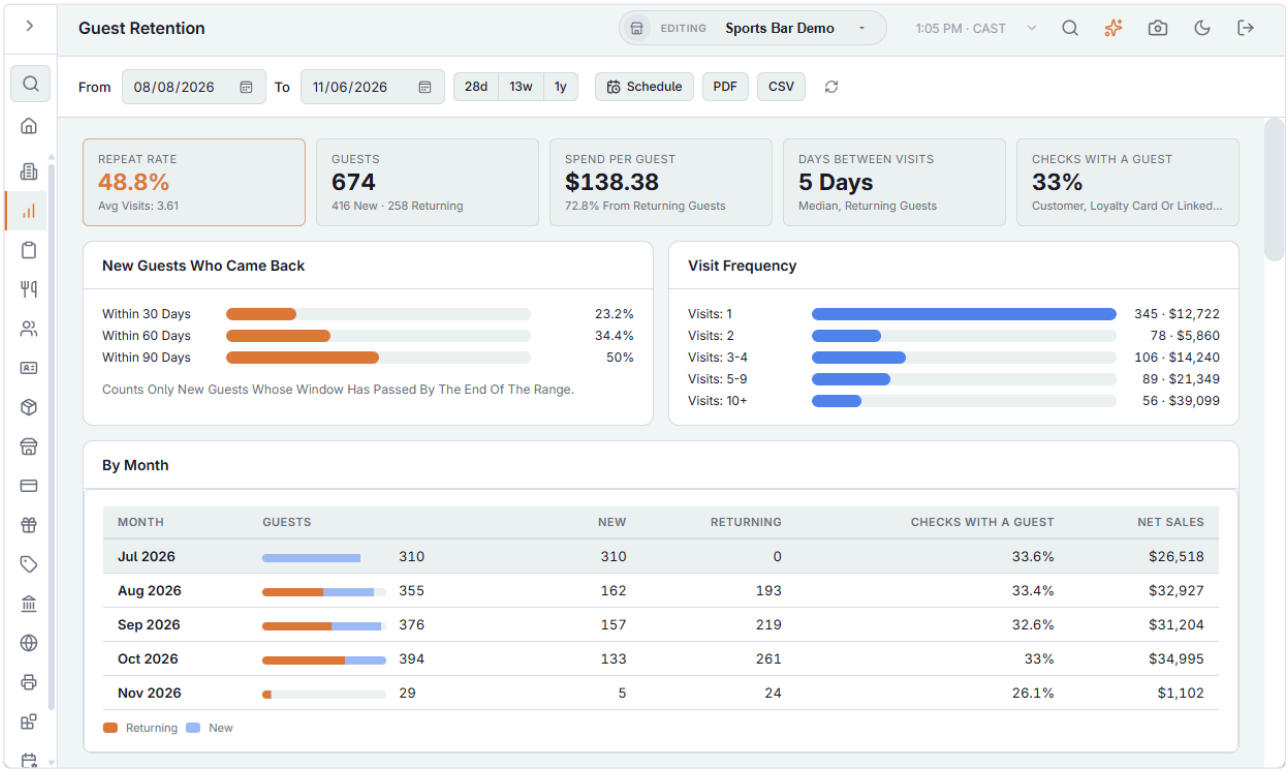
The AI assistant can answer the same questions: "Who sells the most desserts?"

Guest Retention: who comes back, and who stopped

View online ↗

Repeat rate, new and returning guests, days between visits, how many new guests come back — and the list of regulars who have stopped coming, ready to export for a win-back message.

Back Office › Analytics › Performance › Guest Retention shows how many of your guests come back, how often, and which regulars have quietly stopped coming. Winning back a regular costs less than finding a new guest. The page is read-only.



The toolbar

- **From** and **To** — the range. The page opens on the 13 weeks up to yesterday.
- **28d**, **13w** and **1y** — the last 28 days, 13 weeks or a full year, ending yesterday.
- **Schedule** — emails the report as a PDF on a recurrence; the **Away For (Days)** and **Min Visits** values are saved with it. See Emailing the performance reports on a schedule.
- **PDF** (preview, download, email) and **CSV** — the same report as a file. See Exporting and PDF preview. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
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Who counts as a guest

A check has a guest when it names a customer (call center, online orders, a customer added at the POS) or carries a How loyalty works. Checks with neither are anonymous and are left out. The shared customers the delivery marketplaces and Uber Eats put on their orders are not guests. A **visit** is a business day with a settled check. When no check in the range names a guest, the page shows **No Known Guests**.

Checks With A Guest shows how many checks name one. Below 25% the card turns amber and a note warns that the other numbers describe only that share of your business — add the customer or swipe a loyalty card at the POS more often to see more.

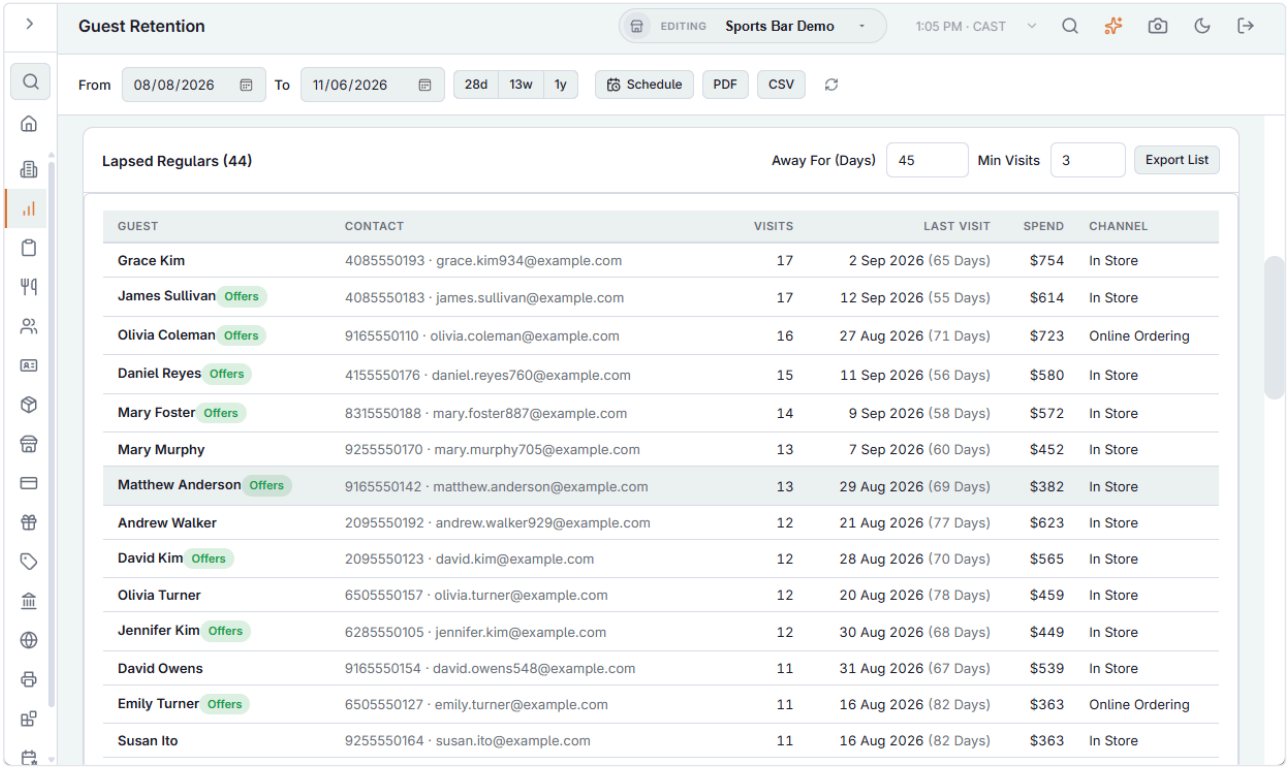
The numbers

- **Repeat Rate** — guests with two or more visits in the range, with the average visits per guest.
- **Guests** — split into **New** (first visit ever falls in the range) and **Returning**.

- **Spend Per Guest** — with the share of sales from returning guests.
- **Days Between Visits** — the median gap for guests who came back.
- **New Guests Who Came Back** — within 30, 60 and 90 days, counting only new guests whose window has passed by the end of the range.
- **Visit Frequency** — guests and their sales by number of visits: 1, 2, 3–4, 5–9 and 10+.
- **By Month** — the 12 months up to the end of the range, whatever range is set: guests split into new and returning, the share of checks with a guest, and net sales.
- **Repeat Rate By Channel** — guests grouped by where they usually order (in store, call center, online ordering), with their repeat rate and spend per guest.
- **Top Guests** — the ten guests who spent the most in the range.

Lapsed regulars

Regulars are guests with at least **Min Visits** visits (default 3, from 2 to 50) in the year up to the end of the range; they are lapsed when they have not been back for **Away For (Days)** days (default 45, from 7 to 365). Change both boxes to suit how often your guests normally come. The list is sorted by visits and spend, with phone, email, last visit, spend, usual channel and an **Offers** badge for guests who accept offers (Send Offers on the Customer info fields and phone format).



The page shows the first 100. When there are more, a line says **Showing 100 Of {n}. Export The List For Up To 2,000 Of Them. Export List** downloads up to 2,000 as a CSV, with headings in the Back Office language, for a WhatsApp, SMS or email campaign, with first and last visit and whether each guest accepts offers. Only message guests who accept offers.

The AI assistant can answer the same questions: “Which regulars haven’t we seen lately?”

Customer Profitability

Analytics & Activity › Performance

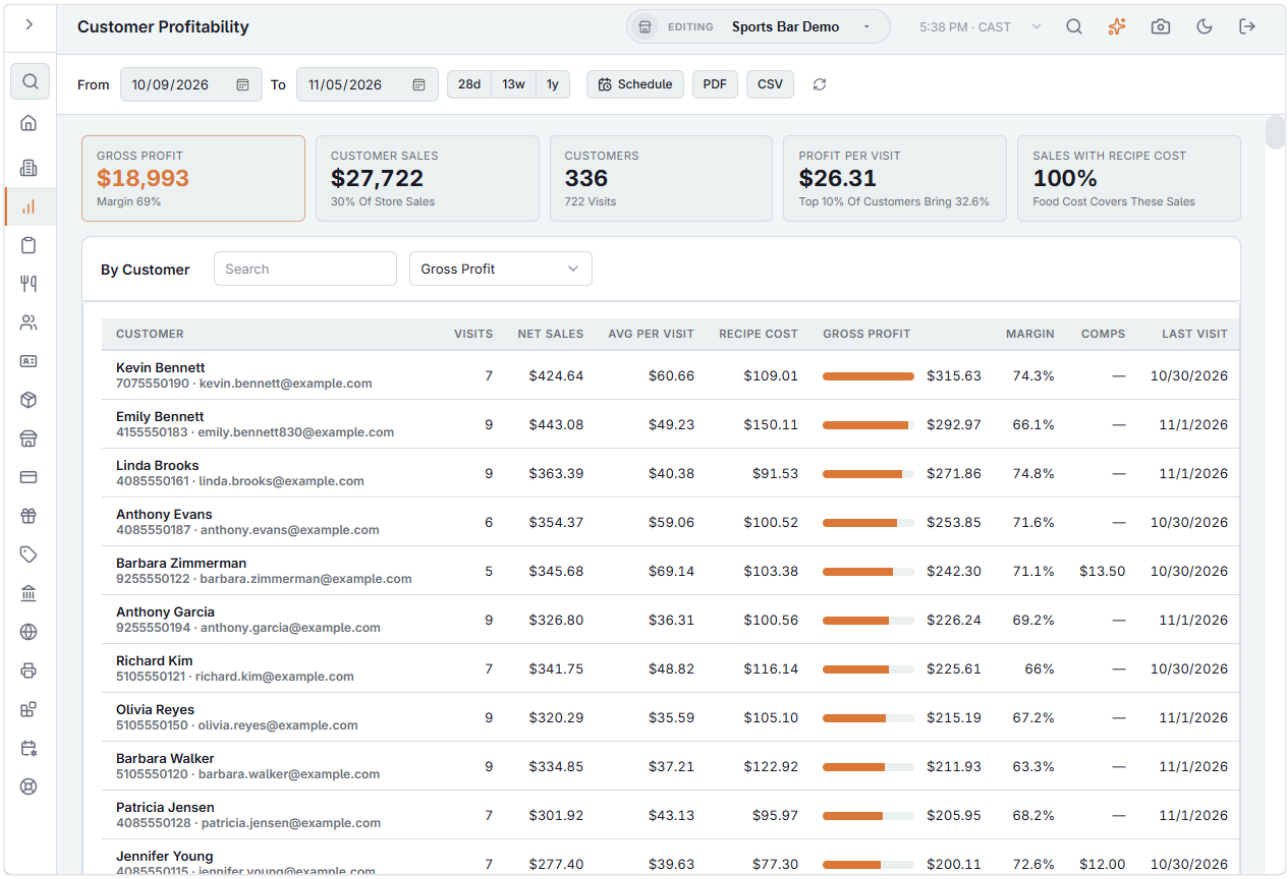
View online ↗

Gross profit by customer: what each known customer bought after discounts, minus recipe cost and comps, with visits, profit per visit and how much your top customers bring.

Customer Profitability shows what each known customer bought over a date range and what it left after recipe cost. Use it to see which regulars are worth the most, and which ones cost you more in comps and discounts than they bring.

Open it

Go to **Back Office › Analytics › Performance › Customer Profitability**, pick the dates or one of the quick ranges (28 days, 13 weeks, 1 year).



Who counts as the customer

Each item belongs to:

1. the customer its guest was linked to on the register's guest dialog (see Linking seated guests to customers), else
2. the customer on the check, else
3. the customer who holds the check's loyalty card.

Checks with none of these are not in the report. The shared marketplace and Uber Eats customers, and deleted customers, are left out.

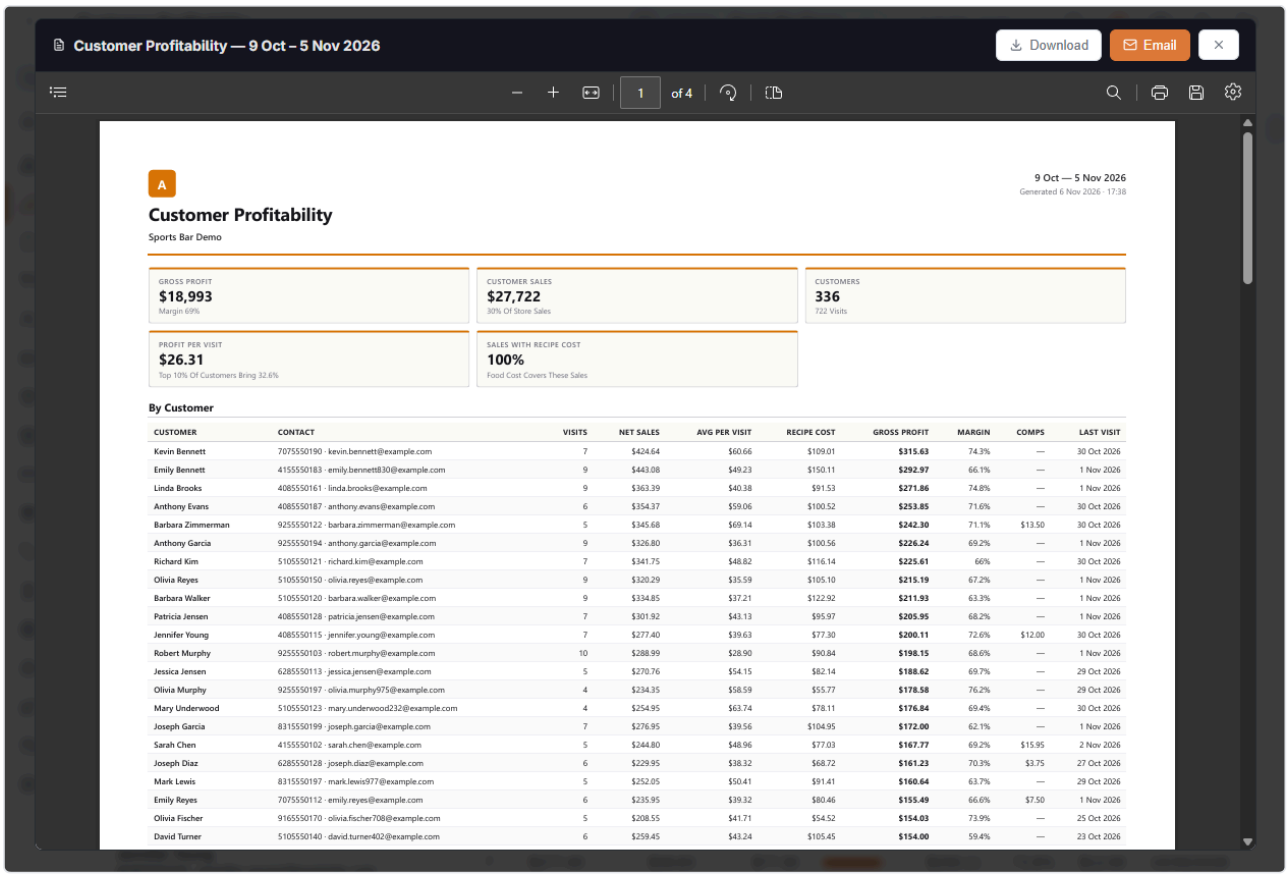
The numbers

- **Customer Sales**: item sales after item and order discounts (an order discount is shared over the items by value), before tax. Under it, the share of all store sales.
- **Recipe Cost**: units × the Menu Costing recipe cost. Comped items cost too and come off the gross profit. Items without a recipe add no cost; **Sales With Recipe Cost** says how much of the sales the margin covers.
- **Gross Profit** = sales − recipe cost − cost of comps. **Margin** is measured on items with a recipe.
- **Visits**: business days with at least one of the customer's items. **Profit Per Visit** and **Avg Per Visit** divide by them.
- The top 10% of customers' share of the gross profit.

Search by name, phone or email and sort by gross profit, sales, visits, margin or profit per visit. A star marks customers with a loyalty card. The table lists the top 500 customers by gross profit.

PDF, CSV and scheduled email

PDF opens a printable copy with the top 100 customers; **CSV** downloads the list as shown (search and sort included); **Schedule** emails the PDF on a schedule. You can also ask the assistant, for example "who are our most profitable customers this quarter?".



Labor is not allocated to customers. Only sales tied to a customer count, so link guests at the table to get a fuller picture. For repeat visits and lapsed regulars, see Guest Retention.

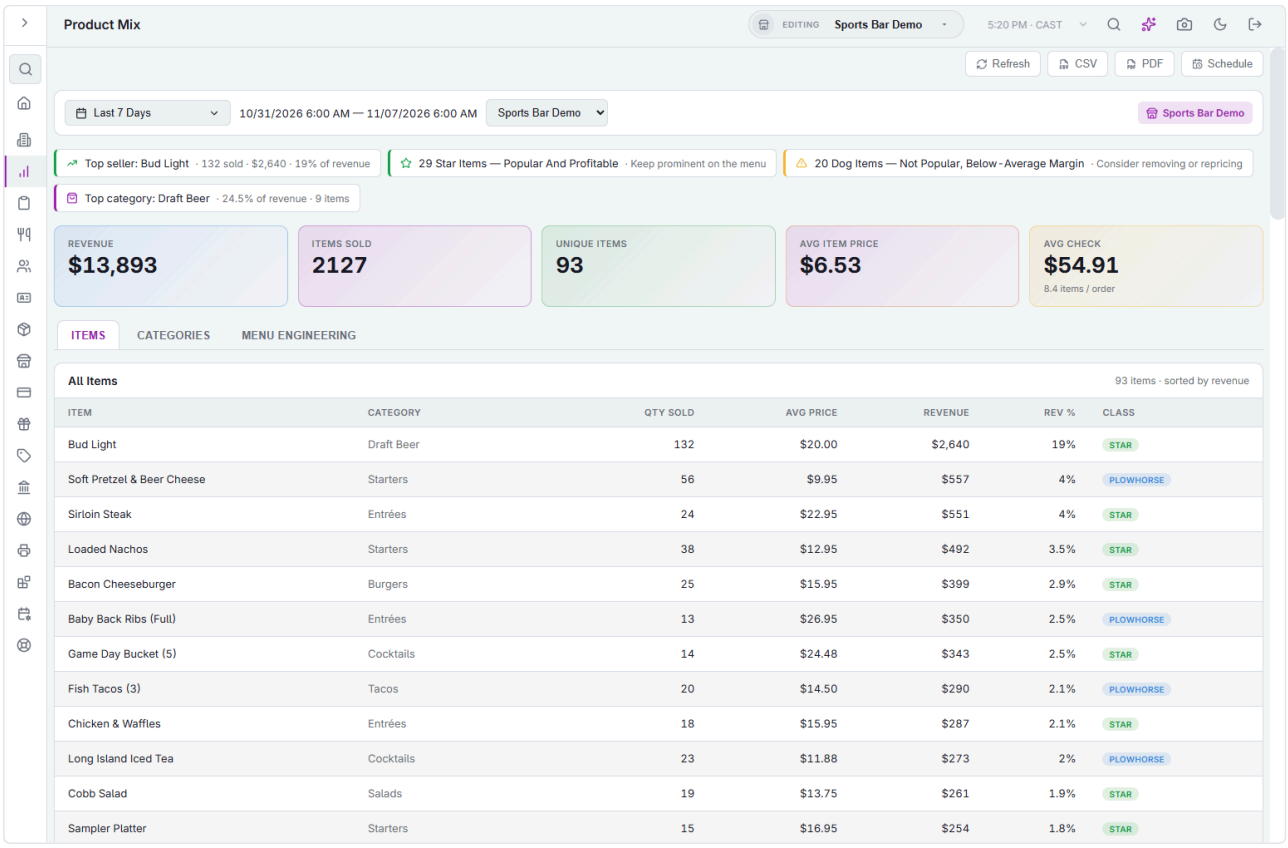
Product mix

Analytics & Activity › Performance

View online ↗

What the menu sold in a date range: each item's quantity and revenue, the categories, and a menu-engineering view.

Back Office › Analytics › Performance › Product Mix shows what the menu sold in a date range: each item's quantity and revenue, the categories, and a menu-engineering view that sorts the items by how often they sell and how much they bring in.



The toolbar

The toolbar works as on Sales performance: a date range (Last 7 Days to start), the exact business-day window, **Store**, **Refresh**, **CSV**, **PDF** and **Schedule**. There is no Day / Week / Month choice on this page.

What is counted

- Menu items sold on the business days in the range. Voided orders and lines removed from an order are left out.
- Modifiers are not counted as items, and their prices are not part of the item's revenue.
- Revenue is the item's price times the quantity sold.

Cards

- **Revenue** — the revenue of all items sold.
- **Items Sold** — the total quantity sold.
- **Unique Items** — how many different menu items sold at least once.
- **Avg Item Price** — revenue divided by items sold.
- **Avg Check** — item revenue divided by the number of orders, with the average items per order under it.

Above the cards, a strip shows up to four notes: the top seller, the number of Star items, the number of Dog items when there are five or more, and the top category.

Items

All Items, sorted by revenue: **Item**, **Category**, **Qty Sold**, **Avg Price**, **Revenue**, **Rev %** (share of all revenue) and **Class** (the item's menu-engineering group), with a **Total** row.

Categories

By Category, sorted by revenue: **Category**, **Items** (how many different items sold in it), **Qty Sold**, **Revenue** and **Rev %** with a bar. Items without a category are grouped as Uncategorized.

Menu Engineering

Every item is placed in one of four groups by two splits: its quantity sold against the median quantity of all items in the range, and its revenue against the median revenue. At or above the median counts as high.

Group	Volume	Revenue	The box lists
Stars	High	High	Revenue
Plowhorses	High	Low	Quantity sold
Puzzles	Low	High	Revenue
Dogs	Low	Low	Quantity sold

Each box shows how many items it holds and lists the first eight.

> The groups use revenue only. Recipe costs and margins are not part of them, so an item with a high price and a high cost can still be a Star.

> The groups are relative to the range you pick. A single busy weekend can move items between groups; read the groups over a month or more before you change the menu.

All Stores

With **All Stores** selected, items with the same name and category at different stores are added up into one row, since each store has its own menu. The totals, the shares, the categories, the menu-engineering groups and the notes are then worked out over the combined items, as for one menu. The PDF covers one store: with more than one store, pick a store before you open it.

CSV

The CSV has three sections: All Items, By Category, and a daily section with the items sold, revenue and orders for each day. The class is written out as its group name.

Related: Product Mix Comparison, Price Change Impact: what a price change did to sales, Check Builder: attach rates and upselling by server.

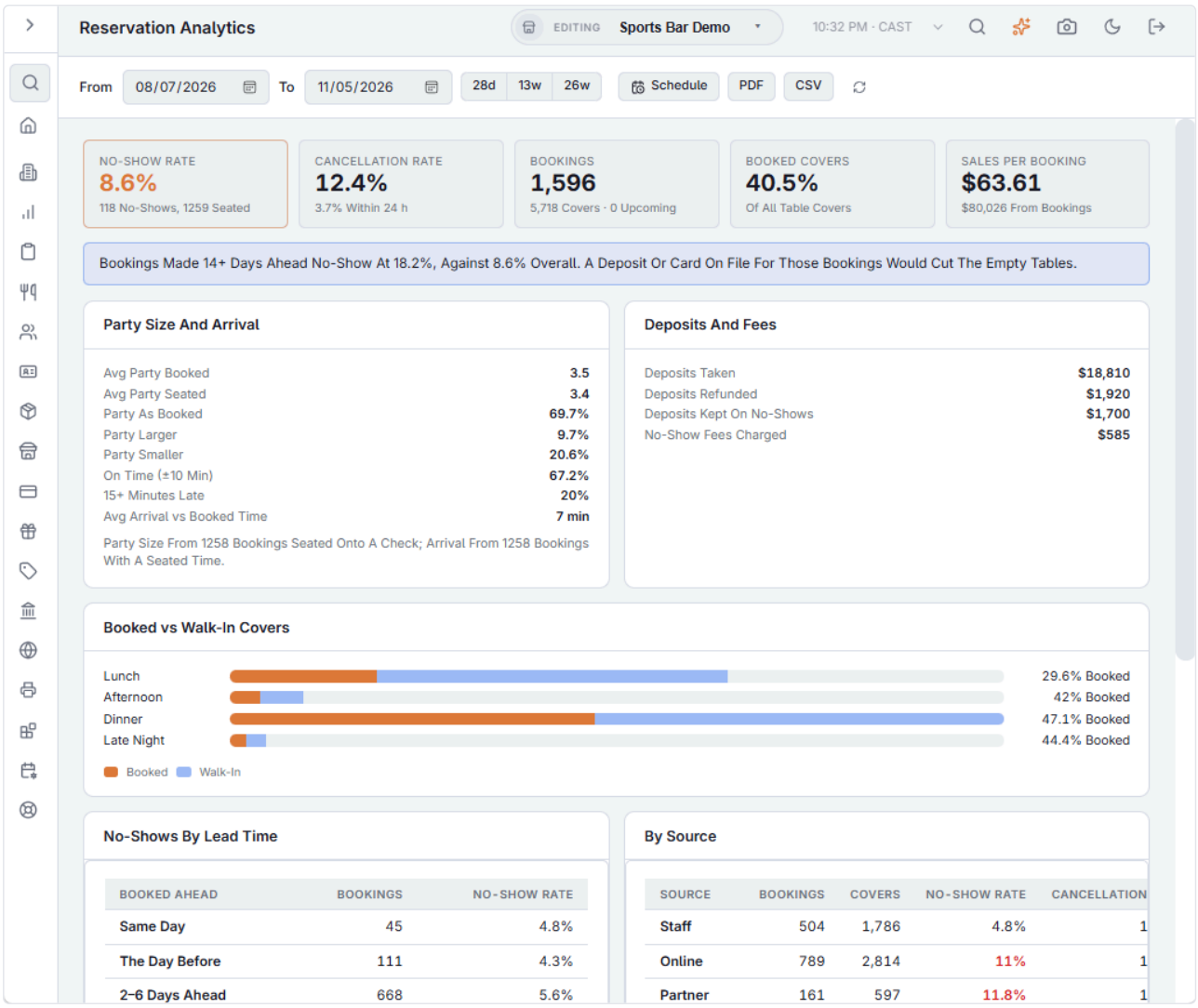
Reservation Analytics: no-shows, cancellations and deposits

Analytics & Activity › Performance

View online ↗

How your bookings turn out — no-show and cancellation rates, party size and arrival against the booking, deposits and fees — and where a deposit would pay off.

Back Office › Analytics › Performance › Reservation Analytics shows how your bookings actually turn out — no-shows, cancellations, party size, arrival and deposits — and where a deposit or card on file would earn its keep. An empty table held for a party that never came costs a full turn. The page is read-only. It is hidden on plans that don’t include Reservations And Booking.



The toolbar

- **From** and **To** — the range, by reservation date. The page opens on the 13 weeks up to yesterday.
- **28d**, **13w** and **26w** — the last 28 days, 13 weeks or 26 weeks, ending yesterday.
- **Schedule** — emails the report as a PDF on a recurrence. See Emailing the performance reports on a schedule.
- **PDF** (preview, download, email) and **CSV** — the same report as a file. See Exporting and PDF preview. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

When the range has no bookings the page shows **No Reservations**.

The numbers at the top

- **No-Show Rate** — no-shows ÷ (seated + no-shows), with both counts. Amber at 10% or more.
- **Cancellation Rate** — cancelled bookings as a share of concluded ones (seated, no-show or cancelled), with the share cancelled within 24 hours of the booked time.
- **Bookings** — with booked covers and how many are still upcoming.
- **Booked Covers** — the share of all table covers that came from a reservation; the rest walked in.
- **Sales Per Booking** — net sales on the checks seated bookings were moved onto, with the total.

Once there are at least 30 seated and no-show bookings, a blue note reads the result: where no-shows concentrate, whether a deposit would help, or that no-shows are low enough to leave alone.

Party size and arrival

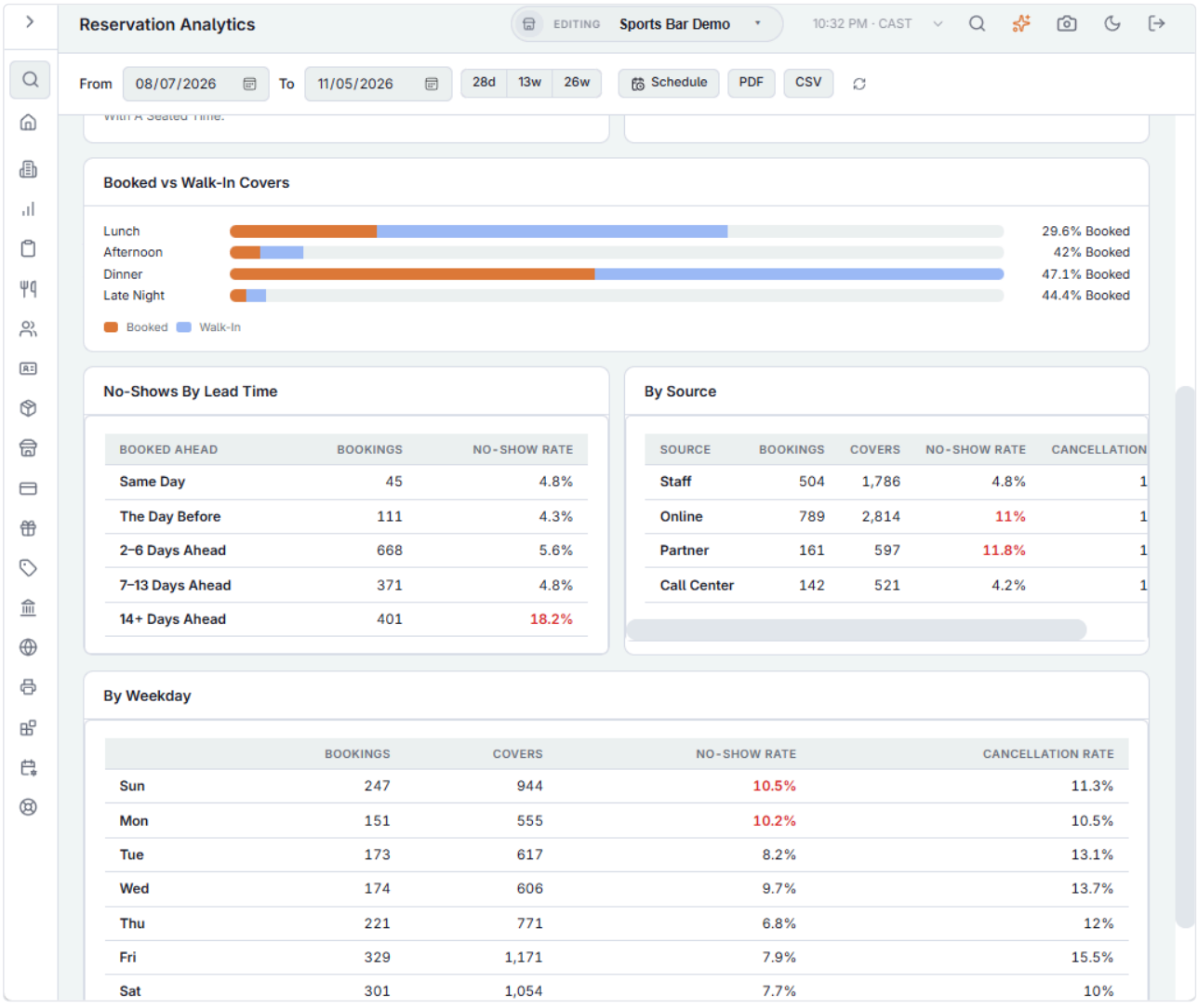
The party booked against the guests on the check it was seated onto: the average of each, and how often the party was as booked, larger or smaller. Arrival compares when the party was seated with the booked time: **On Time (±10 Min)** counts parties seated from 10 minutes before to 10 minutes after the booked time; a party seated more than 10 minutes early is not on time; **15+ Minutes Late** and the average arrival against the booked time follow. The line under the card says how many bookings each figure is based on.

Deposits and fees

Deposits taken and refunded, deposits kept on no-shows, and no-show fees charged. Deposits and no-show fees are set up as described in Deposits, table fees and extras.

Booked vs walk-in, lead time, source and weekday

Booked vs Walk-In Covers shows by daypart how much of the room the book fills. **No-Shows By Lead Time** shows whether bookings made weeks ahead fail more than same-day ones. **By Source** (staff, online, partner, call center) and **By Weekday** show where no-shows and cancellations come from; no-show rates of 10% or more show in red.



What to do with it

- **No-shows concentrate on one source or lead time** — ask for a deposit or card on file only there (online bookings, or bookings made 14+ days ahead), and send a reminder the day before.
- **Parties arrive smaller than booked** — confirm the party size in the reminder; seat at smaller tables.
- **Few covers come from the book** — walk-ins carry the room; keep tables free for them at peak.

> Waitlist entries, expired holds and walk-ins entered in the book are left out of the bookings. See Turn Times: how long parties really stay for how long booked parties stay.

The AI assistant can answer the same questions: “What’s our no-show rate?”

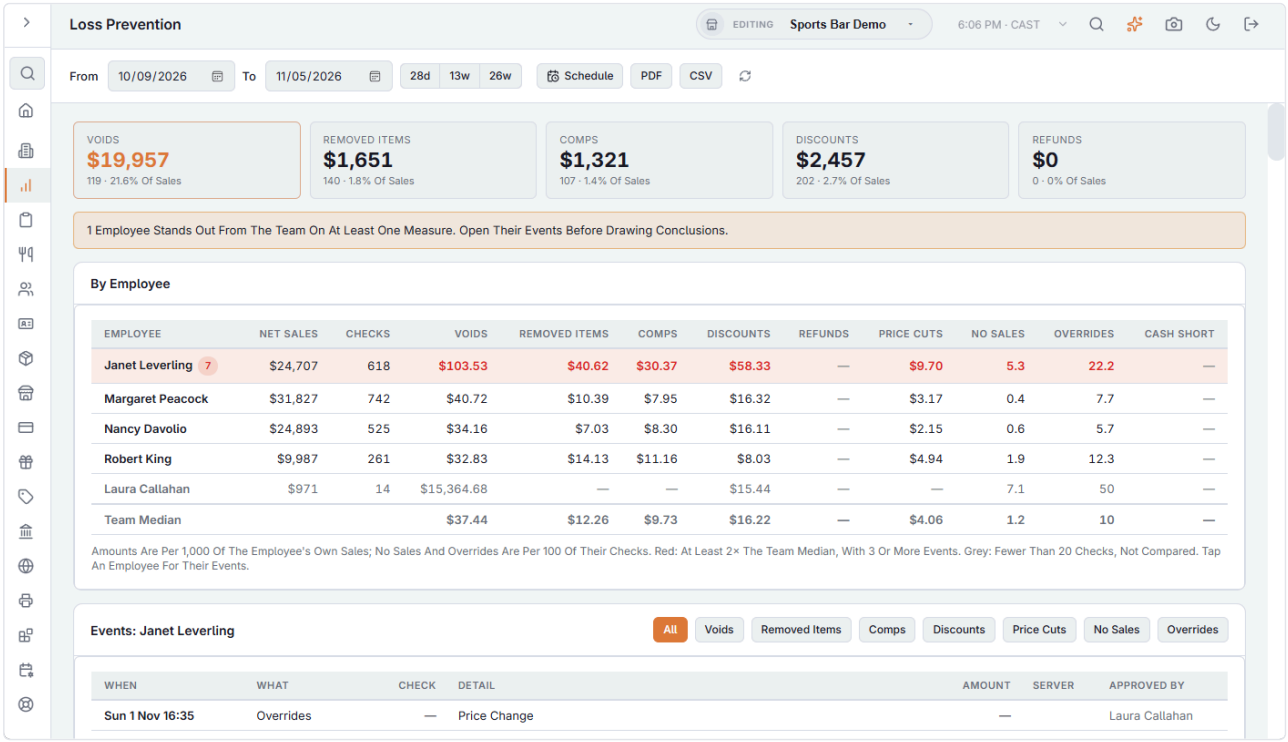
Loss Prevention: exceptions by employee

Analytics & Activity › Performance

View online ↗

Voids, removed items, comps, discounts, refunds, price cuts, no-sales, manager overrides and cash short for each employee, compared with the rest of the team — and the events behind every number.

Back Office › Analytics › Performance › Loss Prevention lines up voids, comps, refunds and the other exceptions employee by employee, so a pattern that one employee shows and the rest of the team doesn’t stands out. Most give-aways and most theft leave a trail: a void here, a comp there, the drawer opened without a sale. One event means nothing; a pattern is worth a conversation. Only employees whose job has the **Manager Screen** permission see the page (see Jobs, roles, and permissions). It is read-only.



The toolbar

- **From** and **To** — the business days to count. The page opens on the 28 days up to yesterday.
- **28d**, **13w** and **26w** — the last 28 days, 13 weeks or 26 weeks, ending yesterday.
- **Schedule** — emails the report as a PDF on a recurrence; send it to managers only. See Emailing the performance reports on a schedule.
- **PDF** (preview, download, email) and **CSV** — the same report as a file. The CSV has the summary, the employees (for each measure, its amount or count and then its rate, with the rate’s unit in the heading), the events, and the void reasons and the removed-item reasons as two separate sections. See Exporting and PDF preview. The file’s section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.
- The refresh button loads the figures again.

The cards at the top

Voids, **Removed Items**, **Comps**, **Discounts** and **Refunds** for the whole team: the amount, the number of events and the share of net sales. The note under them says how many employees stand out from the team on at least one measure, or that nobody does.

What is counted, and against whom

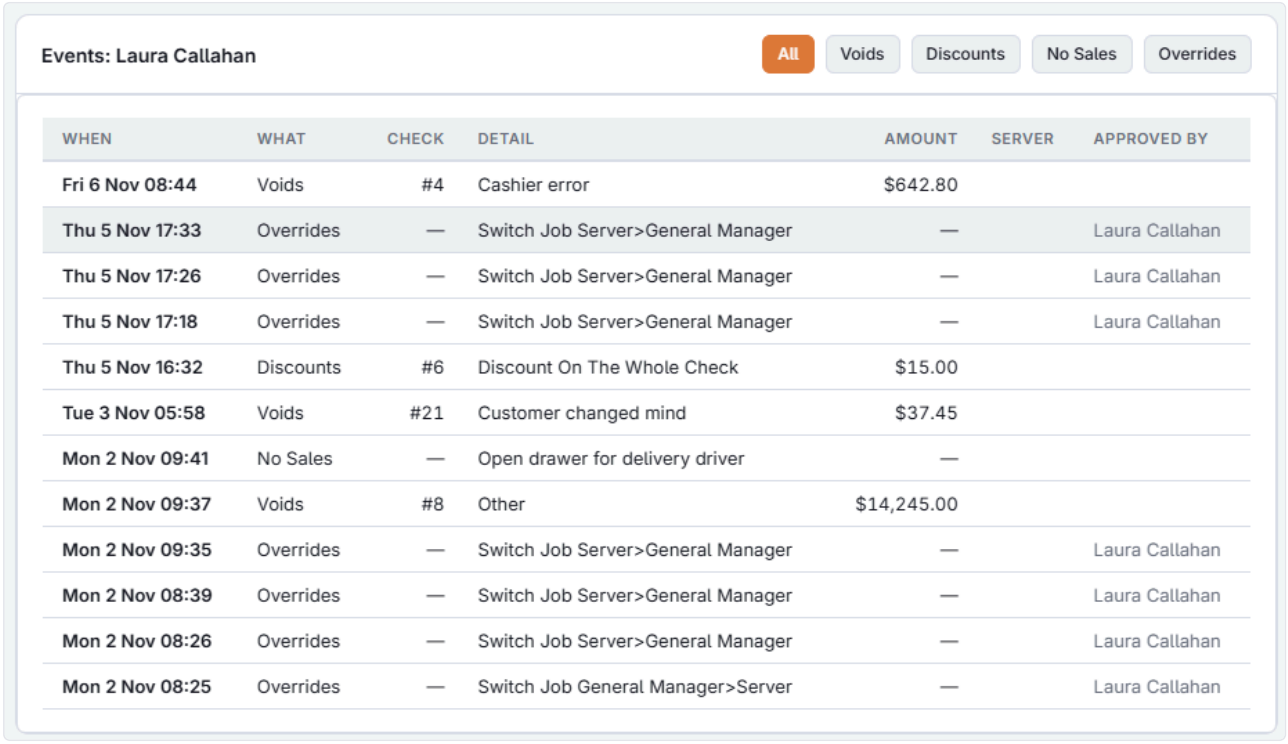
- **Voids** — whole checks voided, at the check's subtotal, against who voided them (see Voids and the void reason prompt). Voids made by splitting or combining checks are left out.
- **Removed Items** — saved items taken off a settled check, with their modifiers, against who removed them; **After Sending** marks items the kitchen had already been sent.
- **Comps** and **Discounts** — against who applied them; a discount on the whole check counts against the check's owner (see Comps, line discounts and order discounts).
- **Refunds** — against who rang them, with the manager who approved. **Price Cuts** — prices set by hand below the original.
- **No Sales** and **Overrides** — drawer opens without a sale, and manager approvals granted to the employee (see Permission overrides and override log).
- **Cash Short** — what the drawer counted short at Drawer reset at end of shift, against the drawer's cashier.

Reading the table

By Employee lists each employee's net sales and checks, then one column per measure. To compare a busy server with a quiet one, each number is a rate: money per 1,000 of the employee's own sales, and no sales and overrides per 100 of their checks. The **Team Median** row at the bottom is the middle of the team. A cell turns **red** when it is at least twice the median and has at least three events behind it; the badge next to a name counts the red cells. Employees with fewer than 20 checks are greyed and not compared. Hover a cell for the number of events, the amount and the rate with its unit, for example **3 Events; Rate 2.5 Per 100 Of Their Checks**. Employees with red cells are listed first.

The events behind a number

The page opens with the events of the first flagged employee. Tap another employee to list theirs, or tap the same one again to close the list. Each event shows when, what, the check number, the item or reason, the amount, the check's server and who approved it, newest first. For an override, the detail is the approved permission's name as the job editor shows it or, for an approval that is not a permission, its name split into words (for example **Time Clock · Early Clock In**), here and in the CSV; the PDF shows the name as it was stored. The page shows the latest 200, and the CSV has more. Use the buttons above the list (**All**, then one per kind of event) to see one kind only. The two cards at the bottom, **Why Checks Were Voided** and **Why Items Were Removed**, give the count and amount per reason for the whole team.



WHEN	WHAT	CHECK	DETAIL	AMOUNT	SERVER	APPROVED BY
Fri 6 Nov 08:44	Voids	#4	Cashier error	$642.80		
Thu 5 Nov 17:33	Overrides	—	Switch Job Server>General Manager	—		Laura Callahan
Thu 5 Nov 17:26	Overrides	—	Switch Job Server>General Manager	—		Laura Callahan
Thu 5 Nov 17:18	Overrides	—	Switch Job Server>General Manager	—		Laura Callahan
Thu 5 Nov 16:32	Discounts	#6	Discount On The Whole Check	$15.00		
Tue 3 Nov 05:58	Voids	#21	Customer changed mind	$37.45		
Mon 2 Nov 09:41	No Sales	—	Open drawer for delivery driver	—		
Mon 2 Nov 09:37	Voids	#8	Other	$14,245.00		
Mon 2 Nov 09:35	Overrides	—	Switch Job Server>General Manager	—		Laura Callahan
Mon 2 Nov 08:39	Overrides	—	Switch Job Server>General Manager	—		Laura Callahan
Mon 2 Nov 08:26	Overrides	—	Switch Job Server>General Manager	—		Laura Callahan
Mon 2 Nov 08:25	Overrides	—	Switch Job General Manager>Server	—		Laura Callahan

Before you act on a red cell

- A flag is a question, not proof. The manager who handles every void, or the bartender who rings the owner's comps, will stand out for good reasons.
- Look at the events: the same table, the same guest, the end of the shift, items removed after the kitchen made them, refunds approved by the same person who rang them.
- Compare with the The end-of-day report and the Audit trail for the same days.
- Tighten the permission where it is abused: require a manager for voids or comps on that job, and give each employee their own login so nothing is rung under someone else's name.

The AI assistant can answer the same questions: "Who voids the most?"

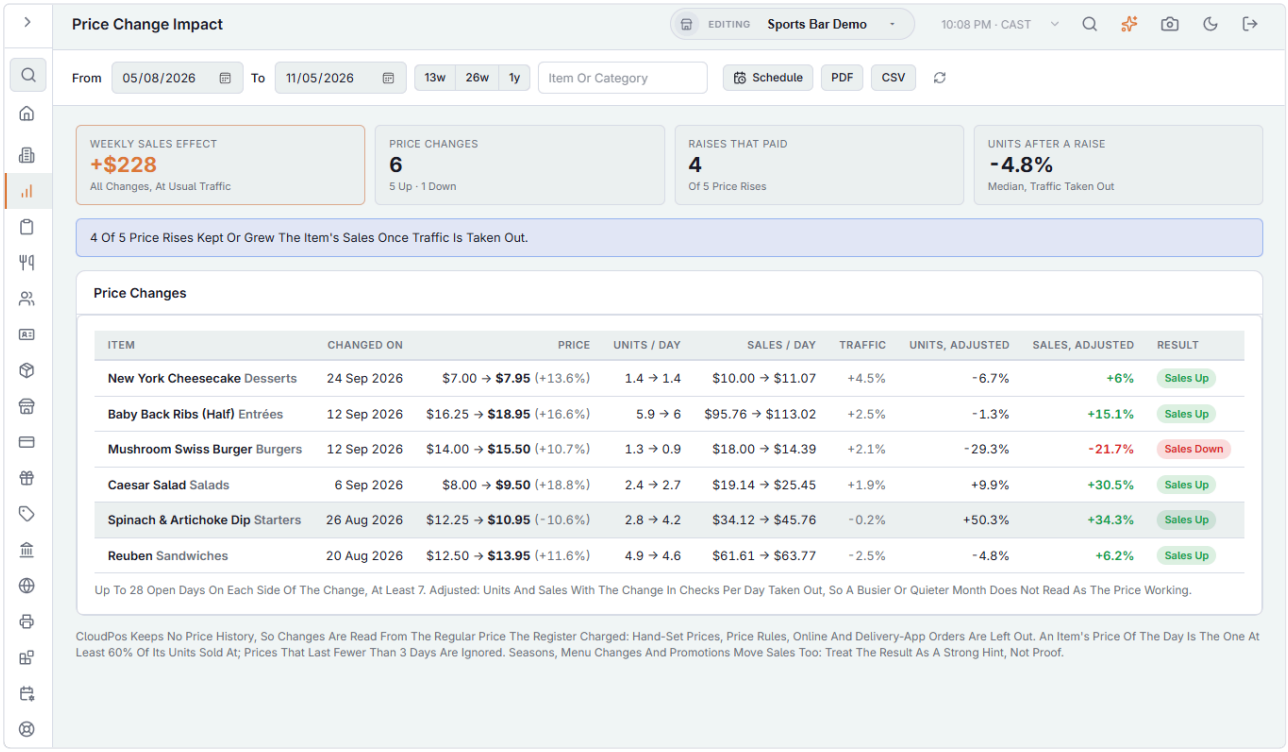
Price Change Impact: what a price change did to sales

Analytics & Activity › Performance

View online ↗

Every menu price change, with units and sales per day before and after it — adjusted for how busy the store was — and whether the change paid off.

Back Office › Analytics › Performance › Price Change Impact shows, for every menu price you have changed, what the change did to the item's units and sales. Raising a price usually sells a few fewer units at a higher margin; whether the item ends up earning more or less depends on how many guests walk away from it. The page is read-only.



The toolbar

- **From** and **To** — when the price changes happened. The page opens on the 26 weeks up to yesterday.
- **13w**, **26w** and **1y** — the last 13 weeks, 26 weeks or a year, ending yesterday.
- The **Item Or Category** box filters the table as you type.
- **Schedule** — emails the report as a PDF on a recurrence. A new schedule starts monthly over last month, so the changes have time to show. See Emailing the performance reports on a schedule.
- **PDF** (preview, download, email) and **CSV** — the same report as a file. See Exporting and PDF preview. The file's section titles, column headings, day names and Yes/No values are in the language the Back Office is shown in; numbers use a dot for decimals with no thousands separator, and dates are written year-month-day, so a spreadsheet reads them the same in any language.

- The refresh button loads the figures again.

When no change is found, the page shows **No Price Changes Found**; try a longer range.

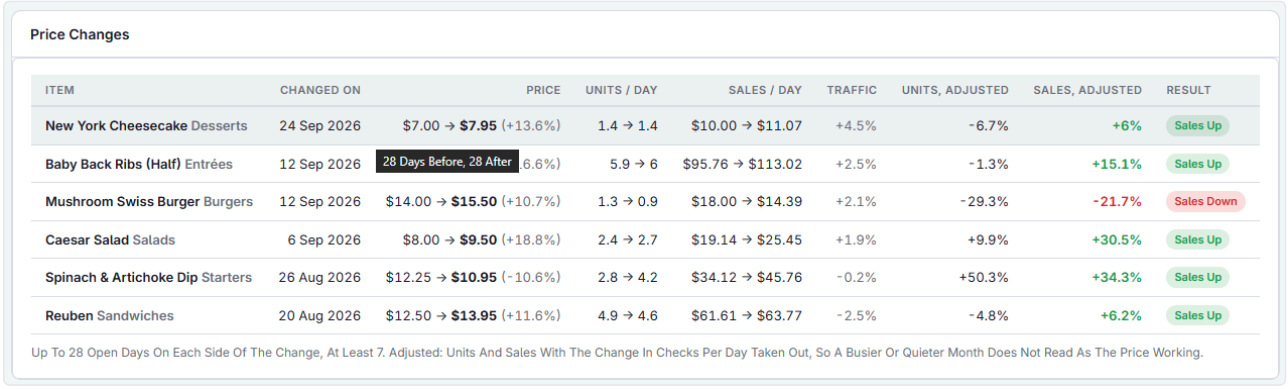
How a price change is found

CloudPos keeps no history of menu prices, so the report reads changes from what the register charged. Only menu items on settled checks rung at the register count, at their regular price: prices set by hand at the register, Price rules, online orders and delivery-app orders are left out (they carry their own prices), and so are modifiers, removed, comped and voided lines, timed items and items sold by weight. An item's price of the day is the price at least 60% of its units sold at; a price that lasted fewer than 3 days is ignored. A change is the first day of a new price.

> Change prices in Menu items (prices, SKUs, buttons) and leave the new price in place for at least a week before judging it here.

Reading a row

- **Item** and **Changed On** — the item with its category, and the first day of the new price. Hover the date to see how many days before and after were compared.
- **Price** — old price, new price and the change in percent.
- **Units / Day** and **Sales / Day** — for up to 28 open days at the old price and 28 at the new one; at least 7 on each side.
- **Traffic** — the change in checks per open day for the whole store. A price rise just before the busy season looks great unless this is taken out.
- **Units, Adjusted** and **Sales, Adjusted** — the change with the traffic change taken out. This is the column to judge by.
- **Result** — **Sales Up** when adjusted sales rose 2% or more, **Sales Down** when they fell 2% or more, otherwise **About Even**. **Early** means the latest price has fewer than 28 days behind it; check again later.



The cards at the top

- **Weekly Sales Effect** — what all the changes are worth per week at your usual traffic. Amber when negative.
- **Price Changes** — how many were found, with how many went up and down.
- **Raises That Paid** — price rises with **Sales Up**, out of all price rises.
- **Units After A Raise** — the median change in units after a rise, with traffic taken out.

With at least three price rises that are not early, a blue note says how many of them kept or grew the item's sales, or how many lost sales.

What to do with it

- **A raise with sales up** — guests barely noticed; similar items in the same category can probably take a rise too.
- **A raise with sales down** — guests switched away. Check whether they moved to a cheaper item in Product mix before rolling the price back.
- Seasons, menu changes and promotions also move sales: treat the result as a strong hint, not proof.

The AI assistant can answer the same questions: "Did raising the burger price hurt sales?"

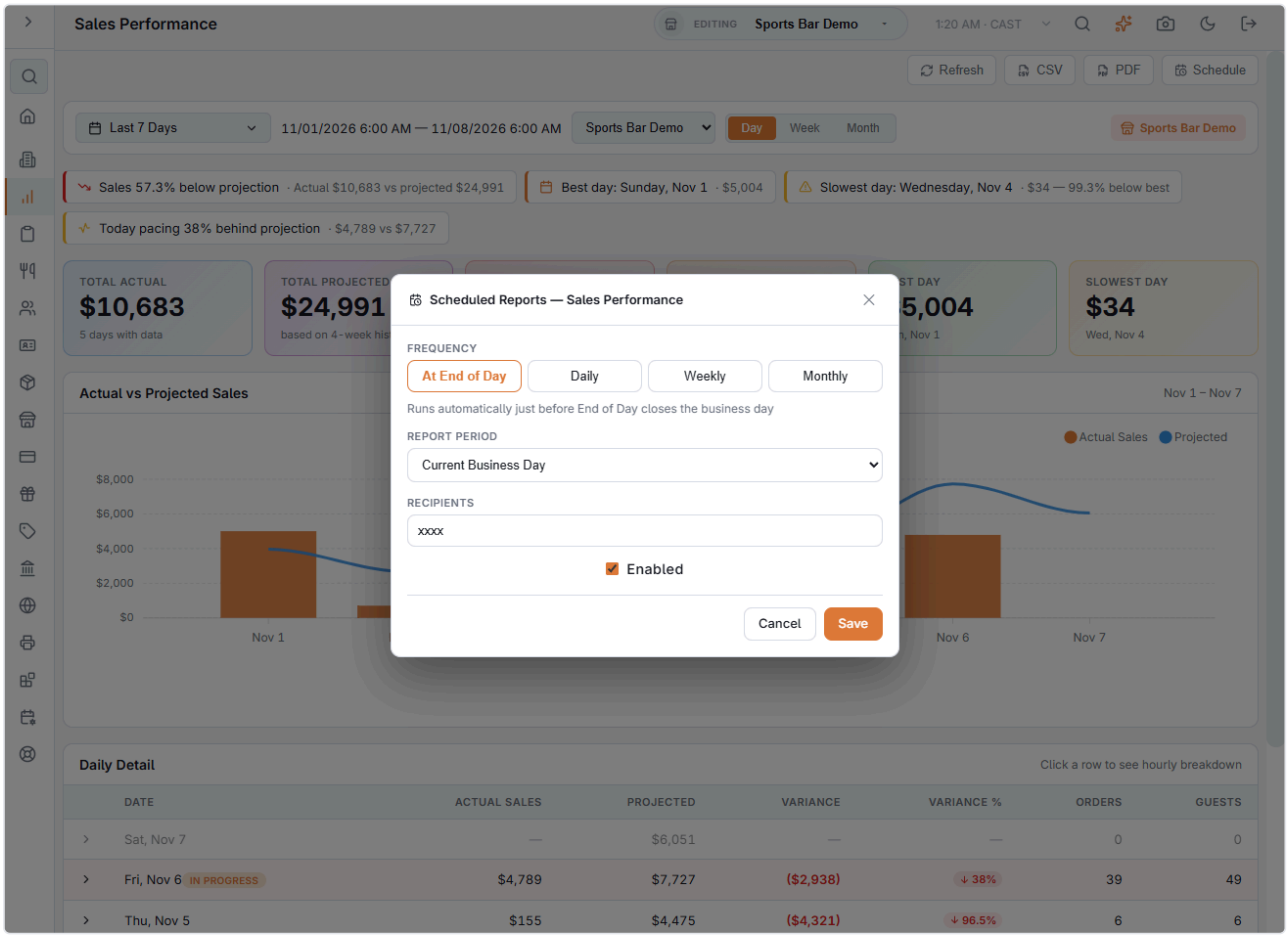
Emailing the performance reports on a schedule

Analytics & Activity › Performance

View online ↗

Have RevPASH, Daypart Prime Cost, Loss Prevention or any other Analytics › Performance report emailed as a PDF every day, week or month.

Most report pages under **Back Office › Analytics › Performance** have a **Schedule** button that emails the report as a PDF on a schedule, so it arrives without anyone opening the page.



Which pages have it

Pages	Where the button is	A new schedule starts as
Sales Performance, Labor Performance, Inventory Performance, Product Mix, Demand Forecast	In the page header, next to PDF	**At End of Day**, over the **Current Business Day**
RevPASH, Table Performance, Table Fit, Turn Times, Staffing vs Demand, Daypart Prime Cost, Channel Profitability, Check Builder, Guest Retention, Reservation Analytics, Loss Prevention: exceptions by employee	In the page toolbar	**Weekly**, on Monday, over **Last week**
Price Change Impact: what a price change did to sales	In the page toolbar	**Monthly**, on day 1, over **Last month**, so the changes have time to show

Delivery Performance, Kitchen Performance, Call Center and the Server Pace Report have no Schedule button.

Setting one up

1. Open the report and set it up the way you want it. On the toolbar pages, the page's own filter — the room, the job, **Table Checks Only** and so on — is saved with the schedule. On the header pages, the **Day** / **Week** / **Month** choice is saved. The dates are not saved: each run works out its own period.
2. Tap **Schedule**. If the report has no schedules yet, a new one opens at once. Otherwise you see the report's schedules; tap **Add Schedule** for another.
3. Choose the **Frequency**, the **Run at** time (6:00 to start), the **Day of Week** or **Day of month** (1 to 28), and the **Report period**. At End of Day has no time: it runs just before End of Day closes the business day.
4. Check the **Recipients**. They start with the store's default report recipient. Leave **Enabled** ticked, then tap **Save**.

Frequency	Report period choices
At End of Day	Current Business Day, Last 7 days, Last 30 days, Month to date
Daily	Yesterday, Last 7 days, Last 30 days, Month to date
Weekly	Last week, Last 7 days, Last 30 days
Monthly	Last month, Last 30 days, Month to date

Managing schedules

Each schedule in the list shows its frequency and time, its recipients, and when it was **Last sent** or its **Last error**. Its buttons are **Send now** (to check that it arrives), **Edit** and **Delete**. Untick **Enabled** to pause a schedule without deleting it.

The Schedule button shows how many schedules the report has. It works like the schedules for custom reports (see PDF and scheduled email).

> Only users with the **Manager Screen** permission can see, create, send or delete schedules for Loss Prevention. Everyone on the recipient list receives it, so send it to managers only. Inventory Performance, Reservation Analytics and Demand Forecast are only sent on plans that include inventory, reservations and AI reports.

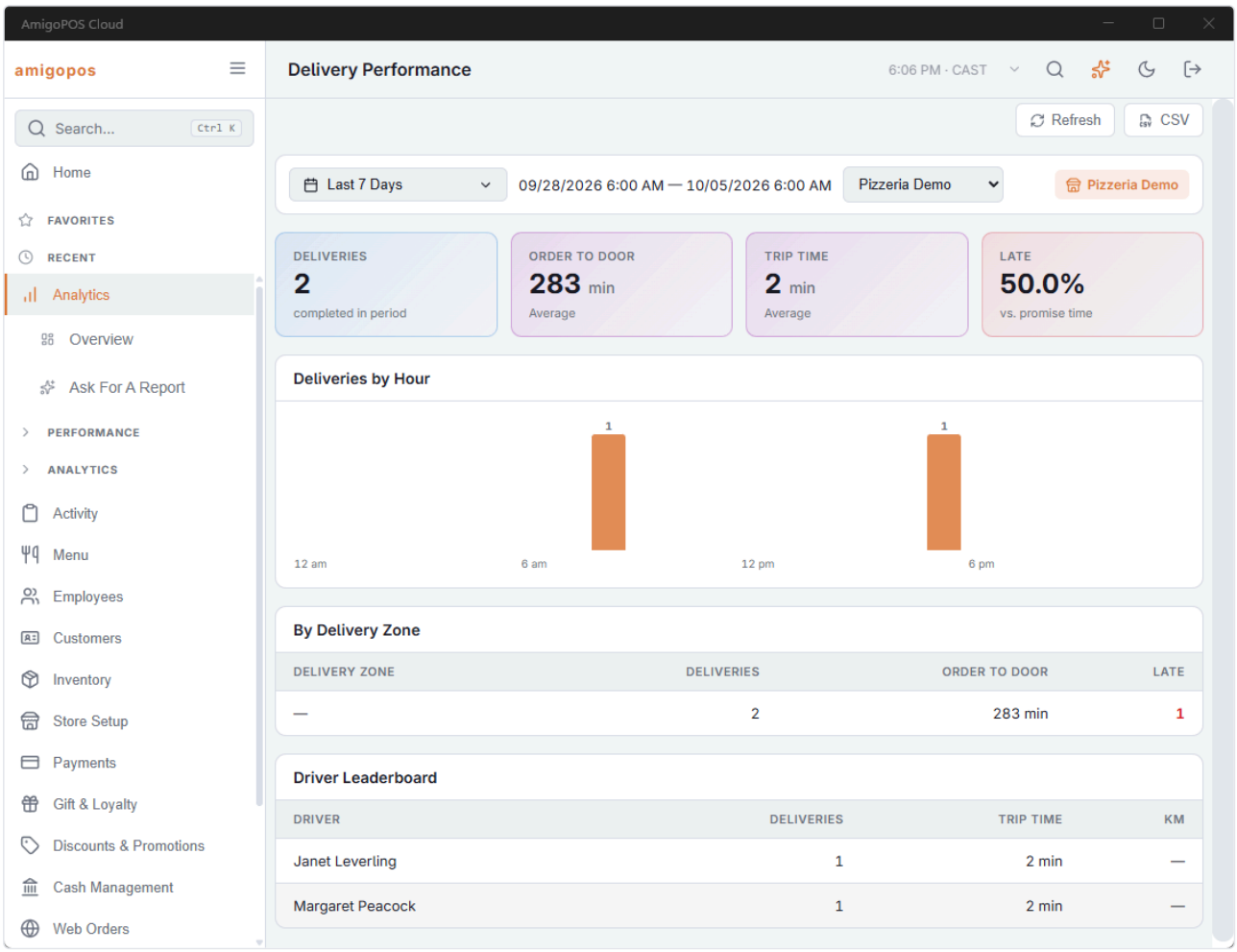
Delivery performance

Analytics & Activity › Performance

View online ↗

Delivery KPIs — order-to-door time, trip time, late percentage, distance — with breakdowns by hour, zone, and driver.

Back Office › Analytics › Performance › Delivery Performance measures the store's own deliveries: how long they took, how many arrived after the promised time, and how each zone and driver did. The page is offered on plans that include Delivery.



The toolbar

- **Date range** and **Store** work as on Sales performance. The page opens on Last 7 Days and on the store you are working in; **All Stores** adds every store you can see together.
- **Refresh** loads new figures.
- **CSV** downloads the Driver Leaderboard.

There is no Day / Week / Month choice, PDF or Schedule on this page.

Which deliveries count

A delivery counts once the driver is back and it has been checked in, and it falls on the business day of the check-in. Deliveries still out, canceled or returned to the store are not counted. Until the period has a checked-in delivery, the page shows **No completed deliveries in this period**.

Cards

- **Deliveries** — deliveries completed in the period.
- **Order to Door** — the average minutes from the order being placed to the delivery. When the driver did not mark the order delivered, the check-in time is used as the delivery time.
- **Trip Time** — the average minutes from dispatch to check-in. This is the whole trip, the drive back included.
- **Late** — the share of deliveries made after their promised time. Green up to 5%, amber up to 15%, red above. A delivery without a promised time never counts as late.
- **Distance** — the kilometers driven on runs that had a route worked out. The card is hidden when there is no distance.

The promised time is set when the order is dispatched: the time the customer was quoted when the order reached the store, or else the order time plus the delivery zone's estimated minutes, or the **Default promise time (minutes)** when the zone has none.

Deliveries by Hour

One bar for each hour of the day, by the hour the order was placed. Hover over a bar to see its count.

By Delivery Zone

One row per zone, busiest first: **Delivery Zone**, **Deliveries**, **Order to Door** (average) and **Late** (the number of late deliveries). The zone comes from the customer's address; deliveries with no zone are grouped under a dash. To change zone boundaries or estimated minutes, see Delivery zones and the zone map.

Driver Leaderboard

One row per driver, most deliveries first: **Driver**, **Deliveries**, **Trip Time** (average) and **km**. A driver who covers the far zones has longer trips; compare drivers on similar zones.

This page is about speed. For the money each driver brought back, use the Driver bank report.

Related: The delivery screen and dispatch, How a delivery travels.

Call Center dashboard

Analytics & Activity › Performance

View online ↗

Call-center orders and what the store did with them, at every store; the calls, agents and missed calls across the business.

Back Office › Analytics › Performance › Call Center shows the phone orders the call center sent to the stores and what the stores did with them, and for the whole business, the calls themselves. The page shows up only for businesses that use the call center, on plans that include it: a call-center seat is registered, or call-center orders were placed in the last 90 days. Everyone else never sees it.

The toolbar

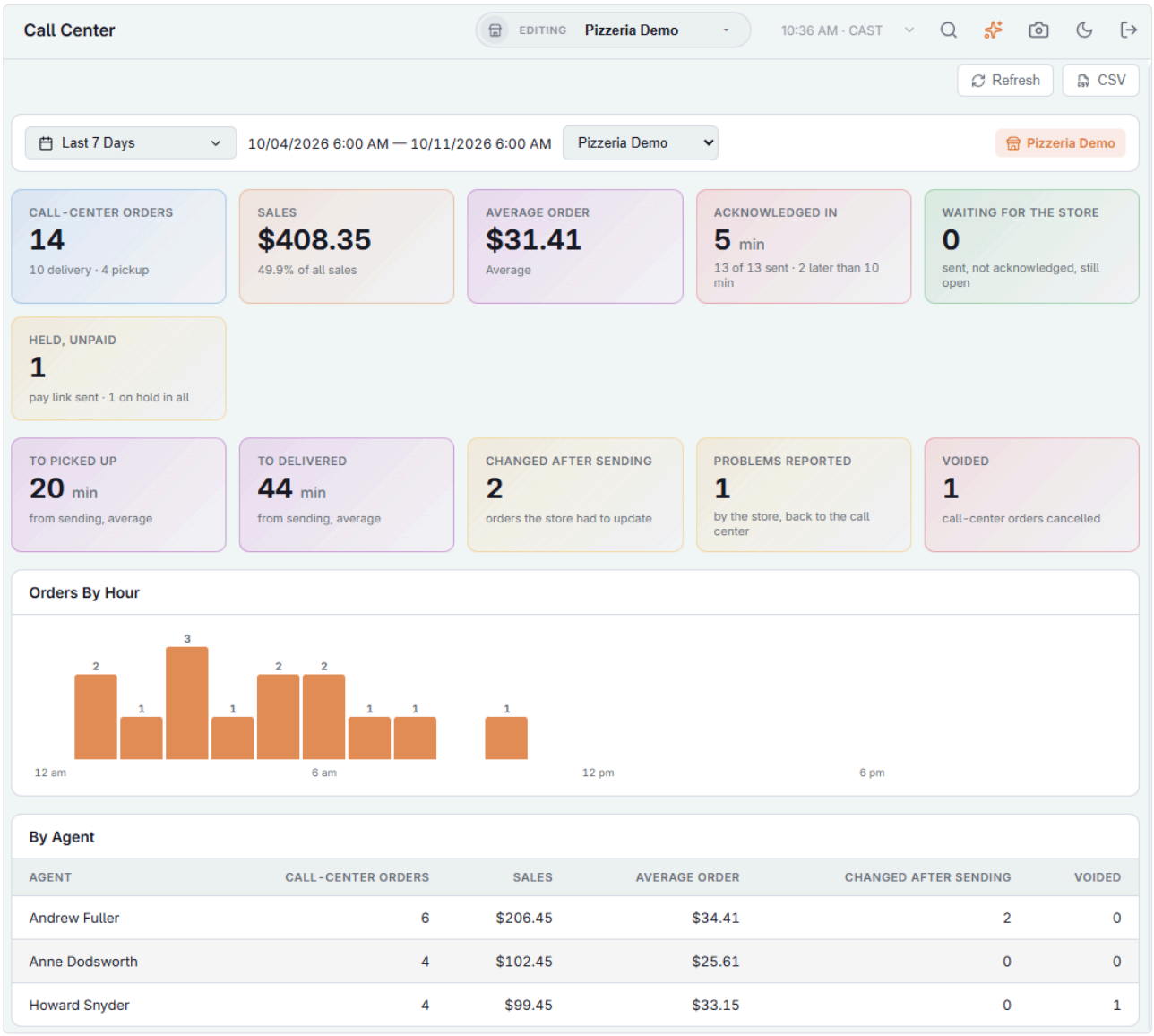
- **Date range** works as on Sales performance; the page opens on Last 7 Days.
- **Store** — a store, or **All Stores** for the whole business (see below).
- **Refresh** loads new figures. **CSV** exports the By Agent table.

There is no Day / Week / Month choice, PDF or Schedule on this page.

At a store

With a store picked in the toolbar (or when you see only one store), the view is that store's side of the phone orders in the date range:

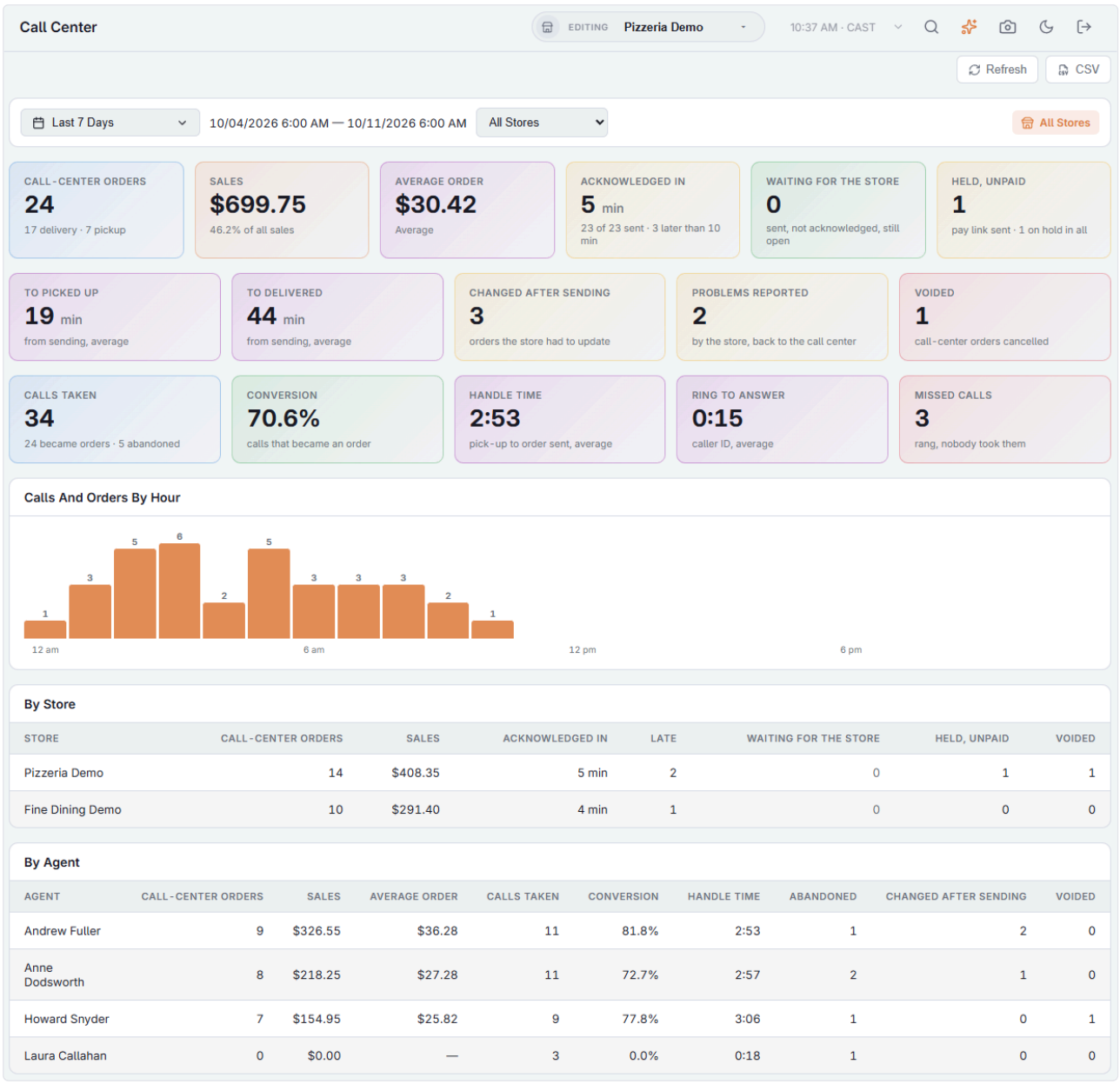
- **Call-Center Orders** — how many, delivery against pickup. **Sales** and its share of all the store's sales, and **Average Order**; these two leave voided orders out.
- **Acknowledged In** — average minutes from the order reaching the store to somebody acknowledging it, with how many of the sent orders were acknowledged and how many took more than 10 minutes. **Waiting For The Store**: sent, not acknowledged, still open right now.
- **Held, Unpaid** — orders on the call-center hold with a pay link sent, waiting for the customer to pay; the line under it counts all orders on the call-center hold.
- **To Picked Up** and **To Delivered** — average minutes from sending. **Changed After Sending** (orders the store had to update), **Problems Reported** (by the store, back to the call center) and **Voided**.
- **Orders By Hour**, and a **By Agent** table: orders, sales, average order, changes and voids for this store's orders.



The whole business

All Stores is offered to a call-center seat and to anyone who sees more than one store. It adds the calls themselves, which belong to the business rather than to a store (a call has no store until it becomes an order):

- **Calls Taken**, how many became orders and how many were abandoned; **Conversion**, the share of calls that became an order.
- **Handle Time** — from answering to the order sent, on average; **Ring To Answer** from caller ID.
- **Missed Calls** — rang on any line and nobody took them. A ring counts as missed once two minutes pass. Test rings sent from Caller ID are not counted.
- **Calls And Orders By Hour**; a **By Store** table (orders, sales, acknowledged in, late, waiting, held unpaid, voided); the agent table gains calls taken, conversion, handle time and abandoned.



By Store

STORE	CALL-CENTER ORDERS	SALES	ACKNOWLEDGED IN	LATE	WAITING FOR THE STORE	HELD, UNPAID	VOIDED
Pizzeria Demo	14	$408.35	5 min	2	0	1	1
Fine Dining Demo	10	$291.40	4 min	1	0	0	0

By Agent

AGENT	CALL-CENTER ORDERS	SALES	AVERAGE ORDER	CALLS TAKEN	CONVERSION	HANDLE TIME	ABANDONED	CHANGED AFTER SENDING	VOIDED
Andrew Fuller	9	$326.55	$36.28	11	81.8%	2:53	1	2	0
Anne Dodsworth	8	$218.25	$27.28	11	72.7%	2:57	2	1	0
Howard Snyder	7	$154.95	$25.82	9	77.8%	3:06	1	0	1
Laura Callahan	0	$0.00	—	3	0.0%	0:18	1	0	0

The same questions in plain words — “which agent took the most delivery orders last month” — go to Ask For A Report, which has Call Center Calls and Call Center Orders datasets.

> Handle time comes from the call log the seats keep per call; days before that log was corrected read long or empty.

Related: How a call-center order travels, Pending call-center orders at the store, Sending a pay link.

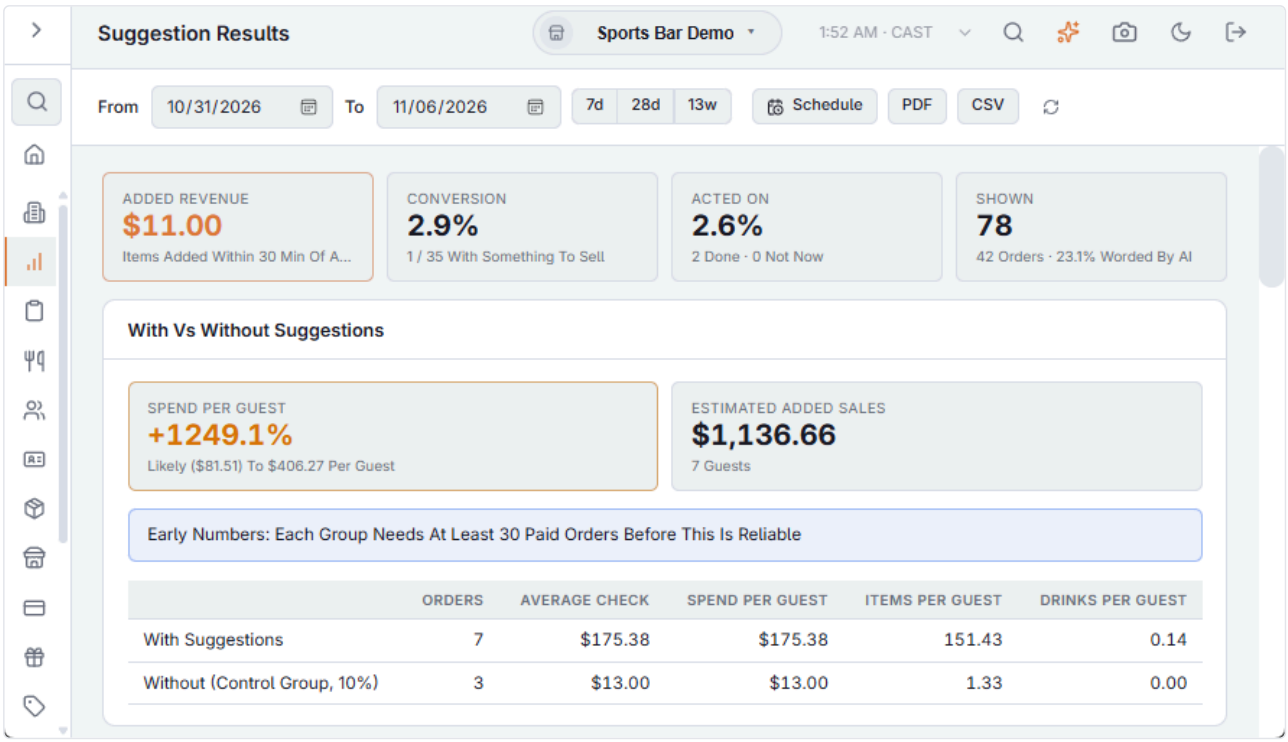
Suggestion Results

Analytics & Activity › Performance

View online ↗

What the suggestions led to, and what orders with suggestions spent compared with orders that got none.

Back Office › Analytics › Performance › Suggestion Results shows what the suggestions led to: how many were shown, how many staff acted on, the sales they added, and — most important — what orders with suggestions spent compared with orders that got none.



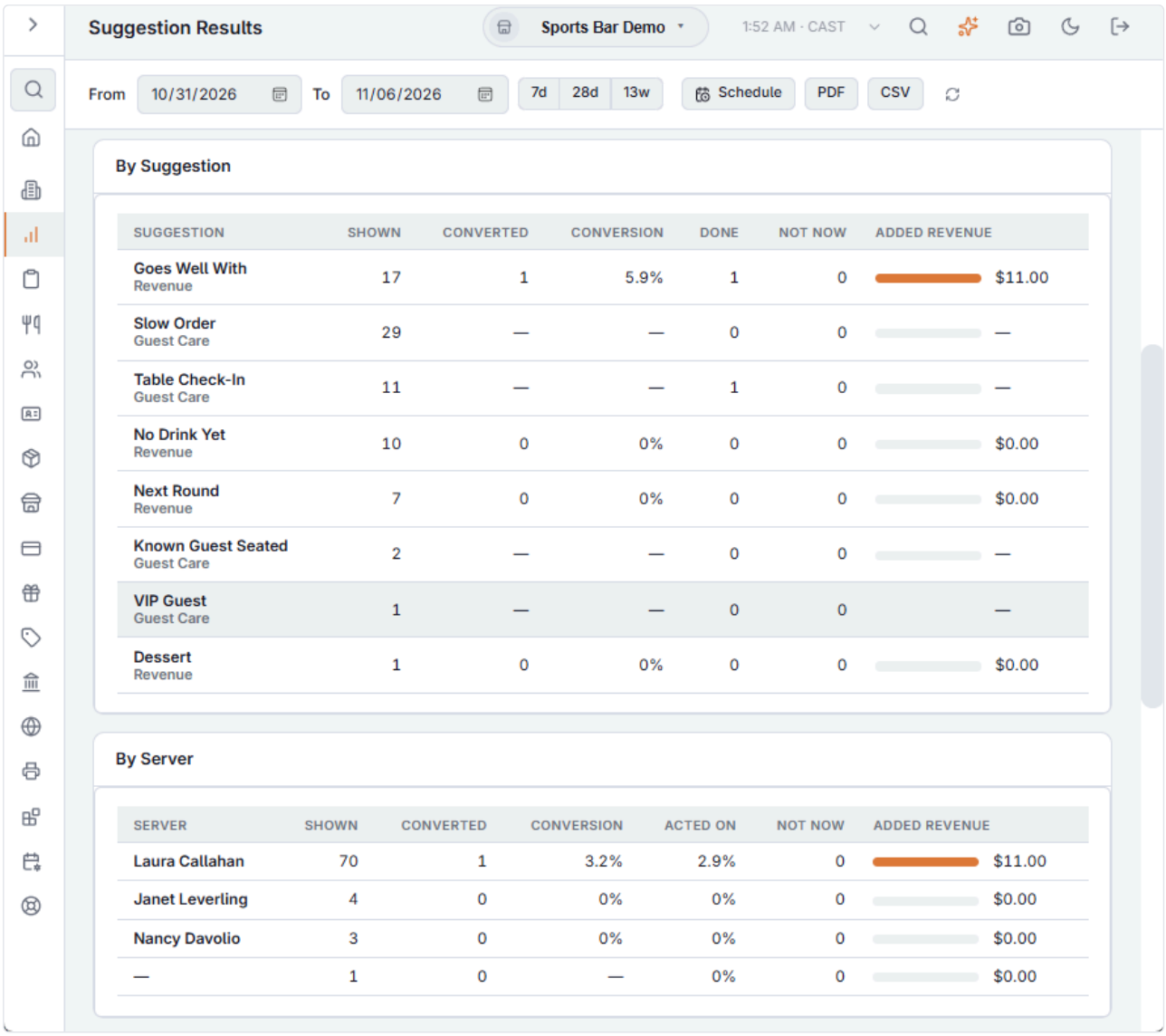
The tiles

- **Added Revenue**: the sales of the suggested item, category or drink added to the same order (and guest) within 30 minutes of the suggestion.
- **Conversion**: of the suggestions with something to sell, how many sold.
- **Acted On**: sold, or marked Done by the server; with the Done and Not Now counts.
- **Shown**: suggestions shown, on how many orders, and how many were worded by AI.

With vs without suggestions

A small share of orders never gets suggestions, picked at random (the control group). This section sets the paid orders where staff looked at suggestions against the paid orders where they looked and got none: average check, spend per guest, items and drinks per guest. **Spend Per Guest** shows the difference and its likely range; **Estimated Added Sales** is that difference times the guests served with suggestions.

> The comparison needs at least 30 paid orders in each group before it is reliable, and says so while it has fewer. When the likely range still includes zero there is no clear difference yet; give it more days.

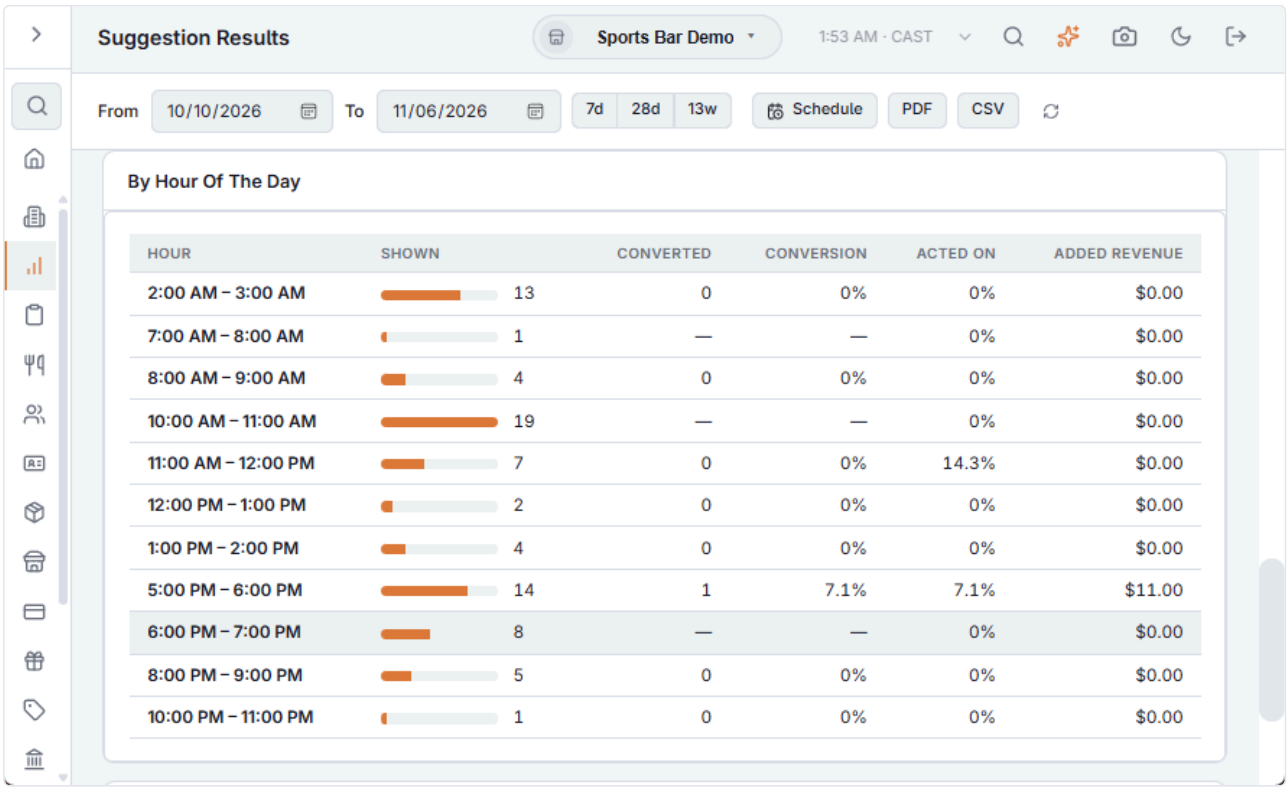


By suggestion and by server

The two tables break the results down by kind of suggestion and by the order's server. **CSV** exports all three sections.

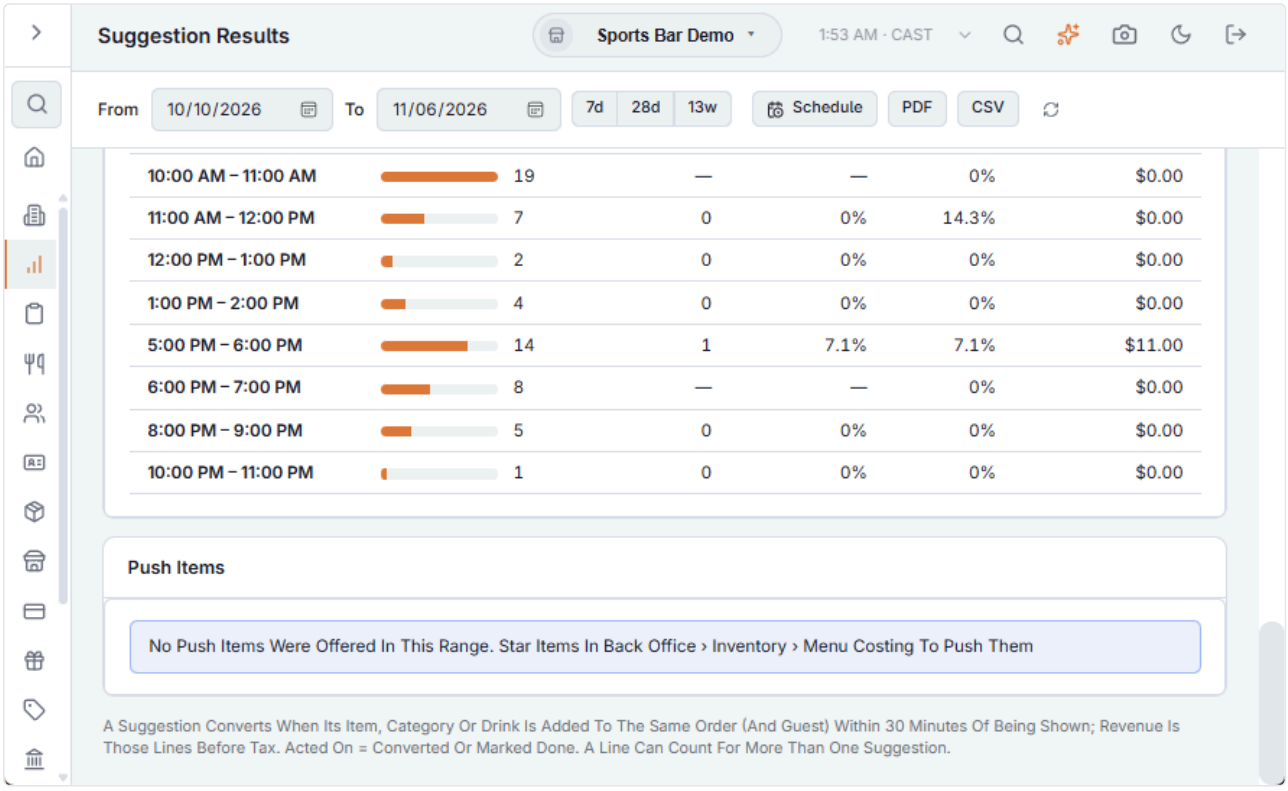
By hour of the day

When in the day the suggestions are shown and how well they convert, hour by hour in store time.



Push items

Each push item: how often it was offered (as the push, or while starred as a pairing), on how many orders, how often it sold and the sales it added. A star marks the items on tonight's list.



PDF and scheduled email

PDF builds the whole report; **Schedule** emails it on a regular basis, like the other reports. An upgrade counts as converted when its option is added to the item.

Analytics

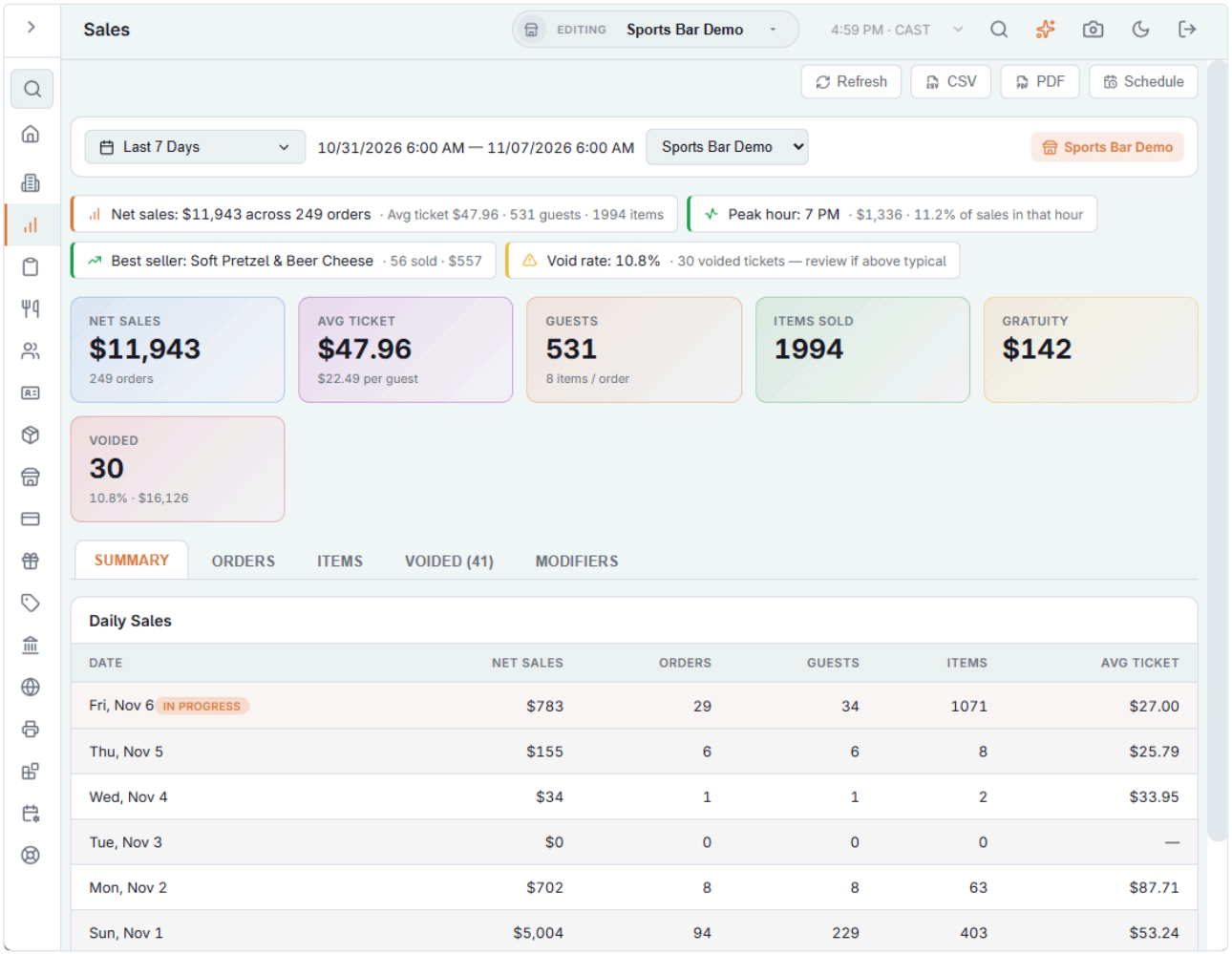
Sales analytics

Analytics & Activity › Analytics

View online ↗

Sales sliced by period, category, order type and channel, with comparisons.

Back Office › Analytics › Analytics › Sales breaks down the sales for the dates on the toolbar by day, hour, order type, server, category and item, and lists the voided tickets and lines and the most-used modifiers.



The page counts every ticket in the period that is not voided, including tickets still open. **Net Sales** here is the tickets' order total, gift cards sold included, so it can be higher than Net Sales on the Overview and insights strip. For the dates, store and export buttons, see Exporting and PDF preview.

Insights

Up to four lines across the top: net sales and orders (with the average ticket, guests and items), the **Peak hour**, the **Best seller** by revenue, and the **Void rate** when it is above 5%.

KPI cards

Card	What it shows
Net Sales	Order totals, with the number of orders.
Avg Ticket	Net sales per order, and per guest below it.
Guests	The guest count (a ticket without one counts as one guest), with items per order.
Items Sold	Items on the tickets, without modifiers and without removed lines.
Gratuity	Gratuity on the tickets.
Voided	Voided tickets, with the void rate (voided out of all tickets) and their subtotal. The card turns red above 5%.

Summary tab

Daily Sales: one row per day, newest first, with **Date**, **Net Sales**, **Orders**, **Guests**, **Items** and **Avg Ticket**, and a total row. Today is marked **In Progress**.

Orders tab

- **Hourly Pattern** — each hour that had sales, across all the days: **Hour**, **Net Sales**, **Orders** and **% of Total**. The busiest hour is tagged **Peak Hour**. Hours are written the way your language writes them, for example 1 PM or 13.
- **By Order Type** — **Order Type**, **Net Sales**, **Orders**, **Avg Ticket** and **% of Total**.
- **By Server** — the employee who owns each ticket: **Employee**, **Net Sales**, **Orders**, **Guests**, **Avg Ticket** and **% of Total**.

Items tab

- **By Category** — **Category**, **Unique Items**, **Qty Sold**, **Revenue** and **% of Total**.
- **Top Sellers** — the 20 items with the highest revenue: **Item** (with its category), **Qty** and **Revenue**.
- **Slow Movers** — the 20 items with the lowest revenue among those that sold at least one.

> Revenue on this tab is price times quantity of the item lines, without modifiers and before order discounts. % of Total compares it with Net Sales, so the column does not add up to 100%.

Voided tab

The tab shows how many voided tickets and lines it lists.

- **Voided Tickets** — newest first, up to 200: **Ticket #**, **Date/Time**, **Order Type**, **Created By**, **Voided By** and **Subtotal**.
- **Voided Items** — lines removed from tickets that were not voided, newest first, up to 200: **Ticket #**, **Date/Time**, **Item**, **Employee** (who rang the line), **Qty** and **Amount**.

Modifiers tab

Top Modifiers: the 30 modifiers sold most often, with **Modifier**, **Qty Sold**, **Revenue** and **Avg Price**.

Export

CSV exports every table: daily, hourly pattern (all 24 hours), by order type, by server, by category, top sellers, slow movers, voided tickets, voided items and top modifiers. **PDF** opens the Sales Analytics Report with the same sections.

All Stores

With **All Stores** selected, the page adds up every store. Averages and shares are worked out again from the totals, and the peak hour is picked from the combined hours. Order types, categories and modifiers with the same name at different stores share one row; an employee who worked at two stores has one row on By Server. The voided lists hold each store’s rows, up to 200 per store.

Top Sellers and Slow Movers are built from each store’s own 20 top sellers and 20 slow movers, added up by item name and category, and Top Modifiers from each store’s 30. An item that is outside every store’s lists is not counted, so the combined lists can miss an item that sold moderately at every store.

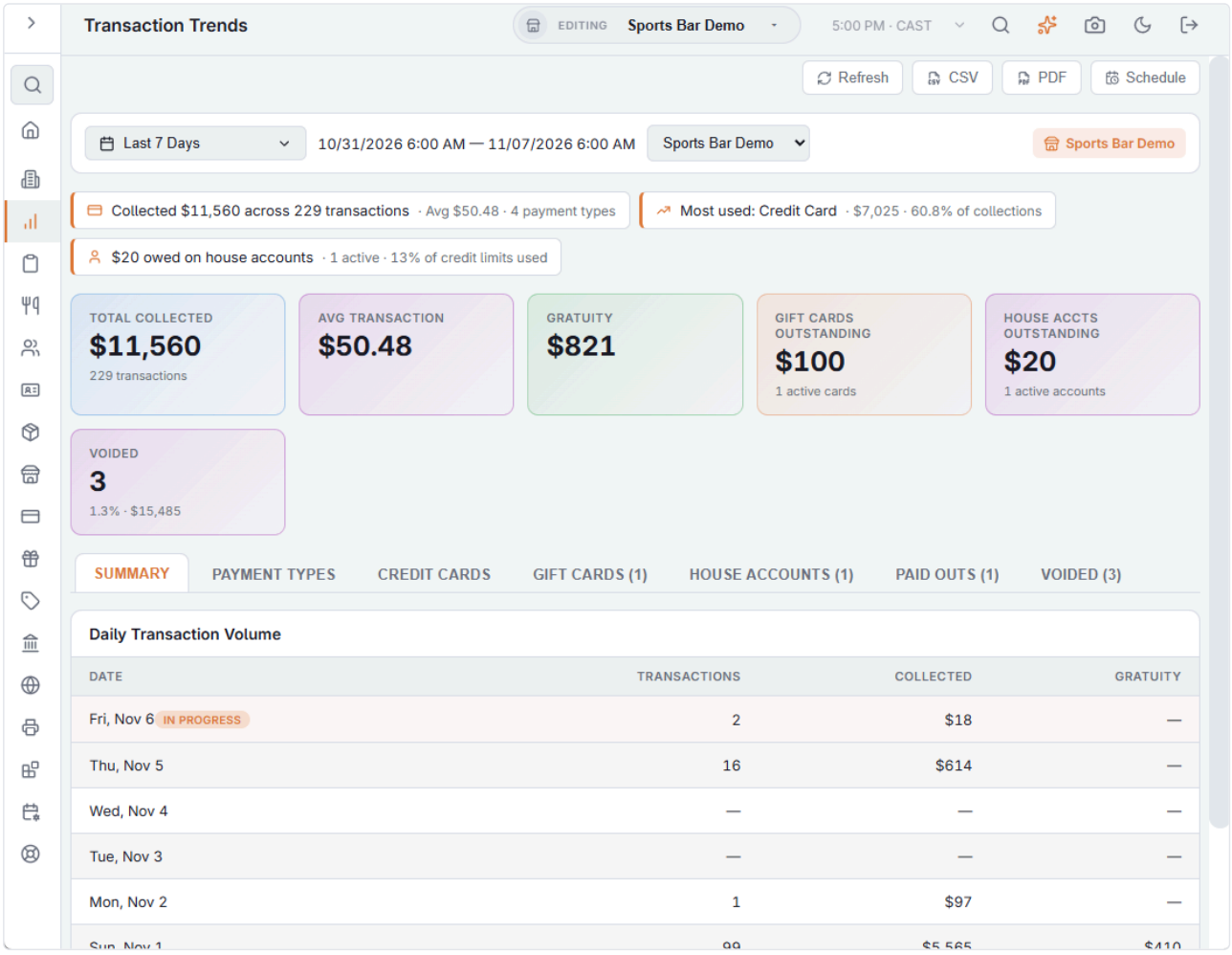
The PDF covers one store. With All Stores and more than one store, pick a store before you open it.

Transactions analytics

View online ↗

Payments for a period by payment type and card issuer, with gift card and house account balances, paid outs and voided payments.

Back Office › Analytics › Analytics › Transaction Trends shows the payments taken during the dates on the toolbar, by payment type and card issuer, with gift card and house account balances, cash paid outs and voided payments.



For the dates, store and export buttons, see Exporting and PDF preview.

Insights

Up to three lines across the top: the amount collected over how many transactions (with the average and the number of payment types), the most used payment type, and the amount owed on house accounts. The house account line turns to a warning when the balances use more than 80% of the accounts' credit limits.

KPI cards

Card	What it shows
Total Collected	Payments that are not voided, with how many.
Avg Transaction	Total collected per payment.
Gratuity	Tips on those payments.
Gift Cards Outstanding	The balance left now on the gift cards issued at the store, whatever the dates, with the number of active cards (not disabled and carrying a balance).

Card	What it shows
House Accts Outstanding	What all house accounts owe now, whatever the dates, with the number of active accounts. Turns amber above 80% of the total credit limit.
Voided	Voided payments, with the void rate and the amount. Turns red above 5%.

Tabs

- **Summary** — **Daily Transaction Volume**: **Date**, **Transactions**, **Collected** and **Gratuity** per day, newest first, with a total row.
- **Payment Types** — **By Payment Type**: **Payment Type**, **Count**, **Amount**, **Gratuity**, **Avg / Txn** and **% of Total**. Use it to check against processor deposits and drawer counts.
- **Credit Cards** — **By Card Issuer**: approved and partly approved card payments that were not voided, with **Issuer**, **Count**, **Amount**, **Gratuity**, **Avg / Txn** and **% of Total** (of the card total).
- **Gift Cards** — four cards (**Total Cards**, **Outstanding**, **Issued This Period**, **Redeemed This Period**) and a **Gift Card Balances** list.
- **House Accounts** — see below.
- **Paid Outs** — every cash paid out that was not voided, newest first: **Date/Time**, **Vendor**, **Reason**, **Employee**, **Notes** and **Amount**, with the total. See Cash paid-out and reasons.
- **Voided** — **Voided Transactions**, newest first, up to 200: **Txn #**, **Ticket #**, **Date/Time**, **Payment Type**, **Employee** (who voided it, or the payment's employee when no one is recorded) and **Amount**.

The Gift Cards, House Accounts, Paid Outs and Voided tabs show how many rows they hold.

Gift Cards tab

Four cards:

- **Total Cards** — gift cards issued at the store, with how many are not disabled and still have a balance.
- **Outstanding** — the balance left on those cards: the liability on the books.
- **Issued This Period** — value loaded on gift cards at the store during the dates, new cards and reloads, with how many. Transfers between cards, balance adjustments, complimentary value and imported opening balances are not counted.
- **Redeemed This Period** — gift card payments taken at the store during the dates, with how many. Transfers and adjustments are not counted.

A load or a redemption that was voided is taken off again.

Below them, **Gift Card Balances** lists every card issued at the store, highest balance first. The screen shows the first 100; the CSV has them all.

Cards with no store, such as digital or imported cards, are not on any one store's tab. When there are any, the **Gift Card Balances** header says *n cards with no store are counted under All Stores*. With **All Stores**, or at a business with a single store, they are counted once: the header says *Includes n cards with no store*, their rows show · *No Store* after the card number, and the four cards and **Gift Cards Outstanding** include them.

Column	What it holds
Card #	The card number, hidden except for the last four digits. The CSV shows it the same way.
Issued, **Expires**	The card's dates.
Loaded, **Redeemed**	All the value put on the card and all the value spent from it over its life, at any of the business's stores.
Balance	Loaded minus redeemed.
Status	**Disabled**, **Active** (with a balance) or **Empty**.

For one card's history, see The card detail window; for the liability over time, the Gift card liability.

House Accounts tab

Four cards: **Total Accounts** (with how many are active: not disabled and carrying a balance), **Outstanding** (against the total credit limit), **Charged This Period** and **Paid This Period**.

Below them, every house account on file, highest balance first. The screen shows the first 100; the CSV has them all.

Column	What it holds
Card #, **Customer**	The account and its customer.
Balance Due	Charges minus payments over the account's life. Red when it is over the credit limit.
Credit Limit, **Available**	The limit and what is left of it; blank when the account has no limit.
Created, **Expires**	The account's dates.
Status	**Disabled**, **Over Limit**, **Active** or **Zero Balance**.

Statements and payments for one account are in Account transactions, voids, and statements.

Export

CSV exports the daily, payment type, card issuer, gift card, house account, paid out and voided transaction tables. **PDF** opens the Transactions Analytics Report in landscape.

All Stores

With **All Stores** selected, the page adds up every store. Payment types and card issuers with the same name share one row, and the shares are worked out again from the totals. The gift card, house account, paid out and voided lists hold each store's rows; each gift card is listed under the store that issued it, and the cards with no store are added once. The PDF covers one store: with more than one store, pick a store before you open it.

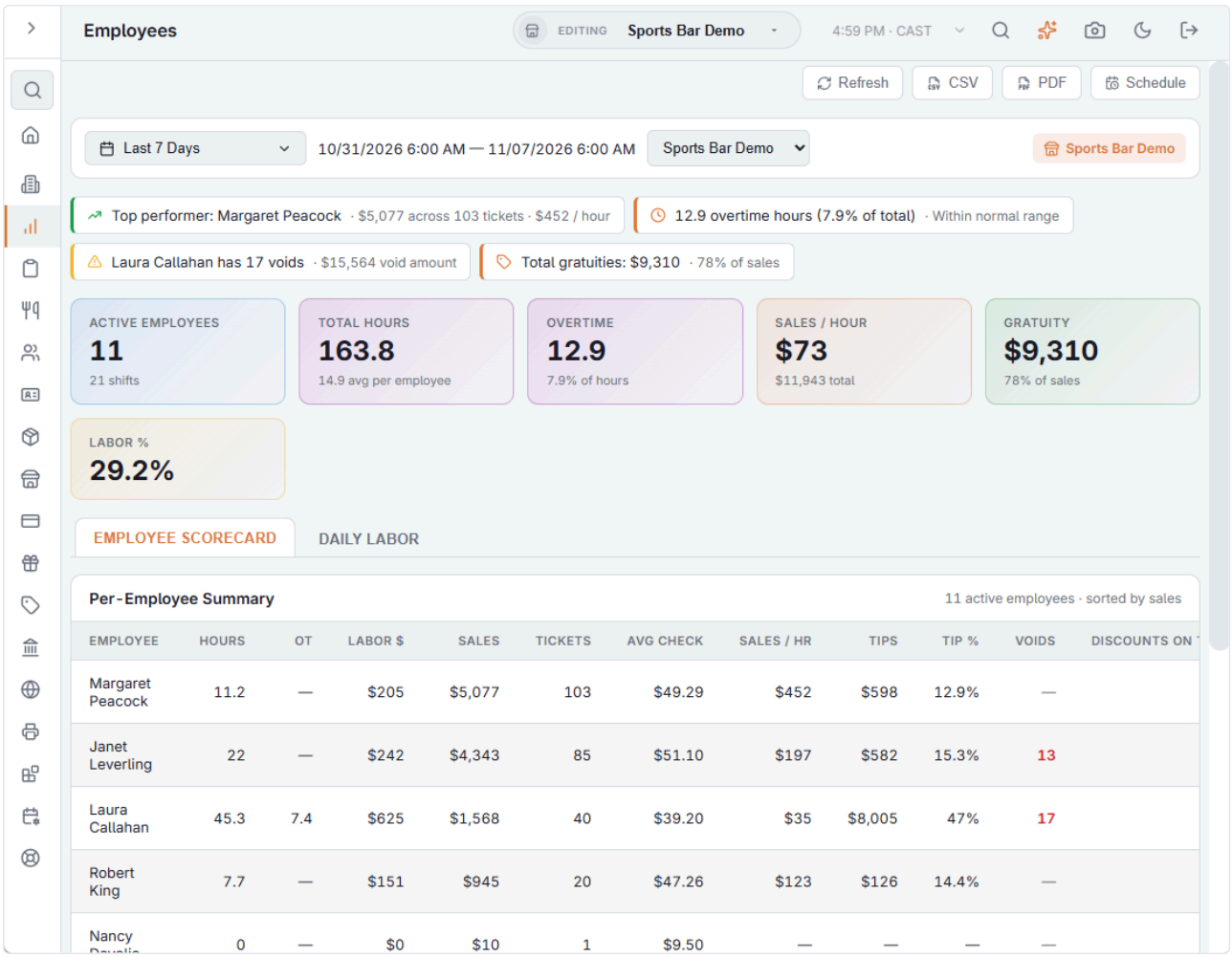
Employee analytics

Analytics & Activity › Analytics

View online ↗

Each employee's hours, labor cost, sales, tips and exceptions on one row, with a day-by-day labor table.

Back Office › Analytics › Analytics › Employees puts each employee's hours, labor cost, sales, tips and exceptions on one row for the dates on the toolbar, with a day-by-day labor table.



An employee is listed when they have hours, shifts or sales in the period. Hours and labor cost come from the time clock, so fix punch errors in Timesheets first. For the dates, store and export buttons, see Exporting and PDF preview.

Insights

Up to four lines across the top:

- **Top performer** — the employee with the most sales, with their tickets and sales per hour.
- Overtime hours and their share of all hours; a warning above 10%.
- An employee with 5 or more voids, when more than one employee is listed.
- **Total gratuities** and their share of sales.

KPI cards

Card	What it shows
Active Employees	Employees listed, with the number of shifts.
Total Hours	Hours worked, with the average per employee.
Overtime	Overtime hours on the time sheets, as a share of all hours. Turns amber above 10%.
Sales / Hour	Total sales divided by total hours, with the total sales.
Gratuity	Tips recorded on the shifts, as a share of sales.
Labor %	Labor cost as a share of sales.

Employee Scorecard

Per-Employee Summary: one row per employee, highest sales first, with a total row.

Column	What it holds
Hours, **OT**	Hours on shifts that started in the period, and their overtime. A shift still open counts up to now.
Labor $	Labor cost of those shifts.
Sales, **Tickets**, **Avg Check**	Order totals and number of the tickets the employee owns, voided tickets left out, and sales per ticket.
Sales / Hr	Sales divided by hours.
Tips, **Tip %**	Cash and non-cash tips recorded on the employee's shifts, and tips as a share of the tipable sales on those shifts. See Declaring cash gratuities.
Voids	Voided tickets, counted against the employee who voided them (or the ticket's owner when no one is recorded). Red at 5 or more.
Discounts On Their Orders	Discounts on the employee's own tickets, whoever applied them. Point at the heading for the same explanation.
Removed	Lines removed from tickets, counted against the employee who rang the line.

> Voids, Discounts On Their Orders and Removed are counts only. Discounts On Their Orders follows the ticket's owner, so a high count does not mean that employee applied the discounts.

Daily Labor

One row per day, newest first: **Date**, **Employees**, **Shifts**, **Hours** and **Labor Cost**. Today is marked **In Progress**. For labor against sales over time, see Labor performance.

Export

CSV exports the scorecard and the daily labor table. **PDF** opens the Employee Analytics Report in landscape.

All Stores

With **All Stores** selected, the page adds up every store. An employee who worked at more than one store has one scorecard row with the figures of all their stores, and counts once in **Active Employees**. On Daily Labor, the **Employees** column also counts each employee once a day, even when they worked at two stores that day. The PDF covers one store: with more than one store, pick a store before you open it.

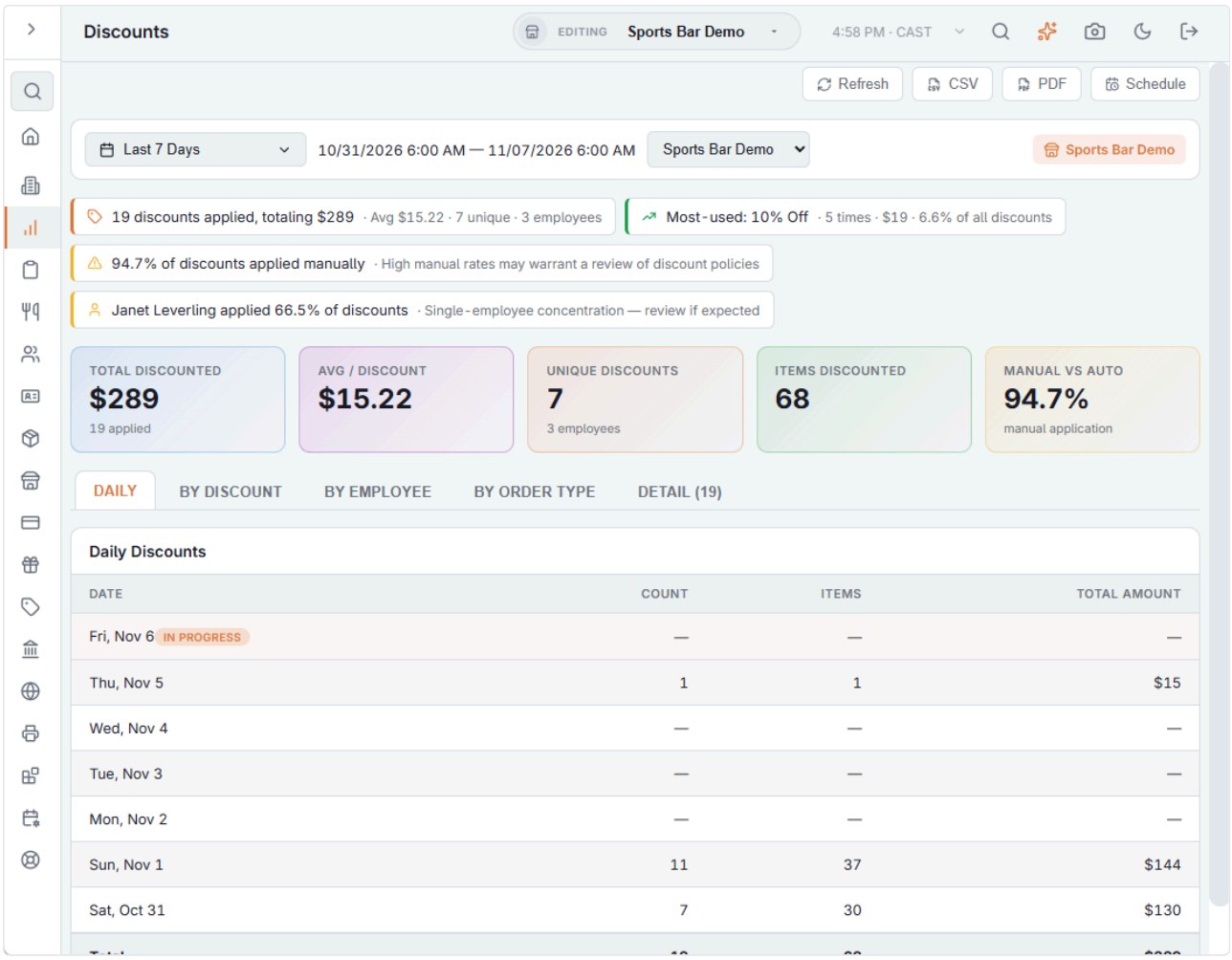
Discounts analytics

Analytics & Activity › Analytics

View online ↗

How much was discounted or comped, by whom, on what, and over which period.

Back Office › Analytics › Analytics › Discounts shows the discounts on tickets during the dates on the toolbar: how much, which discounts, on whose tickets and on which order types, with a line-by-line list.



The page counts each time a discount was applied to a ticket that is not voided; coupons count as the discount they apply. For the dates, store and export buttons, see Exporting and PDF preview.

Insights

- How many discounts were applied and their total, with the average, the number of different discounts and of employees.
- **Most-used** — the discount applied the most times (on a tie, the one with the larger total), with how many times, its total and its share of all discounts.
- The share applied manually, when it is above 60% and there are more than 10 discounts.
- One employee's tickets carrying more than 40% of the discount total, when more than one employee has discounts.

KPI cards

Card	What it shows
Total Discounted	The amount discounted, with how many times a discount was applied.
Avg / Discount	Amount per application.
Unique Discounts	Different discounts used, with the number of employees whose tickets had one.
Items Discounted	Items the discounts covered.
Manual vs Auto	The share of applications whose discount does not have **Automatic** ticked in its setup. Turns amber above 60%.

Tabs

- **Daily** — **Daily Discounts**: **Date**, **Count**, **Items** and **Total Amount** per day, newest first, with a total row.
- **By Discount** — **By Discount Type**: **Discount**, **Type** (**Auto** or **Manual**), **Count**, **Items**, **Total** and **% of Total**, largest total first.

- **By Employee** — **Employee**, **Discounts On Their Orders** (point at the heading for an explanation), **Items**, **Total Amount** and **% of Total**.
- **By Order Type** — **Order Type**, **Count**, **Total Amount** and **% of Total**.
- **Detail** — newest first, up to 200: **Ticket #**, **Date/Time**, **Discount**, **Coupon** (the code entered, if any), **Employee**, **Order Type**, **Items** and **Amount**. The tab shows how many rows it holds.

> On By Employee and Detail, the employee is the one who owns the ticket, not necessarily the person who applied the discount.

The **Automatic** box and the other discount settings are described in Discounts (types and rules); coupon use is also listed in the Coupons log.

Export

CSV exports the daily, by discount, by employee, by order type and detail tables. **PDF** opens the Discounts Analytics Report with the same sections.

All Stores

With **All Stores** selected, the page adds up every store. Discounts with the same name and the same Automatic setting share one row, and so do order types with the same name; an employee who worked at two stores has one row. **Unique Discounts** and the number of employees count those combined rows. The Detail tab holds each store's rows, up to 200 per store. The PDF covers one store: with more than one store, pick a store before you open it.

Tax analytics

Analytics & Activity › Analytics

View online ↗

Tax collected for a period: the return tab, daily totals, by rate and component, by order type, and the exempt tickets with their certificates.

Back Office › Analytics › Analytics › Taxes is the filing-support report: what tax was collected over the dates on the toolbar, under which rates and order types, and which tickets were exempt. It counts settled tickets that are not voided.

For the dates, store and export buttons, see Exporting and PDF preview.

Insights and KPI cards

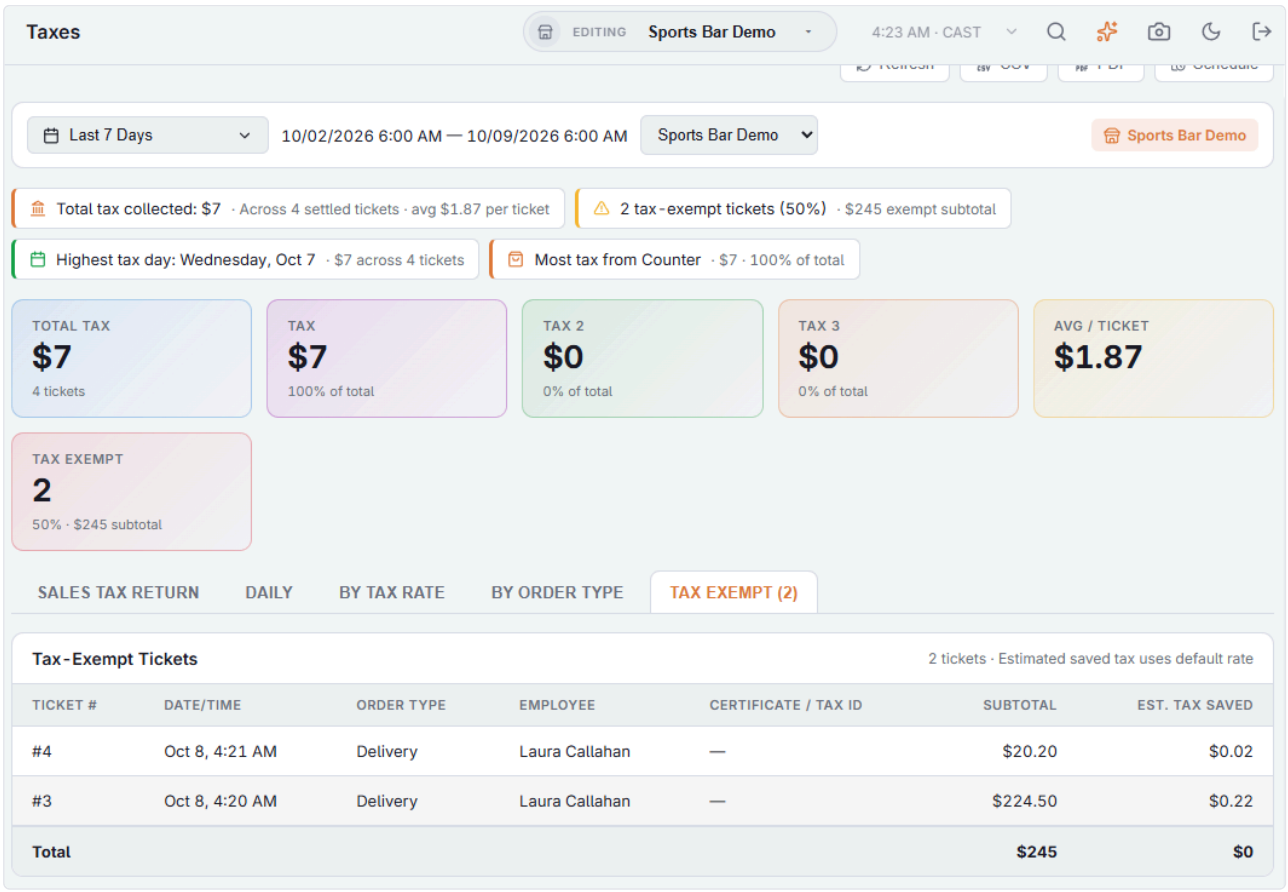
Up to four insights: the total tax collected (with the number of tickets and the average per ticket), the number of tax-exempt tickets, the highest tax day and the order type that brought in the most tax.

- **Total Tax** — all tax on the tickets, inclusive bar tax included, with the number of tickets.
- One card per tax component, named as in Sales tax setup (*Tax 1*, *Tax 2*, *Tax 3* when unnamed), with its share of the total.
- **Avg / Ticket** — tax per ticket.
- **Tax Exempt** — exempt tickets, their share of all tickets and their subtotal. Turns red above 10%.

Tabs

The page opens on **Daily**.

- **Sales Tax Return** — the figures a return asks for, in filing order. See Filing your sales tax return.
- **Daily** — **Daily Tax Collected**: one row per day, newest first, with each tax component, **Total**, **Tickets** and **Exempt**, and a total row; the rows your filing period sums over.
- **By Tax Rate** — each rate used, with **Components** (the rate's percentages, such as 6% + 1%), **Items**, **Taxable Amount**, **Non-Taxable**, **Tax Collected** and **% of Total**. Tax collected is read from the tax each line was saved with; a line on the rate that carried no tax counts as non-taxable. A rate without a name shows as *Rate* and its number.
- **By Order Type** — **Tickets**, each tax component, **Total** and **% of Total** per order type. Where take-out is taxed differently from dine-in, this is where you check the split.
- **Tax Exempt** — every exempt ticket: **Ticket #**, **Date/Time**, **Order Type**, **Employee**, **Certificate / Tax Id** (as entered at the register), **Subtotal** and **Est. Tax Saved**, with totals. The tax saved is an estimate at the store's default rate. The tab shows how many tickets it lists.



Tax collected is what each line was charged at the time of sale. The Components column shows the rate's percentages as they are set up now, and the line **Rates Shown Are Today's Rates** under the table says so. After a mid-period rate change the percentages and the tax collected may not match. Tickets saved before the register began stamping each line with its tax (October 2026) are in the totals but cannot be split by rate; a line under the By Tax Rate table says how many there are and how much tax they carry.

Export and schedule

CSV exports every section, the return lines and the tax by rate and component first, then daily, by tax rate, by order type and tax exempt. **PDF** opens the Tax Report: the KPI cards, the return, then the other sections. **Schedule** emails it on a cadence — **Monthly**, day 1, over **Last month** covers most filings.

All Stores

With **All Stores** selected, every tab adds up the stores, the **Sales Tax Return** included, and the insights are worked out from the totals. Order types with the same name share one row. Tax rates are set up in each store, so By Tax Rate lists each store's rates on their own rows, and joins two stores' rates into one row only when their rate number, name and percentages all match. The PDF covers one store: with more than one store, pick a store before you open it.

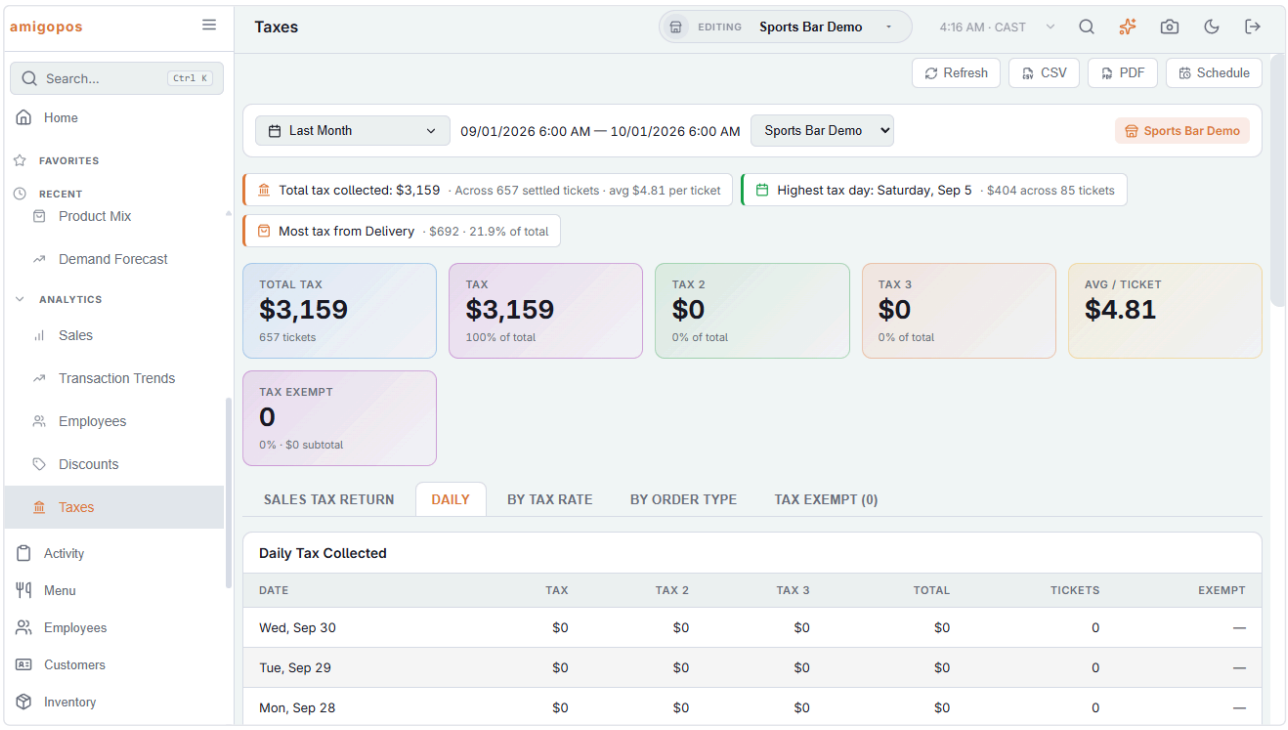
Filing your sales tax return

Analytics & Activity › Analytics

View online ↗

The Return tab lays out gross, non-taxable by reason, taxable, tax by component, refunds and net due for a period; one store or every store, as PDF, CSV or on a schedule.

Set the period on **Analytics › Analytics › Taxes** (a calendar month for most filings) and open the **Return** tab. The figures are laid out the way a return asks for them.



What each line is

Line	What it holds
Gross sales	Net item sales of settled, non-void tickets after line and pre-tax discounts; gift cards sold are excluded (a liability, not a sale).
Non-taxable: tax-exempt customers	Sales on orders marked tax exempt at the register.
Non-taxable: non-taxable order types	Sales on order types marked *Non Taxable*.
Non-taxable: non-taxable items	Items on the non-taxable rate (or a rate set to 0%).
Non-taxable: takeout exemptions and minimums	Takeout-non-taxable items on takeout orders, and amounts under a rate's minimum.
Taxable sales	Everything that carried tax.
Tax by rate and component	Taxable sales and tax per rate, one line per component (State, County, City…) — the jurisdiction lines of the return.
Tax on delivery fees and surcharges	Tax charged on header amounts rather than items.
Tax collected	The total the tickets carried, inclusive bar tax included.
Less tax refunded	Tax on refunds dated in the period.
Net tax due	Collected minus refunded.

A line *Not classified* appears when the period contains tickets saved before the register began stamping each line with its tax (October 2026): they are in gross sales and tax collected, but their split by reason and rate cannot be reconstructed.

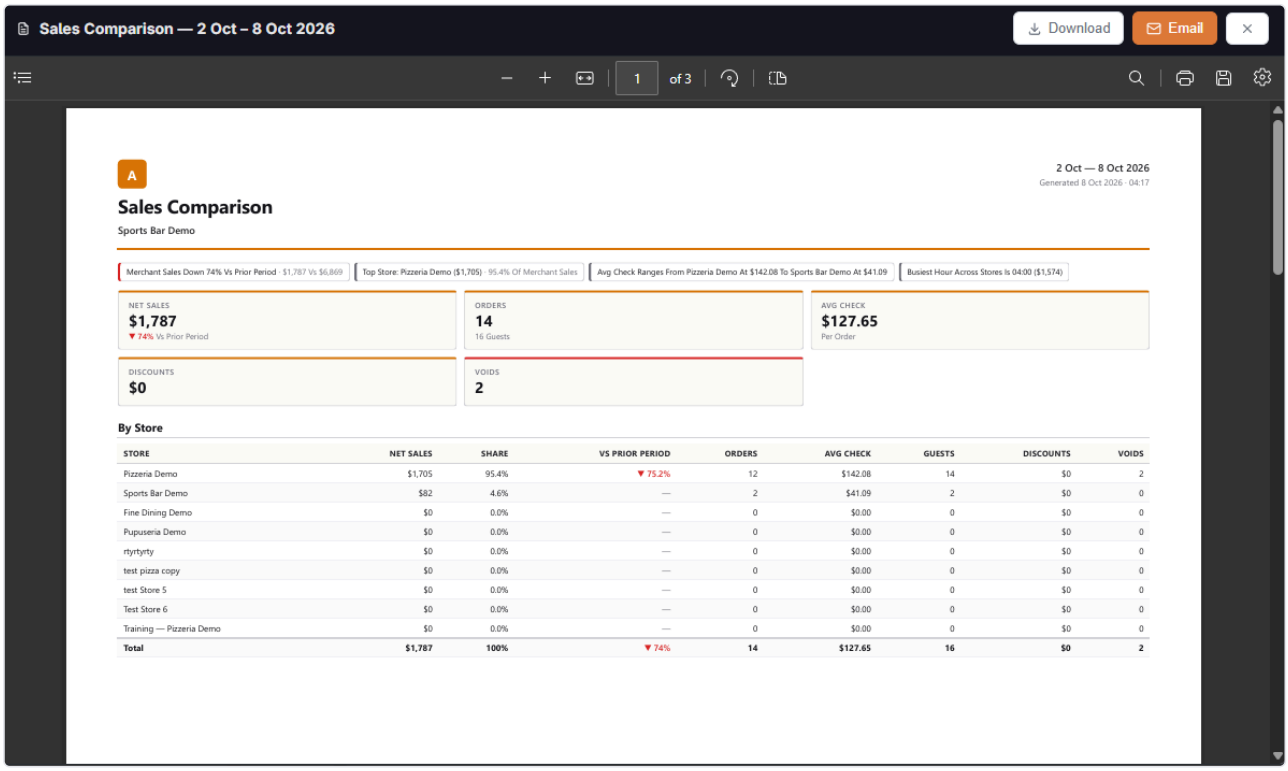
Getting it to the bookkeeper

- **CSV** on the page exports the return lines and the components first.
- **PDF** opens the Tax report with the return on page one; **Schedule** emails it on a cadence — monthly on the first covers most filings.

Chains

On **Back Office › Multi-Store › Sales Comparison**, **Tax Return** builds one PDF for the range: the chain total first, then one section per store, each on its own clock. File per location from the sections, or a combined return from the total; the *Tax Return · Schedule* button

sends it monthly. Components merge across stores by rate number, component and rate, which is why Sales tax setup asks a chain to keep the same rate numbers for the same kind of item everywhere.



> The report follows your setup; it does not know your jurisdiction’s rules. Check that items, order types and exemptions are configured the way the law treats them before relying on the figures, and keep exemption certificates on file outside the POS.

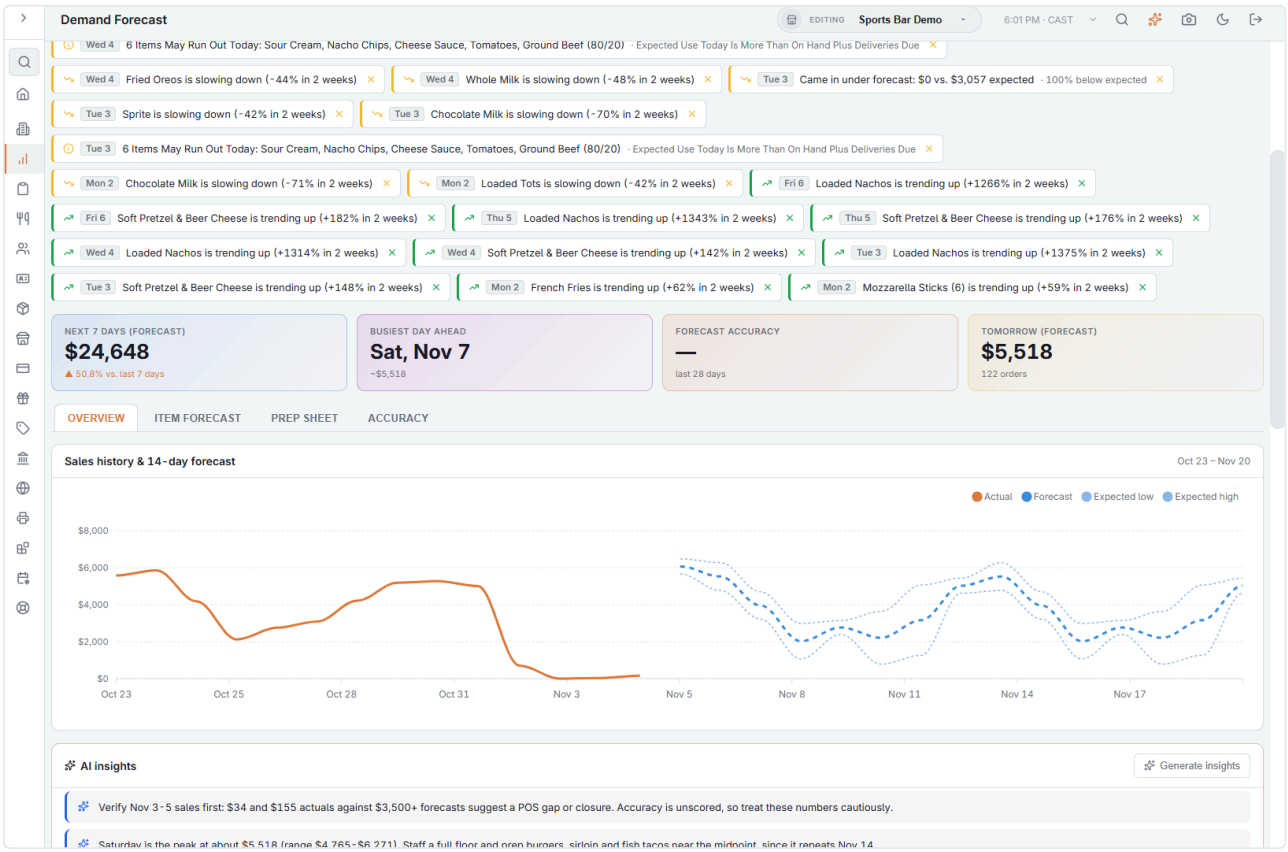
Demand forecast

Analytics & Activity › Analytics

View online ↗

Tomorrow's prep quantities and the two-week sales outlook — from your own history.

Back Office › Analytics › Performance › Demand Forecast predicts the next 14 days of sales and the next 7 days of quantities per menu item from your own sales history, and scores each forecast against what you actually sold. Use it to plan prep, purchasing and staffing. The page is hidden on plans that don’t include AI Reports.



The toolbar

- **Refresh** — loads the forecast again.
- **CSV** — downloads the daily series: date, forecast, **Expected low**, **Expected high**, actual, orders and whether the day is closed.
- **PDF** — the forecast, tomorrow's prep sheet and the accuracy log as one report, to preview, download or email. It covers one store: with **All Stores** and more than one store, the button stays greyed out until you pick a store. See Exporting and PDF preview.
- **Schedule** — emails that PDF on a recurrence. Choose **Daily** to send tomorrow's prep sheet to the kitchen every morning. See Emailing the performance reports on a schedule.
- The store box — one store, or **All Stores** to add the stores' days together.

There are no dates to pick: the forecast always starts from today, and the page shows the last 14 days next to the next 14.

How the forecast is made

Each day is forecast from the same weekday in your recent weeks, weighted toward the latest ones, blended with the middle value of the last eight, and adjusted for the sales trend of the last four weeks against the four before. A Saturday forecast comes from your recent Saturdays. A weekday with no sales in any of its recent weeks (at least two of them) is treated as closed and forecast as zero.

The forecast is recalculated once each business day. If it has not run yet when you open the page, it runs then. While the store has fewer than 14 days with sales, a note above the cards says how many days of history there are so far; forecasts sharpen after about two weeks. When there is no forecast to show, the page reads **No data available** with *Forecasts Appear Once The Store Has A Few Days Of Sales History.*

The cards

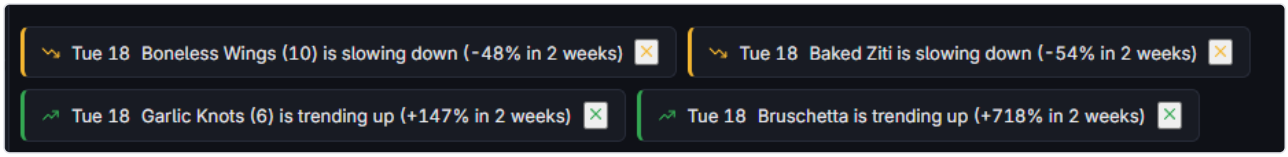
- **Next 7 days (forecast)** — the forecast total, with the change against actual sales of the last 7 days.
- **Busiest day ahead** — the open day with the highest forecast in the next 7, and its amount.
- **Forecast accuracy** — over the last 28 days: 100% minus the average error of the scored days. It shows once five days have been scored, and turns green at 80% or more. Check it first: it tells you how much to trust the rest of the page.
- **Tomorrow (forecast)** — tomorrow's forecast, with the expected number of orders.

Alerts

Alerts appear above the cards when the daily run finds something worth your attention:

- yesterday **beat the forecast** or **came in under forecast** by well more than the expected range allows;
- an item is **trending up** or **slowing down** — its last two weeks against the two before (up to two of each);
- a **busy day ahead** — a day in the coming week forecast at least 25% above your daily average of the last four weeks;
- ingredients that may run out today (see **Run-out alerts** below).

Alerts stay for seven days. Dismiss one with the **×** once you have acted on it; it does not come back. With **All Stores** the alerts of every store are listed together.



Overview

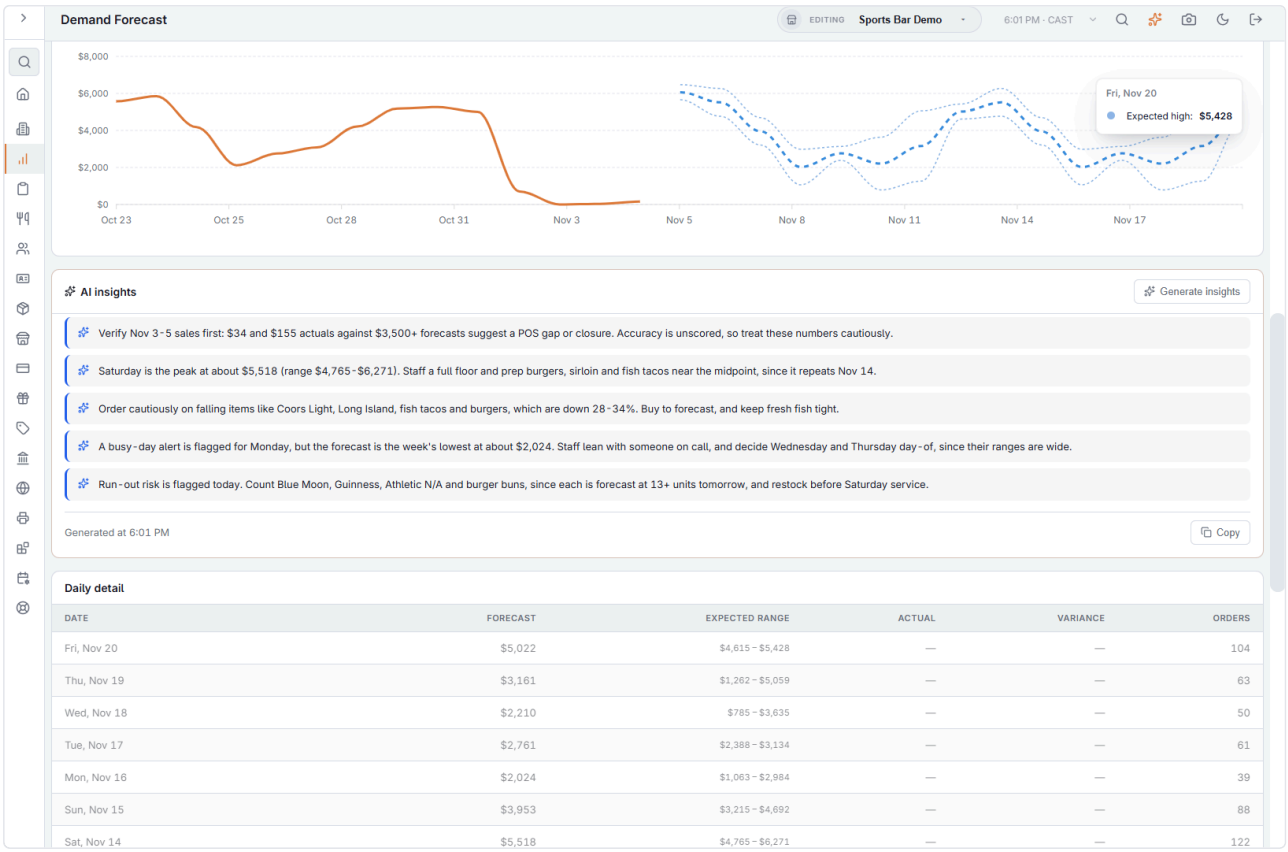
The chart, **Sales history & 14-day forecast**, shows actual sales for the last two weeks as a solid line and the forecast for the next two as a dashed line. The thin dotted lines are the expected low and high: the range the forecast expects about eight days in ten to land inside. Landing inside it is normal variation, not a miss. A wide range means that weekday genuinely varies at your store. Amounts on the chart use the same currency symbol as the rest of the page.

Daily detail lists the same days, newest first: **Forecast**, **Expected range**, **Actual**, **Variance** (actual minus forecast) and **Orders** (expected for days ahead, actual for days past). Today is marked **In Progress** and closed days **Closed**.

AI insights

Generate insights turns the forecast into three to five short recommendations: prep and purchasing quantities, staffing for busy or slow days, items to push or watch. **Copy** copies them. They are made for one store, so the card is hidden with **All Stores**, and they need the two weeks of history. Asking again within the next few hours usually returns the same list; a new list uses your AI allowance (see AI usage, limits and your monthly allowance). Under the list, **Generated at** gives the store time the list was made, so a list returned again keeps its first time.

When no list can be made, the card says why instead: *Not Enough Sales History Yet.*, *Today's AI Limit For This Account Has Been Reached. It Resets At Midnight UTC.*, *AI Insights Are Not Set Up On This Server.*, or *Insights are unavailable right now.*

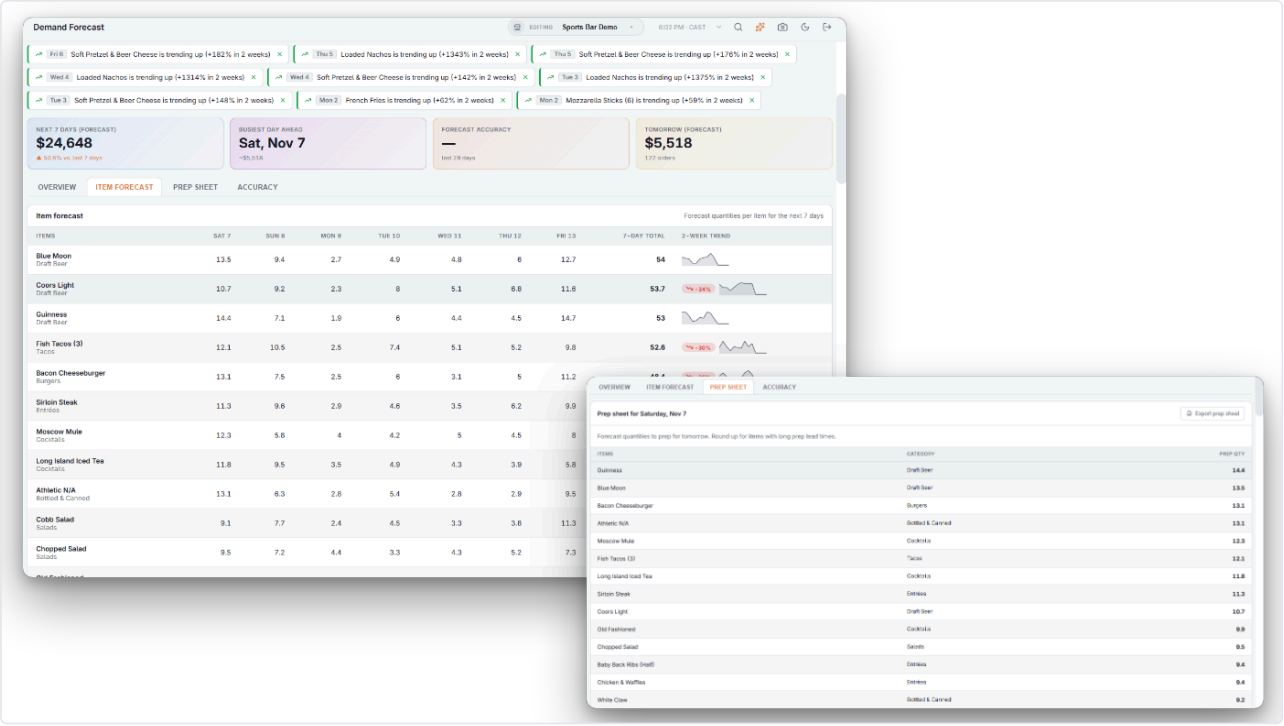


Item forecast and prep sheet

Item forecast lists up to 100 menu items with the forecast quantity for each of the next 7 days and the **7-day total**. The **2-week trend** column shows a badge when the item's last two weeks are 25% or more above or below the two before, and a small chart of its last 14 days.

Prep sheet lists tomorrow's quantities, biggest first. **Export prep sheet** downloads it as a CSV. Round up for items with long prep lead times, and treat the quantities as a starting point during the first weeks.

Both tabs need one store selected; with **All Stores** they ask you to select a single store.



Accuracy

Each day's forecast is scored against actual sales once the day is over. The **Accuracy** tab lists the scored days of the last 28: **Forecast**, **Actual**, **Error** (green within ±10%) and **In range**, a tick when the day landed inside the expected range. Nothing needs adjusting on your part: each day becomes history for the next forecast.

Asking the assistant

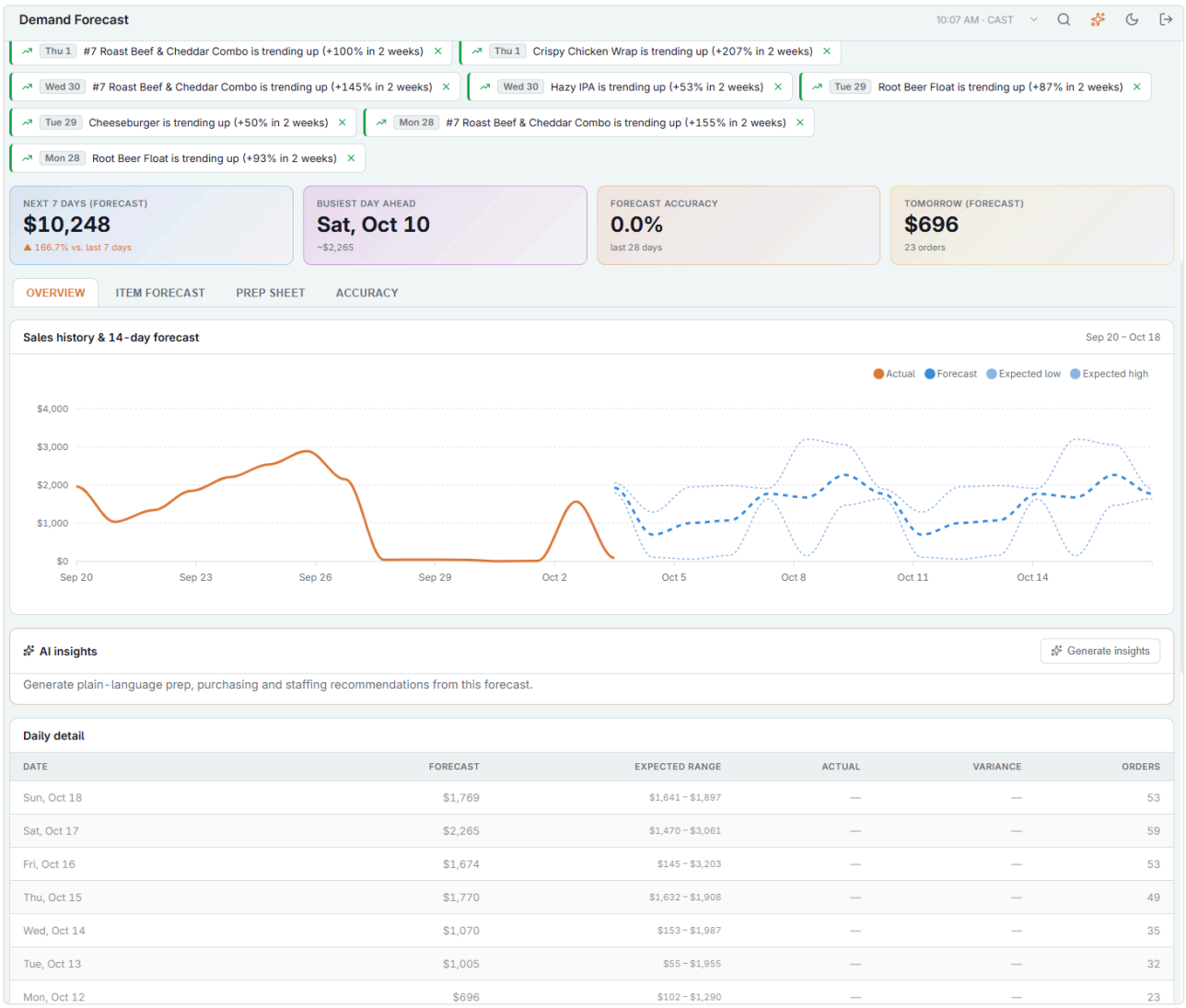
The AI assistant answers from the same forecast: "How busy will Saturday be?", "What should we prep tomorrow?", "How reliable is the forecast?"

Ordering from the forecast

The same store forecast drives **Suggest From Usage** on purchase orders, turning expected sales into expected ingredient use — see Ordering from the forecast. The **Scheduler** also uses it; see Drafting the schedule from the forecast.

Run-out alerts

When the daily forecast runs, one alert lists the ingredients that may run out today — for example *3 Items May Run Out Today: Wings, Buns, Romaine*. An ingredient is listed when today's expected use is more than what is on hand plus deliveries due today. It sits with the other forecast alerts and can be dismissed the same way. For a live check during service, ask the assistant — see Inventory and purchasing questions.



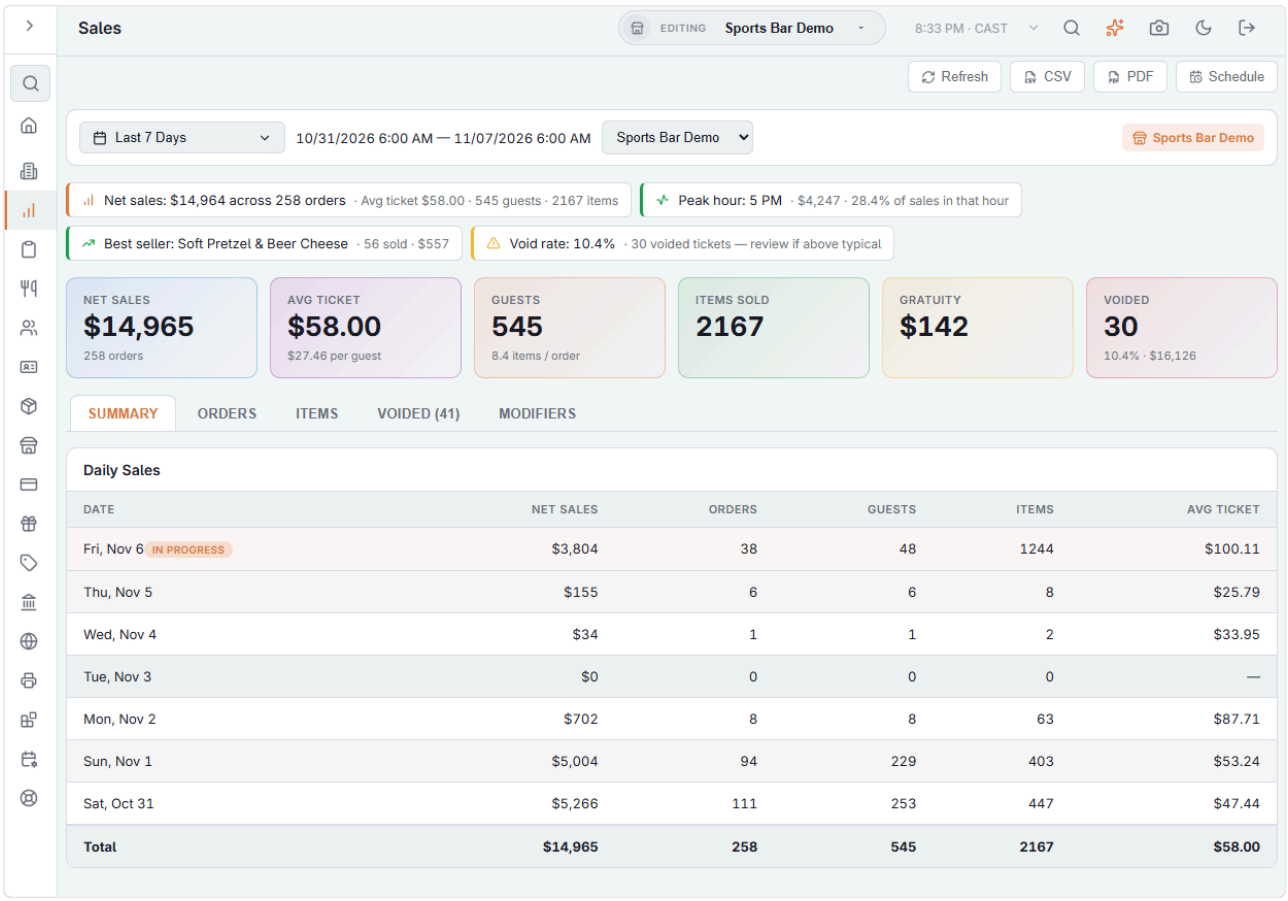
Exporting and PDF preview

Analytics & Activity › Analytics

View online ↗

Getting any report out as a PDF or spreadsheet, and previewing it before you send it.

Back Office › Analytics: the Overview and insights strip and the Sales, Transaction Trends, Employees, Discounts and Taxes pages share one header and toolbar. The toolbar sets the dates and the store; the header buttons reload the figures, export them to CSV, open the report as a PDF and schedule it by email.



Dates and store

- **Date menu** — opens on **Last 7 Days**. Pick **Today**, **Yesterday**, **This Week**, **Last Week**, **Last 7 Days**, **Last 30 Days**, **Month to Date**, **Last Month** or **Year to Date**, or type dates in **Start** and **End**. **This Week** and **Last Week** start on the store's **Business Week Start Day** (**Back Office › Store Setup › General Settings**, **Reporting**); when it is not set, weeks start on Sunday. See General settings. The page reloads as soon as you choose.
- **Time range** — beside the menu, the exact window the figures cover, for example *10/01/2026 4:00 AM — 10/08/2026 4:00 AM*. Each date is a business day that starts at the store's business day start time, not at midnight. See The business day and when it rolls over.
- **Store** — starts on the store this device is signed in to. **All Stores** covers every store you can open; the store in use also shows at the right end of the toolbar.

With **All Stores** selected, every page adds up all the stores. Each page's topic says how rows from different stores are combined.

Refresh

A page keeps the figures it loaded for one store for five minutes, so going back to the same page, dates and store is instant. **Refresh** (or Ctrl+R) fetches them again, and the next PDF is built again with the new figures.

CSV

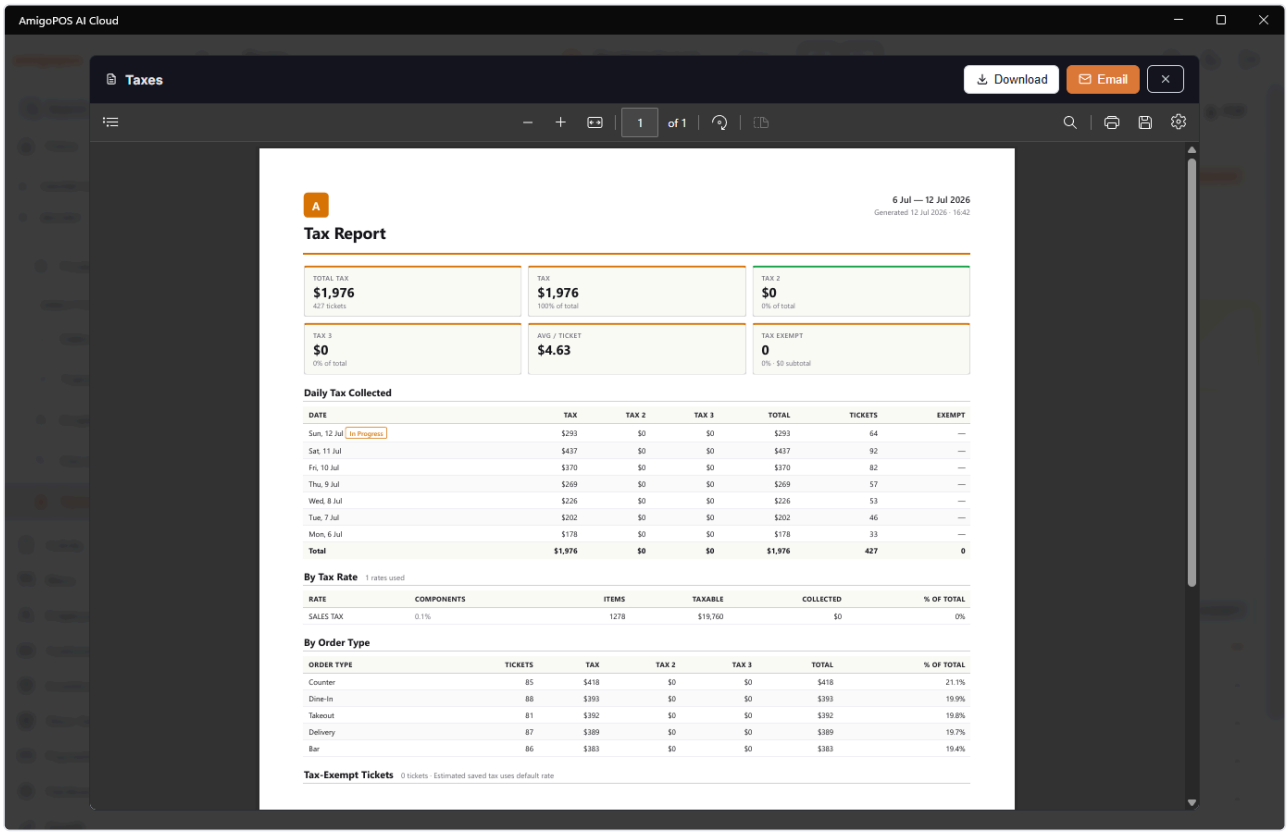
CSV (or Ctrl+E) downloads the page's tables as one CSV file for the dates and store on the toolbar. Each table starts with its title on a row of its own, then a heading row and the data rows.

- Every row the page loaded is in the file, including rows a tab cuts off on screen, such as house accounts past the first 100.
- Amounts have no currency symbol, dates read *yyyy-MM-dd HH:mm*, and yes/no columns read *Yes* or *No* in your language.
- Section titles and column headings are in your language. Internal ID columns are left out, and insights are written out as their text.
- The file is named after the report, the store (*allstores* for All Stores) and the dates.

Ctrl+R and Ctrl+E do nothing while the cursor is in a box or drop-down.

PDF

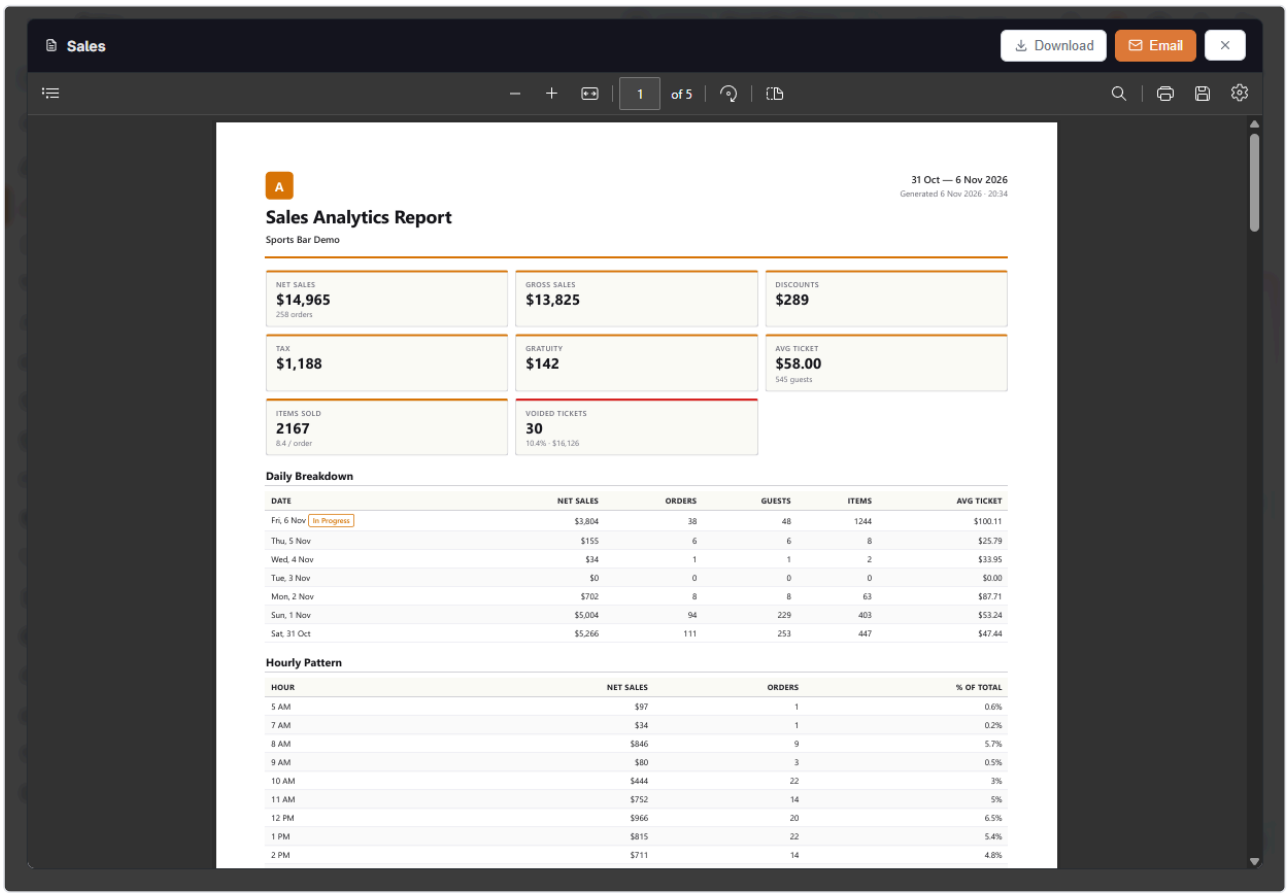
PDF opens a preview of the report laid out as a document: the report title, the store, the period, the KPI figures and the page's tables. *Generating PDF…* shows while it is built, which can take a few seconds for a long period.



- **Download** — saves the PDF.
- **Email** — opens the email form above the preview.
- **×** — closes the preview. Tapping outside it also closes it.

The PDF and its email cover the store chosen on the toolbar. A PDF covers one store: with **All Stores** selected and more than one store, the PDF button is greyed out, and pointing at it shows *A PDF Covers One Store — Pick A Store First*. If the preview cannot be built, it shows *The Server Returned No PDF. Check That The Server Can Be Reached.*

Emailing the PDF



- **Recipients** — filled in with the store's **Report email recipients** (**Back Office › Store Setup › Manager Screen**, **End Of Day** tab). Separate several addresses with commas.
- **Subject** — filled in with the report title, the business name and the dates.
- **Message (Optional)** — a note that goes in the body of the email.
- **Send Me A Copy (BCC To …)** — sends a blind copy to the report email recipients. The box shows only when the store has report email recipients.

Send mails the PDF as an attachment. *Email Sent.* appears and the form closes; if sending fails, the form stays open with *Failed:* and the reason.

Schedule

Schedule opens **Scheduled Reports** for the page's report. A number on the button shows how many schedules the report has. Each saved schedule lists when it runs, its recipients and **Last sent** or **Last error**, with **Send now**, **Edit** and **Delete**. **+ Add Schedule** starts a new one.

A new schedule starts as **At End of Day** over **Current Business Day**, addressed to the report email recipients. Change **Frequency**, **Run at**, **Day of Week** (Weekly) or **Day of month** (Monthly, 1–28), **Report period**, **Recipients** and **Enabled**, then **Save**. Each run picks its own dates from the report period.

Frequency	Report period choices
At End of Day — runs just before End of Day closes the business day	Current Business Day, Last 7 days, Last 30 days, Month to date
Daily	Yesterday, Last 7 days, Last 30 days, Month to date
Weekly	Last week, Last 7 days, Last 30 days
Monthly	Last month, Last 30 days, Month to date

Scheduling works the same way on the Performance reports; see Emailing the performance reports on a schedule.

Activity

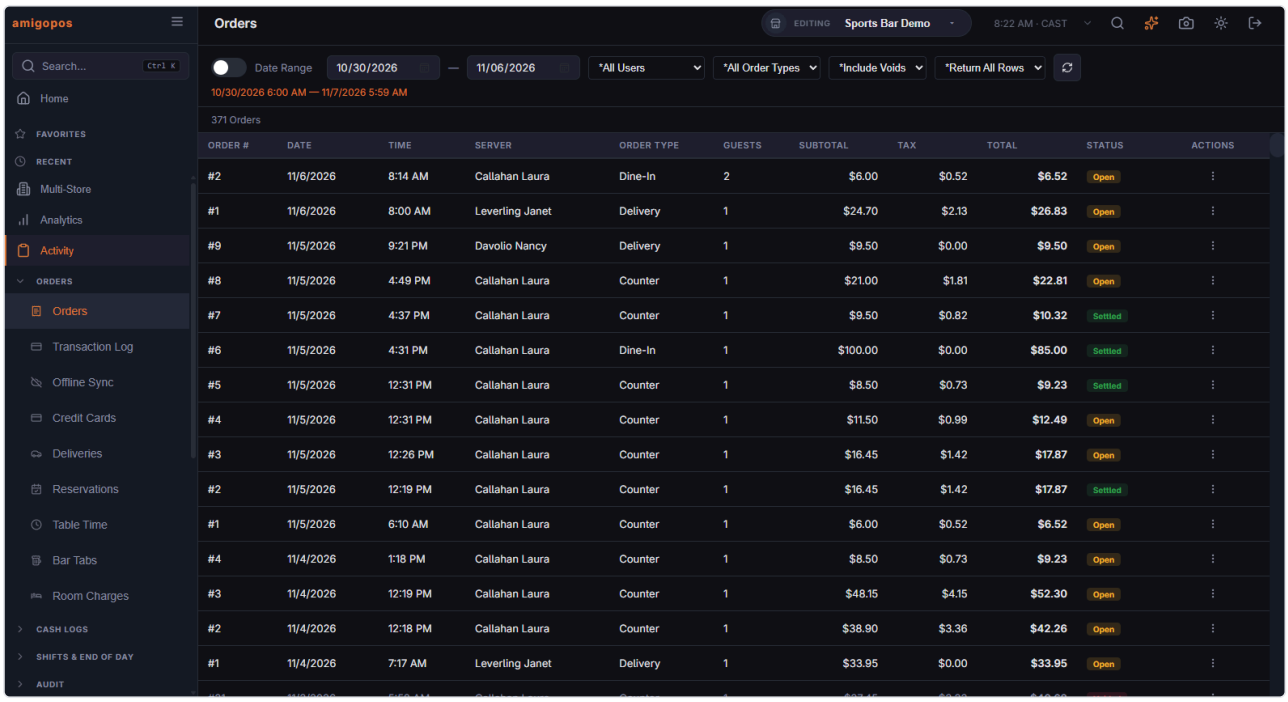
The Orders log

Analytics & Activity › Activity

View online ↗

The store's orders for a business day or a date range, with their totals and status, and how to open, reprint, refund or void one.

Back Office › Activity › Orders › Orders lists the store's orders for the current business day or for a date range, with their totals and status. From a row you can open the order, reprint its receipt, refund a settled order or void an open one. The payments themselves are on the **Transaction Log** and **Credit Cards** pages, which have their own help topic.



Choosing what to list

The toolbar is the same on all the lists under Activity › Orders, except that each page has only the filters that apply to it.

- **Current Business Day** — the switch is on when the page opens. The list shows the orders that no End of Day has closed yet. The line under the toolbar says since which End of Day, or that End of Day has never been run.
- **Date Range** — switch it off to get two dates, set to the last 7 days. Each day runs from the store's **Business Day Start Time** (see General settings) to just before that time the next day, so an order rung after midnight belongs to the day before, as on the End of Day report. The line under the toolbar shows the exact start and end.
- **All Users** — pick an employee to see only the orders on which they are the server.
- **All Order Types** — pick an order type to see only those orders.
- **Include Voids**, **Exclude Voids** or **Voids Only**.
- **Return All Rows**, or **Top** 100, 500, 1000 or 2000 to limit the list.
- The refresh button (**Update Results**) runs the search.

> Only the Current Business Day switch reloads the list by itself. After you change a date or a filter, press the refresh button.

The columns

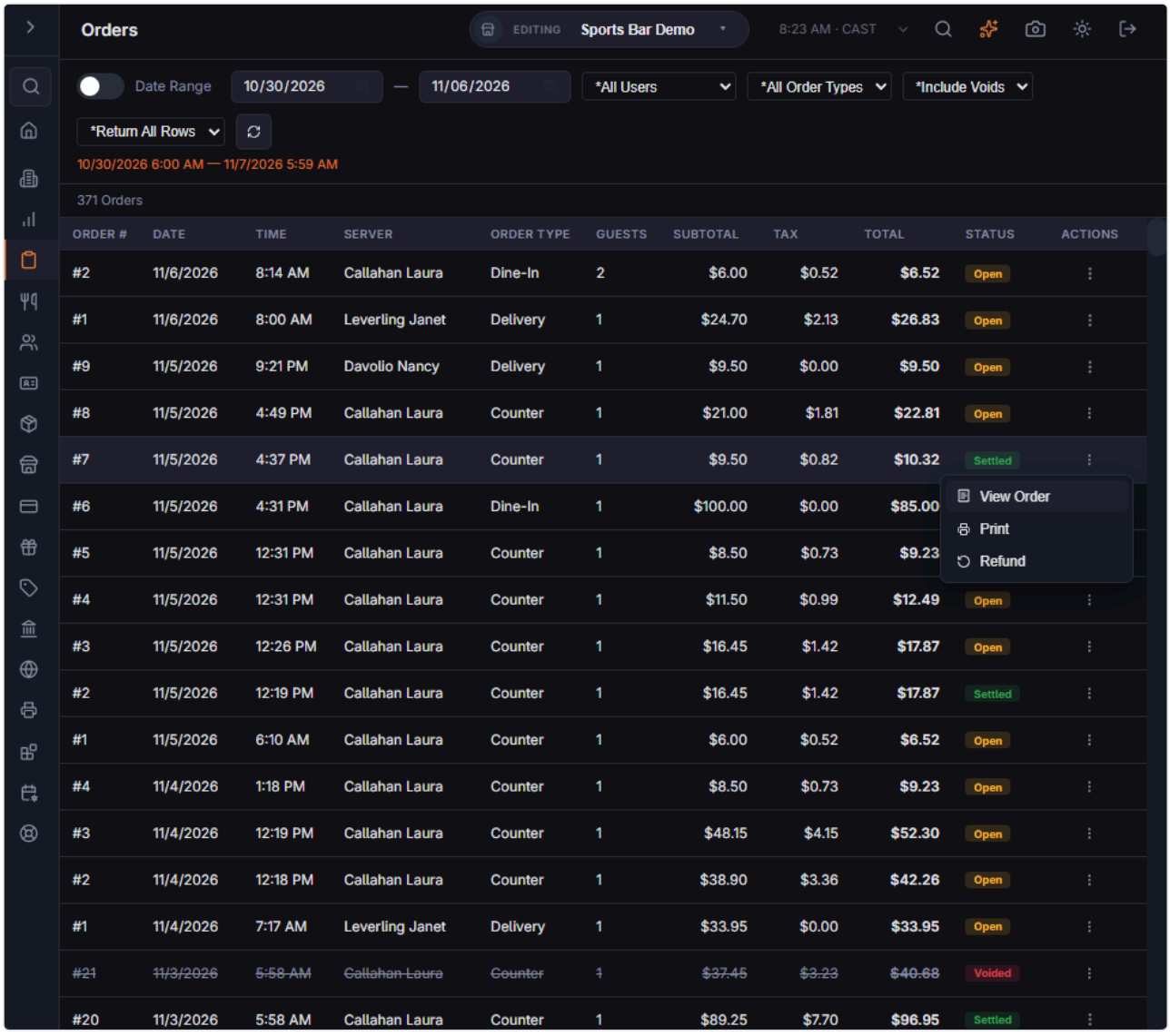
The number of orders found shows above the grid. The newest orders come first; with **Top**, the list keeps the newest ones. Voided orders are struck through.

Column	What it shows
Order #	The daily order number.

Column	What it shows
Date, Time	When the order was started, in store time.
Server	The employee the order belongs to.
Order Type	The order type, such as dine-in or delivery.
Guests	The guest count.
Subtotal, Tax, Total	Tax is all the order's taxes added together.
Status	**Voided**; **Refunded** with the amount refunded; **Settled**; or **Open** for an order not yet paid.

What you can do with an order

The ⋮ button in the **Actions** column opens a menu. It offers only the actions that fit the order's status.



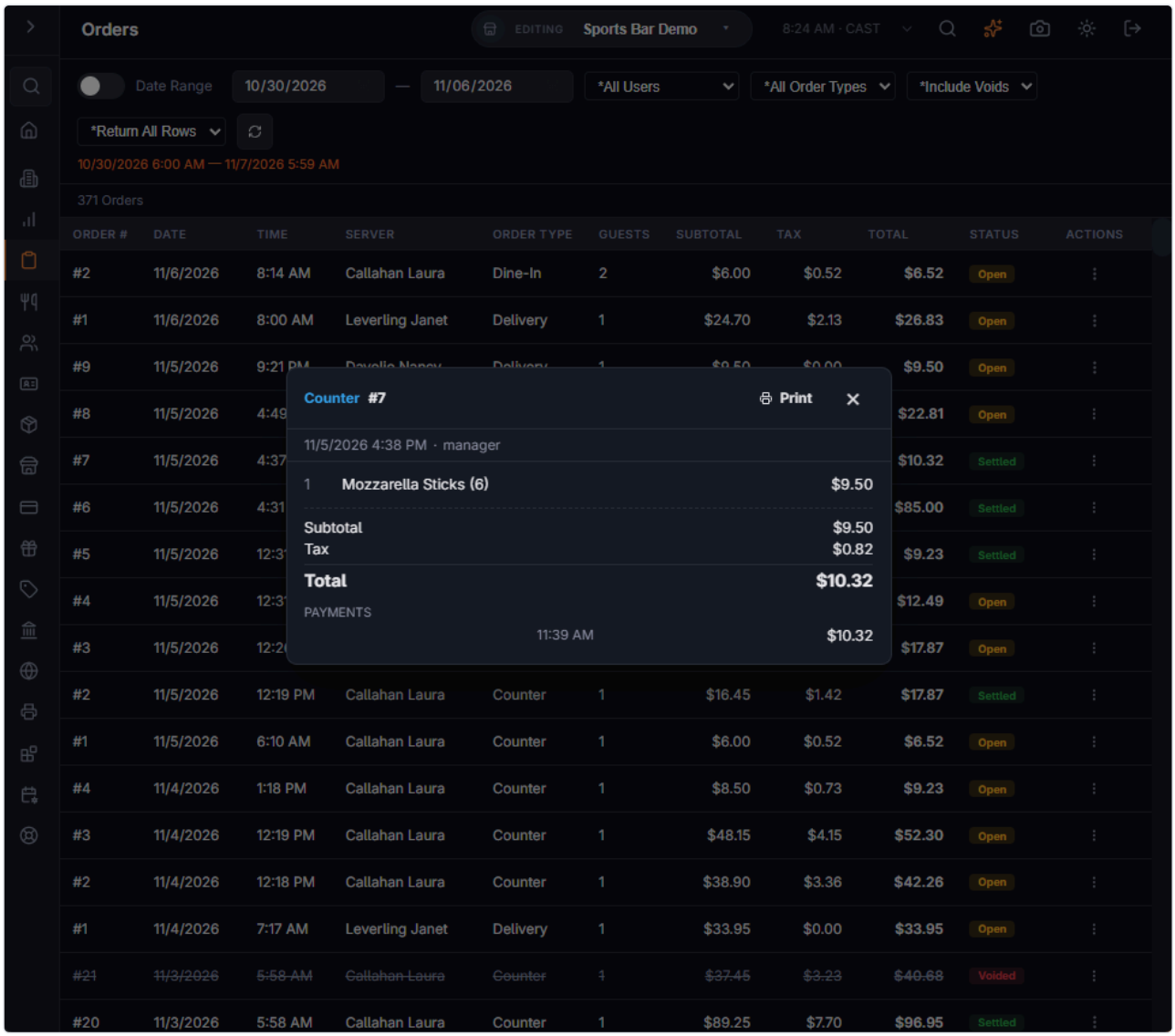
- **View Order** — opens the order in a read-only viewer (see below).
- **Print** — reprints the customer receipt. If it cannot print, **Print failed.** appears.
- **Refund** — settled orders only. Opens the same refund screen as the register. See Refunds.
- **Void** — open orders only. A settled order is refunded, not voided. The steps are the same as at the register: a void reason, whether to return the items to inventory and, for an order paid by card, whether to send the money back. See Voids and the void reason prompt and Voiding an order that was paid by card.

- **Undo Void** — shown on voided orders. A voided order cannot be restored; the message **A Voided Order Cannot Be Restored — Ring It Again** appears.

Refund needs the **Refund** permission and Void the **Void Order** permission. Without it, a manager is asked to approve. After a refund or a void, the list reloads.

The order viewer

The viewer shows the order as it is now. It cannot change anything.



- The header: the order type and number, with **Voided** or **Refunded** when that applies, and a **Print** button that reprints the receipt.
- The date and time, the store, the server, the customer and the table.
- The item lines, with modifiers indented. Removed lines are faded and struck through.
- **Subtotal**, **Discount**, **Tax**, **Delivery Fee**, **Gratuity** and **Total**. Discount, delivery fee and gratuity show only when there is one.
- **Payments** — each payment method with its time, the last four card digits and the amount. Voided payments are struck through.
- **Refunds** — the reason, when, how it was paid back, who did it and the amount.
- The order notes, if any.

Close it with ✕ or by clicking outside it.

> The Activity section shows only to employees whose permissions include **Summary**.

Related: The end-of-day report, The orders list: recalling and managing orders.

Transaction Log and Credit Cards

Analytics & Activity › Activity

View online ↗

Every payment taken, and the card transactions from the integrated processors, with their filters and columns.

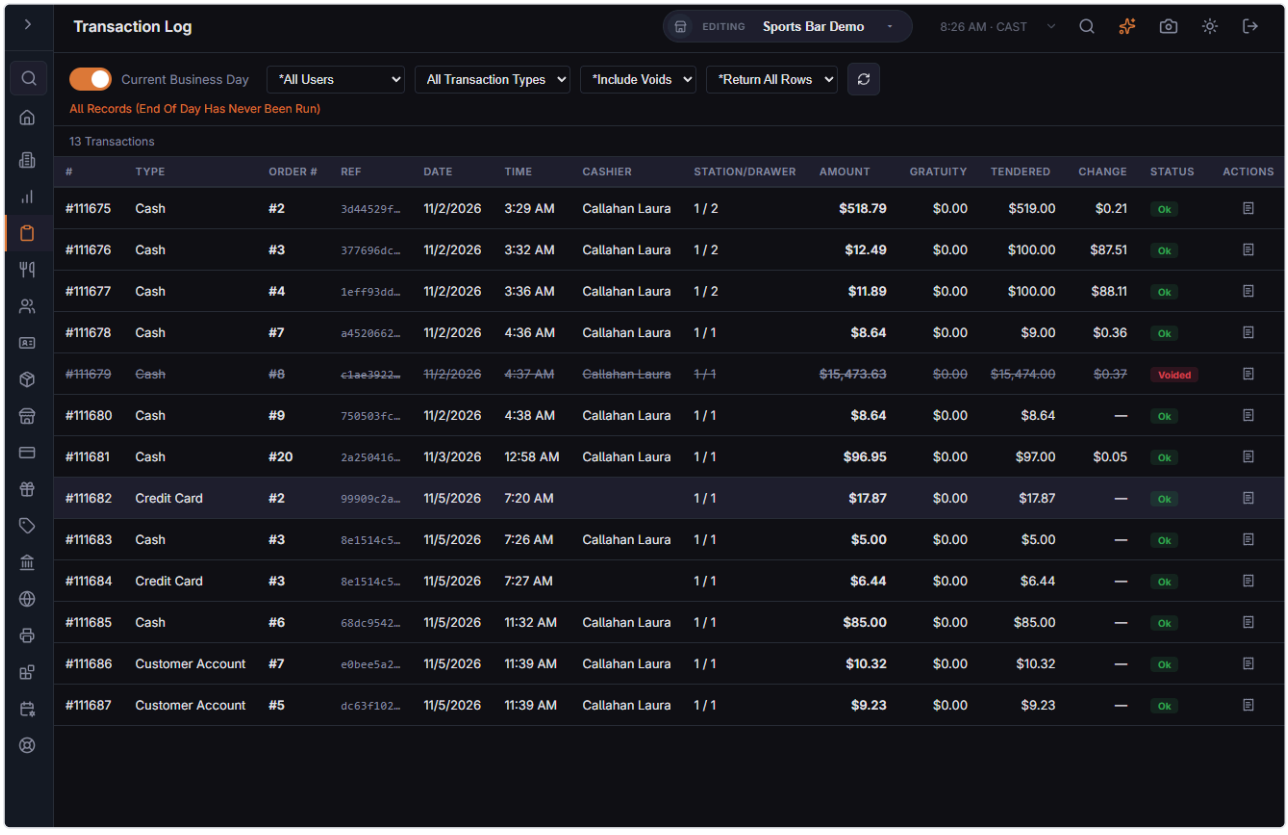
Back Office › Activity › Orders › Transaction Log lists every payment taken, one row per payment. **Back Office › Activity › Orders › Credit Cards** lists the card transactions recorded by the integrated card processors, with the card brand and last four digits. Use them to match the payments to a drawer count or to a processor's deposit.

The filters

Both pages use the same toolbar as the Orders page (see The Orders log):

- **Current Business Day** — on when the page opens. Switch it off to get **Date Range** and two dates, set to the last 7 days. Each day starts at the store's **Business Day Start Time**.
- **All Users** — the employee who took the payment.
- **All Transaction Types** — Transaction Log only. Pick a payment method to see only those payments.
- **Include Voids**, **Exclude Voids** or **Voids Only**.
- **Return All Rows**, or **Top** 100, 500, 1000 or 2000.
- The refresh button (**Update Results**) runs the search. Only the switch reloads the list by itself.

Transaction Log



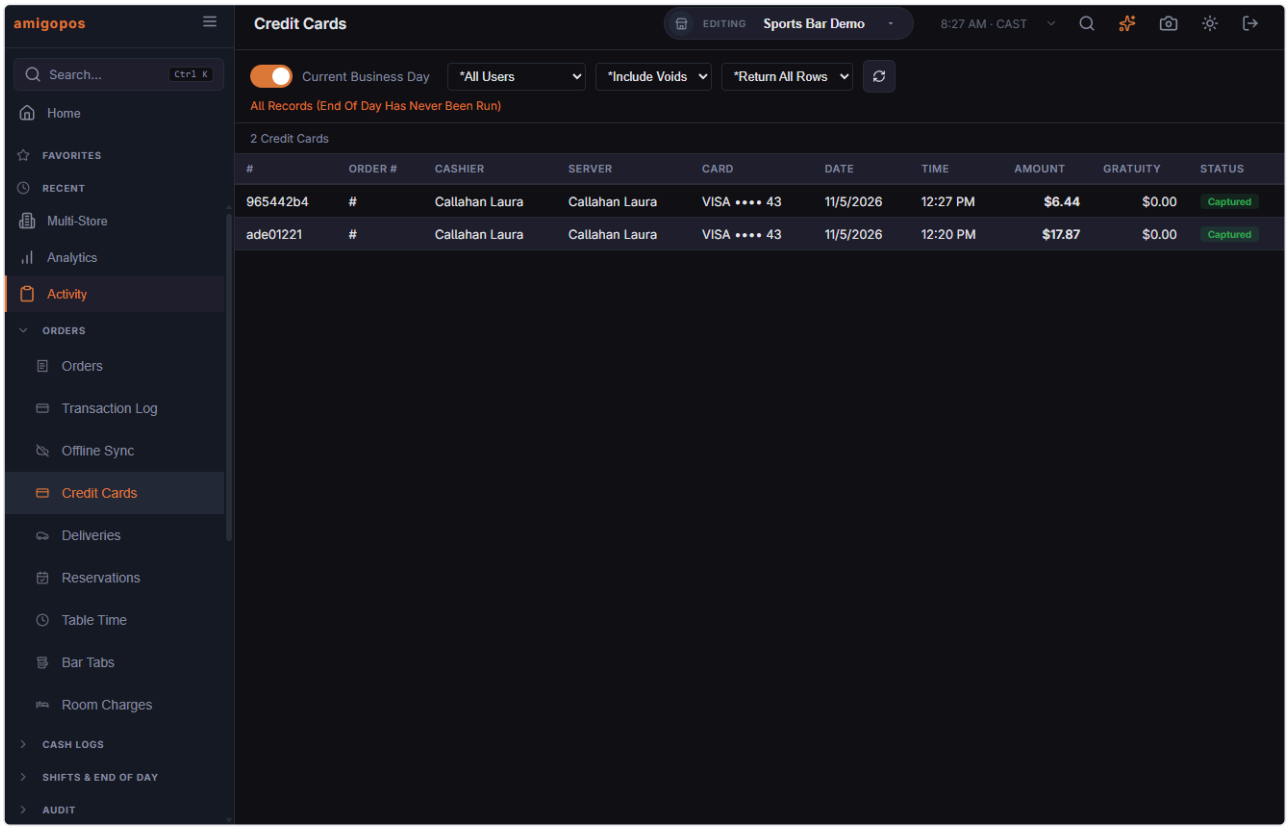
On the current business day the list shows the payments that no End of Day has closed yet. With a date range it uses the time of the payment. With **Top**, the list keeps the newest payments; the rows are shown in transaction number order. Voided payments are struck through.

Column	What it shows
#	The transaction number.

Column	What it shows
Type	The payment method.
Order #	The daily number of the order the payment belongs to.
Ref	The first characters of the order's ID, or — when the payment has no order.
Date, **Time**	When the payment was taken, in store time.
Cashier	The employee who took the payment.
Station/Drawer	The station number and the cash drawer number, or — when there is none.
Amount, **Gratuity**	The payment and its tip.
Tendered, **Change**	What the guest handed over and the change given back. Change shows only when the tendered amount is more than the payment.
Status	**Voided** or **Ok**.

The receipt button in the **Actions** column (**View Receipt**) opens the order the payment belongs to, in the same read-only viewer as the Orders page. It is the only button on the row.

Credit Cards



Each row is one transaction returned by the card processor. A later action on a card, such as capturing a pre-authorization, is a row of its own. Card payments typed in on the Manual Credit Card screen are not here; they are in the Transaction Log under their payment method.

On the current business day the list shows the card transactions since the last End of Day. With a date range it uses the time of the transaction. The newest transactions come first. The rows have no buttons.

Column	What it shows
#	The first characters of the transaction's ID. Hold the pointer over it to see all of it.
Order #	The daily order number.

Column	What it shows
Cashier	The employee who ran the card.
Server	The employee the order belongs to.
Card	The card brand and the last four digits, such as Visa •••• 4242.
Date, **Time**	When the transaction ran, in store time.
Amount, **Gratuity**	The amount and the tip of that transaction.
Status	**Voided**; **Captured** when the processor has taken the money; **Pending** when it has not, such as a pre-authorization that is still open.

> These pages are for reading. To void or refund a payment, work from the order: the Orders page or the register. See Refunds and Voiding an order that was paid by card.

Related: The Orders log, Transactions analytics, Manual credit card entry, The end-of-day report.

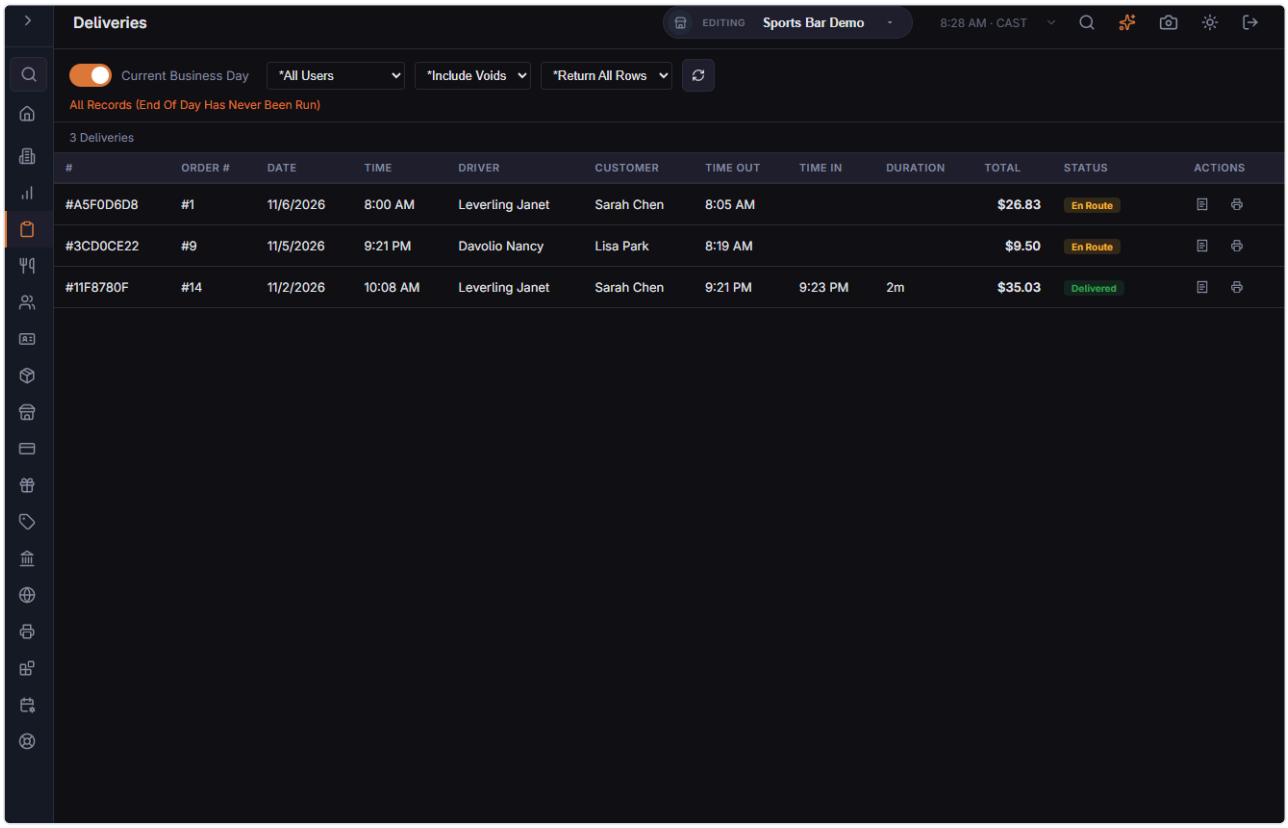
The Deliveries log

Analytics & Activity › Activity

View online ↗

The store's deliveries: who took each order out, when the driver left and came back, and how long it took.

Back Office › Activity › Orders › Deliveries lists the store's own deliveries: who took each order out, when the driver left and came back, and how long it took. A row is added when an order is dispatched to a driver, so delivery orders still waiting for a driver are not listed.



The filters

The toolbar is the same as on the Orders page (see The Orders log):

- **Current Business Day** — on when the page opens: the deliveries whose orders no End of Day has closed yet. Switch it off for **Date Range** and two dates, set to the last 7 days. Each day starts at the store's **Business Day Start Time**.

- **All Users** — the employee the order belongs to.
- **Include Voids**, **Exclude Voids** or **Voids Only** — by whether the order was voided.
- **Return All Rows**, or **Top** 100, 500, 1000 or 2000.
- The refresh button (**Update Results**) runs the search. Only the switch reloads the list by itself.

The columns

Column	What it shows
#	The first characters of the delivery's ID.
Order #	The daily order number.
Date, Time	The order's date and time, in store time.
Driver	The driver the order was dispatched to.
Customer	The customer's first and last name.
Time Out	When the driver was dispatched.
Time In	When the driver was checked back in.
Duration	Time In minus Time Out, in hours and minutes. Empty until the driver is checked in.
Total	The order total.
Status	**Voided** when the order was voided; **Canceled** when the delivery was canceled; **Delivered** once the driver is checked in; **En Route** while the driver is out; **Pending** otherwise.

The newest deliveries come first. Voided orders are struck through. The **Actions** column has two buttons:

- **View Receipt** — opens the order in the read-only order viewer, with its lines, totals and payments.
- **Print** — reprints the order's receipt, as **Print** does on the Orders page. If it cannot print, **Print failed.** appears.

> For drivers' cash and tips, use the driver bank report; for delivery times across many days, use the delivery performance dashboard. This page is the row-by-row record behind them.

Related: The delivery screen and dispatch, Driver bank report, Delivery performance, The Orders log.

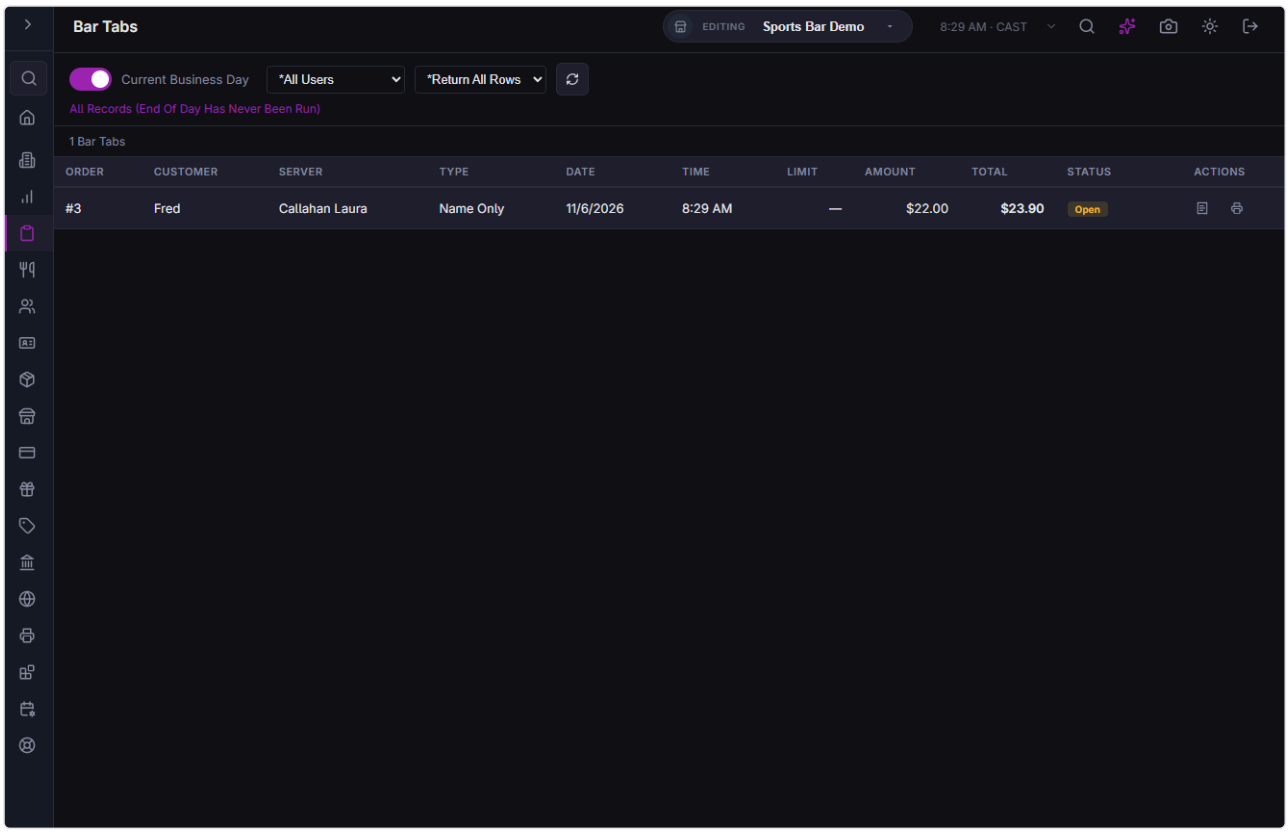
The Bar Tabs log

Analytics & Activity › Activity

View online ↗

The bar tabs opened at the register, with the tab name, pre-auth limit, total and status.

Back Office › Activity › Orders › Bar Tabs lists the bar tabs opened at the register, with the name on each tab, whether it was opened with a card pre-authorization, and what the tab came to. Use it to find a tab after the night is over, or to check which tabs are still open.



The filters

The toolbar is the same as on the Orders page (see The Orders log), without the voids filter:

- **Current Business Day** — on when the page opens: the tabs whose orders no End of Day has closed yet. Switch it off for **Date Range** and two dates, set to the last 7 days. Each day starts at the store's **Business Day Start Time**.
- **All Users** — the employee the tab's order belongs to.
- **Return All Rows**, or **Top** 100, 500, 1000 or 2000.
- The refresh button (**Update Results**) runs the search. Only the switch reloads the list by itself.

A tab is listed once its order has been sent. A tab that was named but never had an order sent does not appear.

The columns

Column	What it shows
Order	The daily order number of the tab.
Customer	The name on the tab.
Server	The employee the tab's order belongs to.
Type	**Pre-Auth** when the tab was opened with a card pre-authorization; **Name Only** otherwise.
Date, **Time**	The date and time on the tab's order, in store time.
Limit	The amount pre-authorized on the card. A dash for a Name Only tab.
Amount	The order's subtotal.
Total	The order total.
Status	**Hidden** when the tab no longer shows in the register's open tabs; **Settled** when the order has been paid; **Open** otherwise.

The newest tabs come first. Hidden tabs are struck through. The **Actions** column has two buttons:

- **View Receipt** — opens the tab's order in the read-only order viewer, with its lines, totals and payments.
- **Print** — reprints the order's receipt, as **Print** does on the Orders page. If it cannot print, **Print failed.** appears.

> The card pre-authorizations behind Pre-Auth tabs are listed on **Activity › Orders › Credit Cards**, with the card brand and last four digits.

Related: Starting and naming a tab, Opening, re-opening and settling a tab, Bar tabs on a card, The Orders log.

End-of-shift and end-of-day logs

Analytics & Activity › Activity

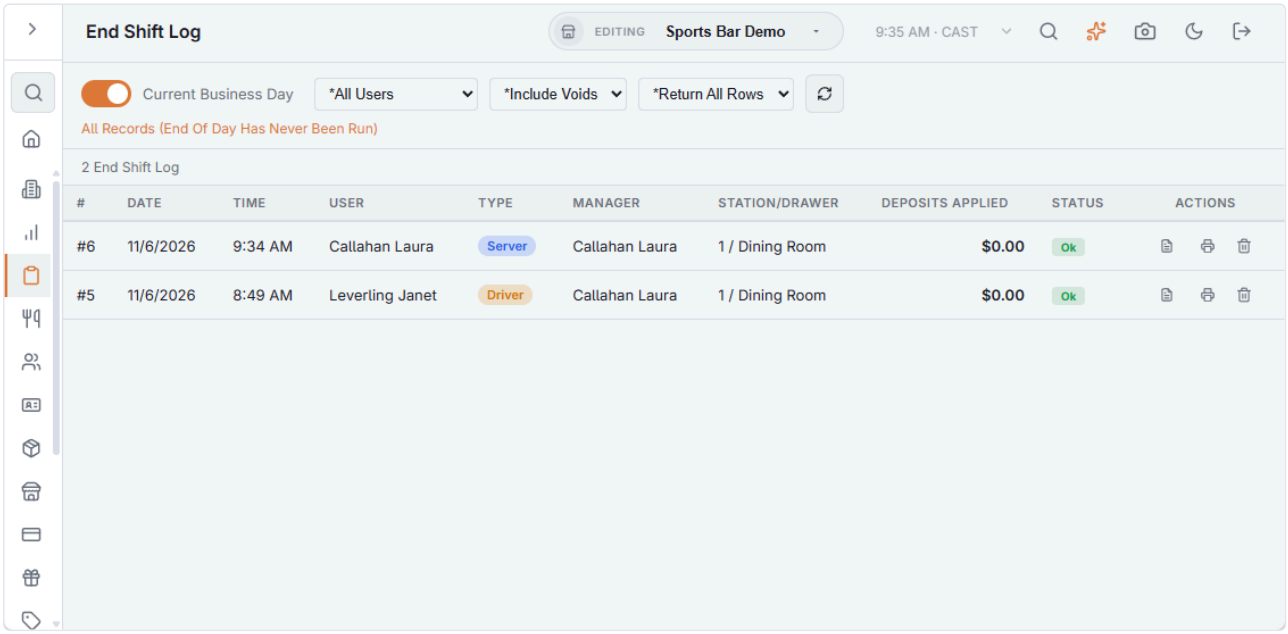
View online ↗

The archive of every closing document, kept exactly as it was confirmed.

Back Office › Activity › Shifts & End of Day › End Shift Log and **Back Office › Activity › Shifts & End of Day › End of Day Log** list every end shift of a banked employee and every End of Day run at the register. Each row keeps the report text exactly as it was produced at the time, so you can read or reprint last Saturday's close without anything being recalculated.

End Shift Log

One row for each end shift run in **Shift Banking** for a banked server or driver. See Shift banking overlay.



The toolbar

- **Current Business Day** — on when the page opens. It lists the end shifts that no End of Day has archived yet. The line under the toolbar says when the last End of Day ran.
- **Date Range** — turn the switch off to pick a start and an end date. The range opens on the last seven days. Each day runs from the store's business day start time to the same time the next day. The line under the toolbar shows the exact start and end.
- **All Users** — pick an employee to see only their end shifts.
- **Include Voids**, **Exclude Voids**, **Voids Only** — show or hide entries marked **Voided**.
- **Return All Rows** or **Top** 100, 500, 1000 or 2000 — limits how many rows come back. The newest entries come first.
- **Update Results** (the refresh button) — loads the list again. The switch reloads at once; other changes wait for this button.

Columns

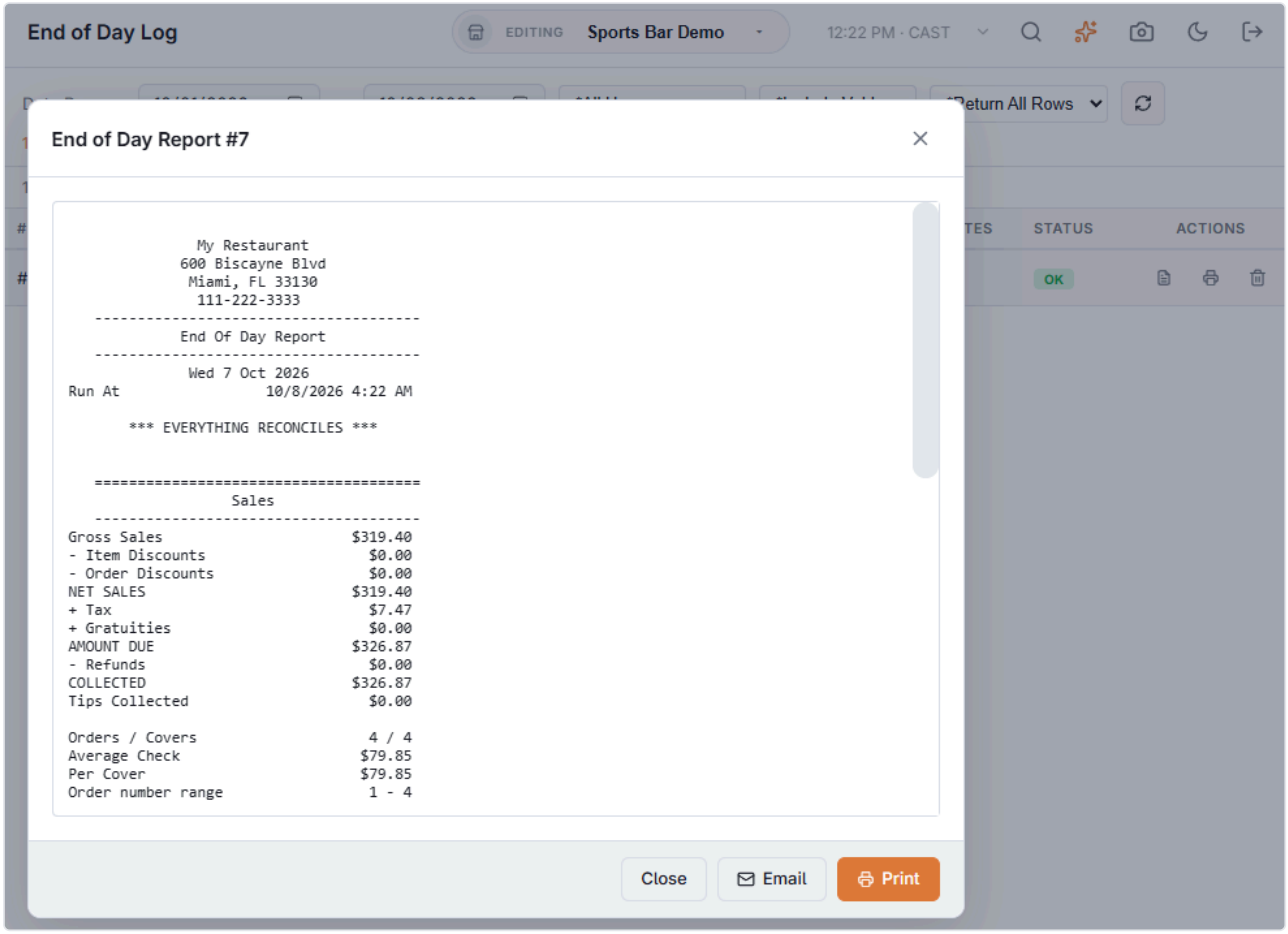
Column	What it shows
#, **Date**, **Time**	The log entry number and when the end shift ran, in store time.
User	The employee whose shift was ended.
Type	**Server** or **Driver**.
Manager	Who ran the end shift.

Column	What it shows
Station/Drawer	The station and drawer the end shift was run on.
Deposits applied	The deposits the employee made during the shift that the end shift took into account.
Status	**Voided** once deleted from Back Office; **Archived** once an End of Day has closed it; otherwise **Ok**.

On a row, **View Report** opens the end shift report and **Print** prints it on the receipt printer assigned to this station. **Delete** asks *Delete Entry #{number}? This Cannot Be Undone.* and then marks the entry **Voided**. The row stays in the list, struck through, and its Delete button goes. Choose **Exclude Voids** to hide it.

End of Day Log

One row for each End of Day run at the register. See Running end of day.



The toolbar

This page has no **Current Business Day** switch. It always shows a **Date Range**, which opens on the last seven days, with the newest End of Day first.

- **All Users** — pick an employee to see only the End of Day runs they made.
- **Include Voids**, **Exclude Voids**, **Voids Only** — show or hide entries marked **Voided**.
- **Return All Rows** or **Top** 100, 500, 1000 or 2000, and **Update Results** — as on the other logs.

Columns

Column	What it shows
#, **Date**, **Time**	The log entry number and when the End of Day ran.
User	Who ran the End of Day.

Column	What it shows
Event, **Weather**, **Temperature**	What the manager picked on the End of Day screen. **Not specified** when nothing was picked.
Notes	The notes typed at the End of Day.
Status	**Voided** or **Ok**.

On a row, **View Report** opens the End of Day report slip and **Print** prints it on this station's receipt printer. **Delete** asks *Delete Entry # {number}? This Cannot Be Undone.* and then marks the entry **Voided**. The row stays in the list, struck through, and the business day stays closed. Choose **Exclude Voids** to hide it.

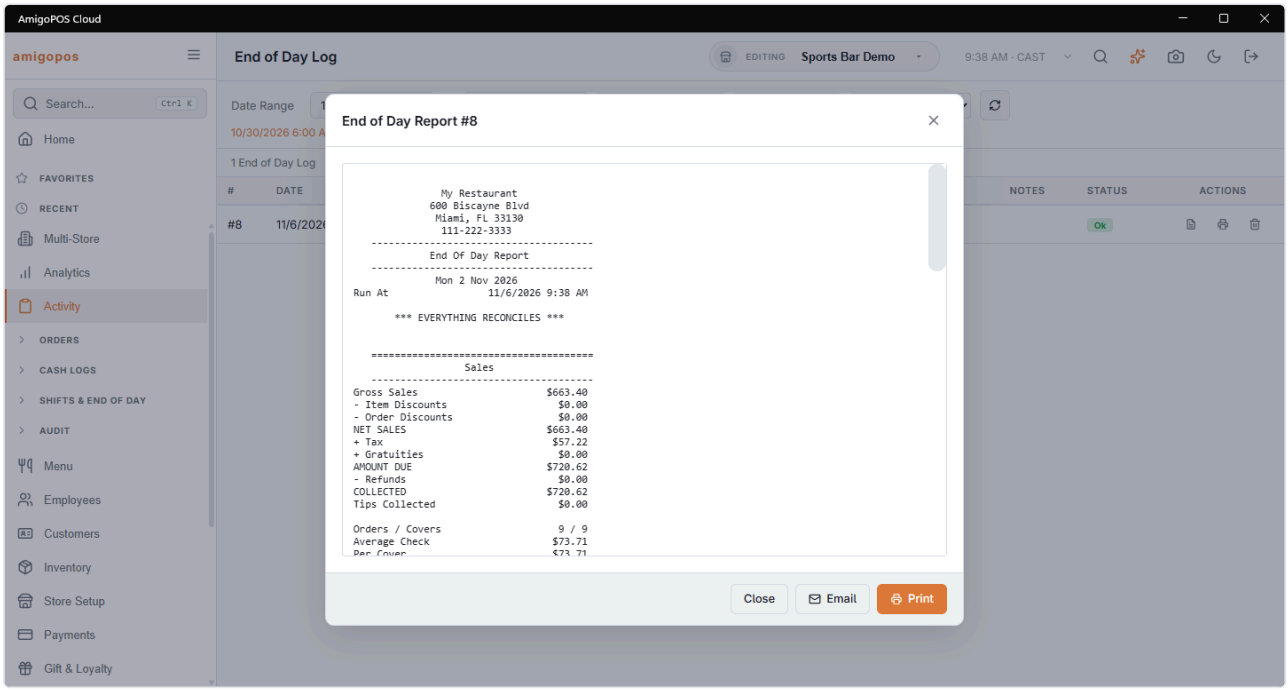
On both pages, **Delete** needs the **Void Records**, **Delete Records** or **Manager Screen** permission. Without one, the page shows *The Entry Could Not Be Deleted*.

The events in the **Event** list are set up in **Back Office › Store Setup › Manager Screen**, on the **Special Events** tab.

Viewing, printing and emailing a report

View Report opens the stored text over the list, titled **End Shift Report** or **End of Day Report** with its number. Its buttons:

- **Print** — prints the report on the receipt printer assigned to this station. A message says *Print job sent*, or *No receipt printer is assigned to this station*.
- **Email** — opens a **Report email recipients** box, filled in with the addresses in **Report email recipients** on the **End Of Day** tab of **Manager Screen**. Change them if needed, separating several with commas, and press **Send**. The email contains the text of the report on screen, with no attachment. The page shows *Email Sent.*, or *Email Could Not Be Sent — Check The Recipient Addresses* when an address is not valid. **Cancel** closes the box.
- **Close** — closes the report. Clicking outside it does the same.



> The report text is a copy of what was produced at the time. If an order or a time punch is corrected later, the log still shows the figures as they were on the night.

The end-of-day report

The text in the End of Day Log is the slip printed at the close. The full closing document for a day — with its tie-out checks, PDF and CSV — has its own page: The end-of-day report.

Related: Employee banking and deposits, Where the cash is: settle to deposit to EOD.

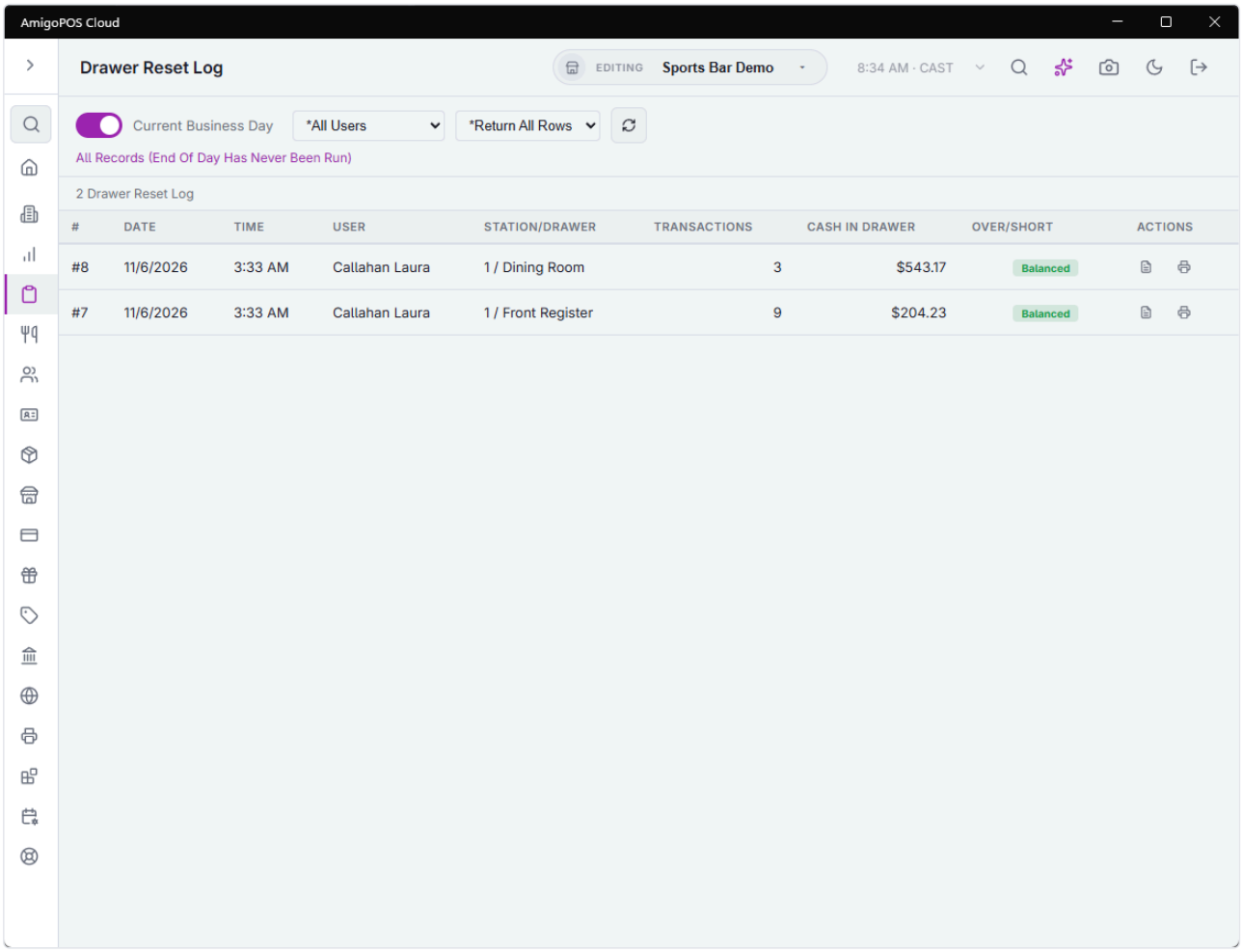
Cash logs in Back Office

Analytics & Activity › Activity

View online ↗

Look up drawer resets, cash drops, paid-outs and employee deposits, and reprint or email a drawer reset report.

Back Office › Activity › Cash Logs holds four lists of cash records written at the register: **Drawer Reset Log**, **Cash Drops**, **Cash Paid Out** and **Employee Deposits**. Use them to look up a past drawer reset and its report, or to check which drops, paid-outs and deposits were recorded, by whom and on which station and drawer.



The toolbar

All four pages share the same toolbar. The list loads when the page opens.

- **Current Business Day** — the switch is on when the page opens. On **Drawer Reset Log** it lists the resets since the last End of Day. On the other three pages it lists the records that no End of Day has archived yet. The line under the toolbar says when the last End of Day ran.
- **Date Range** — turn the switch off to pick a start and an end date. The range opens on the last seven days. Each day runs from the store's business day start time to the same time the next day, so sales after midnight stay on the day they belong to. The line under the toolbar shows the exact start and end.
- **All Users** — pick an employee to see only their records.
- **Include Voids**, **Exclude Voids**, **Voids Only** — on **Cash Drops**, **Cash Paid Out** and **Employee Deposits**.
- **All Employees**, **Servers**, **Drivers** — on **Employee Deposits** only.
- **Return All Rows** or **Top** 100, 500, 1000 or 2000 — limits how many rows come back. The newest records come first, so **Top** keeps the newest ones.
- **Update Results** (the refresh button) — loads the list again with your choices.

> The switch reloads the list at once. A new date, employee or other choice takes effect only when you press **Update Results**.

On every page, **Station/Drawer** shows the station number and the cash drawer's name. A drawer without a name shows its number, such as **#2**, and — means no drawer is recorded.

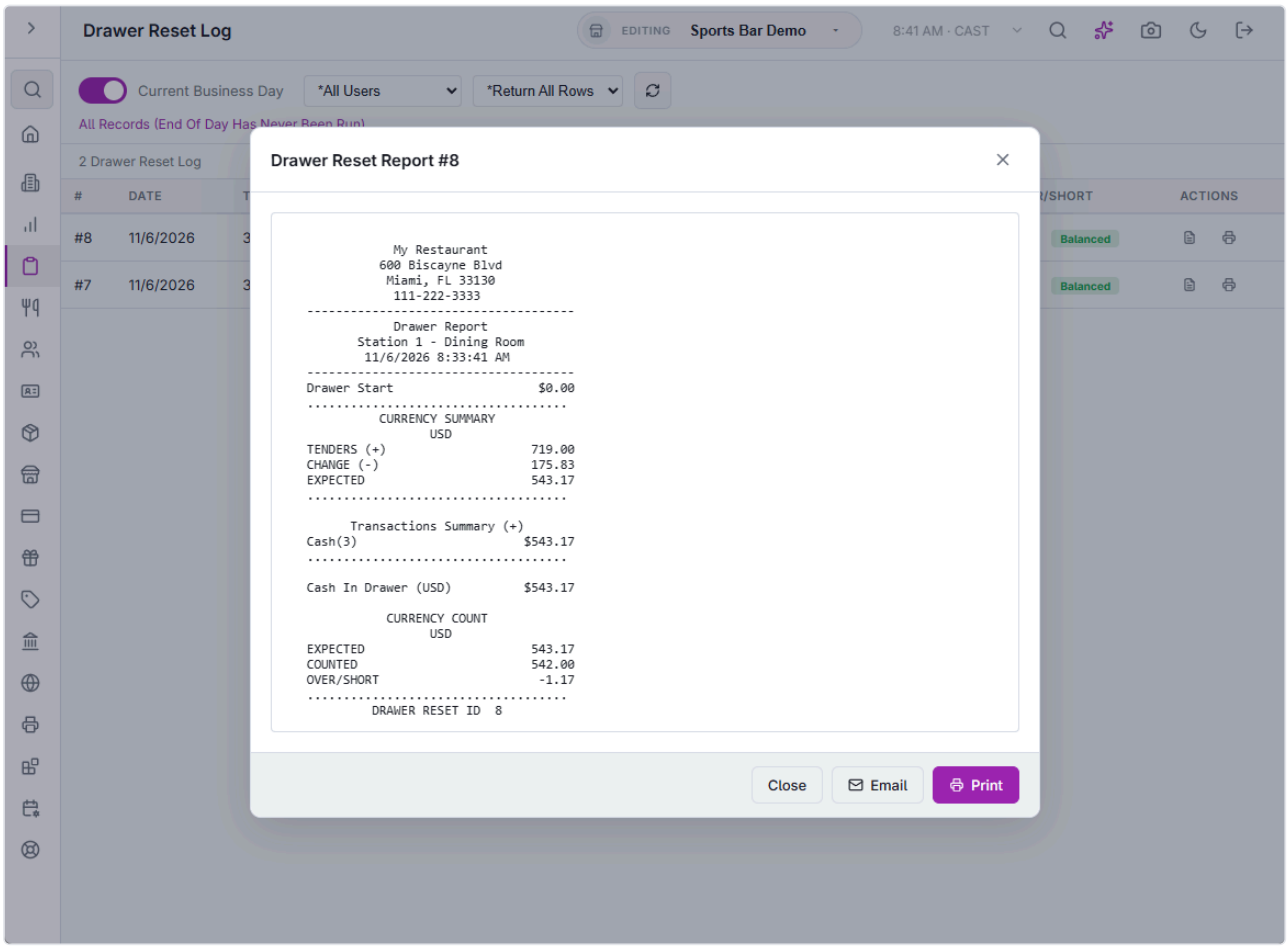
Drawer Reset Log

One row for each drawer reset run at the register.

Column	What it shows
#	The reset number. It is also printed at the foot of the reset report.
Date, Time	When the reset ran, in store time.
User	Who ran the reset.
Station/Drawer	The station and the drawer that was reset.
Transactions	The number of transactions on the drawer at the reset.
Cash in Drawer	The cash the drawer was expected to hold at the reset, in the base currency.
Over/Short	The count less the expected cash. **Balanced** when they match, a **+** amount when the drawer was over, and a red amount when it was short.

Each row has two buttons:

- **View Report** — opens the drawer reset report as it was produced at the reset (see below).
- **Print** — prints that report on the receipt printer assigned to this station, without opening it.



Cash Drops

One row for each cash drop recorded at the register with the **Cash Drops** button. See Cash drops to the safe.

Column	What it shows
#, **Date**, **Time**	The drop number and when it was recorded.
User	Who recorded the drop.
Station/Drawer	The station and the drawer the drop was taken from.
Drawer Reset	A short reference to the drawer reset that included the drop, or — when no reset has included it yet.
Amount	The amount moved to the safe.
Status	**Voided**: deleted from Back Office. **Active**: still counted against the drawer. **Reset**: included in a drawer reset. **Archived**: closed by an End of Day.

Delete on a row asks *Delete Entry #{number}? This Cannot Be Undone.* Confirm, and the drop is voided: the row stays in the list, struck through, as **Voided**, and its Delete button goes. A voided drop no longer counts in the drawer reset report, the drawer's expected cash, the End of Day or the register's Cash Drops list. Deleting needs the **Void Records**, **Delete Records** or **Manager Screen** permission. Without one, the page shows *The Entry Could Not Be Deleted*.

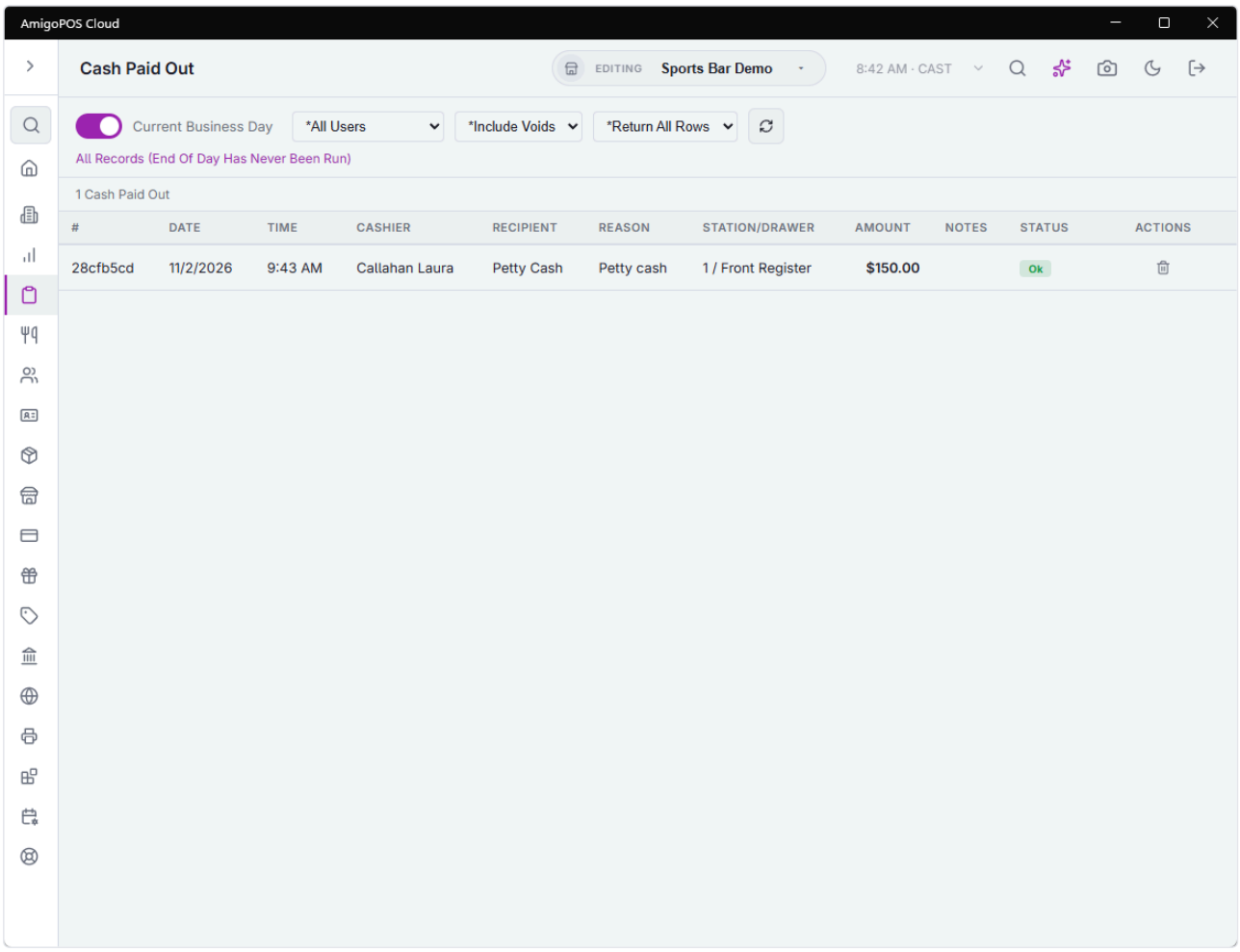
Cash Paid Out

One row for each paid-out taken from a drawer. See Cash paid-out and reasons.

Column	What it shows
#, **Date**, **Time**	A short reference for the paid-out and when it was taken, in store time.
Cashier	Who took the paid-out.
Recipient, **Reason**	As picked at the register.
Station/Drawer	The station and the drawer the cash came from.
Amount, **Notes**	The amount and the note typed with it.
Status	**Voided**, **Archived** (closed by an End of Day) or **Ok**.

With a date range, the list uses the time the paid-out was taken.

Delete on a row asks *Delete Entry {amount}? This Cannot Be Undone.* Confirm, and the paid-out is voided: the row stays in the list as **Voided**, its amount goes back into the drawer's expected cash, and it no longer counts in the drawer reset report or the End of Day. A paid-out that a drawer reset has already included is voided without changing the drawer's expected cash, because the reset started it over. Choose **Exclude Voids** to hide voided rows. Deleting needs the **Payouts**, **Manager Screen** or **Void Records** permission. Without one, the page shows *The Entry Could Not Be Deleted*.



Employee Deposits

One row for each deposit a banked server or driver made in **Shift Banking** at the register. See Employee banking and deposits.

Column	What it shows
#, Date, Time	A short reference for the deposit and when it was made.
User	The employee who made the deposit.
Type	**Server** or **Driver**.
Station/Drawer	The station and the drawer the deposit was taken on.
Amount	The cash handed in.
End Shift	A tick when the employee's end shift has applied the deposit.
Drawer Reset	A tick when a drawer reset has included the deposit.
Status	**Voided**, **Archived** (closed by an End of Day) or **Ok**.

Delete on a row asks *Delete Entry {amount}? This Cannot Be Undone.* Confirm, and the deposit is voided, the same as voiding it in **Shift Banking**: the row stays in the list as **Voided**, and its amount comes back out of the drawer's expected cash, unless a drawer reset has already included it. Delete is not offered on a voided deposit or on one an end shift has already applied (a tick under **End Shift**). Deleting needs the **Banking**, **Manager Screen**, **Void Records** or **Delete Records** permission. Without one, or if the void is refused, the page shows *The Entry Could Not Be Deleted*.

> **Banking** is on for a new job. Turn it off on the jobs that should not void deposits here.

Viewing, printing and emailing a reset report

View Report opens the report over the list. Its buttons:

- **Print** — prints the report on the receipt printer assigned to this station. A message says *Print job sent*, or *No receipt printer is assigned to this station*.
- **Email** — opens a **Report email recipients** box, filled in with the store's end-of-day report recipients. Change the addresses if needed, separating them with commas, and press **Send**. The email contains the text of the report on screen, with no attachment. The page shows *Email Sent.*, or *Email Could Not Be Sent — Check The Recipient Addresses* when an address is not valid. **Cancel** closes the box.
- **Close** — closes the report. Clicking outside it does the same.

The row's **Print** button shows the same messages.

Related: Drawer reset at end of shift, End-of-shift and end-of-day logs.

Reviewing shift declarations

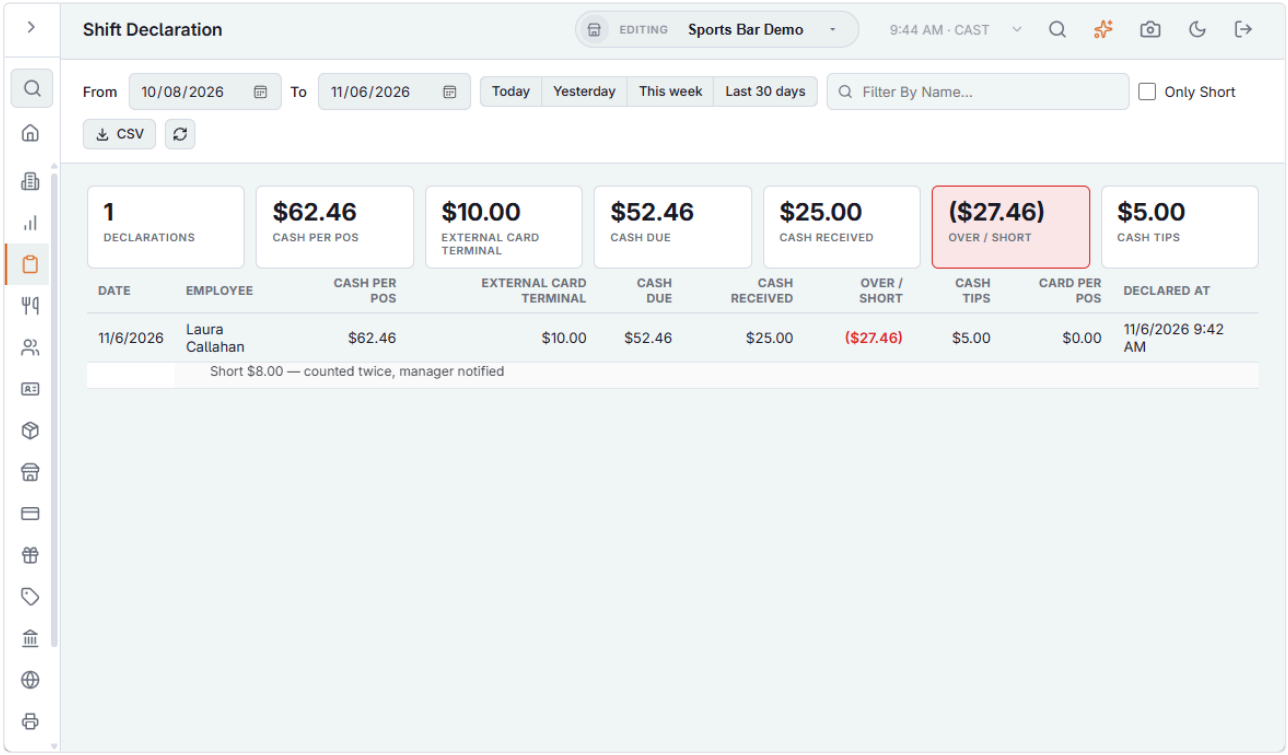
Analytics & Activity › Activity

View online ↗

Compare what each employee declared at the end of a shift with the register's figures, and find who was short.

Back Office › Activity › Shifts & End of Day › Shift Declaration lists the shift declarations employees saved at the register: the cash they received for their checks, the amount they took on an external card terminal, and their cash tips, beside the register's own figures for the same tickets. The page is read-only.

The page appears in the menu only when **Shift Declaration** is switched on in **Back Office › Store Setup › Employee Banking Settings**. With it on, employees declare at the end of a shift on **My Shift** and in **Shift Banking**. See Employee Banking Settings.



How the figures work

When an employee saves a declaration, the register's figures for that employee's tickets are saved with it. The page shows those saved figures, so a past day reads as it did when the employee declared. There is one declaration per employee per business day. Saving again replaces it.

Column	What it shows
Cash Per POS	Cash payments on the employee's tickets, including payments taken on an external card terminal and rung as cash.

Column	What it shows
External Card Terminal	Declared by the employee: the amount taken on a card terminal that is not connected to the register.
Cash Due	**Cash Per POS** less **External Card Terminal**.
Cash Received	Declared by the employee: the cash they actually received for their checks.
Over / Short	**Cash Received** less **Cash Due**. Below zero means the employee is short.
Cash Tips	Declared by the employee. When the employee is clocked in, the amount is also written to their open time clock punch, so payroll, the tip pool and the clock-out screen show the same figure.
Card Per POS	Payments on the employee's tickets taken on an integrated card terminal.
Declared At	When the declaration was saved, in store time. When someone other than the employee saved it, such as a manager, their name shows beside the time.

The figures cover the employee's tickets that the next End of Day will close. When the employee is clocked in, only tickets opened since they clocked in count.

The toolbar

- **From** and **To** — the business days to show. The list reloads as soon as you change a date.
- **Today**, **Yesterday**, **This week**, **Last 30 days** — set both dates in one tap. **This week** starts on the store's business week start day. The page opens on **Yesterday**.
- **Filter By Name...** — shows only employees whose name contains what you type.
- **Only Short** — shows only declarations with **Over / Short** below zero.
- **CSV** — downloads the rows on screen as a spreadsheet file.
- **Refresh** — loads the list again.

> One view covers at most 93 days. A longer range shows only the 93 days ending on the **To** date.

Reading the page

The cards above the table total the rows on screen: **Declarations** (the number of rows), **Cash Per POS**, **External Card Terminal**, **Cash Due**, **Cash Received**, **Over / Short** and **Cash Tips**. The **Over / Short** card is highlighted when the total is short. The name filter and **Only Short** change the totals too.

The table lists the newest business day first, then employees by name. A row that is short is highlighted. Notes typed with a declaration show on a line under its row. With no declarations in the range, the page shows *No Shift Declarations In This Range*.

The CSV file

The file is named for the date range and holds the rows on screen, with the name filter and **Only Short** applied. Besides the table columns it has the card tips and the other payments (such as gift cards and house accounts) per the register, who saved each declaration, and the notes. The column headings are in the language the Back Office is shown in, as on screen.

Related: Shift banking overlay, Declaring cash gratuities, End-of-shift and end-of-day logs.

The end-of-day report

Analytics & Activity › Activity

View online ↗

The stored closing report for any business day: it checks its own arithmetic and names the orders that do not tie.

Back Office › Activity › Shifts & End of Day › End of Day Report shows the full closing document for any business day, stored when the day was closed and shown from that stored copy every time it is opened. The Z summary on the receipt printer and the PDF in the end-of-day email are made from the same stored report — one set of numbers, three ways of reading it.

Choosing a day

- **Business Day** — the day to show. The page opens on yesterday.

- **Stored Reports** — when more than one day is stored in the last 45 days, the most recent ones show as chips. Tap a chip to open that day; hold the pointer over it to see the day's net sales and order count.
- When nothing is stored for the day, the page says *No Report Is Stored For This Day Yet.* and offers **Build Report**.

It checks itself

Every figure has one definition, printed in the definitions at the end, and the report tests its own arithmetic before you read a line of it. The banner under the header is the verdict: green *Everything reconciles*, or red *Reconciliation failed* with the checks that failed. The **Tie-Outs** table beside the waterfall shows each check — net sales from the order lines against the order totals, net plus tax and charges against ticket totals, ticket totals against tenders, gross minus markdowns against net, and the section sums against the whole — and, for the line-versus-total check, lists the exact orders that disagree with the amount on each.

> A red line is not a lost dollar; it is the report telling you which order to look at. A difference on one order with a line discount, or on a split, is a register defect worth reporting; a difference across many orders is a reconciliation problem for the day.

The waterfall

Gross sales are price × quantity on every live line of every settled order — before any discount, with removed, voided and comped lines out. Item discounts and order discounts come off to give **Net Sales**, the figure every percentage in the report is taken against. Gift cards sold are shown as their own line below net, marked **(Liability)**, because money taken for a card is a liability, not a sale. Tax, charges and gratuities take it to **amount due**; refunds, cash discounts and card fees to **collected**, which has to equal what was tendered. Tips collected sit underneath, labelled as not revenue. Comparison columns beside the day — the previous day, the same weekday last week, month to date — fill in as days are stored.

What the pages hold

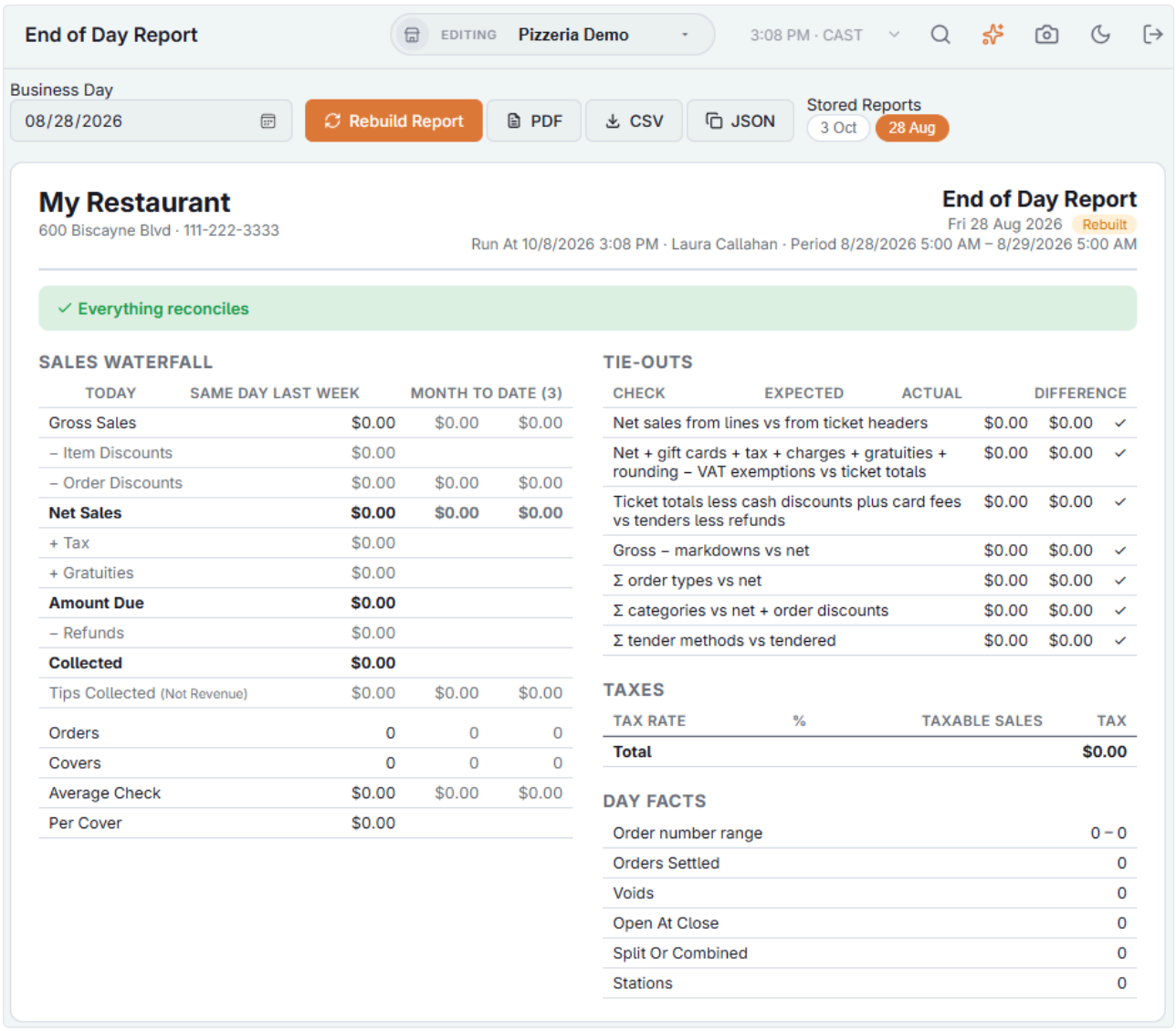
- **Tenders and cash** — every payment method with count, amount, tips, cash discounts and fees; foreign-currency tenders at face and in base currency with the average rate; tenders by user; the cash summary and each drawer's opening float, expected, declared and over/short with its audits, with an **± Employee Deposits** line when it is not zero — plus the employee deposits the drawer took that day, minus the deposits an End Shift at the drawer applied that day, counted in expected; a drawer that only took deposits gets its own entry; paid-outs and drops by line, leaving out any voided in Back Office; no-sales by user.
- **Markdowns** — every discount by name with level (item or order), type and amount, so gross minus the total equals net; price rules such as happy hour with what they gave away against regular price; comps by user; voids and removed items by order with reason, who did it, and whether it was after the ticket had been sent.
- **Sales** — by order type with covers and average check, by revenue center, category, item type, channel and station, sales by hour, server performance with tips and tip percentage alongside each server's discounts, voids, comps and removed items, and the top items.
- **Labor, liabilities, exceptions** — shifts and labor cost as a percentage of net; gift cards sold and redeemed, house-account charges, reservations seated, no-shows and cancellations, deposits taken and refunded, orders still open at close; then the exceptions: orders whose lines and totals disagree, refunds, hand-entered price changes, large discounts, orders settled with a balance, manager overrides, card payments without a tip.
- **Appendix** — every item sold with quantity, gross, discounts and net; every modifier; the definitions.

Stored, not recalculated

Opening a day shows what was stored when it closed; nothing is recomputed, so what a manager read on Tuesday still reads the same on Friday. **Rebuild Report** regenerates the report from the orders as they are now and replaces the stored copy, keeping the previous version; the header marks a rebuilt day **Rebuilt** and shows who ran it. A message then says whether everything reconciles. Use it after correcting an order. For a day closed before this report existed, the same button reads **Build Report**.

PDF, CSV and JSON

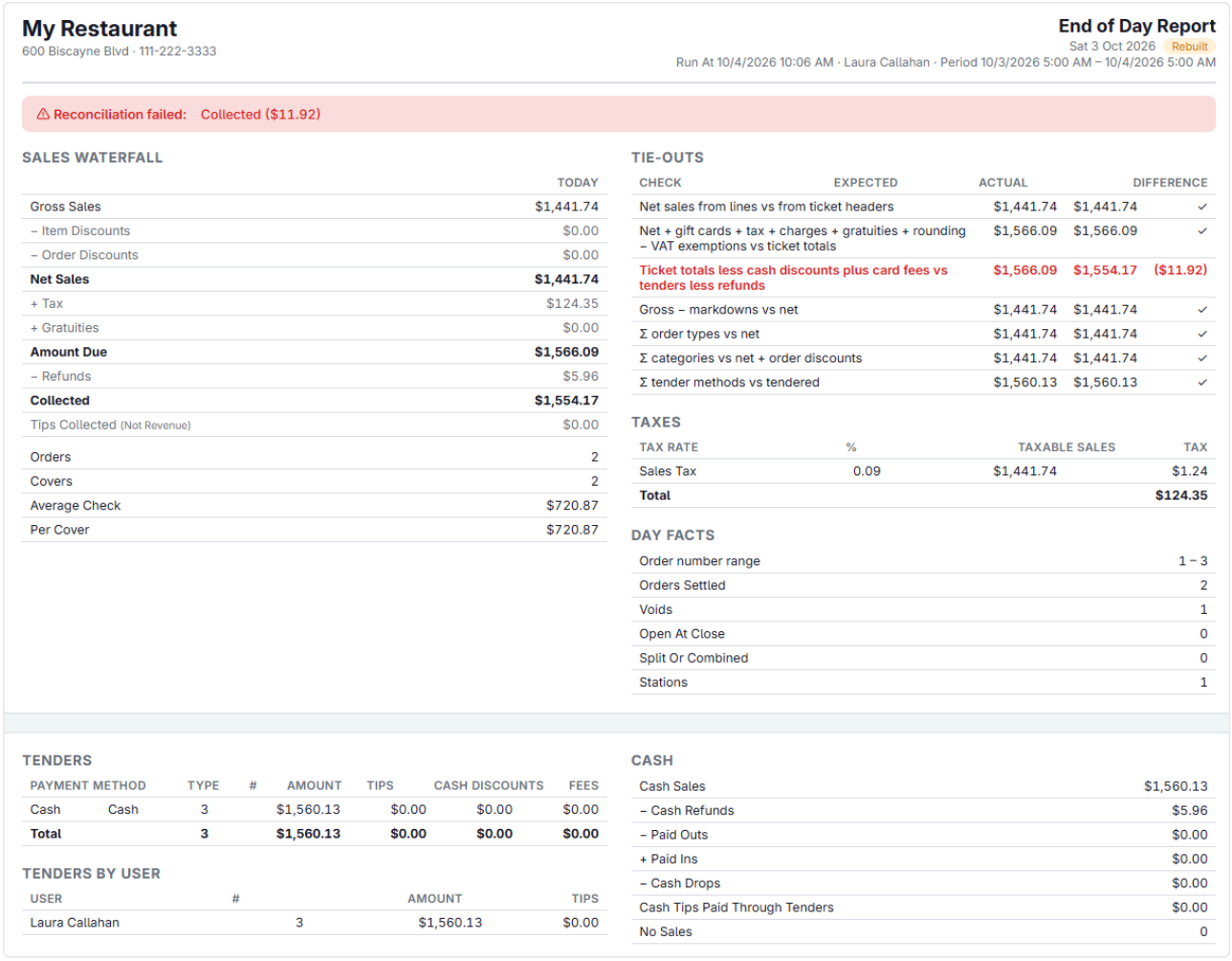
PDF opens the landscape document in a preview with **Download** and **Email**. **CSV** exports every table in the report as one file for a spreadsheet. **JSON** copies the report's raw data to the clipboard, for a support ticket. The same PDF is attached to the email the close sends automatically.



Today at a glance in the close email

The end-of-day close email starts with a short section above the report text (the PDF is unchanged):

- **Summary** — three to five sentences written by AI from the day's numbers: sales against the same day last week, labor percentage and anything that needs a look. Left out when AI is off for the store or its limit was reached.
- **Checks** — tie-outs that did not balance (with the amount off), orders still open at close, staff still clocked in, and drawers over or short by a dollar or more. When all is well it says everything balances.
- **Unusual activity** — employees whose voids, refunds, discounts, removed items or no-sales were at least twice their usual for a day like this (and worth at least $25, or three or more no-sales). "Usual" is the employee's own last 28 days scaled to the day's sales.



My Restaurant
600 Biscayne Blvd · 111-222-3333

End of Day Report
Sat 3 Oct 2026 Rebuilt
Run At 10/4/2026 10:06 AM · Laura Callahan · Period 10/3/2026 5:00 AM – 10/4/2026 5:00 AM

⚠ Reconciliation failed: Collected ($11.92)

SALES WATERFALL

	TODAY
Gross Sales	$1,441.74
– Item Discounts	$0.00
– Order Discounts	$0.00
Net Sales	**$1,441.74**
+ Tax	$124.35
+ Gratuities	$0.00
Amount Due	**$1,566.09**
– Refunds	$5.96
Collected	**$1,554.17**
Tips Collected (Not Revenue)	$0.00
Orders	2
Covers	2
Average Check	$720.87
Per Cover	$720.87

TIE-OUTS

CHECK	EXPECTED	ACTUAL	DIFFERENCE
Net sales from lines vs from ticket headers	$1,441.74	$1,441.74	✓
Net + gift cards + tax + charges + gratuities + rounding – VAT exemptions vs ticket totals	$1,566.09	$1,566.09	✓
Ticket totals less cash discounts plus card fees vs tenders less refunds	$1,566.09	$1,554.17	($11.92)
Gross – markdowns vs net	$1,441.74	$1,441.74	✓
Σ order types vs net	$1,441.74	$1,441.74	✓
Σ categories vs net + order discounts	$1,441.74	$1,441.74	✓
Σ tender methods vs tendered	$1,560.13	$1,560.13	✓

TAXES

TAX RATE	%	TAXABLE SALES	TAX
Sales Tax	0.09	$1,441.74	$1.24
Total			**$124.35**

DAY FACTS

Order number range	1 – 3
Orders Settled	2
Voids	1
Open At Close	0
Split Or Combined	0
Stations	1

TENDERS

PAYMENT METHOD	TYPE	#	AMOUNT	TIPS	CASH DISCOUNTS	FEES
Cash	Cash	3	$1,560.13	$0.00	$0.00	$0.00
Total		**3**	**$1,560.13**	**$0.00**	**$0.00**	**$0.00**

TENDERS BY USER

USER	#	AMOUNT	TIPS
Laura Callahan	3	$1,560.13	$0.00

CASH

Cash Sales	$1,560.13
– Cash Refunds	$5.96
– Paid Outs	$0.00
+ Paid Ins	$0.00
– Cash Drops	$0.00
Cash Tips Paid Through Tenders	$0.00
No Sales	0

Cover charges, kitchen notes and gift cards on the report

- A line the register makes rather than a menu item — a Cover charges, a surcharge, a delivery or takeout charge, a bottle deposit, a misc item — has no category or revenue center of its own, so category sales and revenue-center sales list it under its kind (*Cover Charges*, *Surcharges*…) instead of as Uncategorised, and item-type sales name it.
- Allergen flags and item instructions are kitchen notes, not sales: they do not count as items anywhere on the report.
- The receipt-printer slip gets a **Gift cards** block when anything moved — sold, loaded outside orders, redeemed on orders, cashed out — and a paid-out with no recipient or reason prints its note, so a Cashing out a gift card reads *Gift Card Cash Out •1234* rather than a blank line. A cash out is not a redemption: it is in the paid-outs and the gift-card ledger, never in *Gift cards redeemed*.

Taxes by rate

The taxes section breaks the day down by rate and component from the tax each line was saved with; rates show as percents. A row marked `*` includes tickets saved before lines carried their own tax (October 2026) — their share is estimated as taxable × rate. For a filing period use Filing your sales tax return rather than adding up daily reports.

Related: End-of-shift and end-of-day logs, Running end of day.

The log book in the close e-mail

The end-of-day close e-mail ends with the manager log book:

- the entries written for the day that was closed, each with its category, its author and the time;
- every follow-up that is still open, whatever day it was written, with that day shown.

With no entries and no open follow-ups, the section is left out. See Manager log book.

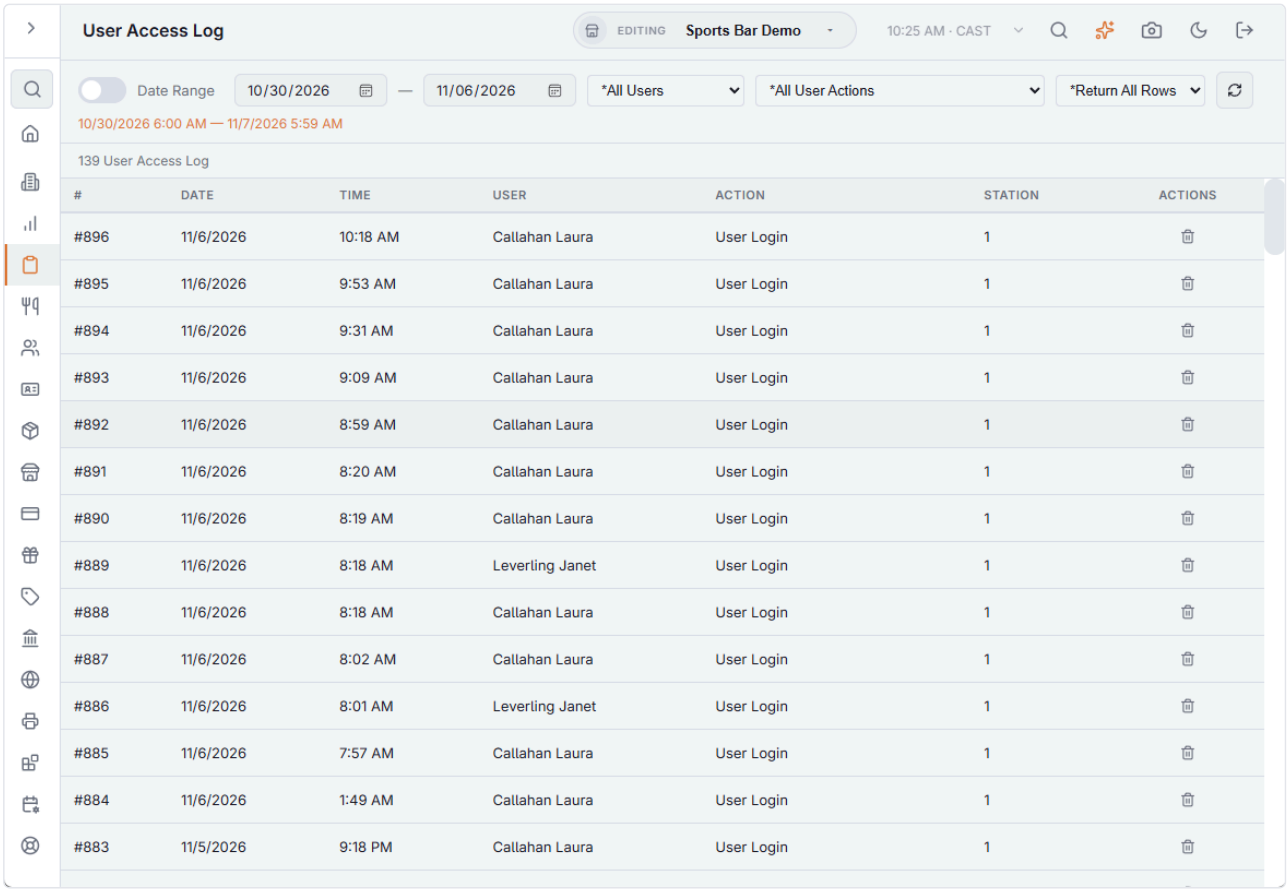
User access and activity log

Analytics & Activity › Activity

View online ↗

Register sign-ins, manager approvals and refusals, and device changes, with who did what, when and at which station.

Back Office › Activity › Audit › User Access Log lists the actions the system records against an employee: register sign-ins, manager approvals and refusals, and changes to the store's devices. Use it to see who signed in, when and at which station, and which manager approved what.



#	DATE	TIME	USER	ACTION	STATION	ACTIONS
#896	11/6/2026	10:18 AM	Callahan Laura	User Login	1	
#895	11/6/2026	9:53 AM	Callahan Laura	User Login	1	
#894	11/6/2026	9:31 AM	Callahan Laura	User Login	1	
#893	11/6/2026	9:09 AM	Callahan Laura	User Login	1	
#892	11/6/2026	8:59 AM	Callahan Laura	User Login	1	
#891	11/6/2026	8:20 AM	Callahan Laura	User Login	1	
#890	11/6/2026	8:19 AM	Callahan Laura	User Login	1	
#889	11/6/2026	8:18 AM	Leverling Janet	User Login	1	
#888	11/6/2026	8:18 AM	Callahan Laura	User Login	1	
#887	11/6/2026	8:02 AM	Callahan Laura	User Login	1	
#886	11/6/2026	8:01 AM	Leverling Janet	User Login	1	
#885	11/6/2026	7:57 AM	Callahan Laura	User Login	1	
#884	11/6/2026	1:49 AM	Callahan Laura	User Login	1	
#883	11/5/2026	9:18 PM	Callahan Laura	User Login	1	

What it records

- **Sign-ins at the register** — each successful PIN sign-in, as **User Login**, with the station it happened at.
- **Manager approvals** — when a manager approves an action someone else's job does not allow, the entry is written under the *manager's* name and named after the action: **Void Order**, **Comp**, **Split Order**, **Transfer Order**, a discount, a price change, a refund, a time clock exception, and so on. An action done by someone whose job already allows it is not recorded here.
- **Refused approvals** — **Manager Override Denied**, under the person who entered their PIN or password but could not approve: their job lacks the right, it was their own action, or the store requires the approving manager to be clocked in and they were not.
- **Devices** — a device registered, authorized with an activation code, deactivated, renamed or given a new role. An activation is written under the manager who created the code; the others under the person who made the change in Back Office.

> Failed sign-ins, locked accounts and website or app sign-ins are not here. They are in the The Security Log.

Choosing what to list

- **Current Business Day / Date Range** — the switch on the left. On, the list covers everything since the last End of Day. Off, two dates appear; the range follows the store's business day, so a day runs from the business day start time to the same time the next day.
- **All Users** — or one employee.

- **All User Actions** — or one action. The list offers only the actions the system records: **User Login**, the manager approvals (including each time clock exception, such as **Override: Early Clock In**), **Manager Override Granted**, **Manager Override Denied** and the five device changes.
- **Return All Rows**, or **Top** 100, 500, 1000 or 2000 — limits how many entries come back.

Changing the dates, the employee, the action or the row limit does not reload the list. Click the refresh button at the end of the toolbar (**Update Results**) to apply them. The line under the toolbar shows the period the list covers.

The list

Column	Shows
#	The entry's number.
Date and **Time**	When it happened, in the store's time.
User	The employee the entry is recorded against. Empty when the change was made by a Back Office account that is not an employee.
Action	What happened.
Station	The station number of the register or device involved.

The newest entries come first. The count above the list shows how many entries it holds.

The trash button at the end of a row (**Delete**) asks you to confirm deleting that entry (**This Cannot Be Undone.**). A deleted entry no longer shows in the list. Deleting needs the **Void Records**, **Delete Records** or **Manager Screen** permission. Without one, the page shows *The Entry Could Not Be Deleted*.

Related logs

- Permission overrides and override log — each approval with both names: who needed it and who approved it, and which permission.
- The Security Log — sign-ins, accounts and devices across the registers, Back Office, the website, the apps and online ordering.

> The log is only as reliable as the PINs behind it. When staff share a PIN, every entry under that name could be any of them.

The Security Log

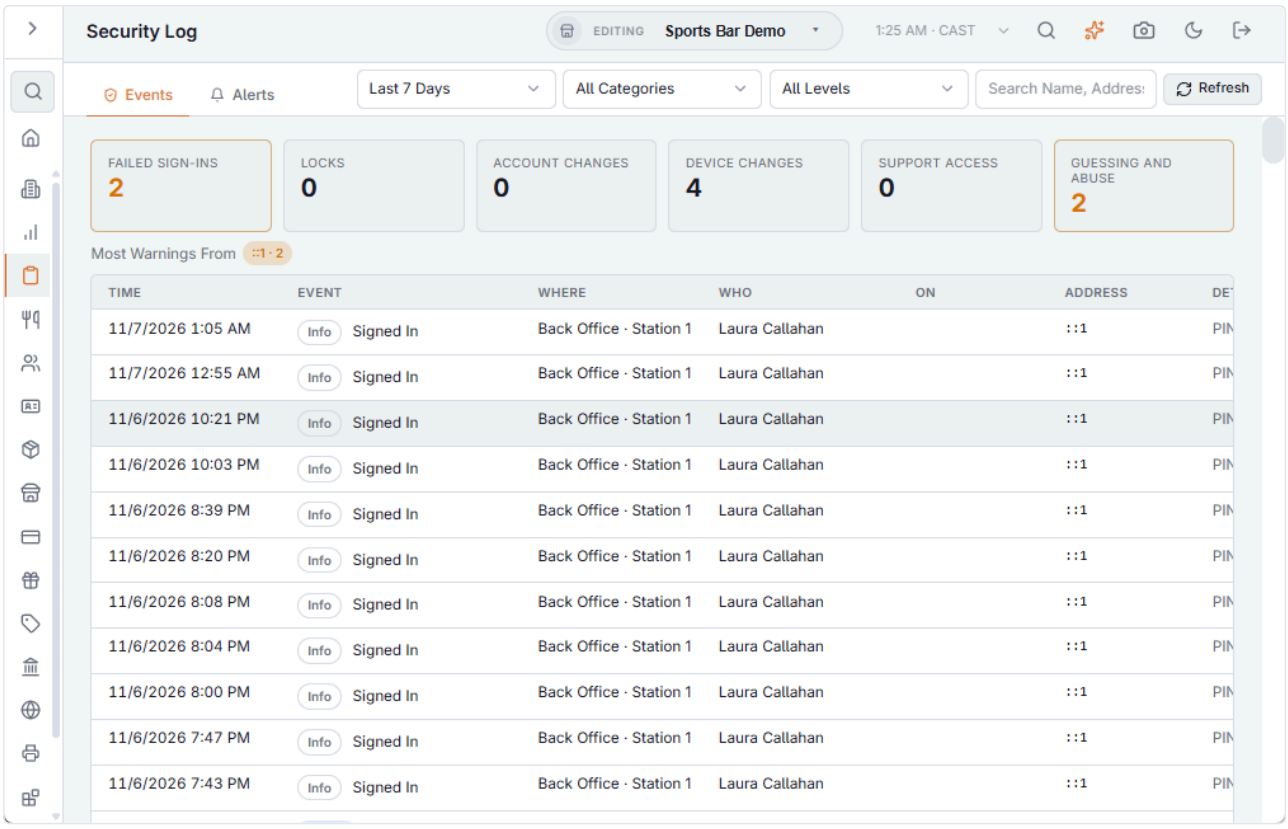
Analytics & Activity › Activity

View online ↗

Every sign-in, account change, device change and suspicious attempt across the registers, Back Office, the website, the apps and online ordering, in one list.

Back Office › Activity › Audit › Security Log lists what happened to sign-ins, accounts and devices across the business: the registers, the call center, Back Office (in the app and on the web), staff phones, the AmigoPOS website, the apps and online ordering. Use it to answer "who signed in, from where", "was that account locked" or "is someone trying to guess something".

Only managers can open it.



What it records

- **Sign-In** — successful and failed sign-ins (PIN, password, two-factor code), accounts locked after failures, tries while locked, locks lifted, sign-ins with an account name that does not exist, and sign-ins with a recovery code.
- **Accounts** — password changed or reset, sign-in email changed, two-factor sign-in turned on or off, new recovery codes, accounts created, deleted, locked or unlocked, account access changed and passwords set by an administrator.
- **Employees And Jobs** — employees added, changed, deleted or restored; a PIN, password, card or iButton changed (that it changed, never the value); jobs and their rights changed.
- **Overrides And Support** — manager overrides approved or refused, and AmigoPOS support working in your data.
- **Devices** — devices activated, deactivated or given a new role, wrong activation codes, and a device asking for something its role does not allow.
- **Cards And Codes** — wrong gift card PINs, gift cards locked, unknown card numbers and unknown promo codes typed online.
- **Abuse** and **Payments** — too many requests from one address, refused online payment confirmations and declined online card payments.

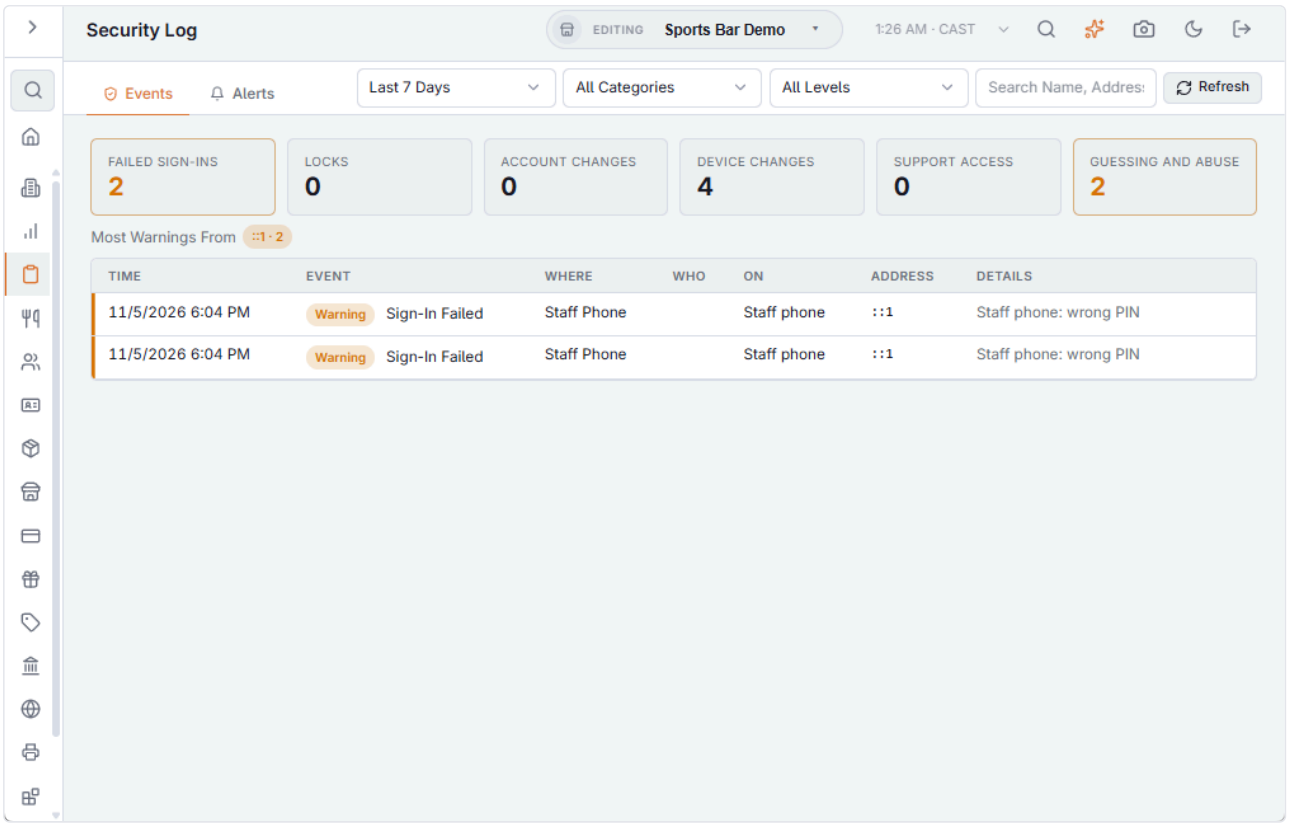
> The log never holds PINs, passwords or full card numbers. Emails, phone numbers and cards are shortened (m***@gmail.com, ***0123, card ***1234). Events are kept for a year.

Reading the page

Across the top:

- The range: **Last 24 Hours**, **Last 7 Days**, **Last 30 Days** or **Last 90 Days**.
- **All Categories** or one category, and **All Levels**, **Notices And Above**, **Warnings And Above** or **Alerts Only**.
- **Search Name, Address Or Details**, and **Refresh**.

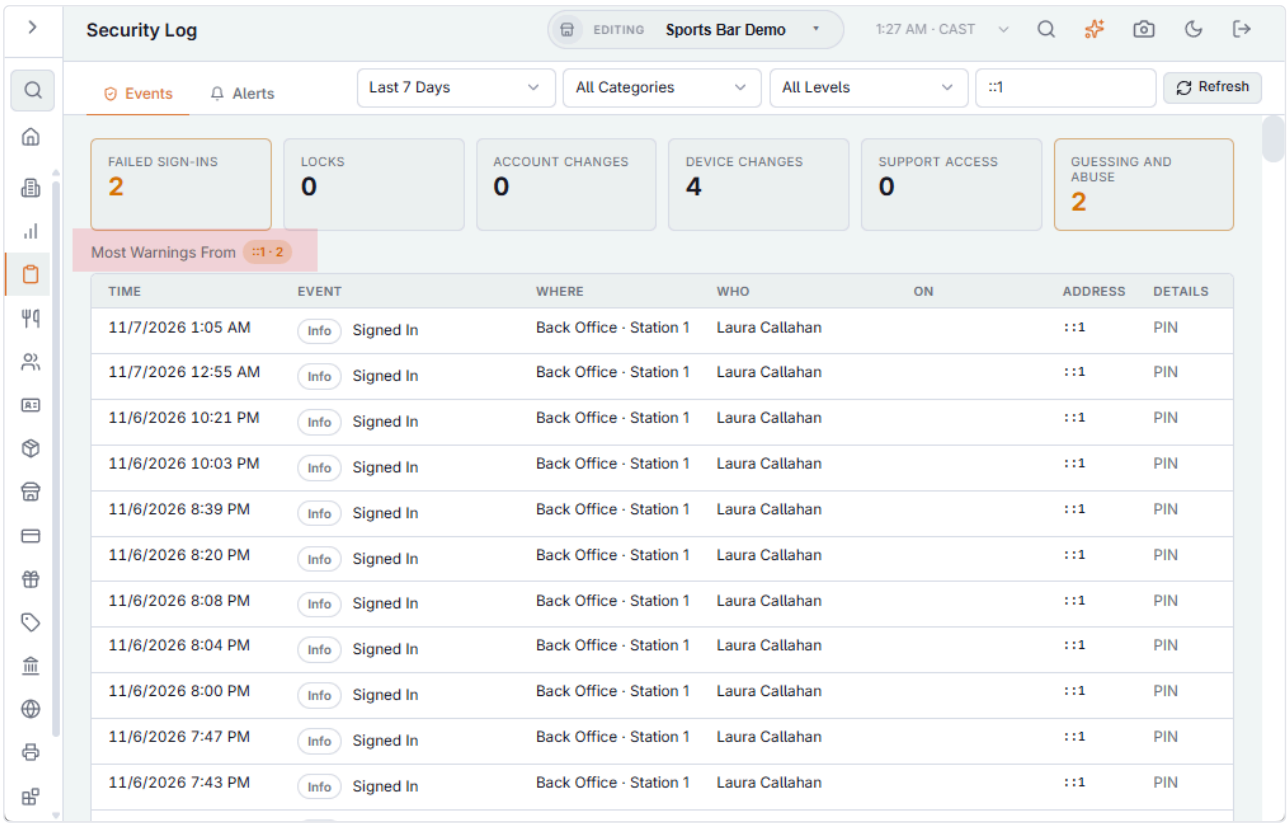
The tiles count the range: **Failed Sign-Ins**, **Locks**, **Account Changes**, **Device Changes**, **Support Access** and **Guessing And Abuse**. Click a tile to list only those events; change any filter at the top to see everything again.



Each row shows:

- **Time** — in the store's time.
- **Event** and its level: Info, Notice, Warning or Alert.
- **Where** — Register (with the station), Call Center, Back Office, Staff Phone, App Sign-In, Website, Online Ordering or Server.
- **Who** did it, and **On** whom or what (the employee, account, device or card).
- **Address** — the internet address it came from.
- **Details**.

Most Warnings From lists the addresses behind the most warnings in the range. Click one to search for its events.



Which stores you see

A manager who works in one store sees that store's events, plus the business's account events (website and app accounts belong to the business, not to a store). A manager with access to all stores sees every store.

What to look for

- **Many failed sign-ins from one address**, or for many different names — someone guessing. A lock that follows is the system stopping it.
- **A sign-in, password change or two-factor change nobody remembers** — change that account's password and sign it out everywhere (Signing out everywhere).
- **A device activated that you did not set up** — deactivate it in Registered Devices.
- **A burst of declined online card payments** — someone may be testing stolen cards on your online ordering.

The most important of these also reach managers as an alert, without opening the page: Security alerts.

Related

- Sign-in lockout (too many wrong PINs)
- User access and activity log
- Account security emails

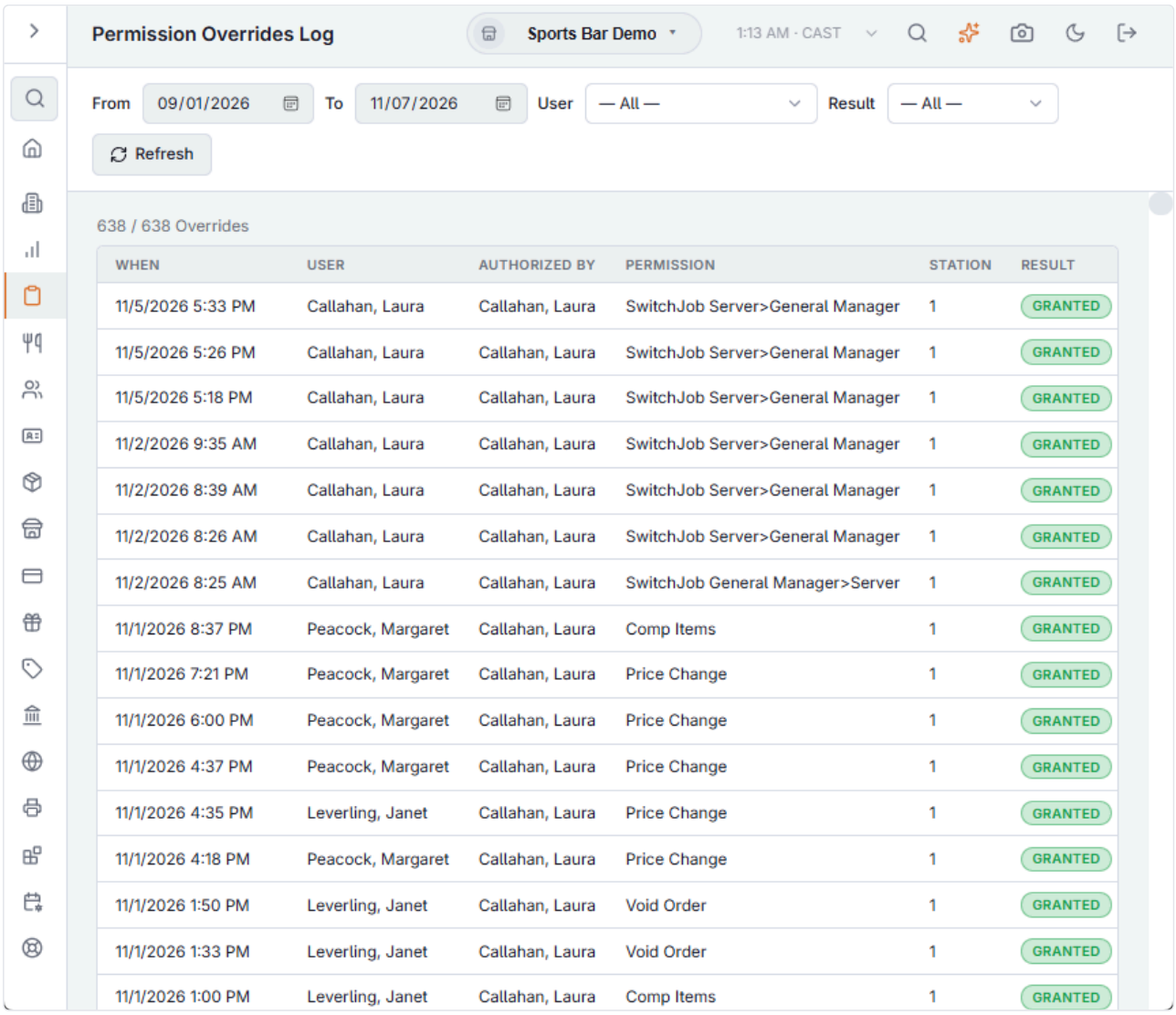
Permission overrides and override log

Analytics & Activity › Activity

View online ↗

On-the-spot manager approvals and the log of who approved what.

When someone tries an action their job does not allow, the register asks for a **manager override**: a manager approves that one action with their own PIN, without the employee signing out. **Back Office › Activity › Audit › Permission Overrides Log** is the record of those approvals, and of the ones that were refused.



The override prompt

The prompt names what the employee is not allowed to do. A manager enters their PIN or password and only that action goes ahead; the employee stays signed in. To approve, the manager's job needs **Override** and the permission for the action itself. A manager cannot approve their own action, and when the store requires it, the manager must be clocked in. See Manager override prompts.

What is recorded

- **Granted** — the manager approved the action.
- **Denied** — a manager's PIN or password was recognised but they could not approve: their job lacks the right, it was their own action, or they were not clocked in when the store requires it.

A wrong PIN, or closing the prompt without approving, is not recorded.

Time clock approvals are recorded here too (clocking in early or without a shift, for example), along with:

- **Manager Clock-Out (Phone)** — a manager closed someone's forgotten punch from the staff site. The employee is the user and the manager is the one who authorized it. See Fixing punches from your phone (managers).
- Punches a register made while offline — the employee is both the user and the one who authorized it, because no one was asked. See Clocking in and out while offline.

Filtering the log

- **From** and **To** — calendar days in the store's time; the last 7 days to start. The list reloads when you change a date.
- **User** — one employee. It shows entries where they are either the employee or the manager who authorized it.

- **Result** — **All**, **Granted** or **Denied**.
- **Refresh** — loads the range again.

The line above the list shows how many entries match the filters out of all entries in the range, for example **12 / 40 Overrides**.

The list

Newest first.

Column	Shows
When	Date and time of the approval or refusal.
User	The employee who needed the approval.
Authorized by	The manager who entered their PIN or password.
Permission	What was needed, by the permission's name in the job editor (for example **Void Order** or **Refund**). Approvals that are not a permission show their own name: the time clock exceptions (such as **Early Clock In** or **Unscheduled Shift**), **Offline Clock Punch Applied**, **Offline Clock Punch Not Applied** with the reason in brackets, **Drawer Variance Over Maximum** and **Exclude Cover Charge**.
Station	The station number of the register.
Result	**Granted** or **Denied**.

In **User** and **Authorized by**, — means no one is recorded, and # with a short code means the person is not in the employee list.

The log is read-only. End of Day does not clear it: earlier days stay in the list.

Reading it

- A permission approved many times a day for the same job may belong on that job. Change it in Jobs, roles, and permissions.
- Repeated **Denied** entries for the same manager usually mean their job is missing the right they are being asked to approve.

The approving manager's side of each approval is also listed in the User access and activity log.

Message log

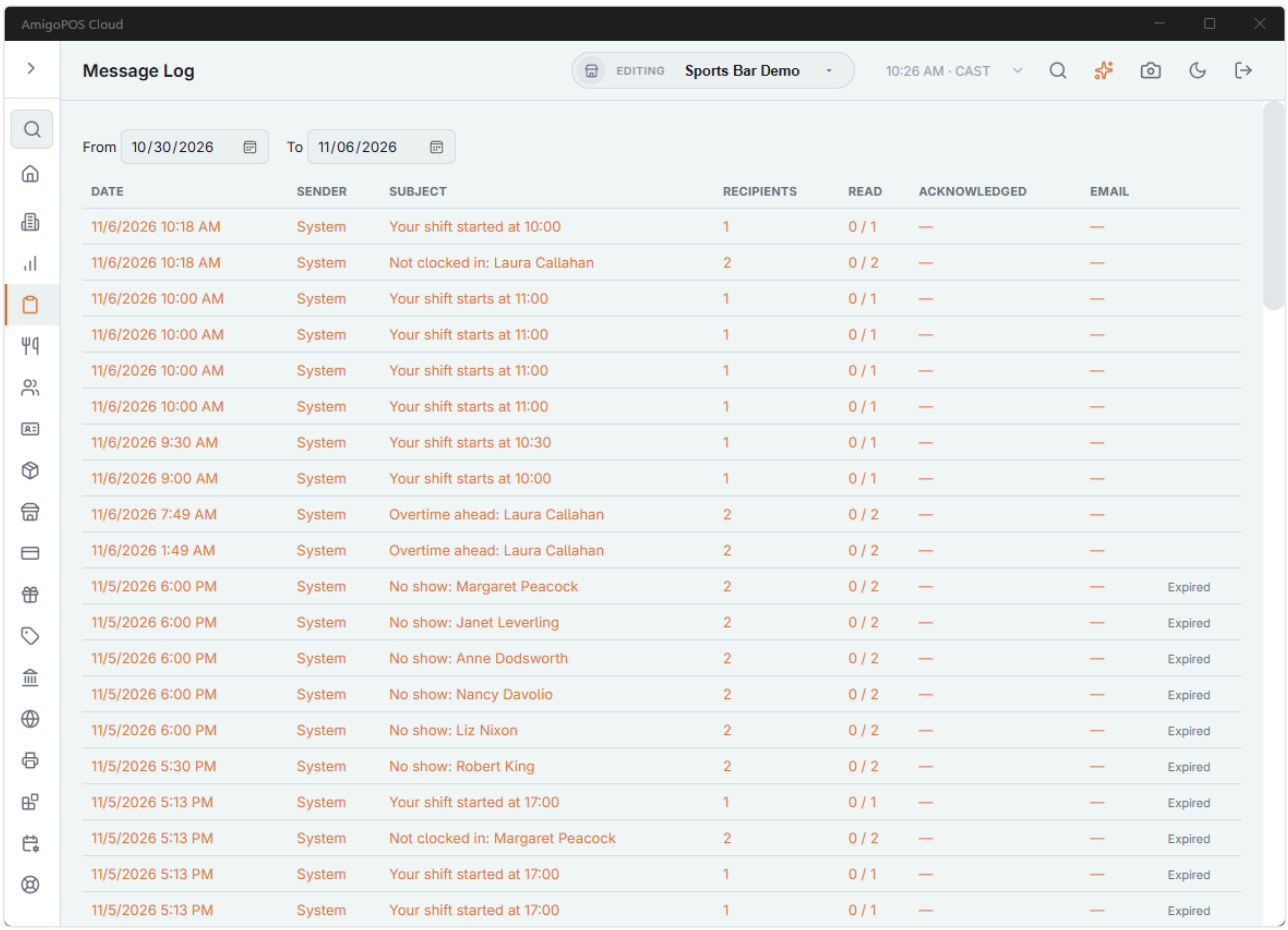
Analytics & Activity › Activity

View online ↗

Every staff message sent in the store, with how many people read it, confirmed it and got it by email.

Back Office › Activity › Audit › Message Log lists every staff message sent in the store, by anyone, with how many people have read it, acknowledged it and been emailed it. Use it to check that an announcement reached the team.

The page appears for employees whose job has the **Message Log** permission.



Choosing the dates

From and **To** are calendar days in the store's time; the last 7 days to start. The list reloads when you change a date. Newest messages come first.

The list

Column	Shows
Date	When the message was sent.
Sender	Who sent it. Messages the system sends on its own, such as security alerts, show **System** instead of a person.
Subject	The message's subject.
Recipients	How many people it was sent to.
Read	How many of them have read it, for example **3 / 5**.
Acknowledged	How many confirmed it, when the message asks for acknowledgement. **—** when it does not.
Email	For a message also sent by email: how many emails went out (✓) and, after a dot, how many failed (✕). **—** when it was not emailed.
(last)	**Expired** once the message is past its expiry time.

- Quick alerts are shown in the accent color.
- Replies are listed as rows of their own.
- Deleted messages are not listed.

The log is read-only. To see who exactly has read a message, edit a scheduled one or expire one, open it from **Back Office › Employees › Communication & Audit › Messages**: see Messages.

> Messages older than 90 days are removed when End of Day runs.

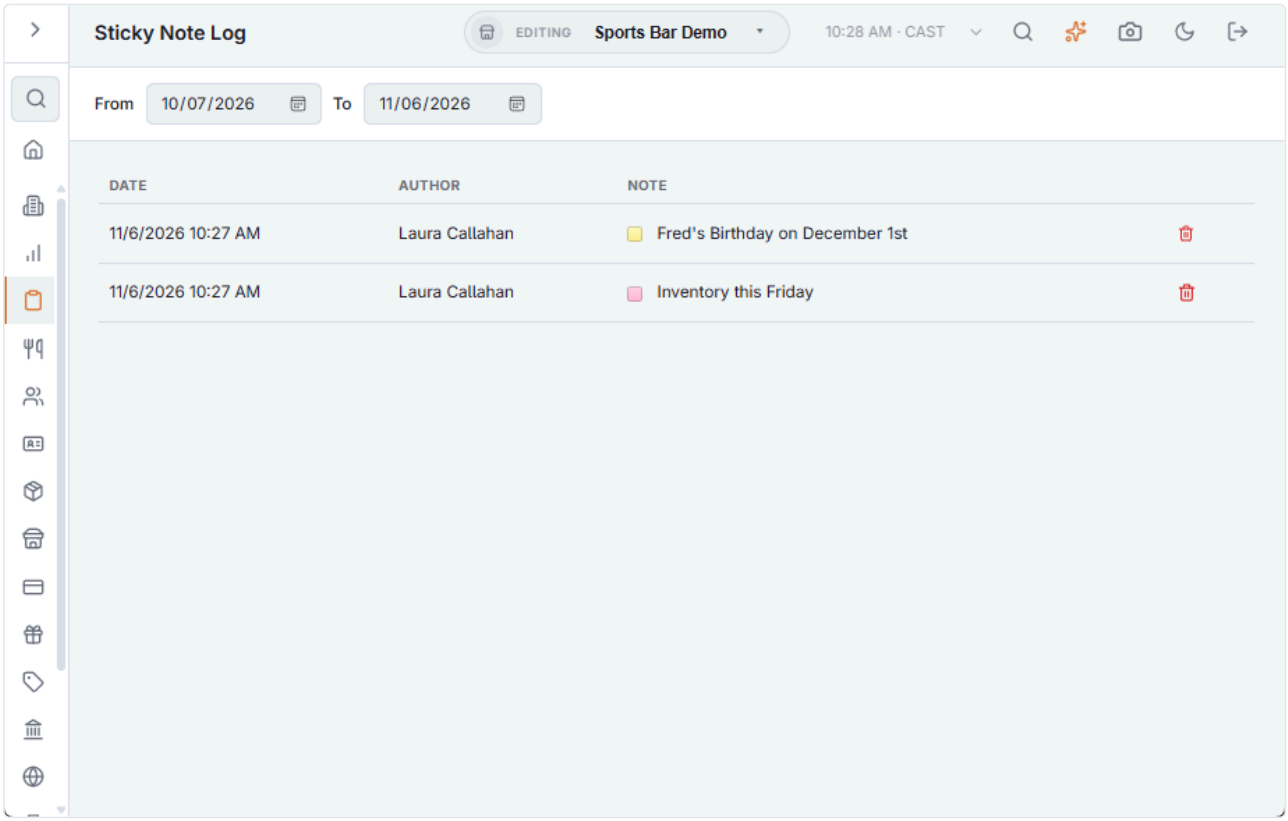
Sticky note log

View online ↗

The public sticky notes posted on the registers, including deleted ones, and how to remove one from Back Office.

Back Office › Activity › Audit › Sticky Note Log lists the public sticky notes posted on the store's registers, including the ones that have since been deleted. Use it to see who posted what, and to take a note off the board from Back Office.

The page appears for employees whose job has the **Message Log** permission.



Choosing the dates

From and **To** are calendar days in the store's time; the last 30 days to start. The list reloads when you change a date. It shows the notes created or last edited in that range, newest first. With none, the page shows **No Notes In This Date Range**.

The list

Column	Shows
Date	When the note was posted, or last edited.
Author	Who posted it.
Note	The note's text as it reads now.
(status)	**Deleted** when the note has been taken off the board. Deleted rows are faded.

- Private notes never appear here. A public note that its author later makes private drops out of the log.
- Editing a note replaces its text. The log shows the current text only, not earlier versions.

Deleting a note

A note still on the board has a trash button at the end of its row. It asks **Delete this note? It will be removed from the board and login screen.** Confirm, and the note is taken off the board and the sign-in screen; it stays in the log marked **Deleted**. If the note cannot be deleted, **The Entry Could Not Be Deleted** appears.

Only the note's author, or someone whose job has **Manager Screen**, can delete it.

For how staff post and use the notes at the register, see Sticky notes (shift notes board).

CHAPTER 13

AI Reports

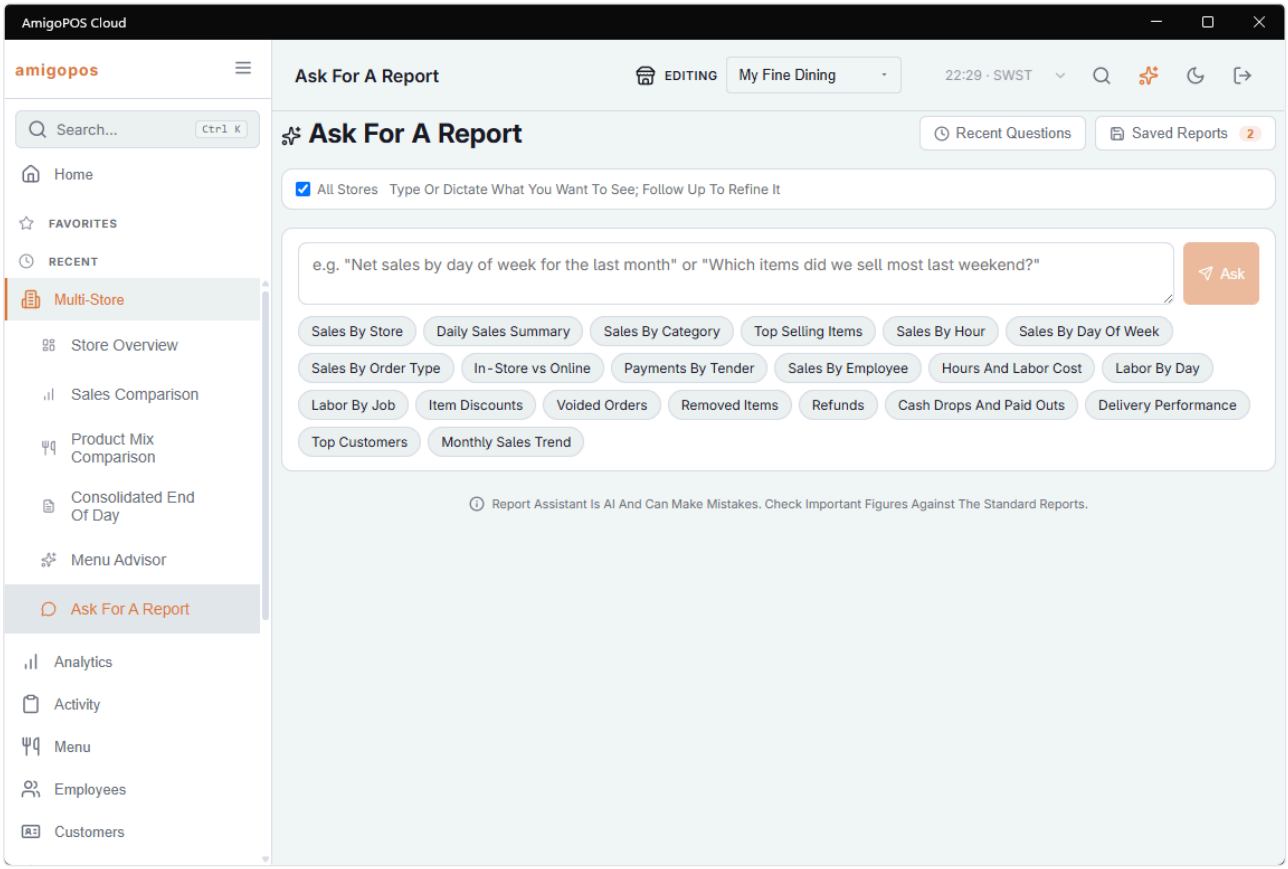
Ask For A Report

AI Reports

View online ↗

Ask a question about your own business in plain words and get back a real report you can export, save or schedule.

Back Office › Analytics › Ask For A Report answers a question about your own business in plain words, and gives back a real report: headline figures, a chart and the table behind them. It is the second entry under Analytics, after Overview. The page is hidden on plans that don't include AI Reports.



For employees with access to all stores of a business with more than one store, the same page also appears under **Back Office › Multi-Store › Ask For A Report**, where it starts with **All Stores** ticked. See Reports across all stores.

How to start

1. Type a question, or use the microphone where dictation is available on your device.
2. Send it. The report arrives in a few seconds.
3. Ask the next question. Each answer stays on the page until you dismiss it, or select **Clear**.

Starters

The page opens with a set of ready-made questions: daily sales, sales by category, by item, by hour, by weekday, by order type, by employee, tenders, labour, discounts, voids, removed items, refunds, cash drops and pay-outs, deliveries, top customers and the monthly trend. They are the fastest way to see what the page can do. **Hide Examples** puts them away and **Show Examples** brings them back.

> Treat a starter as a first draft: run it, then say what you want changed — "only last month", "dine-in only", "by weekday instead".

What it does not do

It only reads. It cannot change the menu, refund an order, edit a shift or alter a figure — it builds a report and runs it against what is already there.

Call center

Two datasets for businesses with a call center. **Call Center Calls**: calls, how many became orders, abandoned, conversion and average handle time — by agent, outcome, order type, store, day and hour. A call counts for the store its order went to; abandoned calls only show with “all stores”. **Call Center Orders**: orders, sales, average minutes to acknowledge, not acknowledged, held waiting for a pay link, changed after sending and voided — by agent, order type, customer, status, store, day and hour. Two starters come with them: Call Center Orders by day, and Calls By Agent.

Asking a good question

AI Reports

View online ↗

Period, measure, grouping and filter: the four things that decide the report you get back.

The clearer the question, the better the report. Four things decide the answer: the period, what is being measured, how it is grouped, and what is filtered out.

Say the period

"Last month", "this week", "the last 30 days", "January", "yesterday" all work. Without a period you get a sensible default, and the report states which one it used.

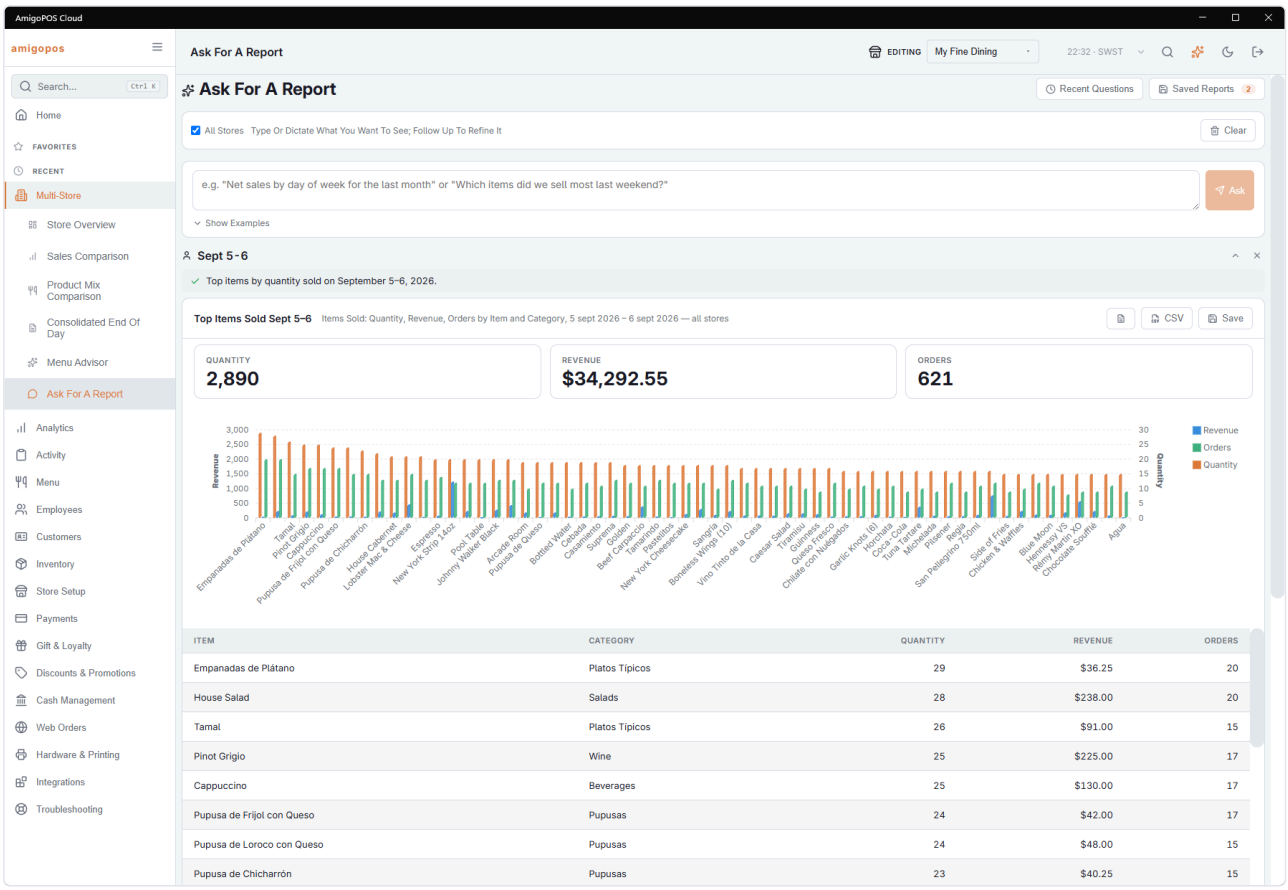
Say the grouping

"By employee", "by category", "by hour", "by weekday", "by order type", "by day". Grouping is what turns a single number into a report worth looking at.

Filter

"Takeaway only", "excluding voided orders", "for the bar categories", "orders over 50". A filter narrows the report without changing what is being measured.

> A pattern worth copying: *net sales by category by weekday for the last 8 weeks, dine-in only.*



Follow-ups

Ask the next question against the last one — "same thing for last month", "only the top ten", "add labour cost". Each turn produces its own report, so they sit on the page side by side for comparison.

When it asks you something back

An ambiguous question gets a short clarifying question instead of a wrong report: average per order or per guest, gross or net, which of two similarly named categories. Answer in a few words and the report follows.

What you can ask about

AI Reports

View online ↗

The subjects available to the report assistant, and the two areas it cannot cover yet.

Questions are answered from a fixed list of subjects. Anything inside them can be measured, grouped and filtered; anything outside them is refused plainly rather than guessed at.

What is covered

Subject	Typical questions
Sales	Net sales, orders, guests, average order, by any grouping; loyalty points earned and redeemed
Items	Quantity and revenue by item, category, size or day part
Modifiers	Which options are chosen, how often, and what they add to the check
Tenders	Cash, card and other payment types, and tips
Labour	Hours and cost by employee, job or day
Discounts, voids, removed items, refunds	How much, how often, by whom, on what

Subject	Typical questions
Cash activity	Drops, pay-outs, no-sales and drawer variance
Deliveries	Orders, drivers, times and areas
Inventory	Usage, goods received and adjustments
Transfers	Stock moved between stores, in either direction, by item, store or date
Reservations	Bookings, covers and no-shows

Gift card activity and the names of order-level discounts are not available to the report assistant yet. Both have their own screens elsewhere in Back Office.

If your subject is not there

Ask anyway. If it cannot be answered you are told plainly, and offered the chance to have it added to a future release.

You do not need the words used above. Ask in your own words — "how much did we throw away on comps last week" lands on discounts without you naming the subject.

More you can ask about

- **Tips** — tips against sales per check, by server, order type, table or hour.
- **Table turns** — dine-in turns, covers and average minutes at the table, by table, area, server or party size.
- **Kitchen ticket times** — average and longest minutes from the kitchen display, and the share of late tickets, by station or order type.
- **Gift card sales** — completed gift card sales and reloads, by kind, employee or station.
- **Customers** — orders by known customers: new against returning, customer type, and who opted in to offers.
- **AI changes** — every change the assistant made. See The AI change log.

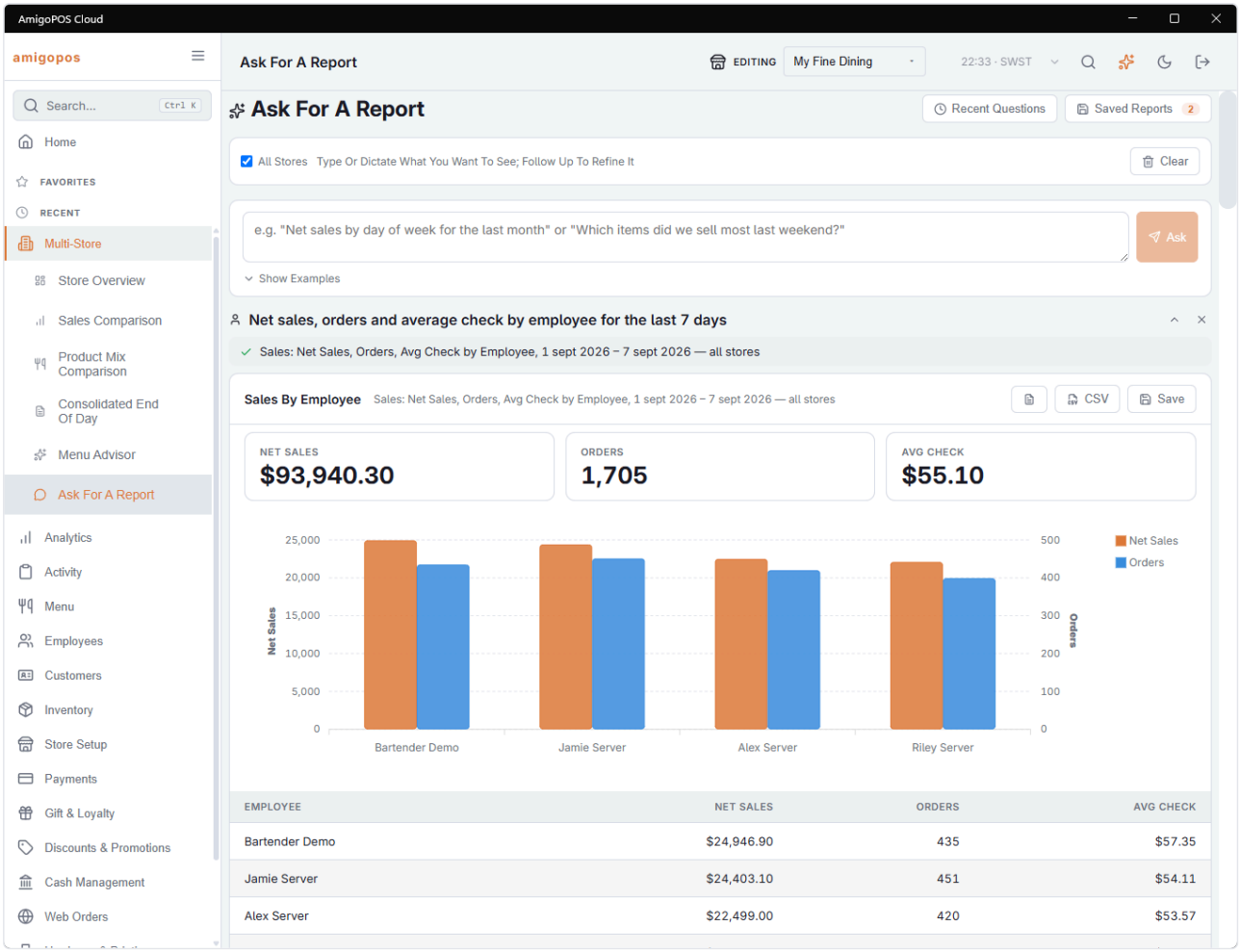
Reading the answer

AI Reports

View online ↗

The headline figures, the chart, the table, and the report definition that shows exactly what was run.

An answer has four parts: a sentence in plain words, the headline figures, a chart and the table behind them.



The figures

The cards at the top carry the totals for the period, each with its change against the period immediately before it, so a number always arrives with something to compare it to.

The chart

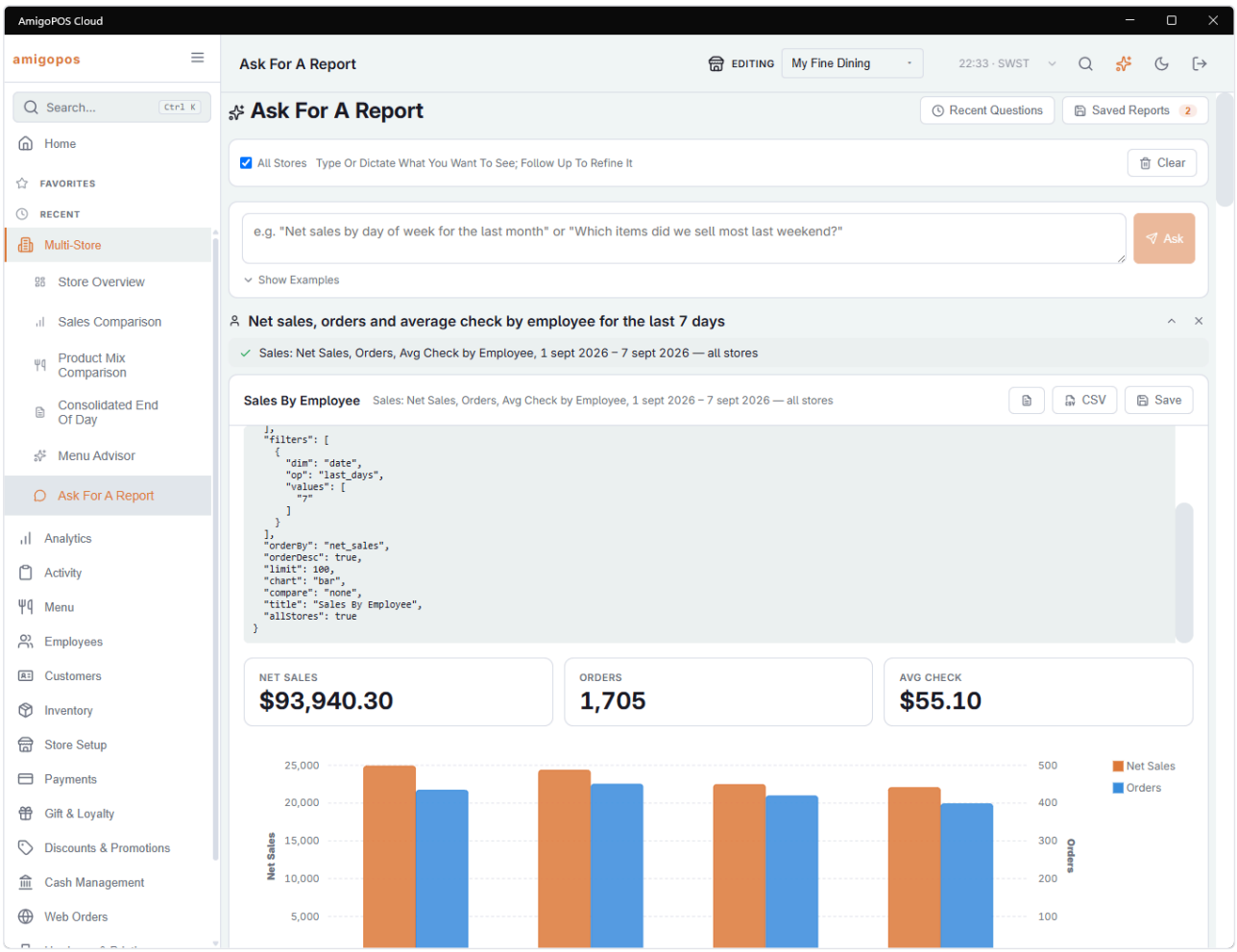
Charts are chosen to fit the question: a line for anything over time, bars for comparisons, a pie for shares of a total with the smallest gathered as Other. Where two different kinds of measure appear together — money and counts, say — each gets its own axis.

The table

Every row behind the chart, with totals. Export it as CSV to carry on in a spreadsheet.

Checking what it actually did

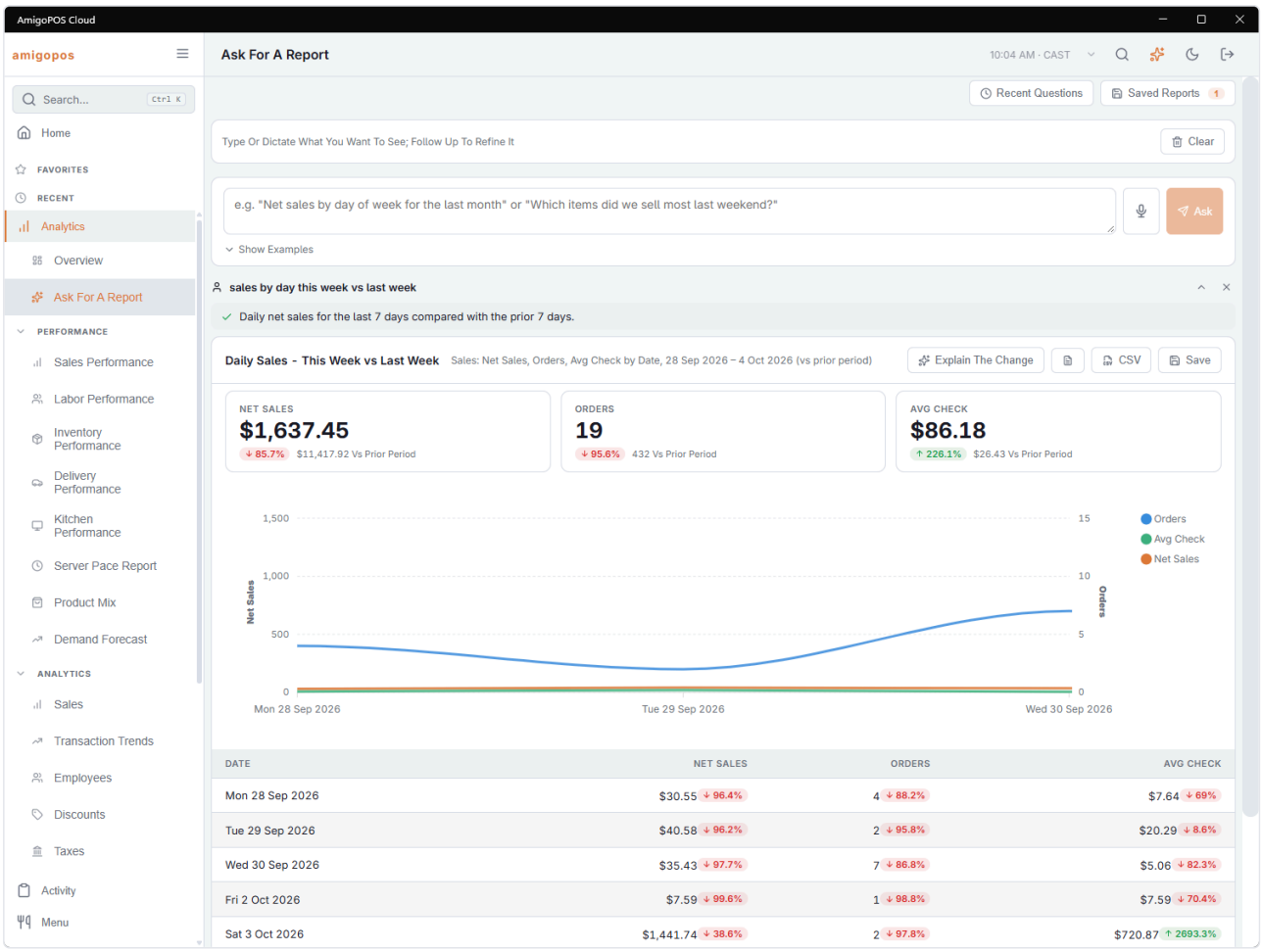
Show report definition opens the exact recipe used: the subject, the period, the grouping, the filters and the sort.



> If a figure surprises you, read the definition before doubting the number. Nine times out of ten the period or the filter is not the one you had in mind.

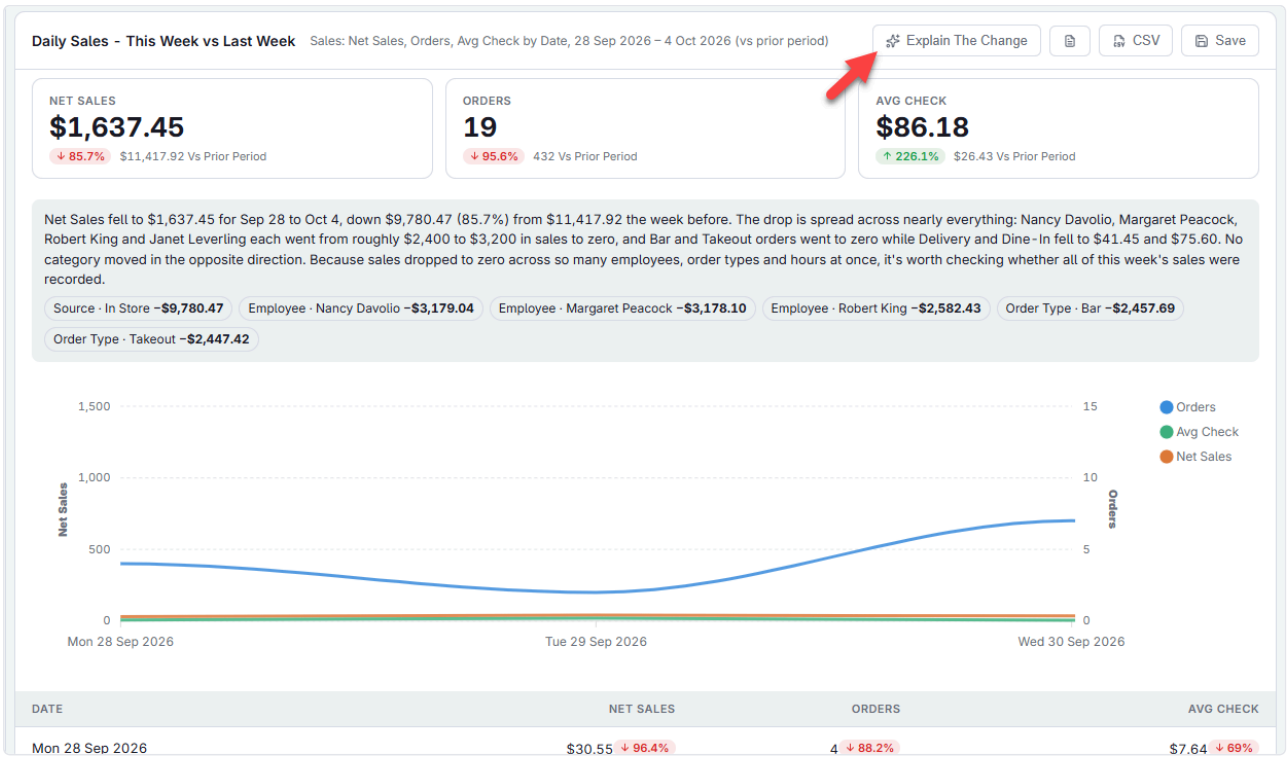
Comparing, drilling down and explaining

When a report compares two periods, every row shows a small percent-change badge next to each figure, so you can see which rows moved without reading two tables. A downloaded CSV gets the earlier period’s columns too.



Click a row to drill down one level: a month opens its weeks, a week its days, a day its hours, a category its items. Each drill-down is a new answer under the first one, instantly and without using an AI action.

Explain The Change writes two to four sentences on why the main figure moved, worked out from the numbers themselves — the totals for both periods and the items, employees, order types or hours that changed most, which appear as chips under the text.



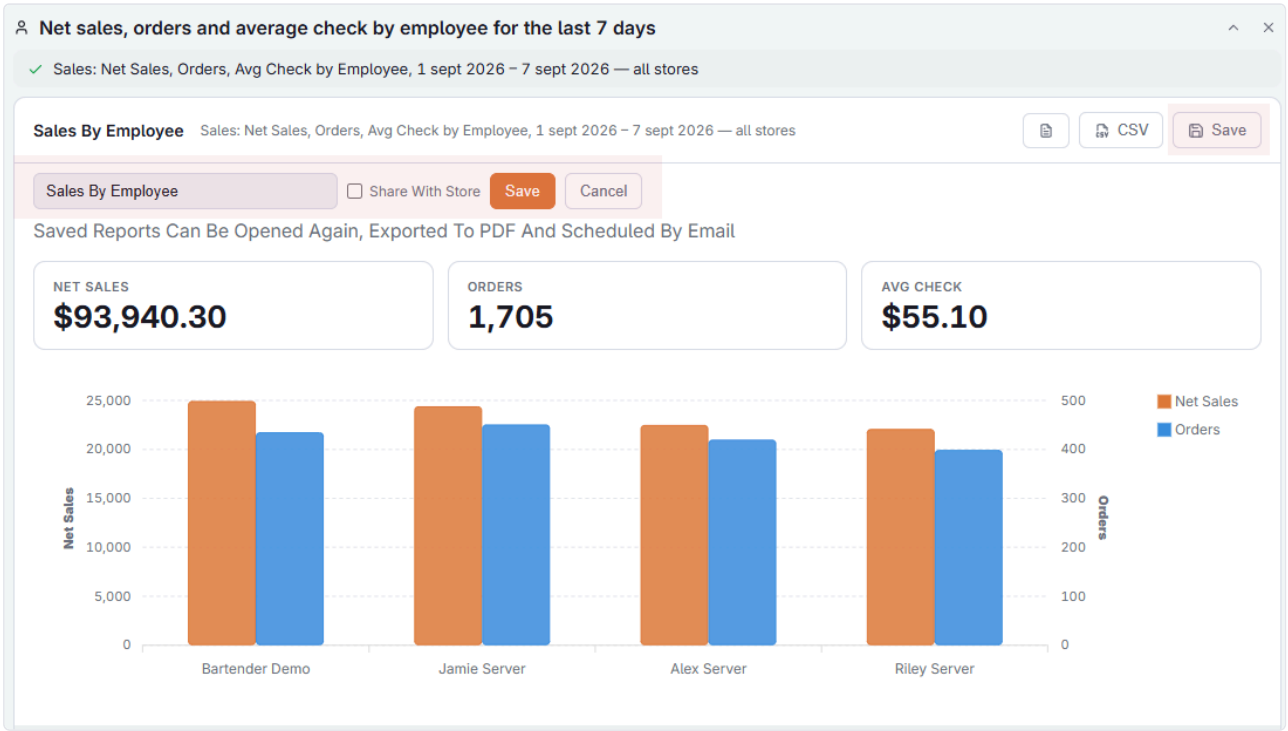
Saving, sharing and pinning reports

AI Reports

View online ↗

Keeping a report you want again, choosing who sees it, and putting it on the Back Office home page.

A report worth running twice is worth saving. **Save** keeps the definition, not the figures, so a saved report always runs fresh.



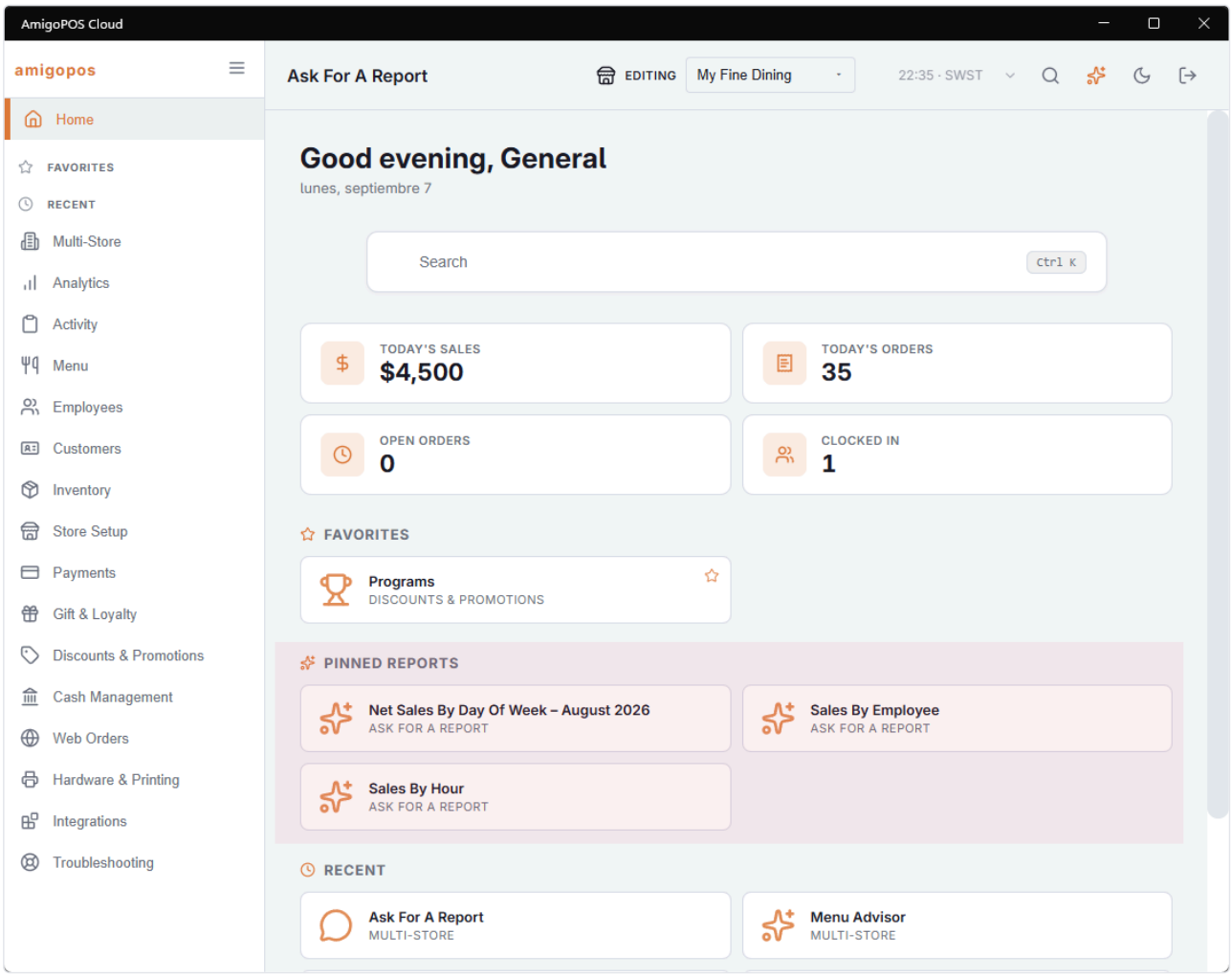
Private or shared

- **Private** — visible only to you. This is the default.
- **Shared with the store** — everyone with report access sees it in the Saved Reports panel.

A shared report can be removed by whoever created it, or by a manager with all-store access.

Pinning to the home page

Pin a saved report and it appears as a tile on the Back Office home page, one tap from the figures you look at every morning.



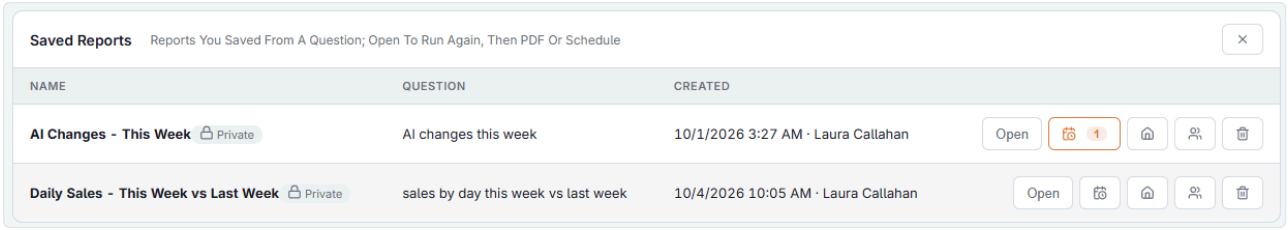
A saved report keeps the period as you asked for it. A relative period such as last week moves with the calendar; a fixed date range stays where you put it.

Running one again

Open it from the Saved Reports panel or from its tile. It runs from scratch, so the figures are current every time.

Live tiles on the home page

A pinned report now shows a live headline on its tile on the Back Office home page — its first figure with the change against the previous period — refreshed every five minutes. Up to eight reports can be pinned.



PDF and scheduled email

AI Reports

View online ↗

Producing a saved report as a PDF, and having it arrive by email on a schedule.

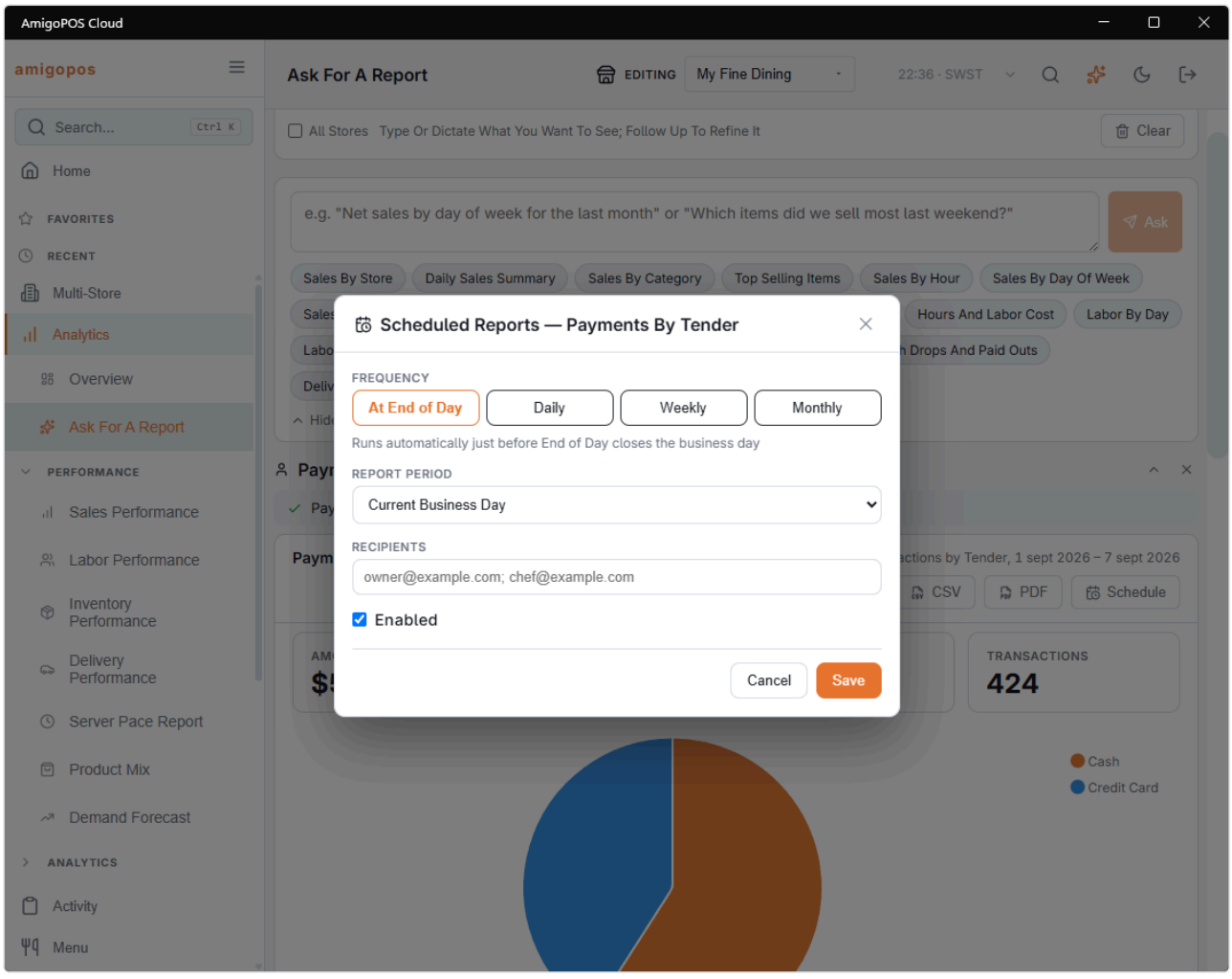
Saved reports produce PDFs and can be emailed on a schedule, exactly like the built-in reports.

PDF

Select **PDF** beside a saved report. The document carries the figures, the chart and the table, with the period and the definition printed on it.

On a schedule

1. Select **Schedule** beside the saved report.
2. Choose the frequency and the period it should cover. A relative period keeps the schedule meaningful week after week.
3. Add the recipients and save. The button stays highlighted while a schedule exists.



Scheduled custom reports join the same subscription list as every other scheduled report, and are cancelled there.

A schedule follows the saved report. Rewrite the definition and the emails change with it.

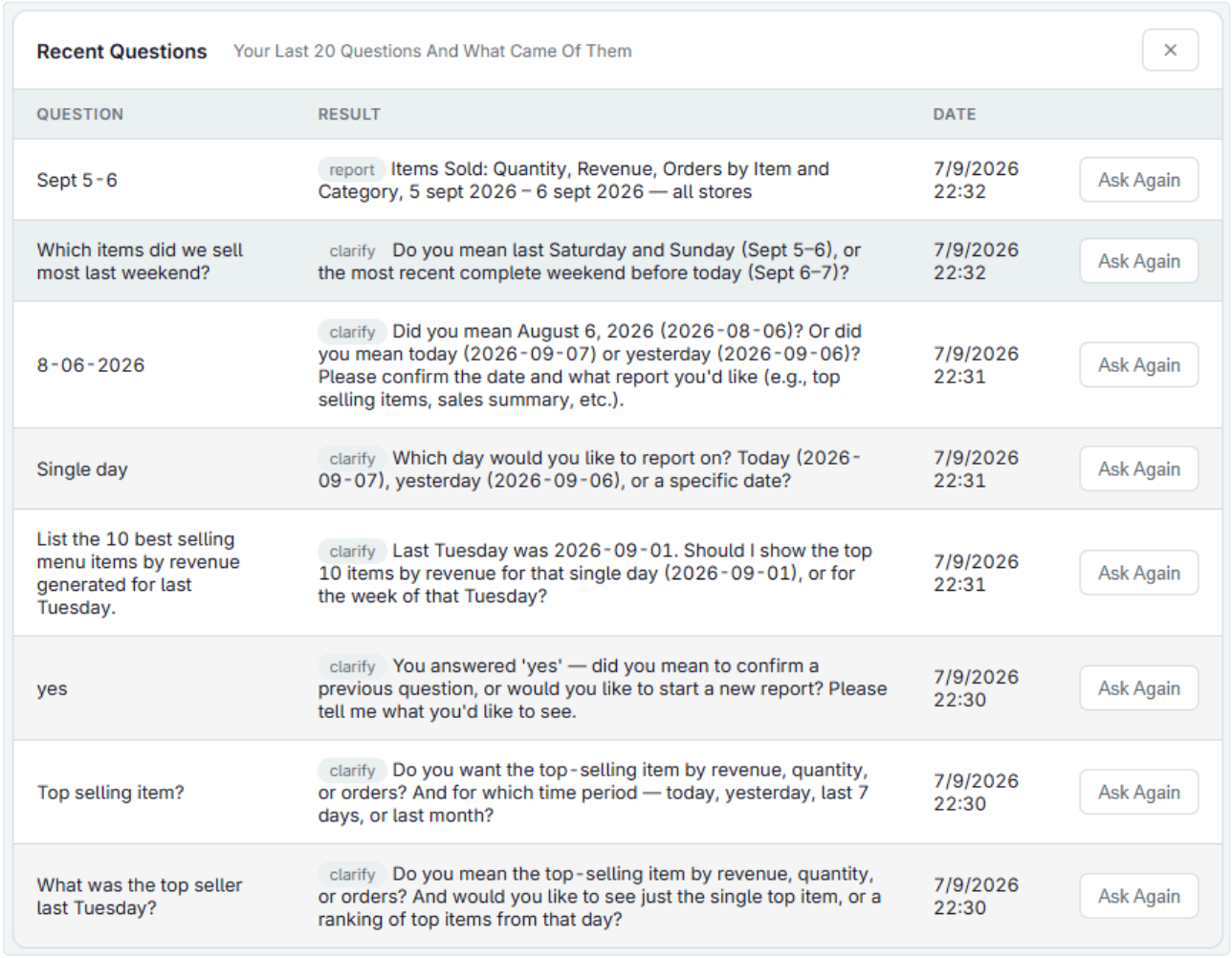
Recent questions

AI Reports

View online ↗

The questions already asked in this store, why they are kept, and running one again.

The **Recent Questions** panel keeps the questions asked in this store, most recent first, with **Ask Again** beside each one.



Why it is there

- Most reporting is repetition — the same handful of questions every week.
- It shows the phrasing that worked, which is the quickest way for a new manager to learn what to ask.
- Questions that produced good reports help the assistant answer future ones in your own words for dishes, categories and jobs.

Only the questions and the report definitions they produced are kept. Nothing leaves your account, and no figures are stored with them.

Asking again

Ask Again runs the same question now. A question that said "last week" gives you last week as it stands today, not the week it was first asked about.

Requesting a report that is not available yet

AI Reports

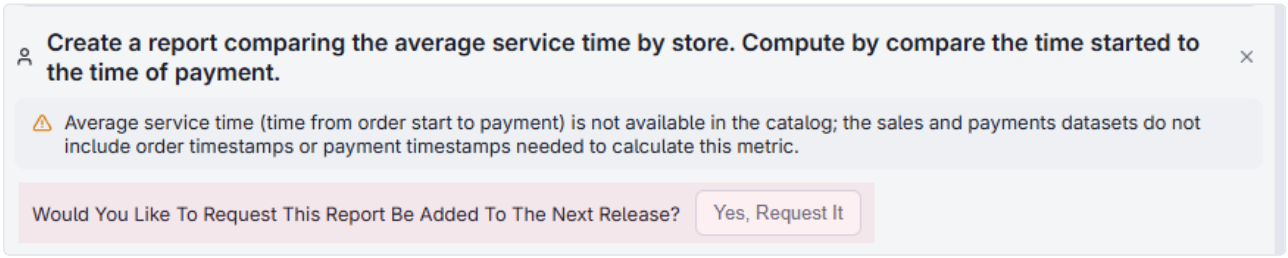
View online ↗

What happens when a question is outside what can be reported on, and how to follow up a filed request.

When a question falls outside what the assistant can report on, it says so plainly and offers to have the report added to a future release.

Filing a request

Accept the offer and your question is filed exactly as you asked it, along with what was missing. Add a line about why you need it if that helps explain the request.



Following it up

Filed requests appear in the **Report Requests** panel with their status, so you can see what has been asked for and what has been picked up. The panel is hidden while there is nothing in it.

> A request that says which decision the report would help you make is far more likely to be built the way you need it. "Waste by prep station, so I know which station to retrain" beats "a waste report".

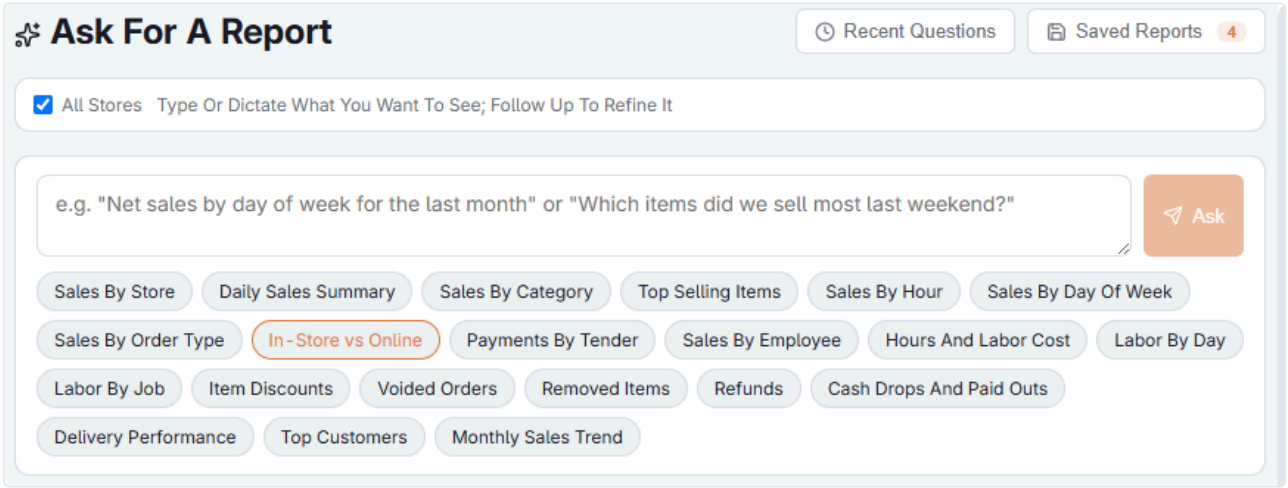
Reports across all stores

AI Reports

View online ↗

The same page in the Multi-Store group, the All Stores box that sets the scope, and grouping a question by store.

Back Office › Multi-Store › Ask For A Report is the same page as **Analytics › Ask For A Report**, opened with **All Stores** ticked, so questions are answered across every store. How the page works is in Ask For A Report.



The All Stores box

The **All Stores** box in the toolbar decides the scope, not the wording of the question. Ticked, every question and every starter covers all the account's stores. Cleared, the report covers the store Back Office is pointed at in the store picker. The box shows only for jobs with **Allow All Stores** on an account with more than one store.

Comparing stores

With the box ticked, ask for a breakdown by store to get the comparison directly: net sales by store by weekday for last month, labor percentage by store, top ten items by store. With the box cleared, a starter drops its store breakdown.

> Each store is measured on its own business day and time zone, so a late-closing store is not credited to the next day.

Saving

A saved all-stores report carries the **All Stores** tag in the saved list, is listed in every store, and keeps its scope when it runs again or is sent on a schedule.

Accuracy and limits

AI Reports

View online ↗

What to check before acting on an answer, the limits worth knowing, and who can see what.

The report assistant is AI and can make mistakes. It reads your question, builds a report definition from it and runs that against your own figures. It does not invent numbers — but it can misread what you meant.

> Before acting on a surprising figure, open **Show report definition** and check that the period, the grouping and the filters are the ones you had in mind.

Limits worth knowing

- Very large results are capped, and the report says when rows were cut. Narrow the period or change the grouping.
- There is a daily limit on AI questions per account, shared with the other AI features. It resets each day.
- Dictation depends on the device. Where it is not available the microphone is hidden and typing works exactly the same.
- Figures follow the same definitions as the built-in dashboards, so a custom report and a standard report for the same period should agree. If they do not, the definition is the place to look.

Who sees what

A report runs against the store you are pointed at, and a private saved report is visible only to the person who created it. Access to the page itself follows the same permission as the rest of Analytics.

The assistant can do this too

The AI Assistant answers the same kind of question by voice or text from the register, which is useful mid-service when you only want a number.

CHAPTER 14

Menu

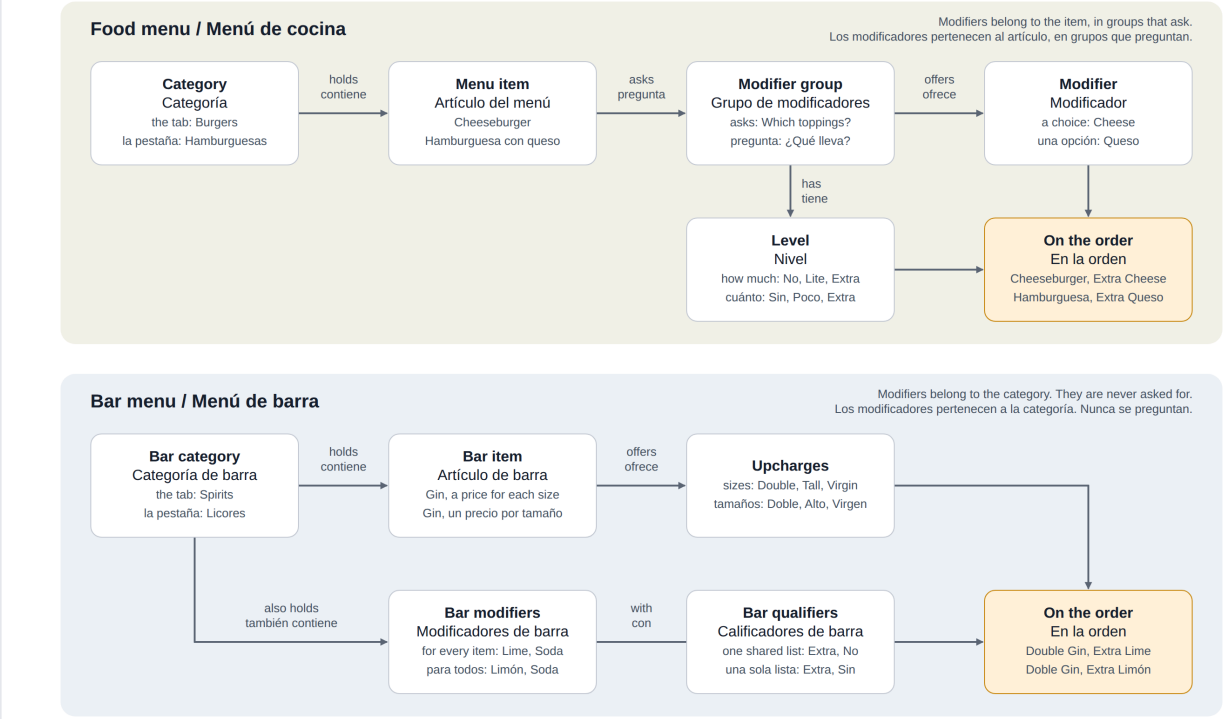
Menu structure

How the menu is organized: food and bar

View online ↗

The pieces of the menu, how they hang together, and what is different about a bar category.

Every button on the register belongs to a category, and every category is one of two kinds: a food category or a bar category. The kind is the category's **Menu Type** (Regular Menu or Bar Menu), and it decides how the items in it take modifiers. Most of what an item carries, such as its price, its prep stations and its recipe, works the same way on both.



The food menu

On the food menu, modifiers belong to the **item**.

1. **Category**: the tab on the menu, such as Burgers. What is set on it applies to its items unless an item overrides it.
2. **Menu item**: the button, such as Cheeseburger.
3. **Modifier group**: one question the register asks, such as "Which toppings?". Groups are assigned to each item, each one required or optional. One group can serve many items.
4. **Modifier**: one answer in the group, such as Cheese.
5. **Level**: how much of it, such as No, Lite or Extra. Levels are set on the group.

At the register, adding the item opens its groups: the required ones first, then the rest in the order you set. A required group has to be answered before the item can be confirmed.

The bar menu

On the bar menu, modifiers belong to the **category**, and they are never asked for.

- **Bar category**: the tab, such as Spirits. It carries the settings only a bar category has: its upcharges, the bar tax rate, and whether its bar modifiers are always on screen.
- **Bar item**: the button, such as Gin.
- **Upcharges**: the sizes and strengths a drink can be sold in, such as Double, Tall or Virgin. The list is set on the category. Each item then carries its own price for every one it offers.
- **Bar modifiers**: mixers, garnishes and preparations, such as Lime or Soda. A bar modifier is offered in every bar category, or only in the ones you choose. It is not assigned item by item and it is not in a group.
- **Bar qualifiers**: one short list of words, such as Extra, Light and No, shared by the whole bar. A qualifier is tapped before a modifier, so the line reads "Extra Lime".

At the register, adding a bar item offers its sizes when it has any. Modifiers are not asked for: the bartender taps a qualifier and a modifier as needed. When the category is set to always show its bar modifiers, they sit in a row under the item buttons.

Food and bar at a glance

	Food menu	Bar menu
Modifiers belong to	The item, through modifier groups	The category
Set up on each item	Its groups, and which are required	Its price for each upcharge
When an item is added	Its groups open	Its sizes are offered, if it has any; no questions
"How much" words	Levels, set on each group	Qualifiers, one list for the whole bar
Sizes and strengths	A modifier group, such as Size	Upcharges
Back Office pages	Menu Categories, Menu Items, Food Modifiers	Menu Categories, Menu Items, Bar Modifiers, Bar Qualifiers

Which kind should a category be?

Make it a bar category when its items are drinks ordered by the pour: the same few mixers and garnishes apply to everything in the tab, and sizes such as Double have their own price. Make it a food category when each item needs its own questions answered before it goes to the kitchen. A tab of soft drinks that take no modifiers can stay a food category.

Where each piece is set up

- **Back Office › Menu › Menu Setup › Menu Categories**: the categories, their Menu Type and, on a bar category, its upcharges. See Categories (food groups) and Bar menu upcharges.
- **Back Office › Menu › Menu Setup › Menu Items**: the items and, on each one, its modifier groups or its upcharge prices. See Menu items and Modifier group assignments.
- **Back Office › Menu › Menu Setup › Food Modifiers**: groups, modifiers and levels. See Food modifiers, groups, and levels.
- **Back Office › Menu › Menu Setup › Bar Modifiers** and **Bar Qualifiers**. See Bar modifiers, qualifiers, and recipes.

How each one behaves while ringing is under Order Entry: Food modifiers and how they prompt and Bar modifiers and qualifiers.

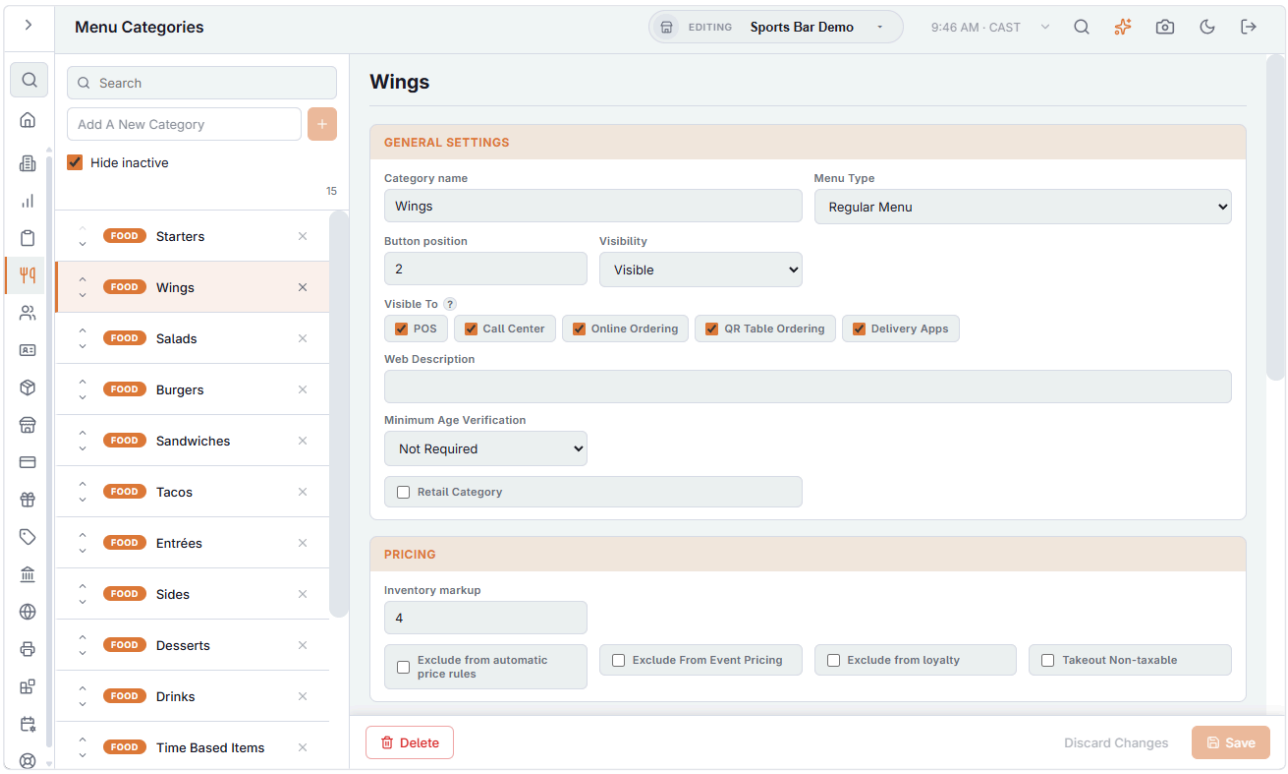
Categories (food groups)

Menu › Menu structure

View online ↗

Setting up the menu categories: food or bar, when and where they sell, tax and pricing, upcharges and the look of their tab button.

Back Office › Menu › Menu Setup › Menu Categories holds the categories: the tabs of the register's menu, such as Appetizers, Entrees or Whiskey. A category decides whether its items are food or bar items, when and where they are sold, how they are taxed and priced, and how the tab's button looks.



The category list

Each row carries a food or bar tag, and a hidden category carries a **Hidden** badge.

- **Add A New Category** — type a name and add it. A new category is a food category, visible, sold on every day at every hour.
- **Search** — finds categories by name.
- **Hide inactive** — on by default; hides hidden categories.
- **Move up** / **Move down** arrows and drag and drop — change the order of the category strip, while the search is empty. See Item buttons and screen placement.
- The delete icon, and **Delete** in the editor, delete the category after you confirm. A category that still has items cannot be deleted: move or delete its items first.

Changes in the editor are kept until you choose **Save**; **Discard Changes** puts back what was saved. Upcharges are the exception: each box saves when you leave it.

General Settings

- **Category name** — the tab's text.
- **Menu Type** — **Regular Menu** (food) or **Bar Menu**. The difference is explained in How the menu is organized: food and bar.
- **Button position** — the tab's place in the strip.
- **Visibility** — **Visible** or **Hidden**. A hidden category has no tab at the register. Its items keep the category's sales channels. While a category is hidden, the editor shows only its name, type, position, visibility and channels.
- **Visible To** — the channels the category, and every item in it, is sold on: **POS**, **Call Center**, **Online Ordering**, **QR Table Ordering** and **Delivery Apps**.
- **Web Description** — food categories: the line under the category's heading on the online menu.
- **Minimum Age Verification** — **Not Required**, or an age from 12 to 30. The register asks to check the guest's age when an item from the category is added. See Age verification and ID-required items.
- **Retail Category** — food categories: for goods sold as they are bought. It carries a retail tag when you add an item, and its items' Inventory tab offers **Retail Inventory**.
- **Always Show Bar Modifiers** — bar categories: the bar modifiers sit in a row under the item buttons, ready to tap. See Bar modifiers and qualifiers.

Pricing

- **Inventory markup** — the multiplier that turns an item's recipe cost into its suggested price, in the item's Inventory tab and on Menu Costing. Left at 0, the store's target food cost is used. See Menu Costing: cost, margin and a recommended price for every item.
- **Bar Menu Tax Rate** — bar categories: the tax rate charged on every item in the category, picked from the store's tax rates (or **None**). See Sales tax setup.
- **Exclude from automatic price rules** — store-wide price rules skip the category's items. Rules set on the category or on an item still apply. See Price rules.
- **Exclude From Event Pricing** — event price changes do not touch the category's items. See Special and event pricing.
- **Exclude from loyalty** — the category's items earn no loyalty points.
- **Takeout Non-taxable** — the category's items are not taxed on take-out orders.

An item has its own exclusion boxes on its Pricing tab. Either one is enough to exclude it.

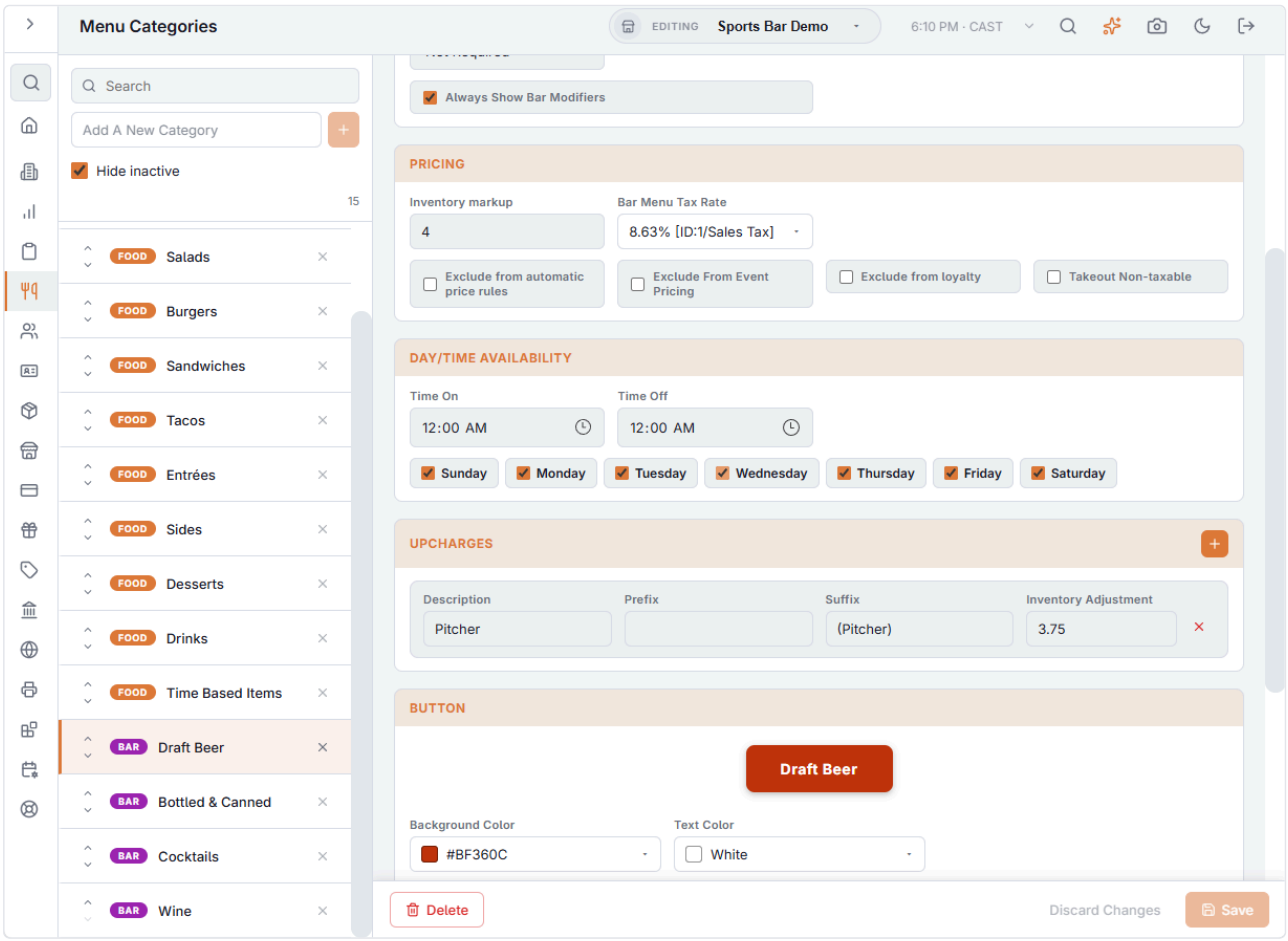
Day/time Availability

- **Time On** and **Time Off** — the hours the tab shows, in store time. The same time in both means all day; a window that ends before it starts runs past midnight. A Breakfast category that goes at 11:00 is set here.
- The day boxes, **Sunday** to **Saturday** — the days the tab shows.

Items have their own hours too; an item shows only when both its own and its category's allow it.

Upcharges

Bar categories only. The **+** adds an upcharge, such as Double or Tall, with its **Description**, **Prefix**, **Suffix** and **Inventory Adjustment**; the × deletes one. See Bar menu upcharges (Double, Tall, Premium, Virgin).



Button

A preview shows the tab's button. Set its **Background Color**, **Text Color** and **Button Image**. The image shows when the register's layout uses Text + Image or Image Only. See Button images.

Reporting

The category's **Id**, for reference.

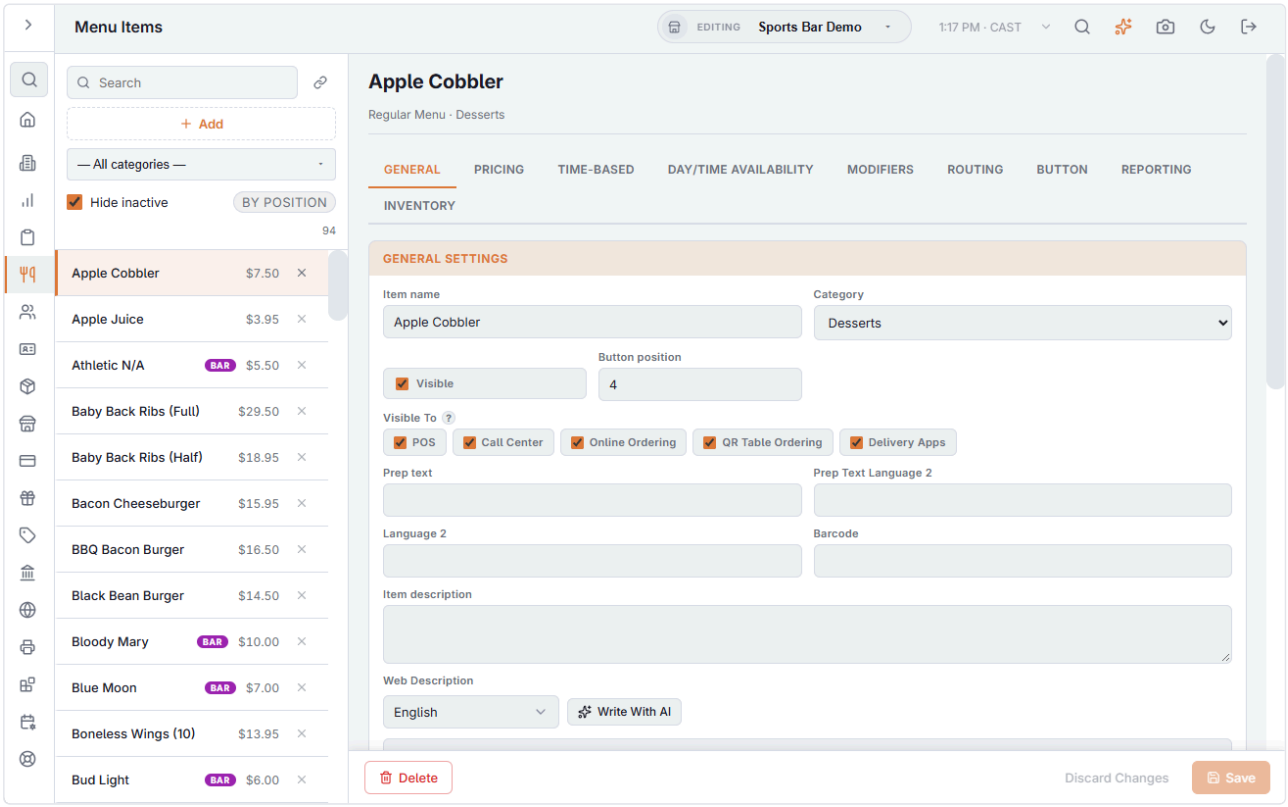
Menu items (prices, SKUs, buttons)

Menu › Menu structure

View online ↗

The item editor: everything about one menu item.

Back Office › Menu › Menu Setup › Menu Items is where each menu item is created and set up: its name and category, its prices, when and where it is sold, its modifier groups, where it prints, how its button looks and its recipe.



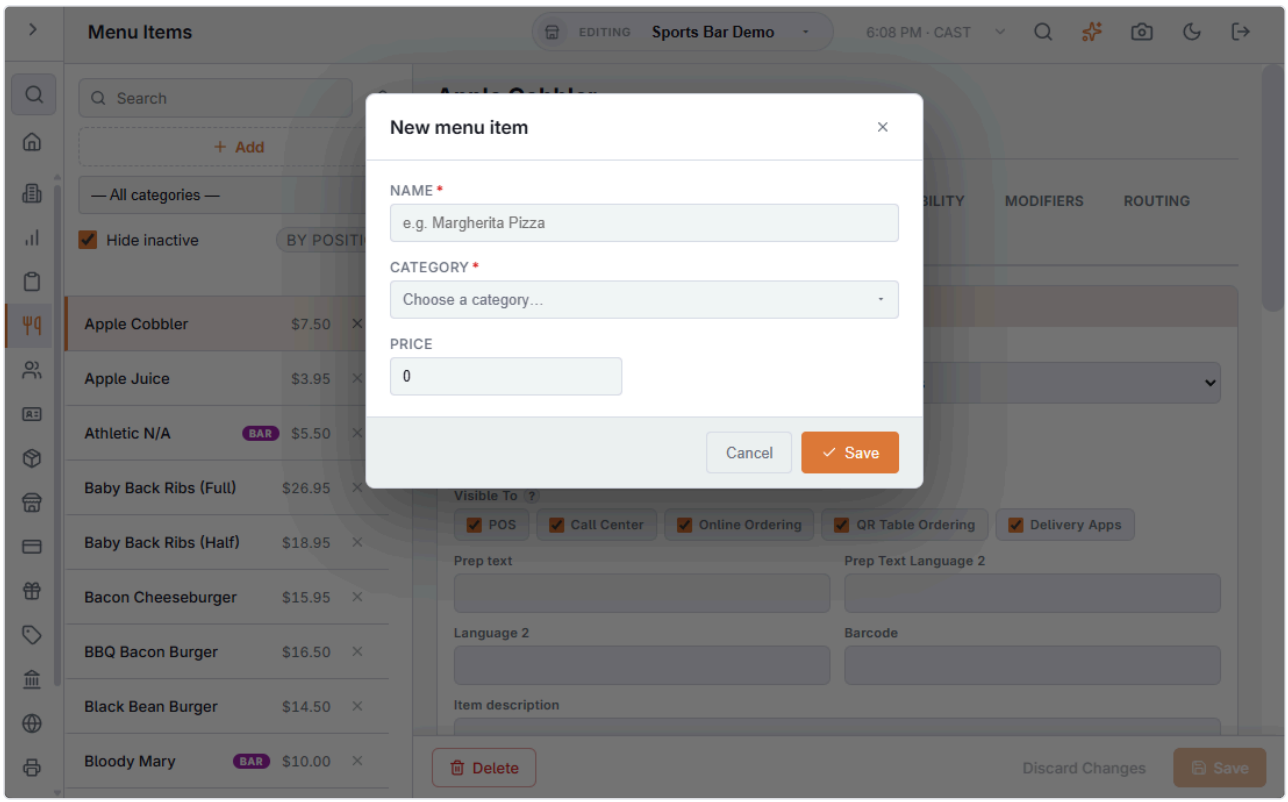
The item list

The list on the left shows every item, with its price. Bar items carry a bar tag, and hidden items a **Hidden** badge.

- **Category** picker — **All categories**, or one category. Pick one category to reorder its items.
- **Search** — finds items by name.
- **Hide inactive** — on by default; hides items whose **Visible** box is cleared.
- **A–Z** / **By position** — switches the store's button order for food items, or for bar items when a bar category is picked. It changes the register too. See Item buttons and screen placement.
- **Move up** / **Move down** arrows and drag and drop — shown when one category is picked, the search is empty and the order is **By position**.
- The delete icon on a row deletes the item after you confirm. It cannot be undone.

Adding an item

Choose **Add**. The **New menu item** window asks for the **Name**, the **Category** and the **Price**. Each category carries a food, bar or retail tag. An item in a bar category becomes a bar item. The new item opens in the editor on the right.



Saving

Changes to the item are kept until you choose **Save**. **Discard Changes** puts back what was saved, and **Delete** removes the item. Two things save on their own as soon as you act: the **Web Image** and the **Allergens**. Saved changes reach the registers without a restart.

The tabs

Tab	What it holds
General	Name, category, visibility, sales channels, prep text, descriptions, web details and allergens.
Pricing	Price, tax rate, web price, codes, weighed pricing, the exclusions and, on bar items, the upcharge prices.
Time-based	Billing by elapsed time, for pool tables, lanes and rentals.
Day/time Availability	The hours, and for food items the days, when the item is offered.
Modifiers	The item's modifier groups.
Routing	Cook time, prep stations and label printers.
Button	Button colors and image.
Reporting	Id, created date and revenue center.
Inventory	The item's recipe.

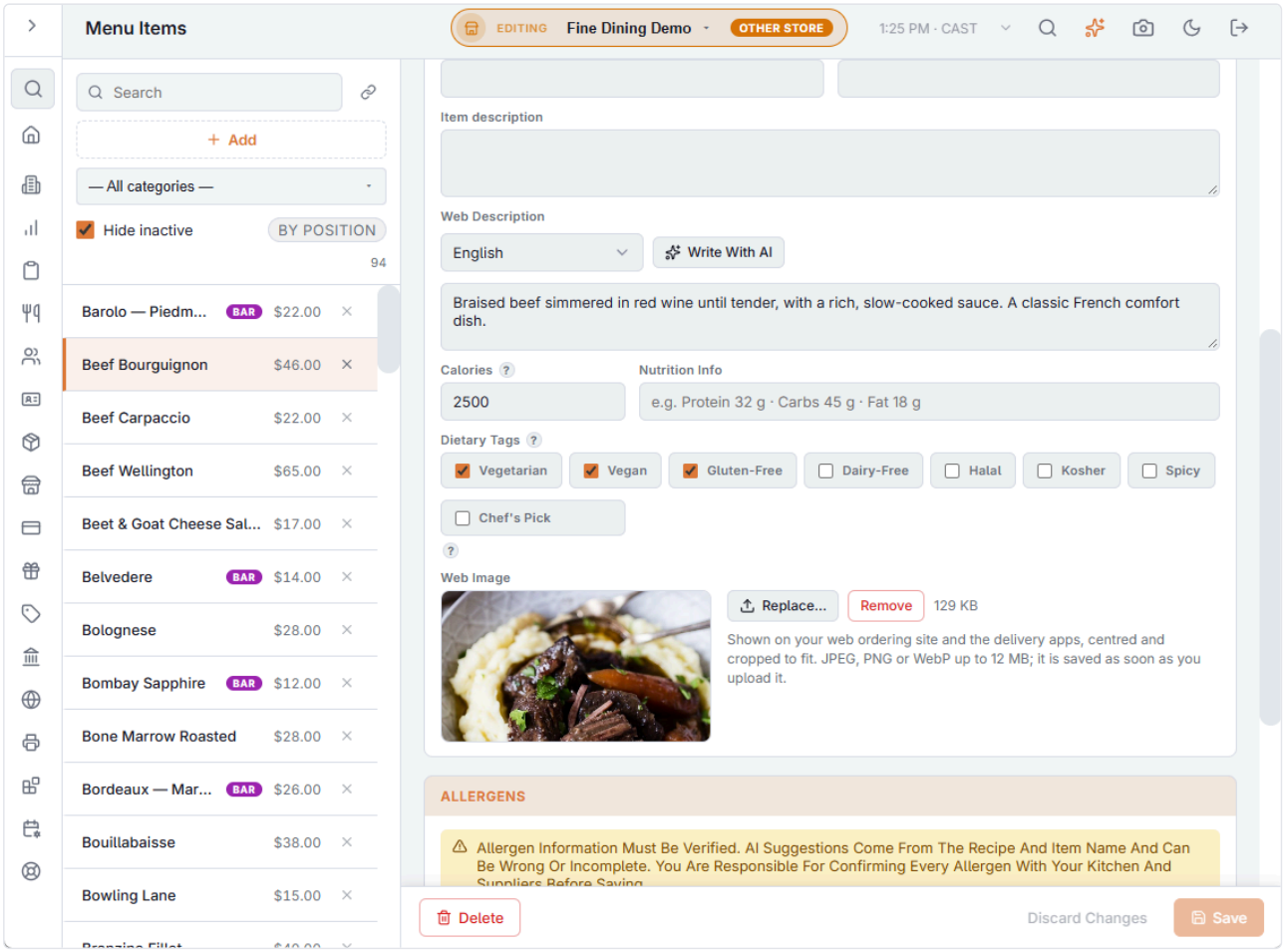
General

- **Item name** and **Category** — the button text and the category tab it sits in. **Uncategorized** leaves it out of every category. Moving an item to a bar category makes it a bar item, and moving it to a food category makes it a food item.
- **Visible** — cleared, the item is not offered at the register, even by scanning.
- **Button position** — its place among the category's buttons.
- **Visible To** — the channels the item is sold on: **POS**, **Call Center**, **Online Ordering**, **QR Table Ordering** and **Delivery Apps** (Uber Eats, on the next menu publish). A channel the category is hidden from hides the item there too.
- **Prep text** and **Prep Text Language 2** — what prep tickets and the kitchen display show, when it should differ from the name. See Prep ticket names and abbreviations.

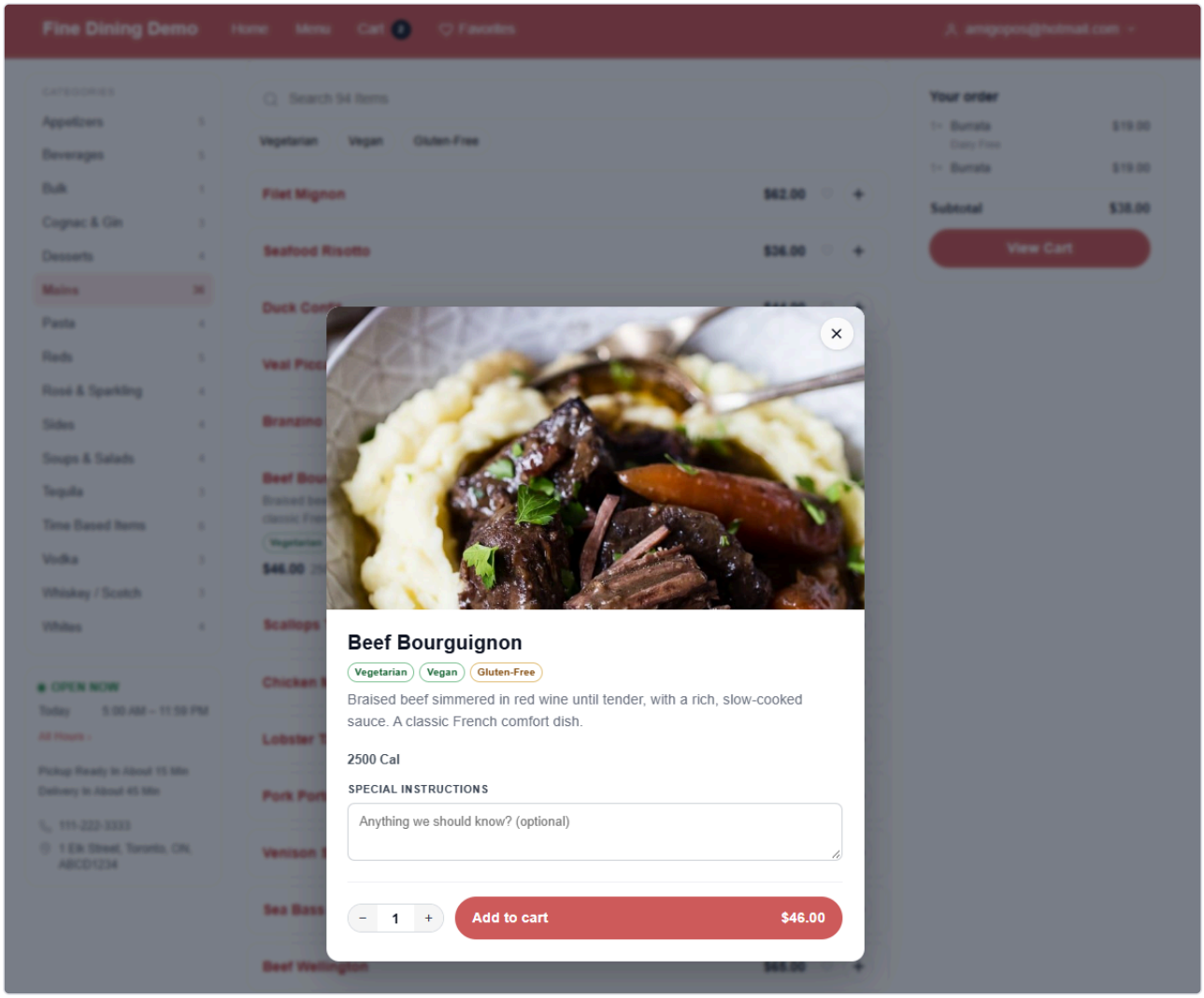
- **Language 2** — the item's name in the second language.
- **Barcode** — the code a scanner looks up.
- **Item description** — a longer description, used on the customer display and on Uber Eats.
- **Web Description** — the description on the online menu. **Write With AI** writes or polishes it in the language you pick; see Writing web descriptions with AI.
- **Calories**, **Nutrition Info**, **Dietary Tags** and **Chef's Pick** — for the online menu; see below.
- **Web Image** — the photo on the online menu and the delivery apps, see below.
- **Allergens** — the staff-verified allergen list; see Allergens on menu items.

Calories and nutrition

- **Calories** — a whole number up to 9999. The online menu shows it after the price, as *450 Cal*, and again in the item window.
- **Nutrition Info** — one line of free text, up to 400 characters, such as *Protein 32 g · Carbs 45 g · Fat 18 g*. It shows in the item window, beside the calories.

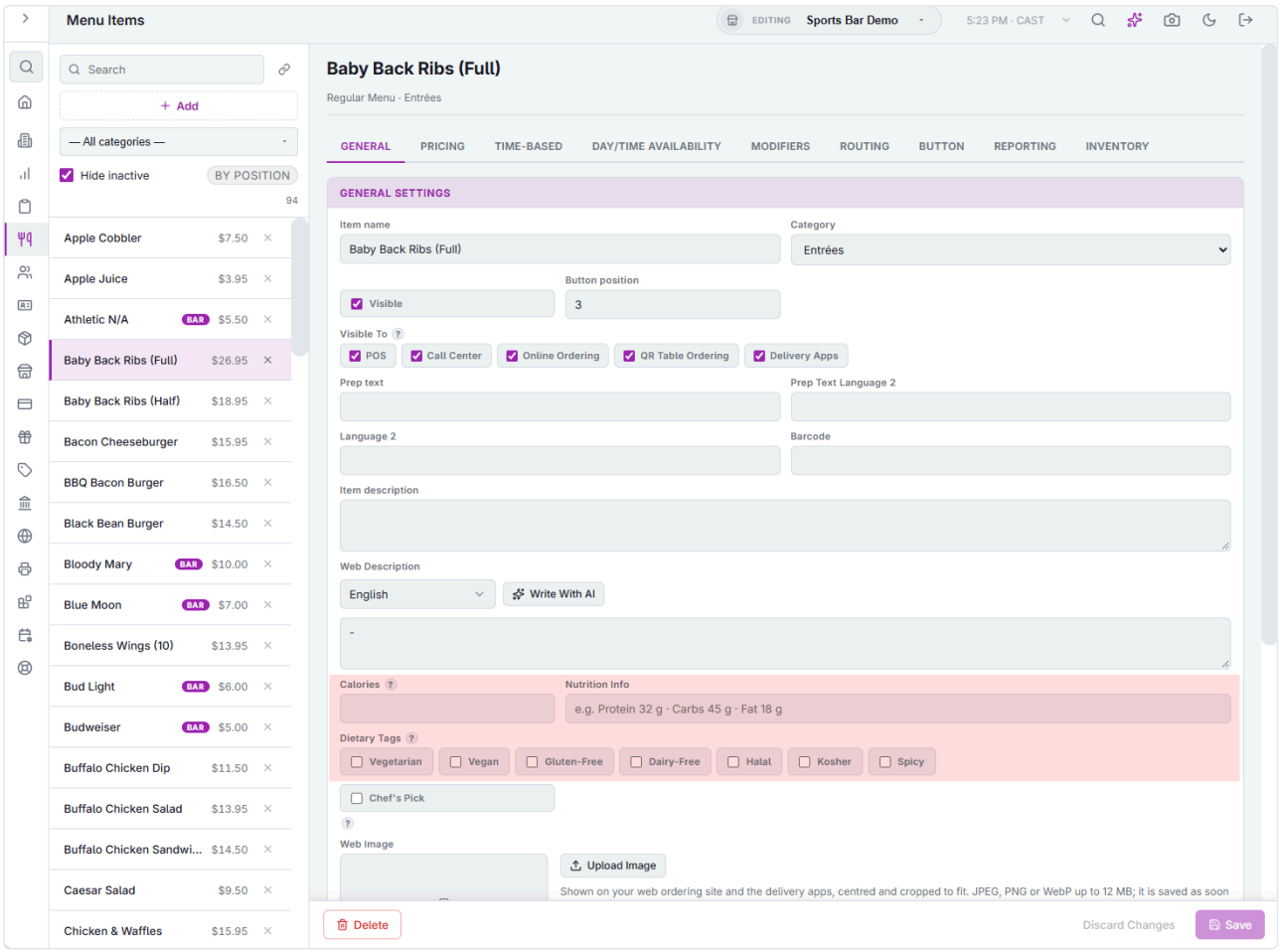


Both are optional and for the web ordering site only: they are not on the register, receipts or the kitchen display. Left blank (or calories at 0), nothing is shown. Copying an item copies them. The online menu can take a few minutes to show a change.

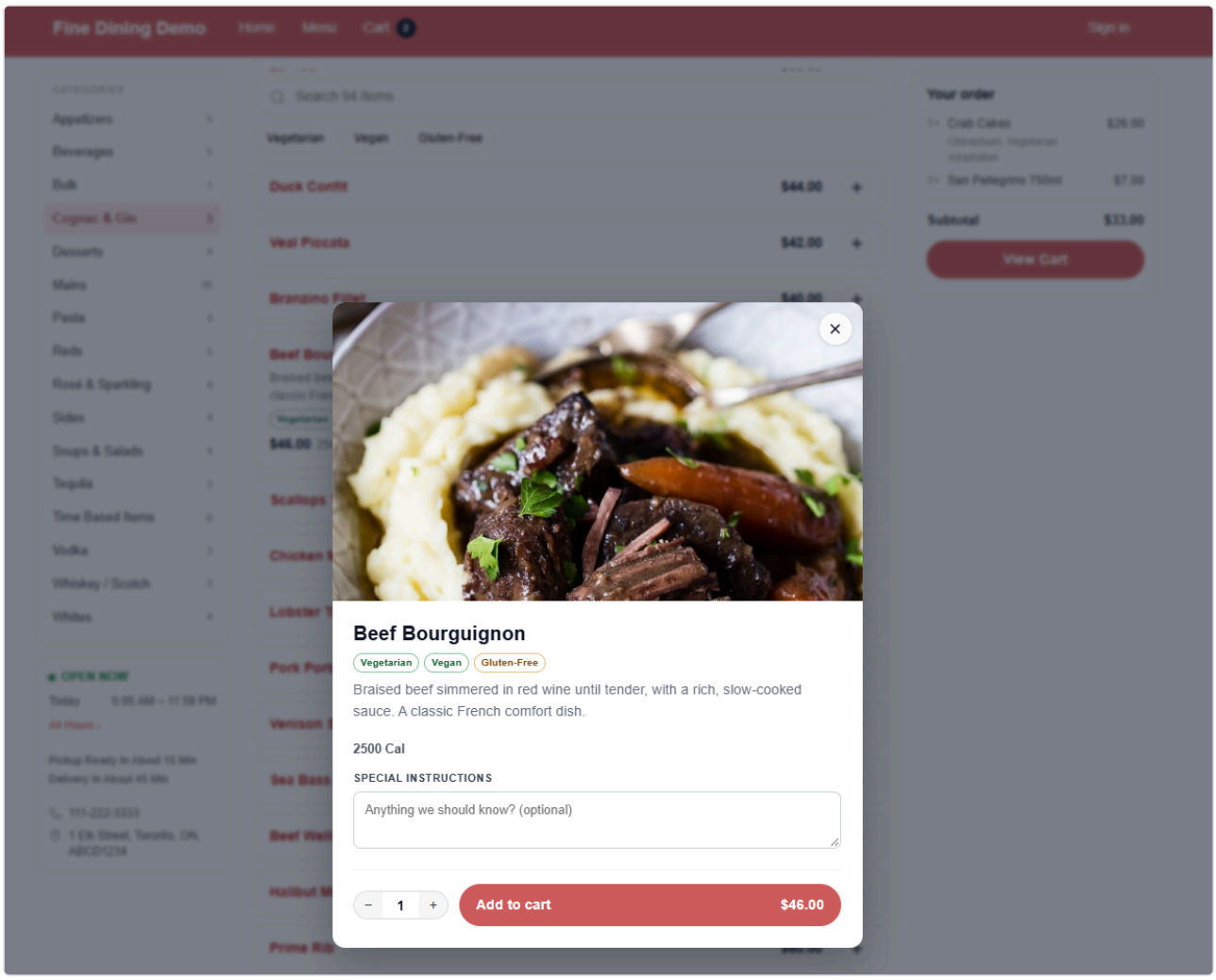


Dietary tags and Chef's Pick

- **Dietary Tags** — tick any of Vegetarian, Vegan, Gluten-Free, Dairy-Free, Halal, Kosher and Spicy. The online menu shows them as small labels on the item's row and in the item window, and the menu search finds them.
- **Chef's Pick** — puts a *Chef's Pick* badge next to the item's name on the online menu and in the item window.



When any item has a tag, the online menu page shows a **Dietary Preferences** chip for each tag in use. A customer who picks chips sees only the items that carry all of them. It works together with the search and the allergen filter, and the choice is remembered on that device.



> The tags are the store's own claims: nothing checks them against the item's allergens or recipe. They are for the web ordering site only — not on the register, receipts, the kitchen display or Uber Eats. For the *Popular* badge, see Basic info and storefront identity.

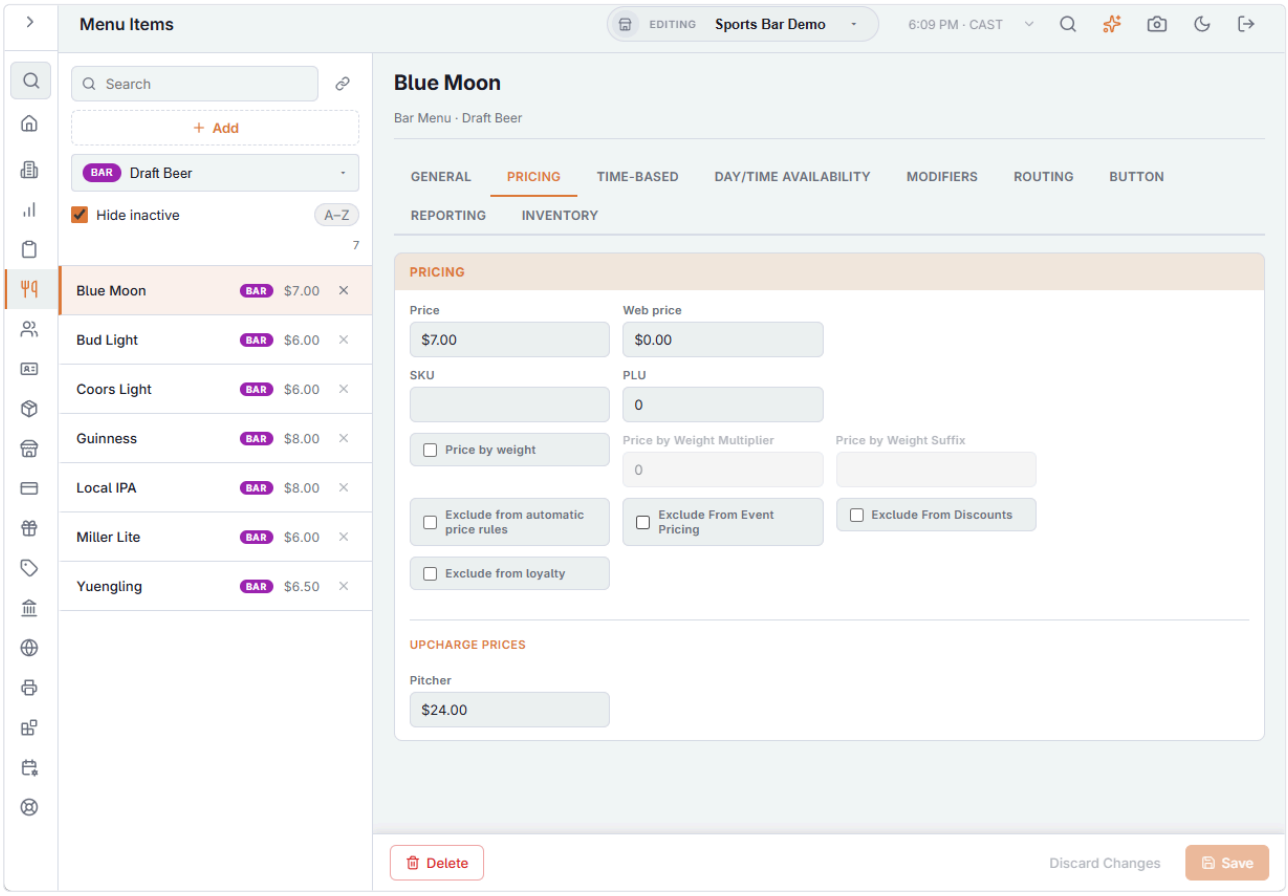
Web image

Upload Image (or **Replace…**) takes a JPEG, PNG or WebP file. It is shown centred and cropped to fit, and it is saved the moment it is uploaded. **Remove** takes it off after you confirm. The line beside the buttons gives the image's size; a file that is too large or too small is refused with the limits.

Pricing

- **Price** — the regular price.
- **Tax Rate** — food items only. Pick one of the store's tax rates, shown with its percentage, ID and name, or **None**. A bar item is taxed at its category's **Bar Menu Tax Rate**. See Sales tax setup.
- **Web price** — the price on the online menu and Uber Eats. At 0 they use **Price**.
- **SKU** and **PLU** — codes the register can look the item up by.
- **Price by weight**, with **Price by Weight Multiplier** and **Price by Weight Suffix** — for items weighed on a scale. See Scales for weighed items.
- **Exclude from automatic price rules** — store-wide and category rules skip the item; a rule set on the item itself still applies. See Price rules.
- **Exclude From Event Pricing** — event price changes do not touch it. See Special and event pricing.
- **Exclude From Discounts** — order and coupon discounts leave it out.
- **Exclude from loyalty** — it earns no loyalty points.

- **Upcharge Prices** — on bar items in a category with upcharges, one price box per upcharge. See Bar menu upcharges (Double, Tall, Premium, Virgin).



Time-based

Ticking **Time-based** bills the item by elapsed time. The fields are explained in Time-based items (pool tables, lanes, rentals).

Day/time Availability

- **Time On** and **Time Off** — the hours the item is offered, in store time. The same time in both means all day. A window that ends before it starts runs past midnight, such as 22:00–02:00.
- **Restrict Days** and the day boxes — food items only. Ticked, the item is offered only on the days ticked.

The category has its own hours and days, and an item shows only when both allow it.

Modifiers

The groups the register asks when the item is added, their order and which are mandatory. See Modifier group assignments.

Routing

- **Cook Time (Minutes)** — paces the item on the kitchen display so its course finishes together. Leave it empty for items that should start at once. See Cook times: finishing a course together.
- **Prep Stations** — Prep 1 to Prep 12, the prep printers and kitchen screens the item goes to.
- **Labels** — Label 1 to Label 5, the label printers it prints on.

See Print routing.

Button

A preview shows the button. Set its **Background Color** and **Text Color**, and its **Button Image**: **Choose Image** picks from the store's library, the × clears it, and the **Button Images** link opens the library. The image shows when the register's layout uses Text + Image or Image Only. See Button images.

Reporting

The item's **Id** and **Created date** are shown for reference. **Revenue Center** groups the item's sales in reports. See Revenue centers.

Inventory

The item's recipe, its cost and the price the cost suggests. See Recipes (yield, cost, ingredients) and Menu Costing: cost, margin and a recommended price for every item. In a **Retail Category**, **Retail Inventory** replaces the recipe with one stock item of the same name.

Allergens on menu items

Menu › Menu structure

View online ↗

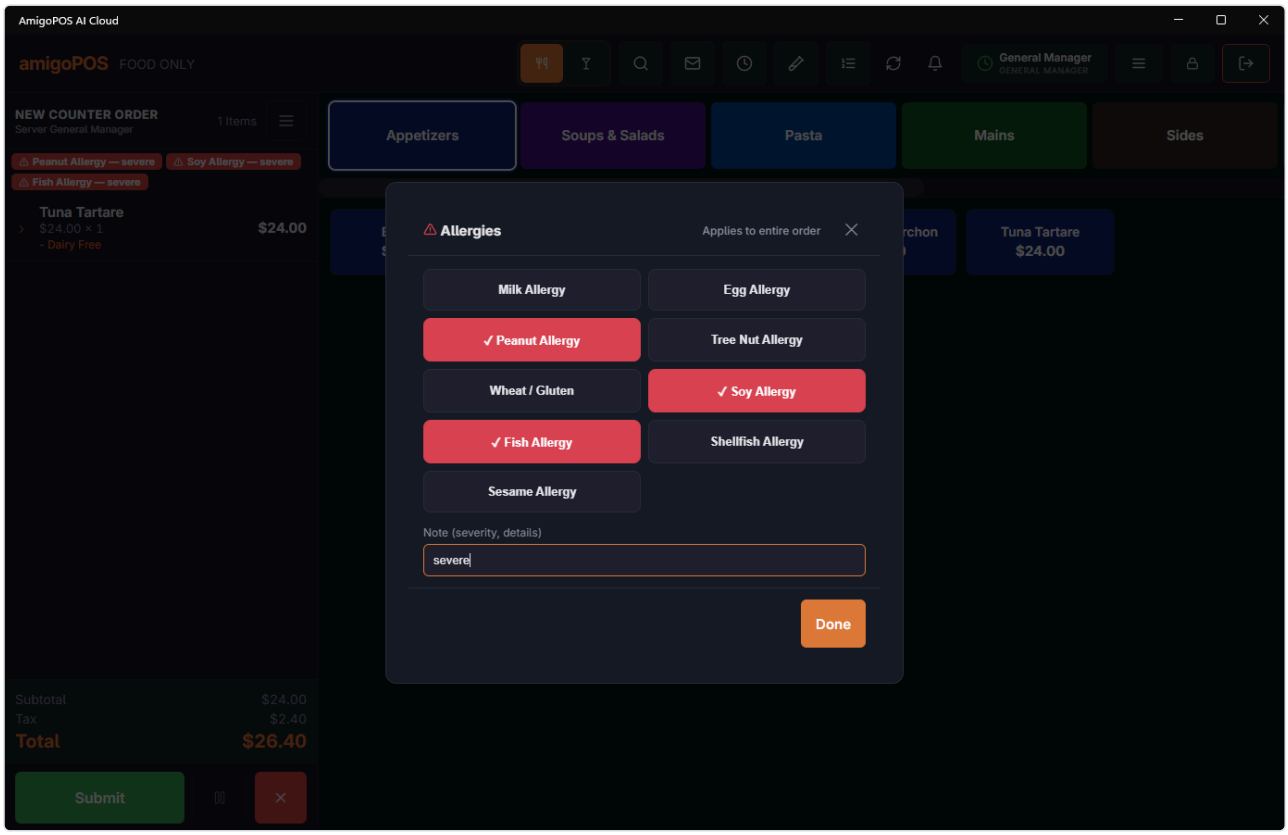
Record the allergens your staff have verified for each item. AI can suggest, but only a person can confirm.

> **Allergen answers must always be verified.** The assistant works from the allergen lists your staff verified and from recipe ingredients; it can be wrong or incomplete, and it cannot see what is inside sauces or bought-in products, or cross-contact in the kitchen. Before a guest with an allergy orders, confirm with the kitchen or a manager. Making sure allergen information is correct is the restaurant's responsibility.

Each menu item can carry a list of allergens that a member of your staff has checked with the kitchen and your suppliers. The assistant uses these lists first when a guest asks about allergens.

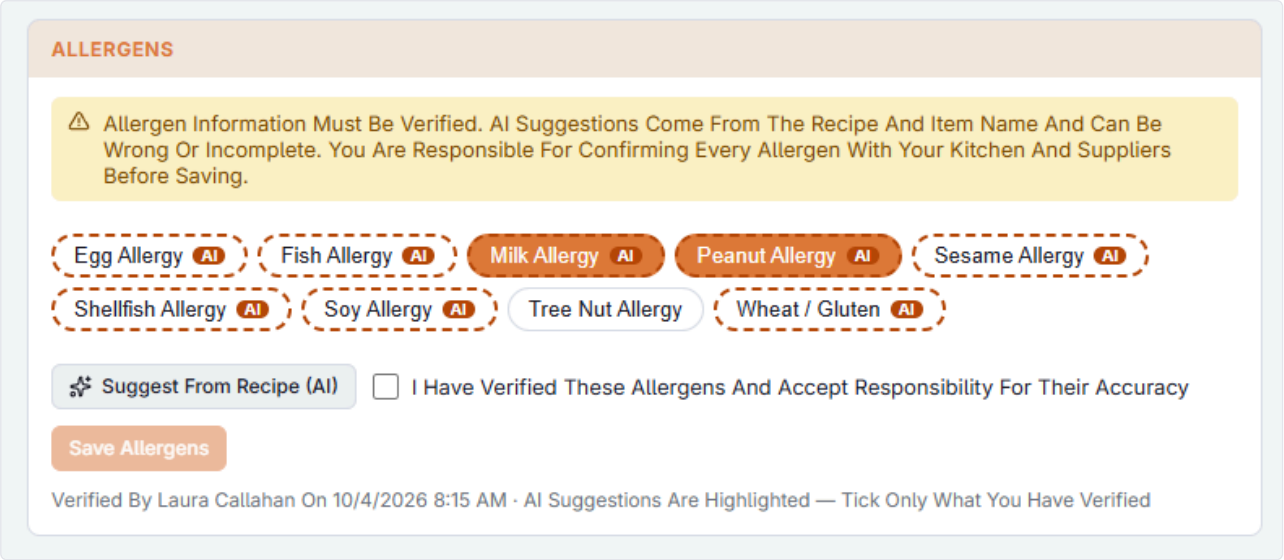
Where

Open the item in the menu item editor (see Menu items). The **Allergens** section is at the end of the **General** tab. It shows every allergen in the store's allergen list as a button; a highlighted button means the item contains it. A new item has to be saved once before its allergens can be set.



Suggestions from the recipe

Suggest From Recipe (AI) reads the item's recipe ingredients (or only its name when it has no recipe) and *marks* the allergens it thinks the item probably contains: a dashed outline and an **AI** badge, with the reason when you hover — for example "flour tortilla" for wheat. It never selects anything for you. When unsure it includes an allergen rather than leaves it out, and it never says an item is free of anything.



Verifying and saving

1. Check each allergen with the kitchen and your suppliers, including sauces and bought-in products.
2. Select the ones the item contains. Selecting or clearing a button is always your decision — a suggestion is only a hint.
3. Tick **I Have Verified These Allergens And Accept Responsibility For Their Accuracy**. Any change afterwards clears the tick.
4. Choose **Save Allergens**. The line under the buttons then reads **Verified By** with your name and the time.

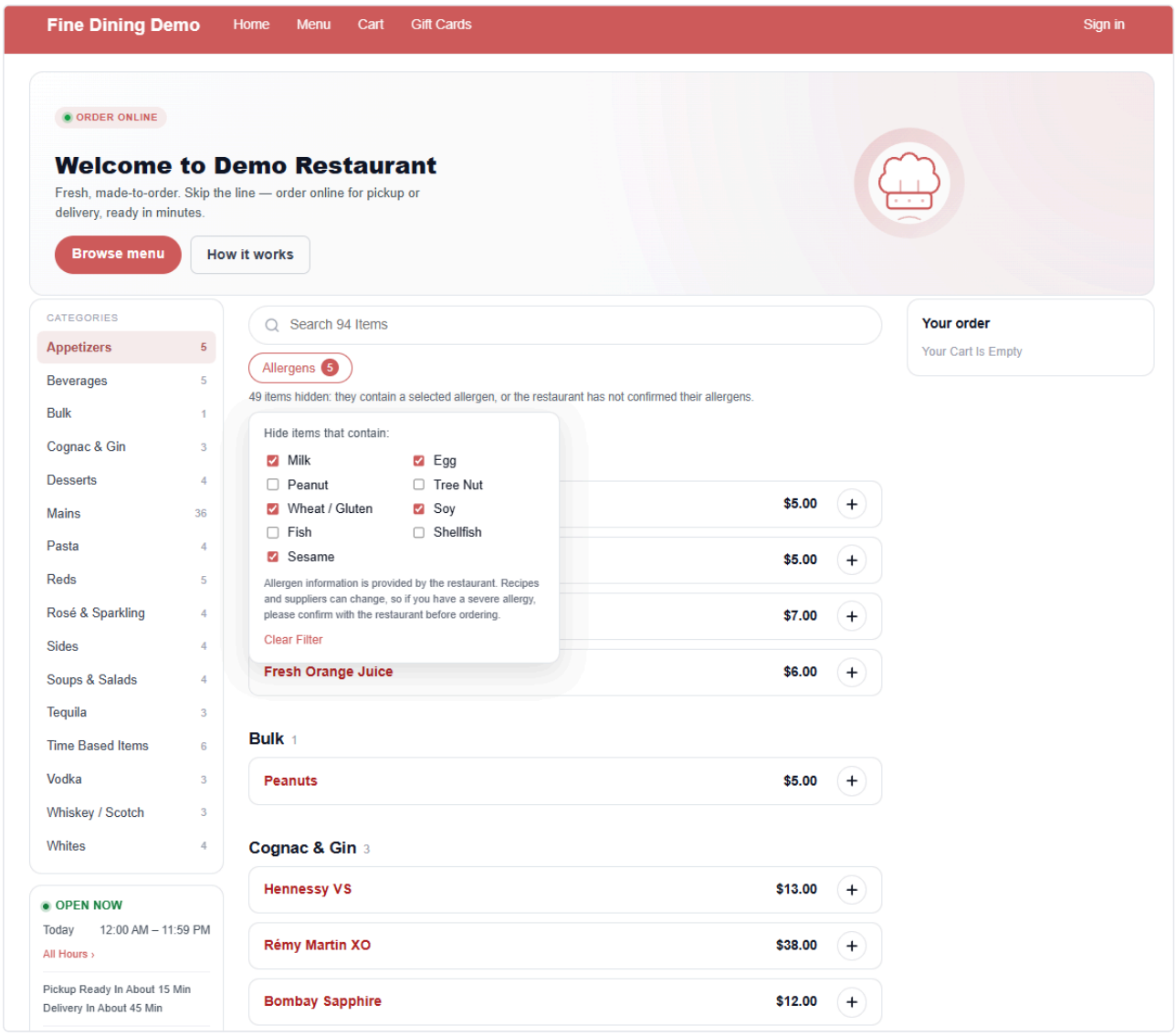
Saving an empty list means you checked and found none of the listed allergens — it is still not a guarantee against cross-contact. Review the list whenever the recipe or a supplier changes.

How the assistant answers guests: Allergen and price questions.

On the online menu

Once at least one item has a verified allergen list, the web ordering site uses the lists:

- The item window says what the item contains (*Contains: …*). For an item verified with an empty list it says the restaurant confirmed none of its listed allergens; for an item never verified, that the allergen information *has not been confirmed*.
- The menu page gets an **Allergens** filter, *Hide items that contain:*, with the store's allergen list. Ticking an allergen hides every item that contains it **and every item whose allergens were never verified**, so an unchecked item never passes for safe. A line says how many items are hidden.
- Both carry the reminder to confirm with the restaurant before ordering with a severe allergy.



Allergen review

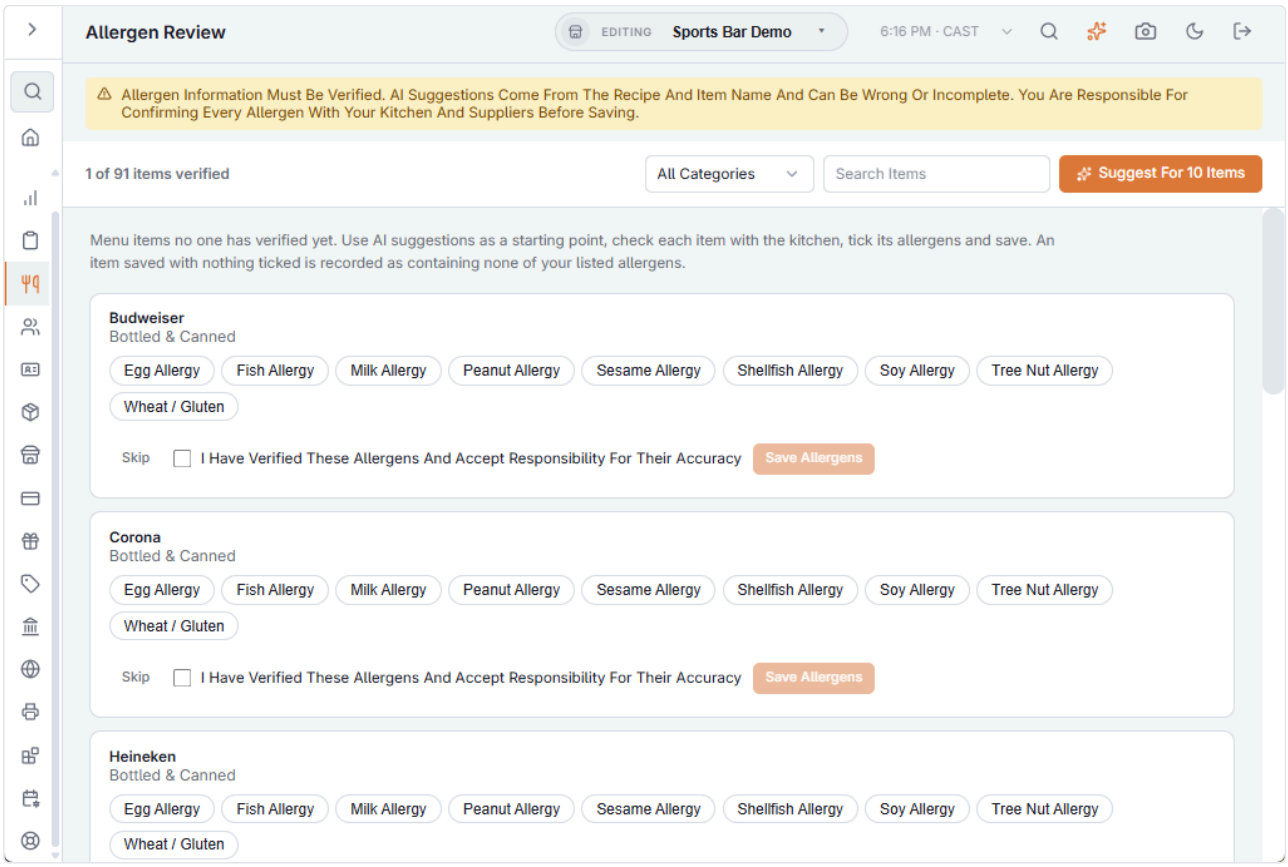
Menu › Menu structure

View online ↗

Verify the allergens of every menu item in one place, with AI suggestions as a starting point.

> **Allergen answers must always be verified.** AI suggestions come from the recipe and the item's name and can be wrong or incomplete. They cannot see what is inside sauces or bought-in products, or cross-contact in the kitchen. Making sure allergen information is correct is the restaurant's responsibility.

Back Office › Menu › Menu Setup › Allergen Review lists the menu items whose allergens no one has verified yet, so you can work through the whole menu in one place. It saves the same verified allergen list as the item editor; see Allergens on menu items.



What is listed

Every visible menu item that is not time-based and has no verified allergen list, ten at a time. The line in the toolbar counts how many of the menu's items are verified. When none are left, the page says **Every Menu Item Has A Verified Allergen List**.

- The category list, **All Categories** or one category, and **Search Items** narrow the list.
- **Suggest For N Items** asks AI about the items on screen that have not been asked yet, in one call. Each click counts as one AI action; see AI usage, limits and your monthly allowance.

Verifying an item

Each card shows the item, its category and a button for every allergen in the store's list. After a suggestion, the allergens the AI thinks the item contains are highlighted with an **AI** tag; hover over one for the reason, such as "flour tortilla". A badge says whether the suggestion came from the recipe or from the name only. Nothing is selected for you.

1. Check the item with the kitchen and your suppliers, including sauces and bought-in products.
2. Select the allergens it contains. **Tick Suggestions** selects all the highlighted ones at once; check each before you go on.
3. Tick **I Have Verified These Allergens And Accept Responsibility For Their Accuracy**. Any change afterwards clears the tick.
4. Choose **Save Allergens**. The item leaves the list and the count goes up.

Skip moves an item to the end of the list, for when you are waiting on the kitchen or a supplier.

> An item saved with nothing selected is recorded as containing none of your listed allergens. It is still not a guarantee against cross-contact. To change an item later, use the **Allergens** section of its **General** tab in Menu Items.

The page needs the **Menus** permission.

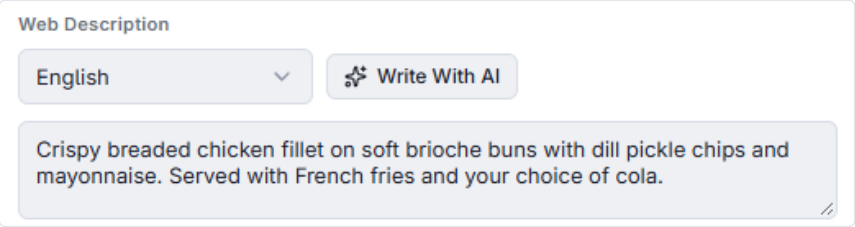
Writing web descriptions with AI

Menu › Menu structure

View online ↗

Let AI write or polish an item's online description in English, Spanish or Arabic.

In the menu item editor, above the **Web Description** box, pick a language (English, Español or العربية) and choose **Write With AI**.



- It writes one or two sentences, about 160 characters, from the item name, its category and its recipe ingredients.
- It never invents ingredients, cooking methods or awards, never mentions the price, and never makes allergen or dietary claims.
- If the box already has a description, it keeps its facts and makes it read better.
- Spanish is written as spoken in El Salvador; Arabic suits a menu in the UAE.

It only fills the box. Read it, edit it, and nothing is saved until you save the item. Needs the Back Office Menus permission; each description counts as one AI action.

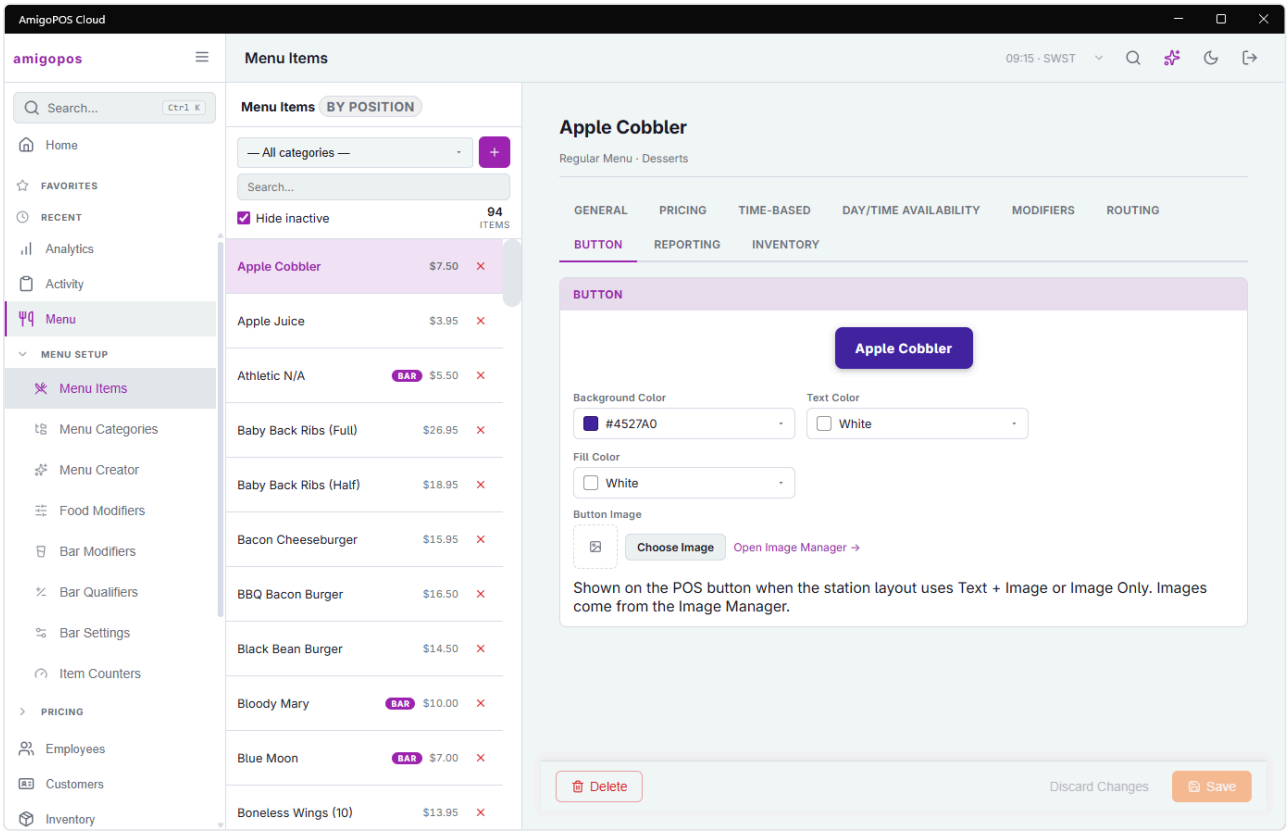
Item buttons and screen placement

Menu › Menu structure

View online ↗

Deciding where an item sits on the grid, and what happens when it has no position.

The register shows the categories as a strip of tabs and each category's items as a grid of buttons. Their order is set in **Back Office › Menu › Menu Setup › Menu Categories** and **Menu Items**, and how the buttons look is set on each category and item.



Button order

Each category and each item has a **Button position**. Categories follow their positions. Items follow theirs too, unless the store sorts items alphabetically:

- Food items: **Order menu items alphabetically** in **Back Office › Store Setup › Order Entry Screen**.

- Bar items: **Order bar menu items alphabetically** in Bar Settings.

Sorted alphabetically, positions are ignored. That suits a long list nobody has arranged. An item with no position (0) comes after the positioned ones.

Reordering in Back Office

In **Menu Categories** and **Menu Items**, drag a row in the list onto another row to move it there; the row it will land on is outlined while you drag. The **Move up** and **Move down** arrows on each row do the same one step at a time, and are the way to do it on a touch screen.

- It saves straight away and renumbers the list 1, 2, 3…, closing any gaps. There is no undo: drag it back.
- The order is what the register's category strip and item buttons follow, and the online menu too.
- On Menu Items, pick one category, clear the search and set the sort to **By position** first. The sort switch is the store-wide alphabetical setting for food or bar items, so switching it to **A–Z** changes the register too.
- Rows hidden by **Hide inactive** are renumbered too, and keep their place among the rows around them.

> Put the items you sell most where a hand lands first. The handful that make up most of your orders should never need a scroll.

Colors and images

A category's **Button** section and an item's **Button** tab set the **Background Color**, the **Text Color** and the **Button Image**. The image comes from the store's library; see Button images.

Whether buttons show text, text with the image, or the image alone is set on the register, under **UI Settings**, for categories and items separately: **Text Only**, **Text + Image** or **Image Only**. The same screen sets how many rows and columns of buttons fit. See Station layout and UI settings.

When an item is missing from the register

- The item's **Visible** box is ticked, and its category's **Visibility** is **Visible**.
- **POS** is ticked in **Visible To**, on the item and on its category.
- The item's and the category's **Day/time Availability** both allow the current hour and day.
- The item has no counter at zero; see Menu item counters (86 / availability).

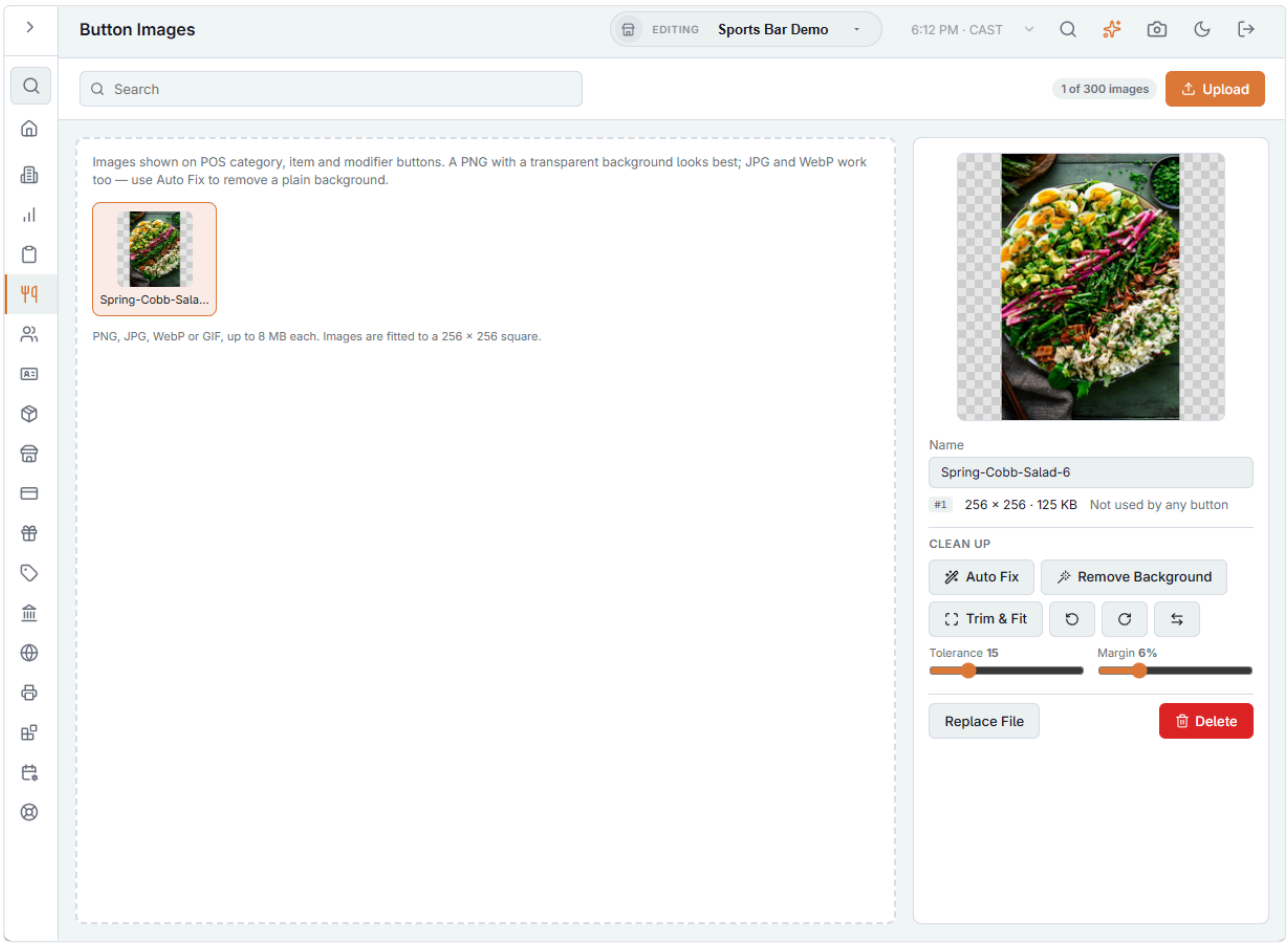
Button images

Menu › Menu structure

View online ↗

Upload, clean up and manage the pictures on the register's category, item and modifier buttons.

Back Office › Menu › Menu Setup › Button Images is the store's library of pictures for the register's category, item, modifier and level buttons. Upload an image once, clean it up here, then choose it in any number of editors. Receipt logos and other printed graphics are kept separately, in the Image manager.



Uploading

- Choose **Upload**, or drop image files onto the library. Several files can go at once.
- PNG, JPG, WebP or GIF, up to 8 MB each and at least 32 pixels on each side. Each image is fitted into a 256 × 256 square.
- A PNG with a transparent background looks best. A photo on a plain background can be cleaned up with **Auto Fix**.
- Each image is named after its file. A file that is refused is listed with the reason.
- The badge in the toolbar counts the images against the library's limit of 300.

The library

Each thumbnail shows the image's name and, in a corner, how many buttons use it. **Search** finds images by name. Select an image to work on it.

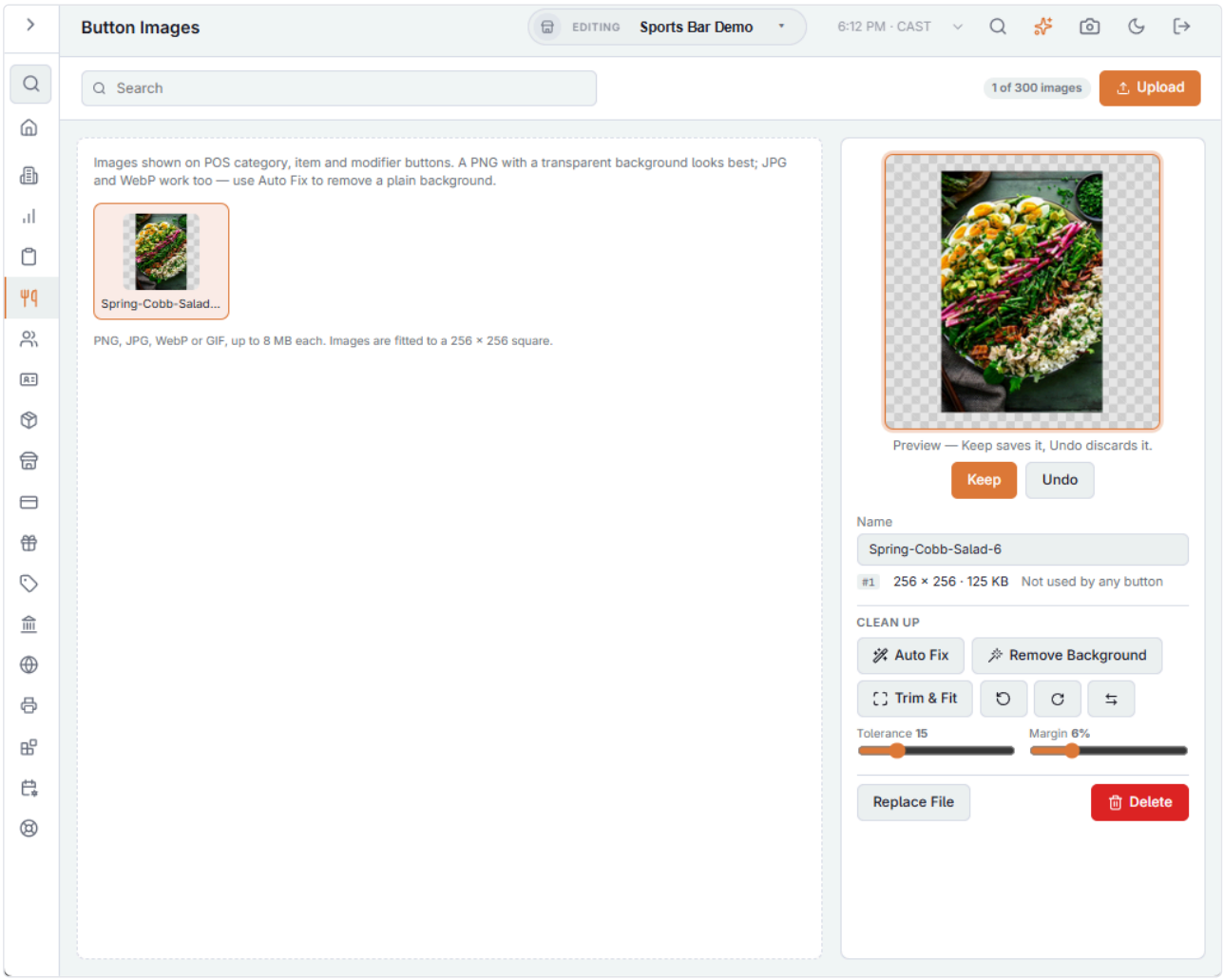
- **Name** — rename it; the name saves when you leave the box.
- The line under the name gives the image's number, size and file size, and **Used by N button(s)** or **Not used by any button**.

Clean Up

Tool	What it does
Auto Fix	Removes a plain background, trims the margins and centres the image.
Remove Background	Makes a plain background transparent.
Trim & Fit	Trims the empty margins and fits the picture to the square.
Rotate Left, **Rotate Right**, **Flip**	Turn or mirror the image.

- **Tolerance** — how far a color can be from the background and still be removed. Raise it for an uneven background, lower it if parts of the picture disappear.
- **Margin** — the space left around the picture, as a percentage of the square.

A tool shows a preview first: **Keep** saves it, **Undo** discards it. Moving **Tolerance** after **Auto Fix** or **Remove Background**, or **Margin** after **Auto Fix** or **Trim & Fit**, runs that tool again. Rotations and flips build on the preview, so you can turn an image and then fix it before keeping it.



Replacing and deleting

- **Replace File** — puts a new file in place of the image. Its name stays, and every button that uses it shows the new picture.
- **Delete** — asks first, and says how many buttons use the image. Those buttons then show text only.

Using an image on a button

The category and item editors, and the modifier and level editors in Food Modifiers, have a **Button Image** field:

- **Choose Image** opens the library with a search box; pick an image.
- The × clears it.
- The **Button Images** link opens this page.

The register shows the images when its **UI Settings** use **Text + Image** or **Image Only**, set separately for categories and items. See Item buttons and screen placement. Registers pick up library changes on their own.

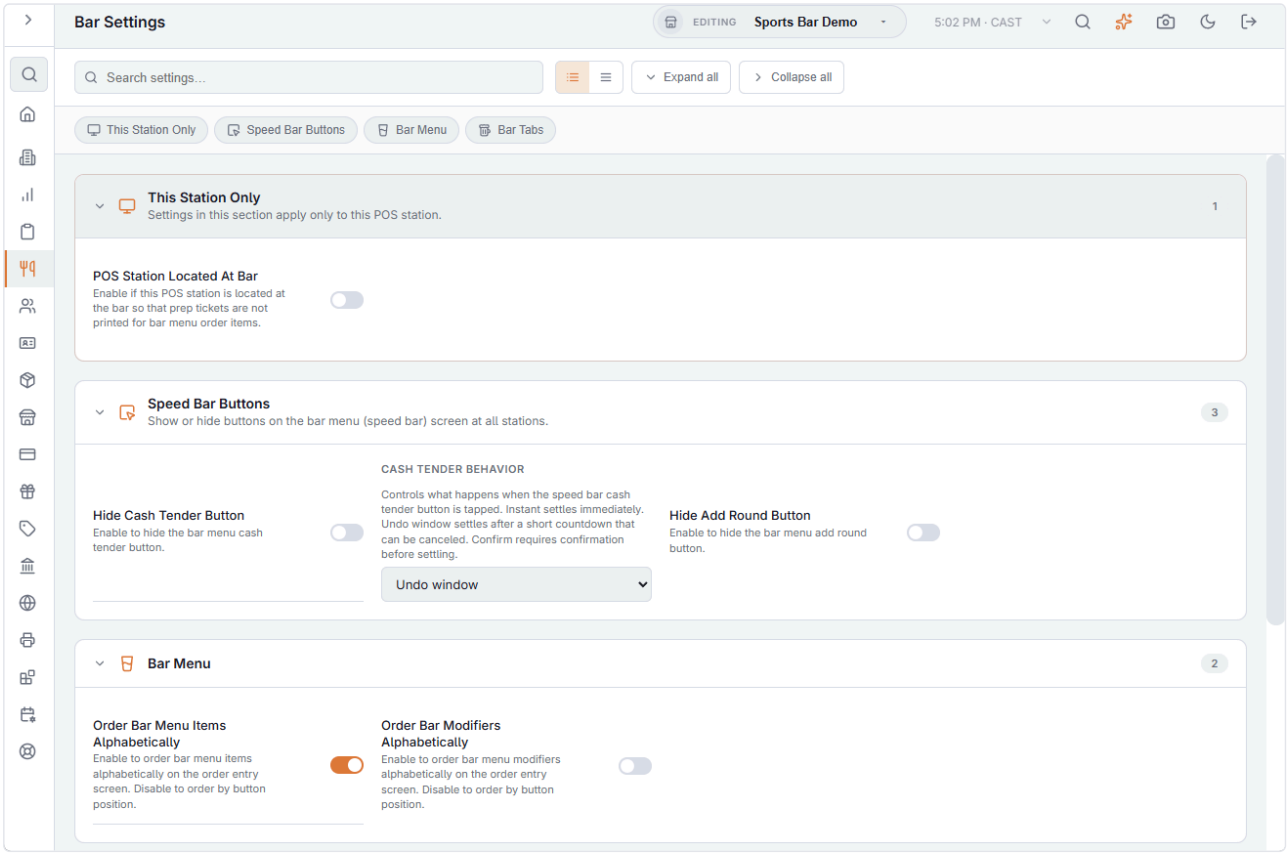
> Image-only buttons work for a bar with familiar bottles and badly for a menu of similar dishes. Text with an image lets staff read the name and recognise the picture.

Bar Settings

View online ↗

The bar menu screen: the bar station switch, the speed bar buttons, sorting, and bar tabs with their default limit and presets.

Back Office › Menu › Menu Setup › Bar Settings sets up the bar menu screen at the register: the speed bar buttons, how bar items are sorted, and bar tabs.



There is no Save button. A switch or drop-down saves the moment you change it; a box saves when you leave it, with a tick to confirm.

This Station Only

- **POS Station Located At Bar** — on this register, bar menu items do not print on the prep printers, because the bartender makes them. The switch is kept on the station itself, so turn it on in Back Office on each bar register.

Speed Bar Buttons

The buttons on the bar menu toolbar, on every station.

- **Hide Cash Tender Button** — removes the cash button, which pays the order in cash without opening the payment screen.
- **Cash Tender Behavior** — what that button does: **Instant** pays at once, **Undo window** pays after a short countdown that can be cancelled, **Confirm** asks first.
- **Hide Add Round Button** — removes **Add Round**, which rings the last round again for the same guests.

Bar Menu

- **Order Bar Menu Items Alphabetically** and **Order Bar Modifiers Alphabetically** — sort by name instead of by button position.

Bar Tabs

Setting	What it does
Show Bar Tab Button	The **Start Tab** (+) and **Tabs** buttons on the bar menu toolbar. Off, tabs are not started from the bar menu; **Settle Tab** still shows on an order that already has a tab.

Setting	What it does
Default Bar Tab Amount	The limit already filled in on Start Tab, 100 when blank. A tab with a limit of 0 has no limit.
Bar Tab Limit Preset 1–4	One-tap limit buttons under the limit box on Start Tab. 0 hides a button.
Show Bar Tab Preauth Button	Start Tab offers **Open Tab With Card**, which pre-authorizes the guest's card for the tab limit on a DC Direct terminal. See Bar tabs on a card.

Related: Starting and naming a tab, Opening, re-opening and settling a tab, Bar menu upcharges (Double, Tall, Premium, Virgin).

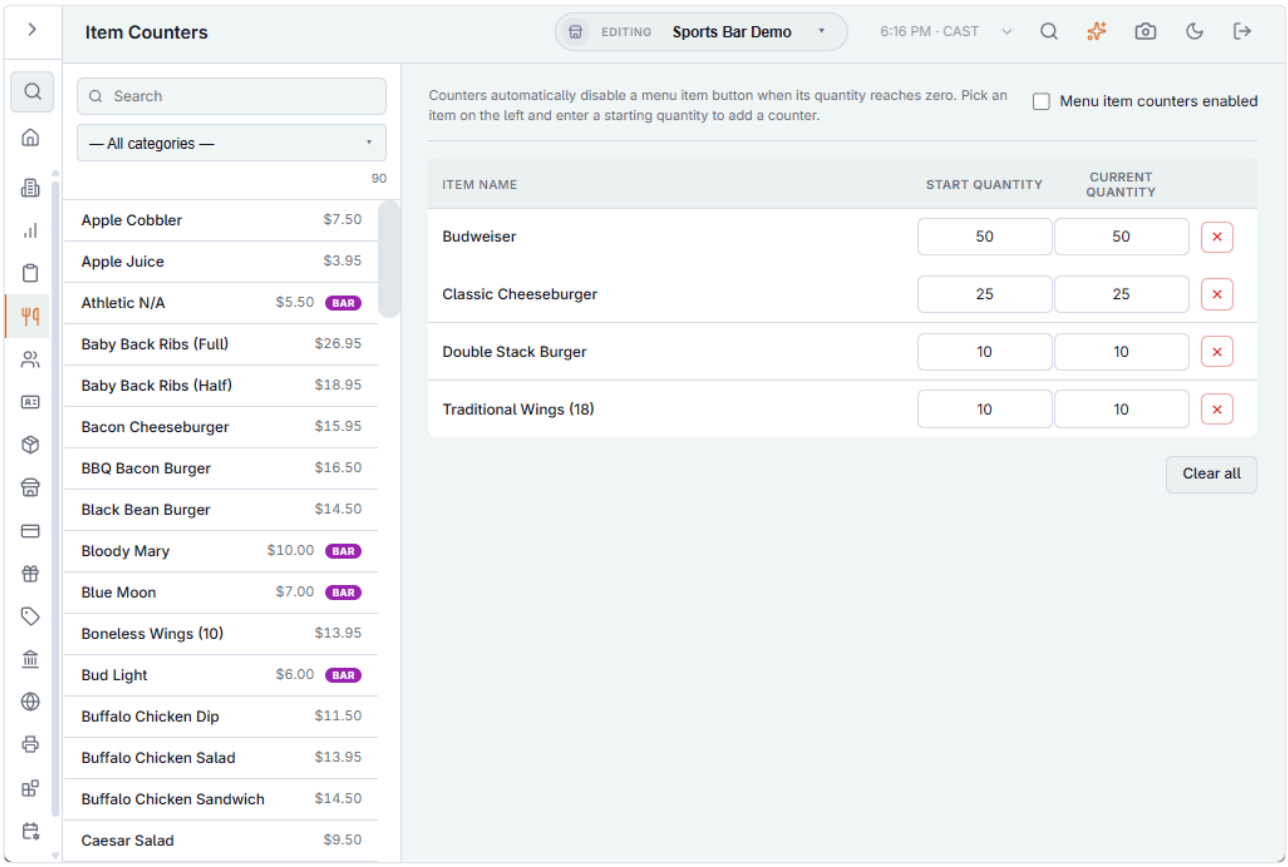
Menu item counters (86 / availability)

Menu › Menu structure

View online ↗

Limited quantities that sell out by themselves when they reach zero, and how counters differ from inventory.

Back Office › Menu › Menu Setup › Item Counters puts a countdown on limited items — tonight's twelve specials. Each sale takes one off, and when the count reaches zero the item's button is disabled, so nobody rings the thirteenth. Managers can do the same from the register; see Menu item counters overlay (86 from the register).



Turning counters on

Menu item counters enabled at the top of the page switches counting on for the store. It is the same setting as in **Back Office › Store Setup › Order Entry Screen**. While it is off, counters can be set up but the register ignores them.

Adding a counter

1. Find the item in the list on the left: pick a category or search by name. Items that already have a counter are not listed.
2. Pick the item. Its name appears under the list with a **Start Quantity** box.
3. Enter the quantity and choose **Add**. The counter starts with its current quantity at the start quantity.

The counters table

- **Item name**, **Start Quantity** and **Current Quantity** for each counter. Both quantities can be changed in place; each saves when you leave the box and reaches the registers straight away.
- Set **Current Quantity** to 0 to sell an item out now, or raise it when the kitchen makes more.
- The × deletes one counter after you confirm. The item is then no longer counted, which means unlimited.
- **Clear all** deletes every counter after you confirm. It cannot be undone.

> A counter at zero and no counter are not the same: zero means sold out, no counter means not counted at all.

With **Delete menu item counters at end of day** on, in **Back Office › Store Setup › Order Entry Screen**, End of Day clears all counters so the next day starts with everything available.

Counters and stock

A counter is a number you set by hand. It does not use recipes and does not restock itself. Stock rules follow real inventory: with **Warn At The POS** or **Block At The POS**, items whose ingredients have run out get a **Low** or **Out** badge on their button. The two work together, and a counter at zero makes the item sold out whatever the stock rule says — see Stock rules: when an item runs out.

Time-based items (pool tables, lanes, rentals)

Menu › Menu structure

View online ↗

Bill by elapsed time — pool tables, bowling lanes, karaoke rooms, rentals — with a per-interval rate, a minimum, grace minutes and optional per-player pricing.

A **time-based item** bills by elapsed time instead of a fixed quantity: pool tables, bowling lanes, karaoke rooms, VR booths, hookah, coworking desks, equipment rentals and similar. You set a price per interval; the POS runs a live timer and the charge grows until the timer stops. For the bigger picture — tables, lights, the guest page — see Pool tables and timed games.

Creating a time-based item

1. Open **Back Office › Menu › Menu Setup › Menu Items** and create (or edit) the item as usual — name, category, button and **Price**. The price is the charge *per interval*, not per hour, unless your interval is 60.
2. Open the **Time-Based** tab and tick **Time-based**.
3. Fill in the fields below and save.

The fields

Field	What it does
Time-based	Turns timed billing on. When off, the other fields are ignored and the item sells normally.
Time interval	The billing unit in minutes. Elapsed time is divided by it and *rounded up*. 1 = per minute, 15 = quarter hours, 60 = per hour.
Minimum Intervals	The fewest intervals ever charged, even if the timer stops sooner. Interval 60 with minimum 1: a 10-minute game still bills one hour.
Grace Minutes	Minutes past each interval before the next one is charged (0–120). Interval 60 with 5 grace: up to 65 minutes bills 1 hour, 65–125 bills 2.
Time-based item type	Pool Table, Bowling Lane, Karaoke Room… Chooses the tile icon at the register and — more importantly — which tables on the floor plan start this item. See Linking tables to timed items.
Players Included	How many players the price covers. See Charging by number of players.
Extra Player Price	Charged per interval for each player beyond those included. Leave at 0 for a plain table rate.

Pricing examples

- *Pool table $12/hour, one-hour minimum, 5 minutes' grace:* Price 12.00, Interval 60, Minimum 1, Grace 5.
- *Karaoke room $5 per 15 minutes, half-hour minimum:* Price 5.00, Interval 15, Minimum 2.
- *Kayak rental $1 a minute, 20-minute minimum:* Price 1.00, Interval 1, Minimum 20.
- *Pool $10/hour for two, $3 per extra player:* Price 10.00, Interval 60, Players Included 2, Extra Player Price 3.00.

How the charge is calculated

`intervals = max(Minimum, (elapsed minutes − Grace) ÷ Interval, rounded up)`

`line total = intervals × rate per interval`

The rate per interval is the price, adjusted by any price rule in effect when that interval starts (happy hour — see Happy hour and rate changes during a game) and by extra players. Tax applies through the item's normal tax rate.

Things to know

- One item can run on many tables at once — each table's game is its own line on its own check. Create separate items only for different *rates* (for example a premium table).
- Time-based items do not print prep tickets.
- The timer keeps counting while the order is parked; the charge is based on when the game started.
- A new or edited time-based item reaches the POS on its next menu refresh — no restart needed.

AI Menu Creator

Menu › Menu structure

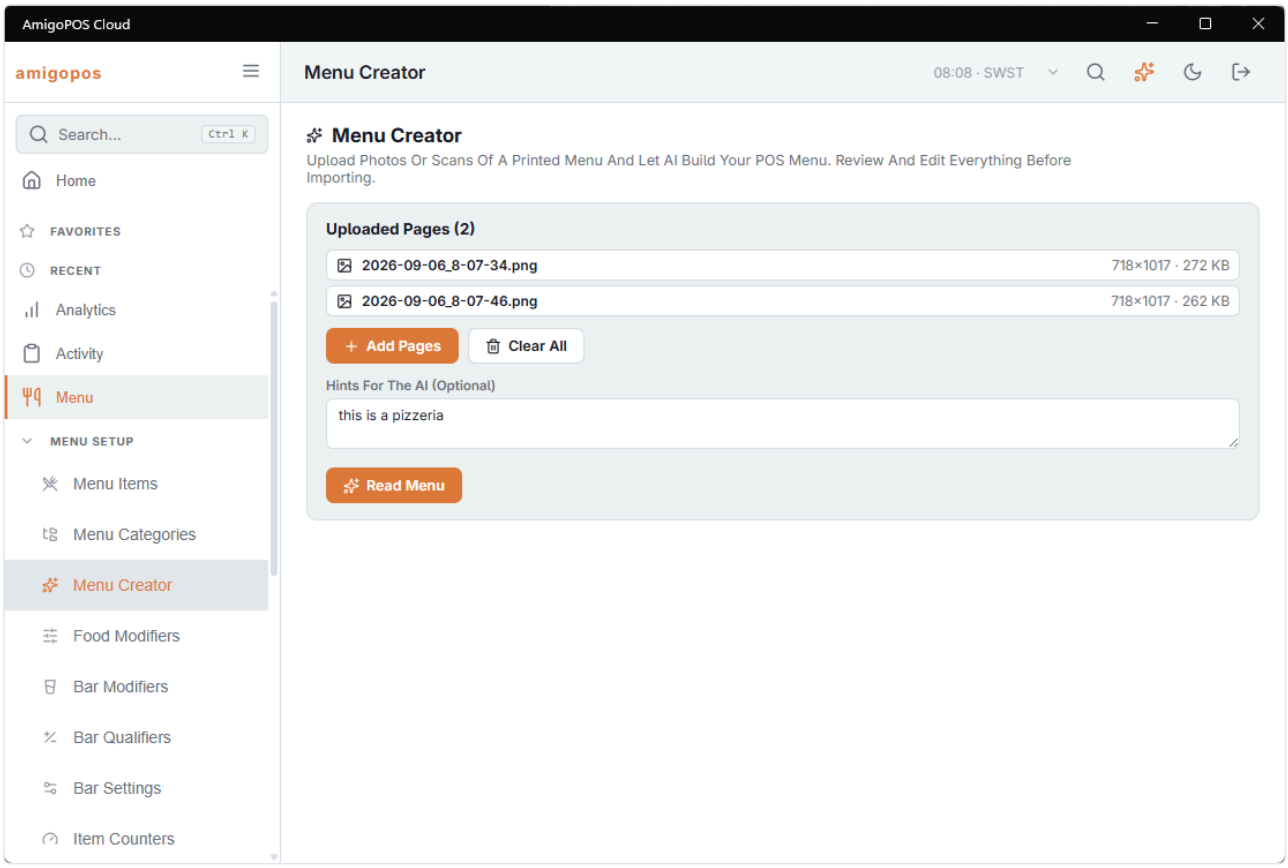
View online ↗

Build a complete POS menu from photos or scans of a printed menu, review every item on screen, then import it in one step.

Back Office › Menu › Menu Setup › Menu Creator builds a POS menu from photos or scans of a printed menu. The AI reads the pages and proposes categories, items, prices, sizes and modifier groups. You review and correct everything on screen, and nothing is written to the store until you import.

1. Upload the menu pages

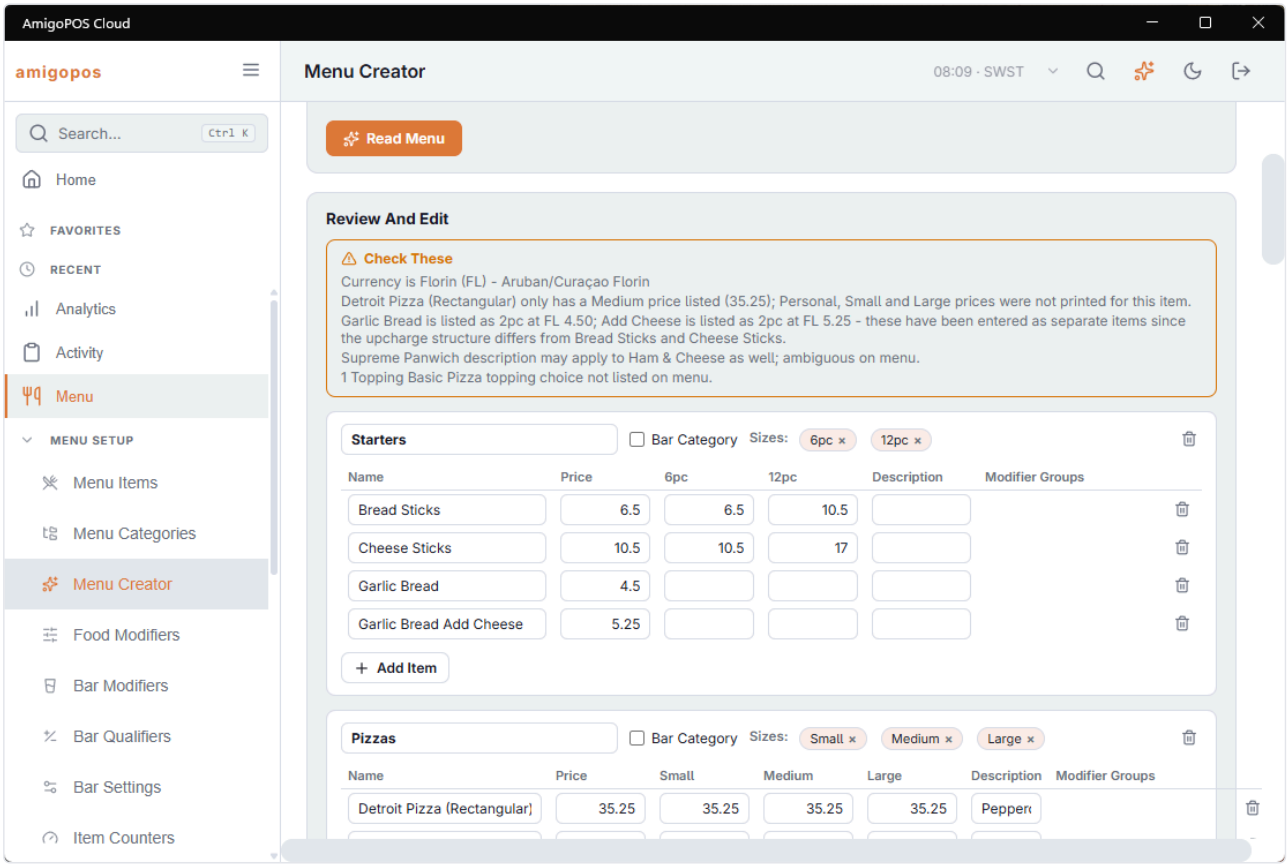
- Choose **Add Pages** and pick photos or scans of the printed menu: JPEG, PNG, WebP, GIF or PDF, up to 8 MB per file and 10 pages in all. Each page appears under **Uploaded Pages**. **Clear All** removes them and starts again.
- Shoot phone photos straight on, in good light, so the smallest print is readable.
- **Hints For The AI (Optional)** is for what the pages do not say: the currency, a page to skip, the kind of restaurant.



2. Read the menu

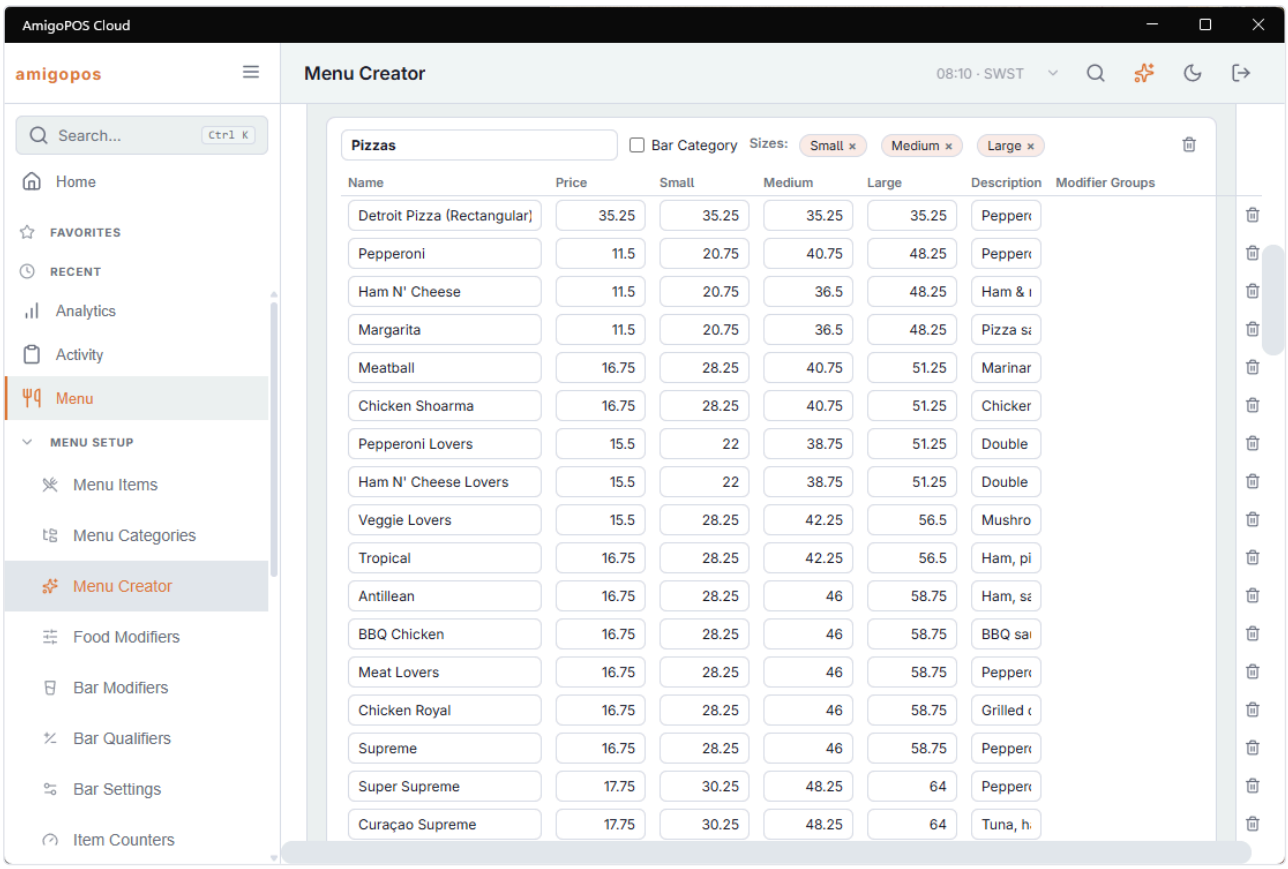
Choose **Read Menu**. A menu of several pages can take a minute or two; leave the page open. The proposed menu then appears under **Review And Edit**. Each reading counts as five AI actions; see AI usage, limits and your monthly allowance.

The **Check These** box at the top lists what needs a look: items with no price found (they are set to 0), sizes or modifier groups an item names that do not exist, modifier groups the AI inferred, groups not attached to any item, and notes from the AI about text it could not read. Work through it first.



3. Review and edit

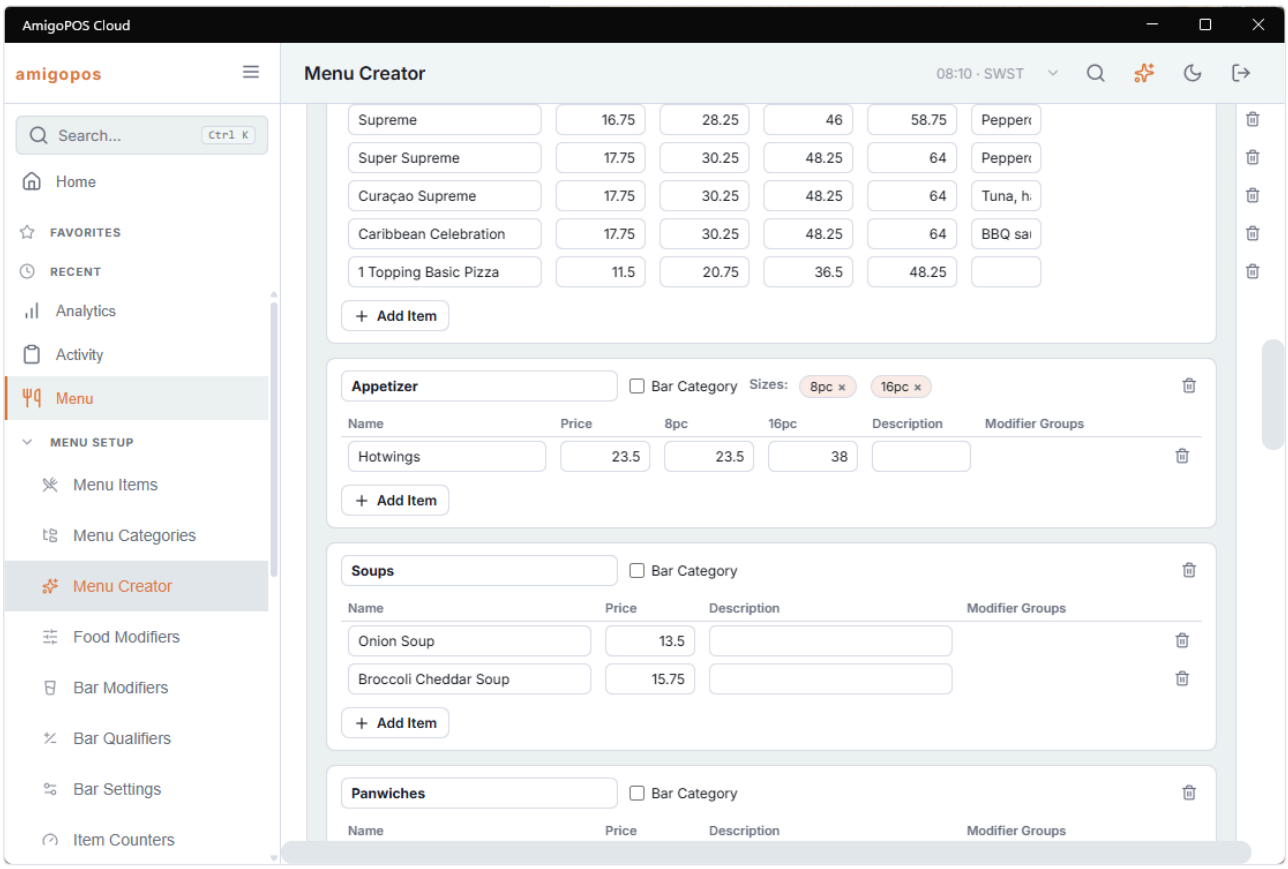
- Each category shows its items in a table. Edit the category name, and each item's **Name**, **Price** and **Description**, in place.
- Where the menu sells items in sizes (Small/Large, Glass/Bottle), the sizes appear as chips under **Sizes**, and each size has its own price column. The × on a size chip removes that size from the whole category.
- Tick **Bar Category** on beer, wine and cocktail sections so they become bar categories. Their sizes become the category's upcharges.
- **Add Item** and **Add Category** add rows; the delete icons remove an item or a whole category.



4. Attach modifier groups to items

The **Modifier Groups** panel below the categories defines each proposed group. A group does nothing until it is attached to the items that offer those choices. The chips in an item's **Modifier Groups** column are those attachments, and they are what the import writes to the store.

- The AI attaches groups where the menu implies them: every pizza gets Toppings, every salad gets Dressings. Check a few rows in each category.
- To attach a group, pick it from the **+** list in the item's row; the × on a chip detaches it. Renaming a group in the panel renames its chips too, and deleting a group removes its chips.
- For each group, choose **Pick One**, **Pick Many** or **Optional**, tick **Required** if needed, and set each modifier's name and price. **Add Modifier** adds one.
- Groups the AI made up from wording like "choice of side" carry an **Inferred** badge. Check their options and prices with the kitchen.

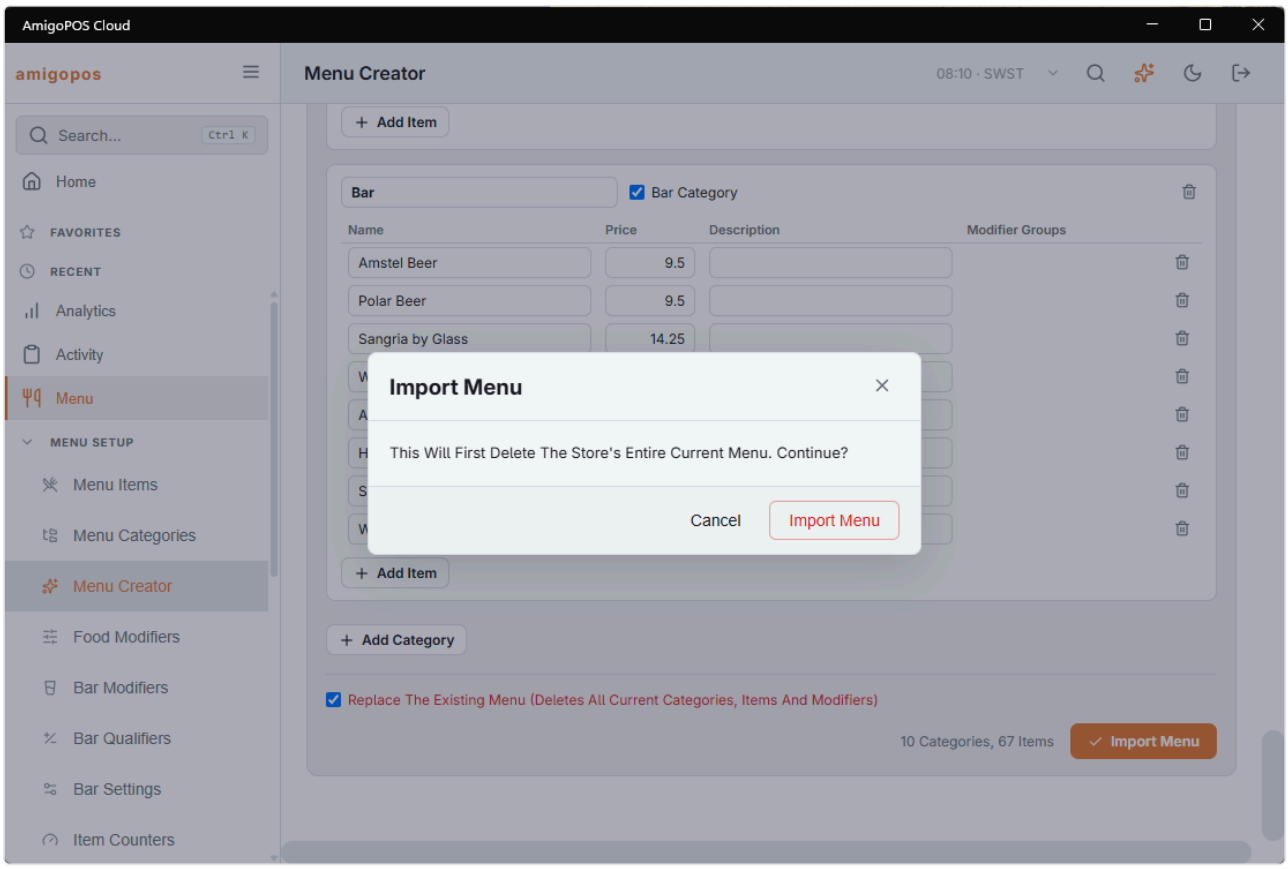


A group with no modifiers, a category with no items and a row with no name are left out of the import. A group that is not attached to any item is still created, but no item offers it until you assign it in the item's **Modifiers** tab.

5. Import

The line beside **Import Menu** counts the categories and items to be imported.

- Leave **Replace The Existing Menu** unticked to add the new categories beside what the store already has.
- Tick it to delete the store's current menu first: categories, items, upcharges, food modifiers and their levels, bar modifiers and qualifiers, recipes, and the price rules and item counters set on the old items and categories. Use it on a new store or for a full rebuild.
- Choose **Import Menu** and confirm. The import is one step: it completes in full or changes nothing. When it is done the page says how many rows were written; **Start Over** clears the page.



What the import sets up

- Each item's description becomes its **Item description**.
- Prep stations are assigned by category: bar categories go to Prep 3; salads, desserts, soups and beverages to Prep 2; everything else to Prep 1.
- Categories and items keep the order they have in the review, after the store's existing categories. Category button colors rotate through a set of colors.
- Items get the tax rate with ID 1 (shown as ID:1 in the tax rate list): food items on the item, bar items through their category's **Bar Menu Tax Rate**. Change it afterwards if your store uses another rate.
- Where a category, item or modifier name matches a picture in the built-in set, it gets that button image, added to Button images while the library has room. If the store has not chosen how buttons look, the register switches to Text + Image.

Fine-tune anything afterwards in Menu items (prices, SKUs, buttons) and Categories (food groups).

> Prices are read by AI from a picture. Check them against the printed menu before going live, especially size prices and everything under Check These.

Modifiers

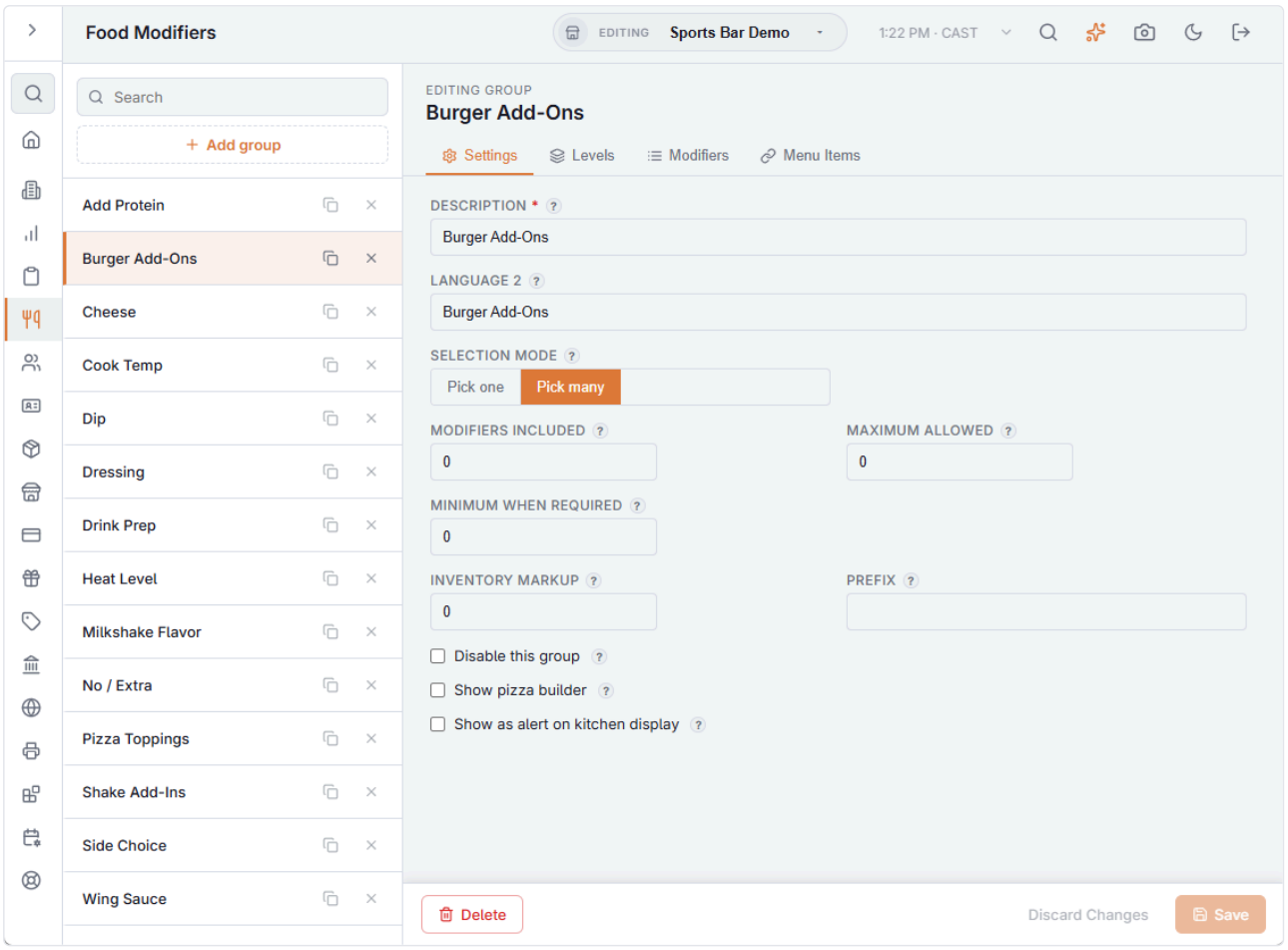
Food modifiers, groups, and levels

Menu › Modifiers

View online ↗

Building the choice structure behind every item.

Back Office › Menu › Menu Setup › Food Modifiers holds the modifier groups of the food menu. A **group** is one question the register asks, such as "Choose a side" or "Toppings". Its **modifiers** are the answers, and its **levels** are the quantity words tapped with them, such as No, Lite or Extra.



The group list

- **Search** finds groups by name; **Add group** starts a new one.
- The copy icon on a row clones the group, with all its levels, modifiers and per-level prices, after you confirm.
- The delete icon deletes the group after you confirm, with its levels, modifiers, prices and menu-item assignments.

The group opens on the right with four tabs: **Settings**, **Levels**, **Modifiers** and **Menu Items**. The last three unlock once the new group has been saved. Settings are kept until you choose **Save**.

Settings

- **Description** — required: the group's name, as the cashier sees it.
- **Language 2** — the name in the second language. Blank uses the description.
- **Selection mode** — **Pick one** allows one modifier; **Pick many** allows any number.
- **Modifiers included** — how many choices ride free on the item's price. The cheapest picks are the free ones; the rest are charged at their regular price. 3 means the first three toppings are free.
- **Maximum allowed** — the most modifiers that can be picked. 0 means no limit. It cannot be lower than **Modifiers included**.
- **Minimum When Required** — where an item makes the group mandatory, the fewest choices the guest must make, such as 2 for "Choose two sides". 0 or 1 means any one choice. It cannot be more than the maximum.
- **Inventory markup** — the multiplier that turns a modifier's recipe cost into its suggested price, in the recipe editor and on Menu Costing. See Menu Costing: cost, margin and a recommended price for every item.
- **Prefix** — the word the register uses in the "included at no charge" hint, such as *Toppings*. Blank uses the description.
- **Disable this group** — ticked, the group is not offered at the register, but it and its assignments are kept.
- **Show pizza builder** — the group's modifiers appear on the visual pizza; see Pizza builder.
- **Show as alert on kitchen display** — see *Kitchen alerts* below.

- **Own Prep Stations** — prints the group at the ticked prep stations instead of with its item, for example the drink included with a breakfast at the bar. Leave every station unticked to print it with its item. See Sending a modifier group to its own prep station.

Levels

The **Levels** tab shows the group's levels as chips, with their quantity multiplier when it is not 1. **Add level**, or a chip, opens the level editor:

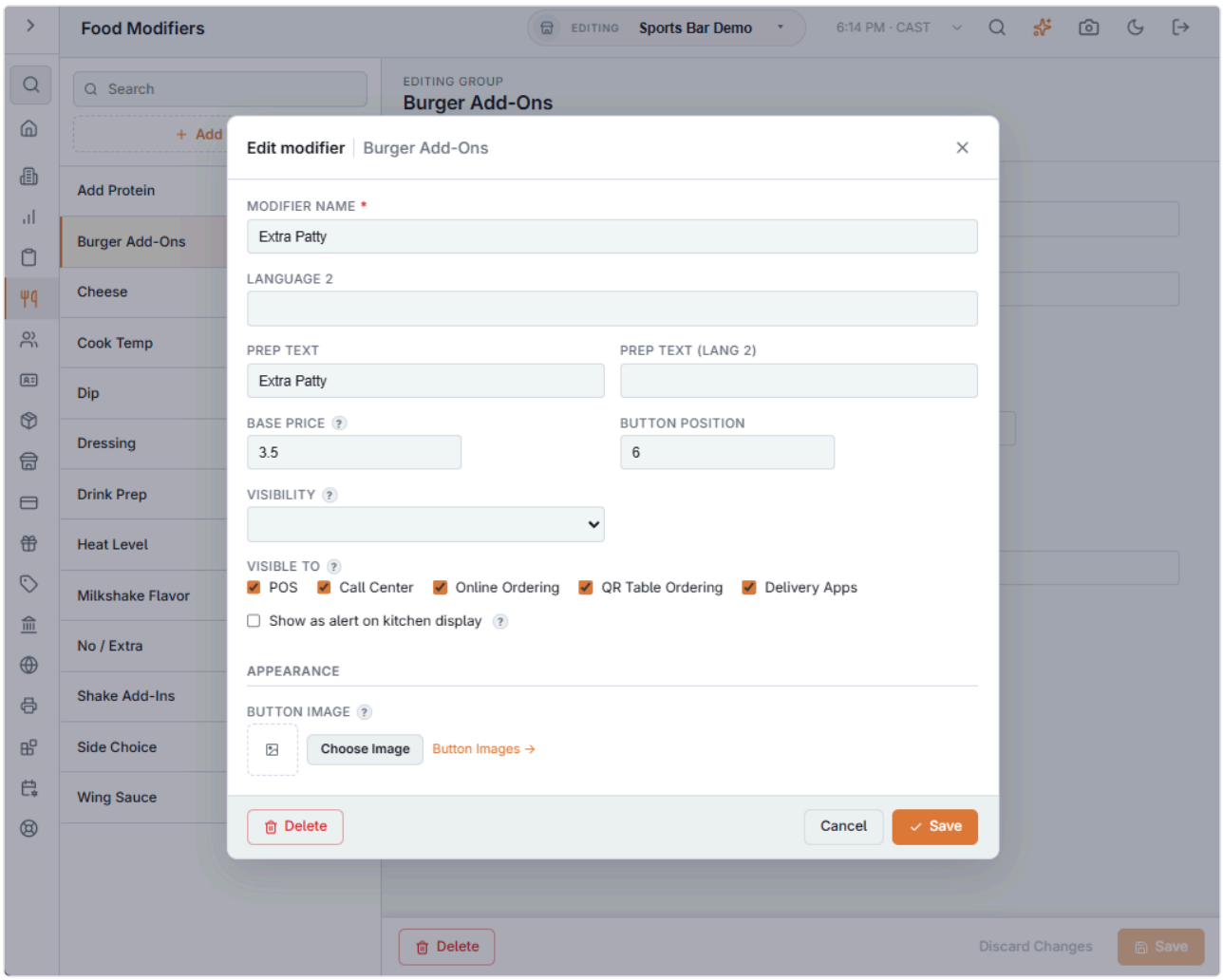
- **Button text** — required: the word on the level button, such as EXTRA or NO.
- **Language 2**, **Prep text** and **Prep text (Lang 2)** — the second-language name, and what prep tickets and the kitchen display show.
- **Quantity multiplier** — how much of the modifier's recipe the level takes from stock: 1 a full serving, 2 double, 0.5 half, 0 nothing. It does not change the price. See How modifiers, levels and pour sizes use stock.
- **Visibility** — **Hidden** keeps the level but leaves it off the register.
- **Sort Order** — the level's place in the row of level buttons.
- **Button Image** — a picture for the level button; see Button images.

A level named No, None, Without or Sin is a removal: it is never charged and never uses a free slot.

Modifiers

The **Modifiers** tab shows each modifier as a card with its price and prep text. **Add modifier**, or a card, opens the modifier editor:

- **Modifier name** — required.
- **Language 2**, **Prep text** and **Prep text (Lang 2)**.
- **Base price** — the charge when no per-level price applies. 0 for free choices.
- **Button position** — its place among the group's buttons.
- **Visibility** — **Hidden** keeps the modifier but leaves it off the register.
- **Visible To** — the channels where it can be chosen.
- **Show as alert on kitchen display** — this modifier stands out on the kitchen display in every group.
- **Button Image** — a picture for the modifier button.
- **Per-level prices** — one row per level. A price in a row replaces the base price when that level is picked; a blank row uses the base price. The × clears a row. Base 0.50 with EXTRA at 1.00 charges 1.00 for Extra.



The level and modifier editors open in a dialog with their own **Save**, **Cancel** and **Delete**. Clicking outside the dialog does not close it.

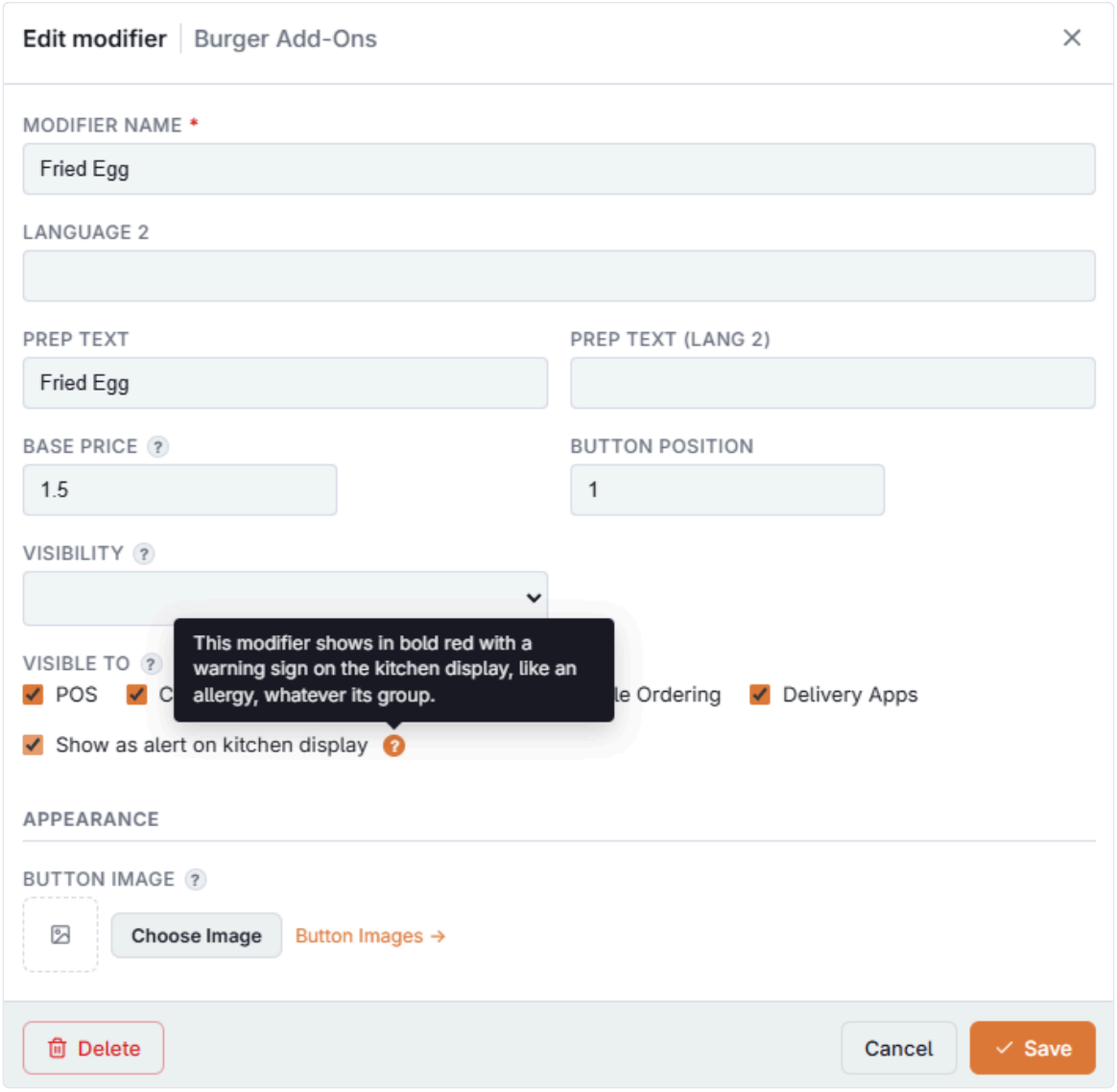
Menu Items

The **Menu Items** tab shows every item the group is assigned to. Pick a **Menu category** and a **Menu item**, tick **Mandatory** if the item cannot be added without an answer, and choose **Assign**. Each row of **Current assignments** has its own **Mandatory** switch and a remove icon. See Modifier group assignments.

Kitchen alerts

Show as alert on kitchen display makes a modifier stand out on the KDS in bold red with a warning sign, like an allergen line. Use it for the choices a cook must not miss: allergies, dietary needs, “no gluten”.

- **On a group** (its **Settings** tab) — every modifier in the group is an alert. The usual choice for an *Allergies* or *Dietary Needs* group.
- **On one modifier** (its editor) — that modifier is an alert in every group it is in.
- It only changes how the line looks on the kitchen display. Printed prep tickets, prices and bumping are unchanged.
- Cloning a group copies the setting.



What the cook sees: KDS overview and ticket layout. How the groups behave while ringing: Food modifiers and how they prompt.

Sending a modifier group to its own prep station

Menu › Modifiers

View online ↗

Print a group of modifiers, such as the drink included with a breakfast, at a different prep station from the item it is added to.

A modifier normally prints wherever its item prints: a breakfast set to the kitchen sends its eggs, its toast and its included drink to the kitchen ticket. When one group of modifiers is made somewhere else — the drink at the bar, the dessert choice at the pastry station — give that group its own prep stations.

Setting it up

1. Open **Back Office › Menu › Menu Setup › Food Modifiers** and select the group, for example *Breakfast Drink*.
2. On its **Settings** tab, under **Own Prep Stations**, tick the station that makes it — for example **Prep 3** if that is the bar.
3. Choose **Save**.

With every station unticked the group prints with its item, as before. The stations are the same Prep 1 to Prep 12 that menu items use, and each prints on the printer Print Routing gives it (Print routing).

What prints where

For a breakfast at Prep 1, the kitchen, with its drink group at Prep 3, the bar:

- **The kitchen ticket** shows the breakfast and its other choices, without the drink.
- **The bar ticket** shows the breakfast's name with the drink under it, so the bartender knows which order and which plate the drink goes with. The breakfast's other choices are not on it.
- **Kitchen displays** follow the same rule: the kitchen screen leaves the drink off, and the bar screen shows the breakfast with the drink only (KDS overview and ticket layout).

Good to know

- It works for every order, wherever it comes from: the register, the online store, QR tables, the call center and delivery apps.
- It is applied when the order is saved. Lines already sent keep the stations they were sent with, and a change to the group reaches new orders within a minute.
- To keep a group off every ticket, tick a station that has no printer and no kitchen display.
- Cloning the group copies its stations.
- While a register is offline, its backup kitchen ticket still prints the group with its item.

The rest of the group's settings are in Food modifiers, groups, and levels.

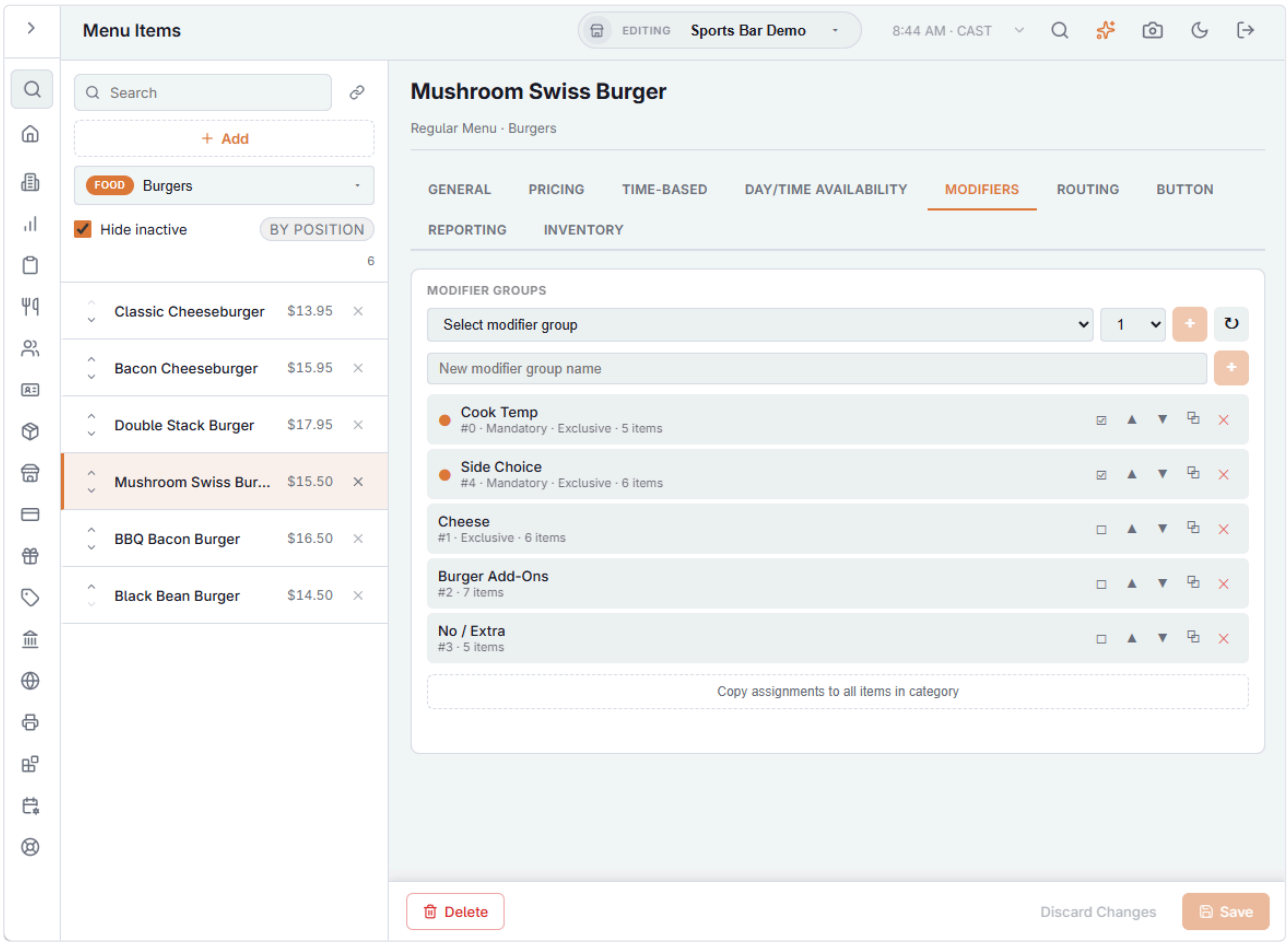
Modifier group assignments

Menu › Modifiers

View online ↗

Attaching groups to items and controlling the prompt order.

An **assignment** connects a modifier group to a menu item. It decides which groups the register shows when the item is added, in what order, and whether an answer is required. One "Choose a side" group can serve fifty items through fifty assignments. Assignments are made in two places: on the item, and on the group.



On the item

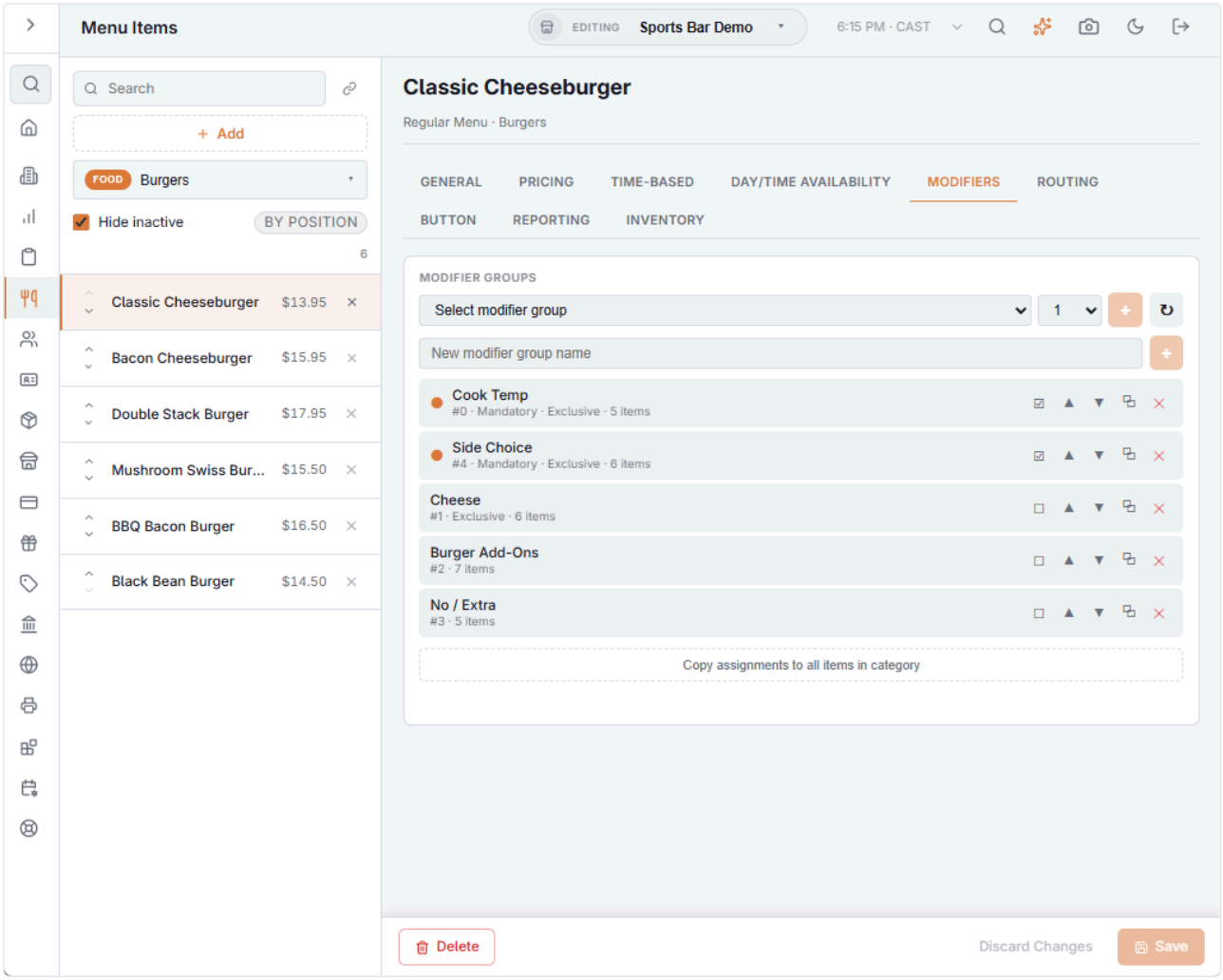
In **Back Office › Menu › Menu Setup › Menu Items**, open the item and its **Modifiers** tab. A new item has to be saved first.

- To add an existing group, pick it in **Select modifier group**, pick its position (1–20) and choose **+**. The ↻ button reloads the list of groups.
- To make a new group and assign it at once, type its name in **New modifier group name** and add it. Fill in its modifiers afterwards in Food modifiers, groups, and levels.

Each assigned group is a row, with a dot when it is mandatory, and these buttons:

- **Make mandatory** / **Make optional** — a mandatory group must be answered before the item is added.
- **Move up** / **Move down** — the order of the group tabs at the register.
- **Copy assignment** — assigns the same group again, at the end.
- **Remove** — takes the group off this item.

Copy assignments to all items in category gives every other item in the item's category this item's groups, in the same order and with the same mandatory settings. It lists the items it will change and asks you to confirm; their own assignments are overwritten, and it cannot be reversed.



Assignment changes on this tab save as you make them.

On the group

In **Back Office › Menu › Menu Setup › Food Modifiers**, open the group and its **Menu Items** tab. Pick a **Menu category** and a **Menu item**, tick **Mandatory** if needed, and choose **Assign**. **Current assignments** lists every item that uses the group, with its category, a **Mandatory** switch and a remove icon. It is the place to check before changing a group that many items share.

Patterns that work

- Build a few groups and reuse them. One “Choose a side” group assigned everywhere means a new side is one edit, not fifty.
- Make a group mandatory when the kitchen cannot start without the answer, such as temperature or size; leave add-ons optional.

> An item that shows no groups when it should: check that the assignment exists, that the group’s **Disable this group** box is clear, and that the group has visible modifiers.

How the groups behave while ringing: Food modifiers and how they prompt.

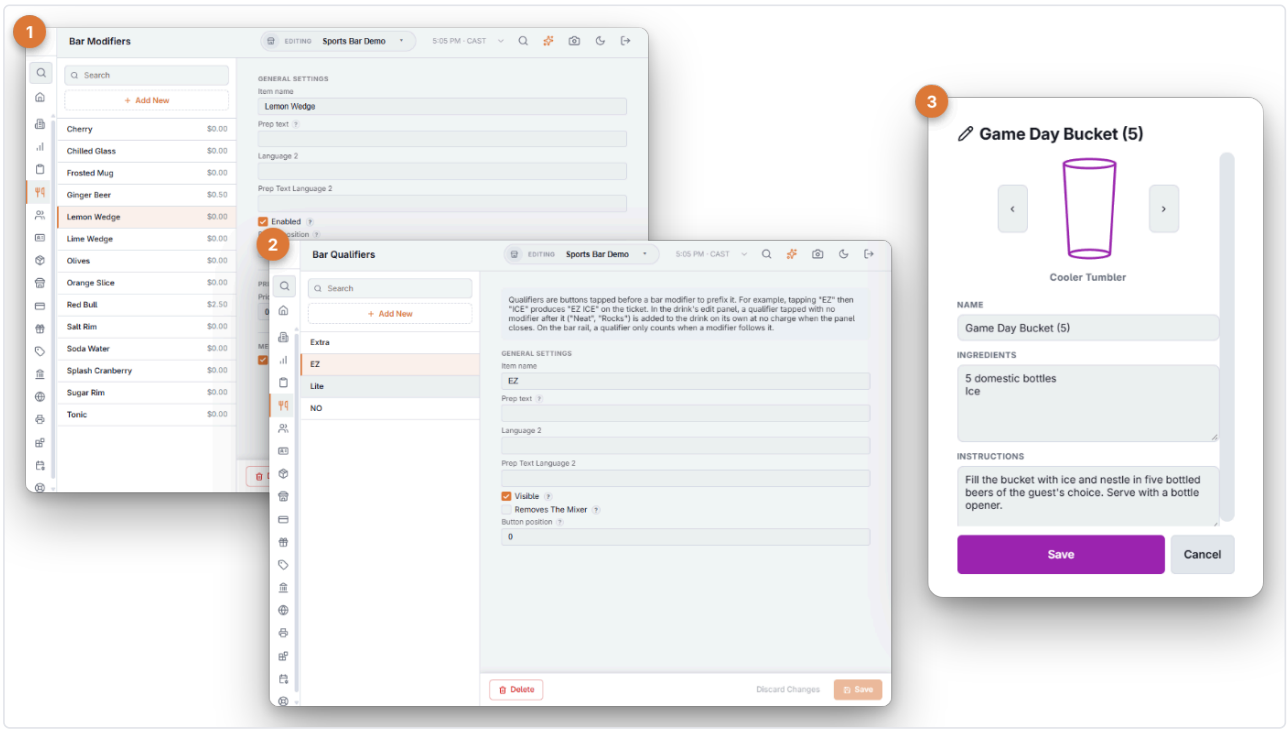
Bar modifiers, qualifiers, and recipes

Menu › Modifiers

View online ↗

Setting up bar modifiers and qualifiers, which bar categories offer them, and how they tie in with drink sizes and stock.

The bar menu has its own modifiers, set up in **Back Office › Menu › Menu Setup › Bar Modifiers** and **Bar Qualifiers**. They are not grouped or assigned item by item: a bar modifier is offered in every bar category or in the ones you choose, and the qualifiers are one short list for the whole bar. Each drink can also have a pour guide, its recipe, which is kept on the register. How the two pages fit with the rest of the menu is in How the menu is organized: food and bar.



Bar Modifiers

Mixers, garnishes and preparations, such as Soda, Lime or Rocks. The list shows each one with its price; a modifier that is turned off is muted and tagged **Off**. **Search** finds one, and **Add New** starts one.

- **Item name** — the text on the button.
- **Prep text** — what the bar ticket and kitchen screens show, when it should differ from the name, such as RB on the button and RED BULL on the ticket.
- **Language 2** and **Prep Text Language 2** — the second-language versions.
- **Enabled** — off, the button is not on the register; the modifier is kept.
- **Button position** — lower numbers come first, unless **Order Bar Modifiers Alphabetically** is on in Bar Settings.
- **Price** — added to the drink when the modifier is picked. 0 for free ones such as Ice or No Ice.
- **Display For All Menu Categories** — on, the modifier is offered in every bar category. Off, tick the bar categories that offer it.

Changes are kept until you choose **Save**. **Delete** removes the modifier after you confirm.

Bar Qualifiers

Qualifiers are short words tapped before a bar modifier to change it: tapping EZ and then ICE puts “EZ ICE” on the ticket. A qualifier adds no charge. In the drink’s line-edit panel, a qualifier with no modifier after it (such as *Neat* or *Rocks*) is added as its own line at 0.00 when the panel closes, and prints on the check and the bar ticket; tap it again before closing to take it off. On the bar rail, a qualifier is kept only when a modifier follows it. The register shows the qualifiers only in categories that have bar modifiers.

- **Item name** — the text on the button.
- **Prep text** — what prints on the ticket, such as “easy” for EZ.
- **Language 2** and **Prep Text Language 2**.
- **Visible** — cleared, the qualifier is kept but not shown on the register.
- **Removes The Mixer** — ticked, the bar modifier tapped after this qualifier is left out of the drink and takes no stock (its price still applies), as with “No Red Bull”. Qualifiers named No, None, Without or Sin start ticked; tick it for any other removal word, such as Hold or Skip.
- **Button position** — its place in the row, unless the bar modifiers are ordered alphabetically.

Pour guides (drink recipes)

A pour guide is a drink’s recipe for the bartender: the glass, the ingredients and the instructions. It is kept on the register, not in Back Office. Tap the drink on the order, then **Pour Guide**; the button is dimmed when the drink has no guide yet. The guide shows the glass, the ingredients and the instructions, with **Print**.

- **Edit Pour Guide** — shown to managers. A drink with no guide yet opens straight in the editor, named after the drink.
- The arrows on each side of the glass pick the glass; its name shows under it.
- **Name**, **Ingredients** and **Instructions** — what the bartender sees. **Save** keeps it for every order of that drink.

A pour guide is only for reading: it does not take stock. Stock comes from the drink’s recipe in Inventory (see Sizes and stock below).

Where the buttons appear

A bar category with **Always Show Bar Modifiers** on keeps its qualifiers and modifiers in a row under the item buttons. See Categories (food groups) and, for ringing, Bar modifiers and qualifiers.

Sizes and stock

- Sizes and strengths with their own price, such as Double or Tall, are not qualifiers: they are the category’s upcharges. See Bar menu upcharges (Double, Tall, Premium, Virgin).
- A bar modifier can have its own recipe in Inventory, so a Red Bull takes a can from stock. See How modifiers, levels and pour sizes use stock.

Pricing

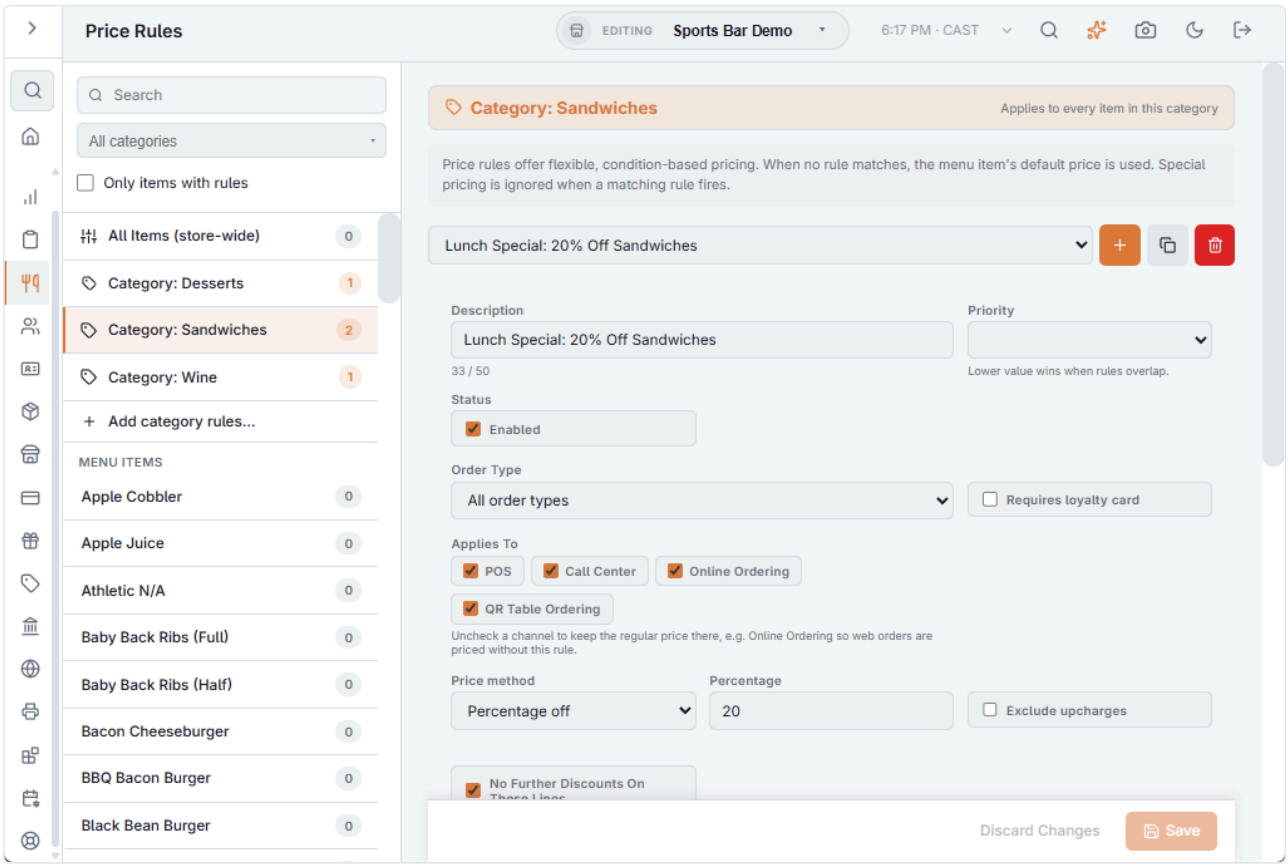
Price rules

Menu › Pricing

View online ↗

Automatic price overrides — a different price when the order, the guest, the day, the time or the quantity matches.

Back Office › Menu › Pricing › Price Rules sets prices that replace an item’s normal price whenever all of a rule’s conditions match the order: happy hour, a lower dine-in price, a members’ price, a better price for six or more. When no rule matches, the item’s own price is used.



Choosing what a rule covers

The list on the left picks the target. The badge on each entry counts the rules already on it.

- **All Items (store-wide)** — rules for every item in the store.
- Categories that have rules are listed under it. To add the first rules to a category, pick the category in the filter at the top, then choose **Add category rules...**.
- **Menu Items** — every item, narrowed by the category filter and the search. **Only items with rules** shows just the items that have some.

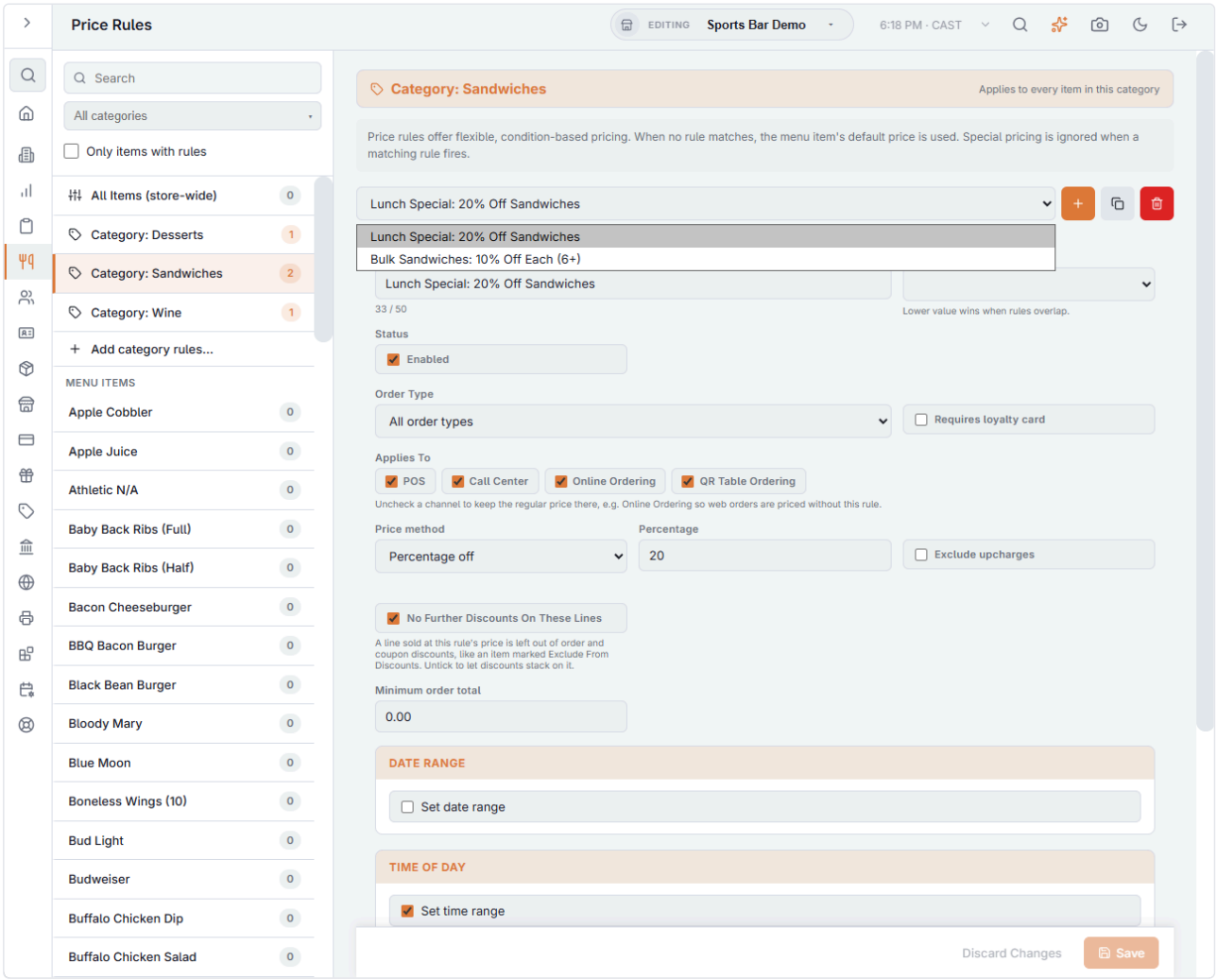
The editor on the right shows the target and, for a category or the whole store, says what the rules apply to. The list at the top picks one of the target's rules; the buttons beside it add a new rule, copy the selected one and delete it. A rule's changes are kept until you choose **Save**.

What a rule can test

- **Order Type** — one order type, or **All order types**.
- **Requires loyalty card** — a loyalty card must be on the order.
- **Applies To** — the channels the rule prices on: **POS**, **Call Center**, **Online Ordering** and **QR Table Ordering**. Untick one to keep the regular price there.
- **Minimum order total** — the order must have reached this amount.
- **Quantity pricing** — item rules only. With **Enable quantity-based pricing**, the rule applies when the line's quantity is between **Quantity from** and **Quantity to**; 0 in **Quantity to** means no upper limit.
- **Date range** — with **Set date range**, between a **Start date** and an **End date**.
- **Time of day** — with **Set time range**, between a **Start time** and an **End time**. A window that ends before it starts crosses midnight: a Friday 21:00–02:00 rule still runs at 01:00 on Saturday, and counts as Friday for the days and dates.
- **Day of week** — the day boxes. New rules start with all seven ticked.
- **Customer type** — one customer type, or **All customer types**. A rule for one type does not apply when the order has no customer. See Customers list, types, and merge.

What a rule does

- **Description** — the rule's name, up to 50 characters. The register can show it under the line the rule prices.
- **Price method** — **Fixed price** charges the amount entered; **Percentage off** takes that percentage off the item's normal price. New item rules start as a fixed price, and new category and store-wide rules as a percentage.
- **Exclude upcharges** — for bar items, and on category and store-wide rules. Ticked, a drink rung with an upcharge, such as a Double, keeps its upcharge price and the rule does not apply to it. Unticked, the rule prices the upcharge too: a fixed price replaces it, a percentage comes off it.
- **No Further Discounts On These Lines** — on by default. A line sold at the rule's price is left out of order and coupon discounts. Untick it to let discounts stack.
- **Priority** — 0 (highest) to 9. When more than one rule matches, the lowest number wins.
- **Enabled** — clear it to park a rule without deleting it, so a seasonal rule can stay set up all year.



Which rule wins

1. Rules on the item itself are checked first. A matching item rule always wins, even when the item is marked **Exclude from automatic price rules**.
2. Then the item's category's rules, unless the item is marked **Exclude from automatic price rules**.
3. Then the store-wide rules, unless the item or its category is marked **Exclude from automatic price rules**.

Within one level, a quantity rule whose range fits the line wins over the others; after that, the lowest priority number wins.

> A rule that never seems to fire is usually missing a tick: an unticked day, a channel unticked in **Applies To**, a customer type that does not match the guest, or a minimum order total the check has not reached.

Other price changes

- Event pricing adds its amount on top of the rule's price; see Special and event pricing.
- Price rules also apply to time-based items, one interval at a time; see Happy hour and rate changes during a game.
- A category's **Inventory markup** is not a price rule: it suggests prices from recipe cost. See Menu Costing: cost, margin and a recommended price for every item.

Modifiers with a charge

A percentage rule on a food item also takes its percentage off the item's charged modifiers. That matters most for an item whose price comes from its choices, such as a $0.00 *Catch of the day* priced by the fish chosen: under a 20% happy hour the fish is 20% off too.

- To keep the modifiers at full price, tick **Exclude upcharges** on the rule. The box is on category and store-wide rules; a rule set on a single food item does not show it, so that rule always includes the item's charged modifiers.
- A fixed-price rule sets the item's price only; its modifiers keep their prices.
- Modifiers included at no charge, and modifier prices changed by hand on the order, are left alone.
- Bar items work as before: **Exclude upcharges** decides whether an upcharge such as a Double is priced by the rule.
- This is applied to orders taken at the register. Online and QR orders price their modifiers at the regular price.

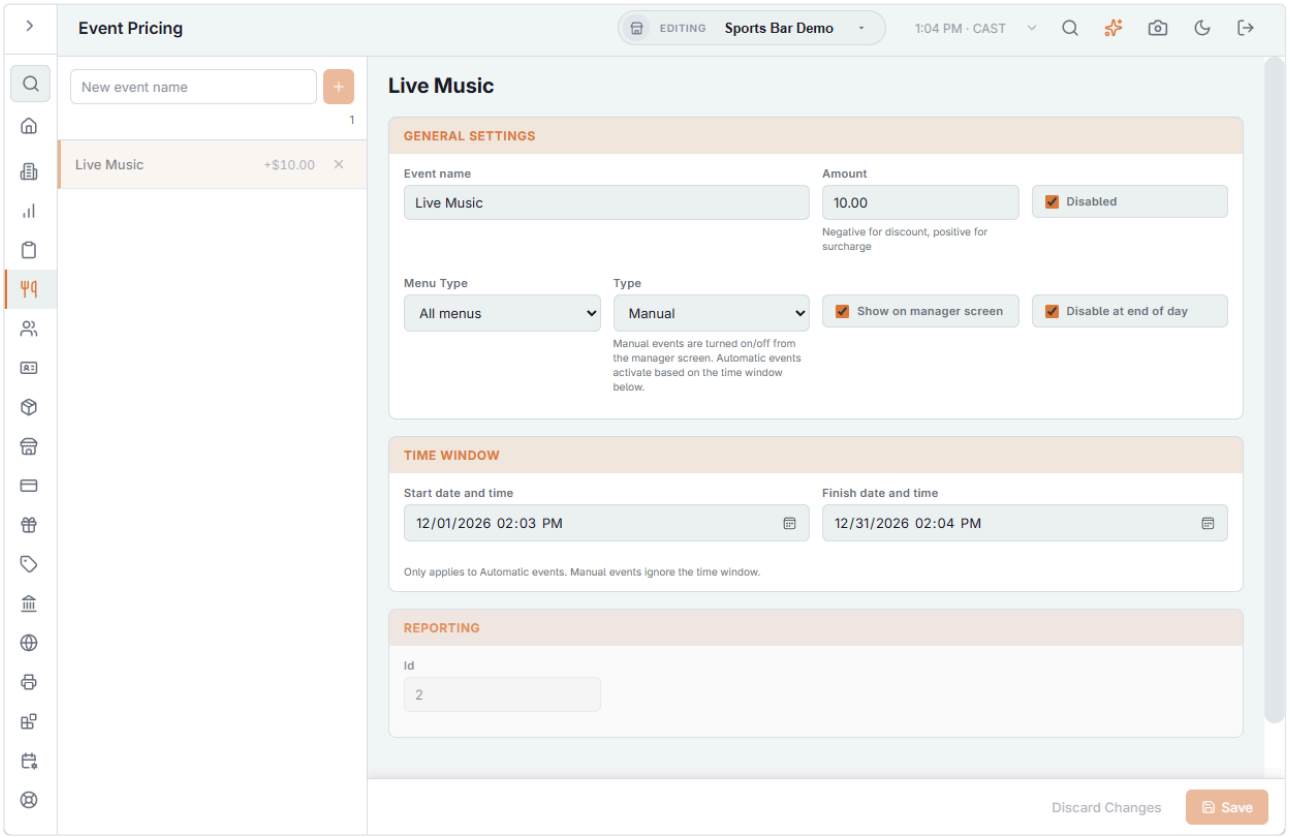
Special and event pricing

Menu › Pricing

View online ↗

Price events that add or take a fixed amount off every menu item while they are on, switched on by a manager or run in a time window.

Back Office › Menu › Pricing › Event Pricing sets up price events: a fixed amount added to, or taken off, every item on the menu while the event is on — game night, a festival weekend, New Year's Eve. An event is either switched on by a manager or runs itself inside a time window.



The event list

Type a name in **New event name** and add it. The list shows each event with its amount; an event that is **Disabled** is muted. The delete icon removes an event after you confirm. A new event starts as a manual event, disabled.

Changes to an event are kept until you choose **Save**.

General Settings

- **Event name** — shown with the order lines the event prices.
- **Amount** — added to each item's price. Negative for a discount, positive for a surcharge.
- **Disabled** — ticked, the event is off. For a manual event this box is the on/off switch: clearing it and saving turns the event on now.
- **Menu Type** — **All menus**, **Regular Menu** or **Bar Menu**: which items the event changes.
- **Type** — **Manual** or **Automatic**.
- **Show on manager screen** — manual events: lists the event in the register's Event Pricing screen, where a manager turns it on and off. See Event pricing overlay.
- **Disable at end of day** — manual events: End of Day turns the event off, so it cannot run into the next day.

Time window

Start date and time and **Finish date and time** are for automatic events: the event is on between them, as long as **Disabled** is clear. Manual events ignore the window.

How the amount applies

- Only one event prices at a time. Only one manual event is on at a time: turning one on turns the others off. An active manual event wins over an automatic one.
- The amount is added when an item is rung, on top of its price, its upcharge price or a price rule's price, and the line shows the event's name, or the price rule's when a rule set the price. A line already rung keeps its price when the event ends.
- Items marked **Exclude From Event Pricing**, and the items of a category marked so, are not changed. See Menu items (prices, SKUs, buttons) and Categories (food groups).

> Event pricing is one flat amount across a menu. For prices per item, percentages, times of day, days of the week or customer types, use Price rules. The two work together: the rule sets the price and the event amount lands on top.

The **Reporting** section shows the event's **Id**.

Bar menu upcharges (Double, Tall, Premium, Virgin)

Menu › Pricing

View online ↗

Upcharge slots per bar category, the per-item price each one needs, and how the affixes reach the ticket.

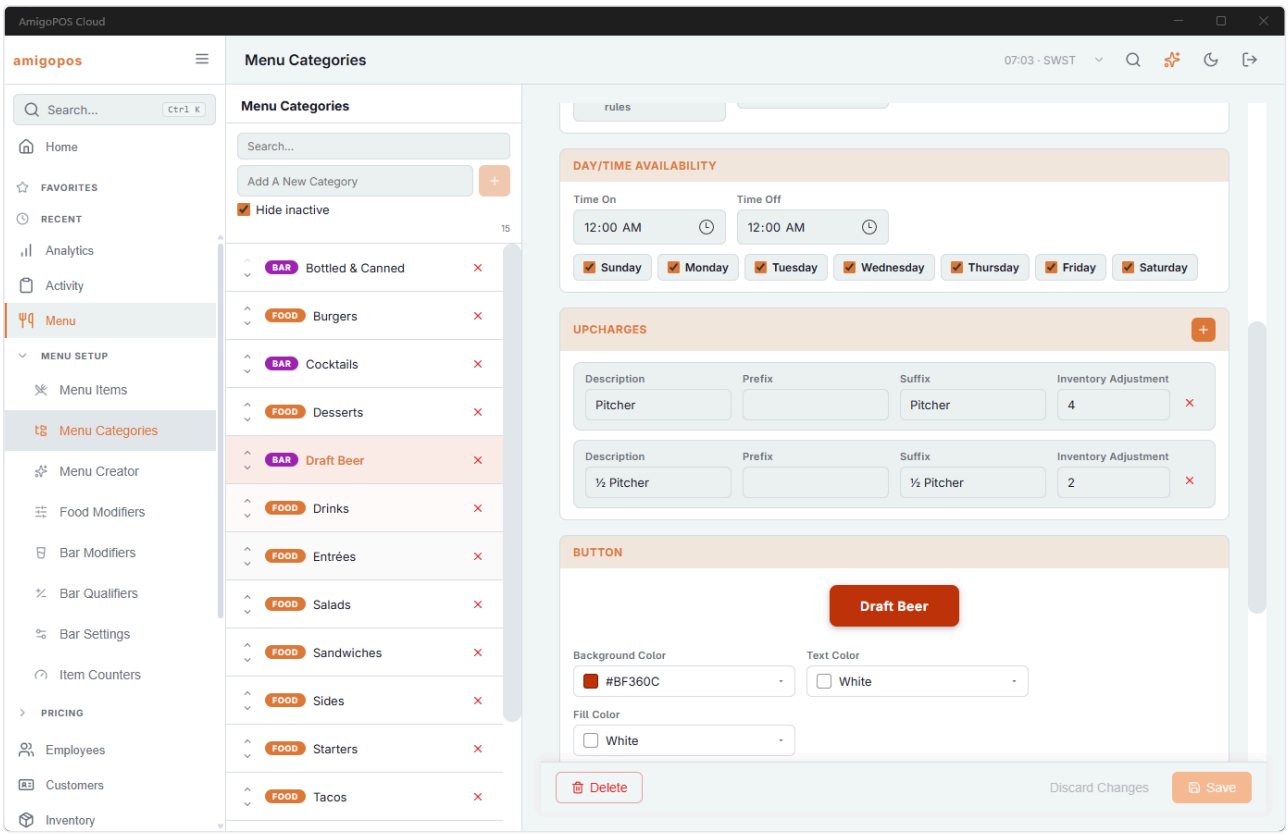
Upcharges are the sizes and strengths a bar item can be sold in, such as Double, Tall, Premium or Virgin. They are set up in two halves, and both are needed before a variation can be sold: the upcharges on the bar category, and a price for each one on the item.

1. Upcharges on the category

In **Back Office › Menu › Menu Setup › Menu Categories**, open a bar category. Its **Upcharges** section lists the upcharges in order. The **+** adds one, and the × deletes one.

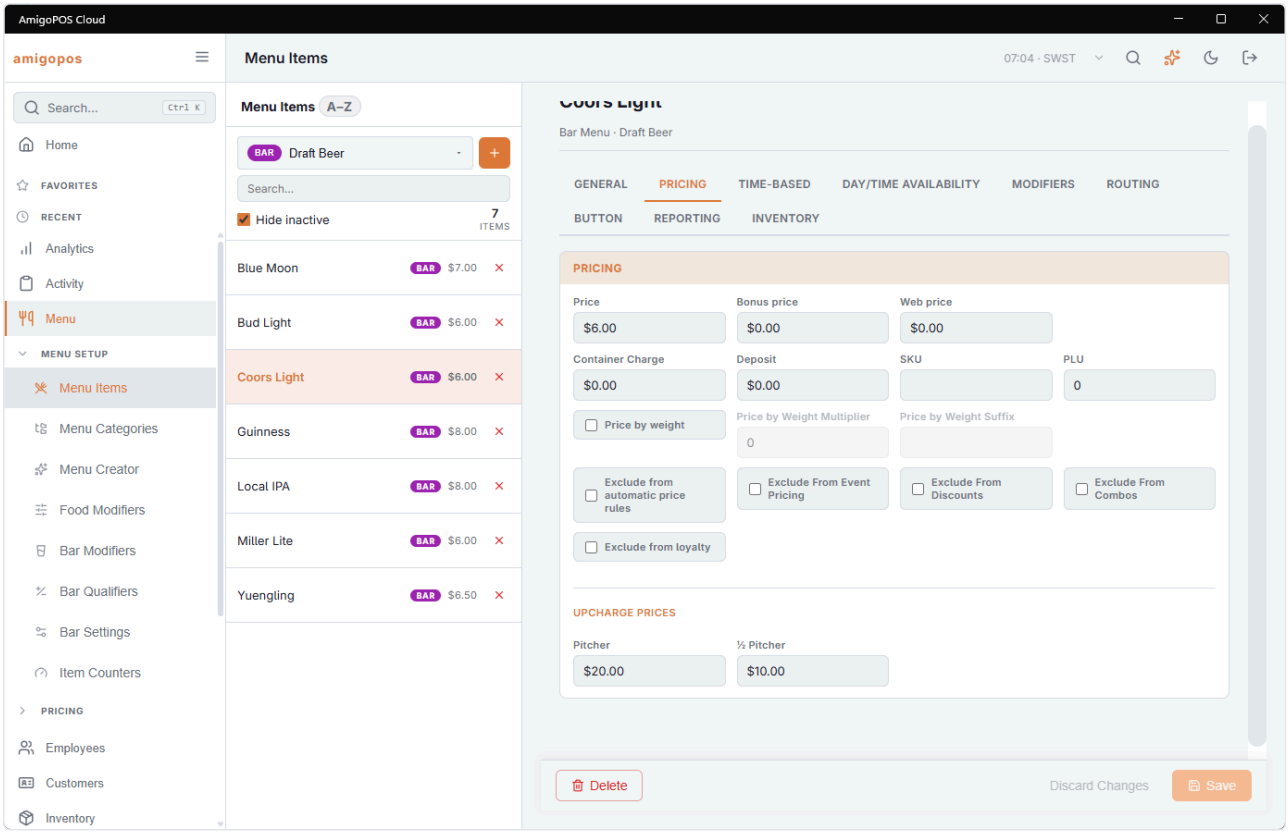
- **Description** — the name staff tap, such as Double.
- **Prefix** and **Suffix** — text added before or after the item's name on the check and the prep ticket, such as "Lg" in front or "Dbl" behind.
- **Inventory Adjustment** — multiplies the drink's recipe when it is sold with this upcharge: 2 for a Double takes twice the pour from stock, 1 the normal pour. See How modifiers, levels and pour sizes use stock.

Each box saves when you leave it; the category's **Save** is not needed for upcharges.



2. A price per item, per upcharge

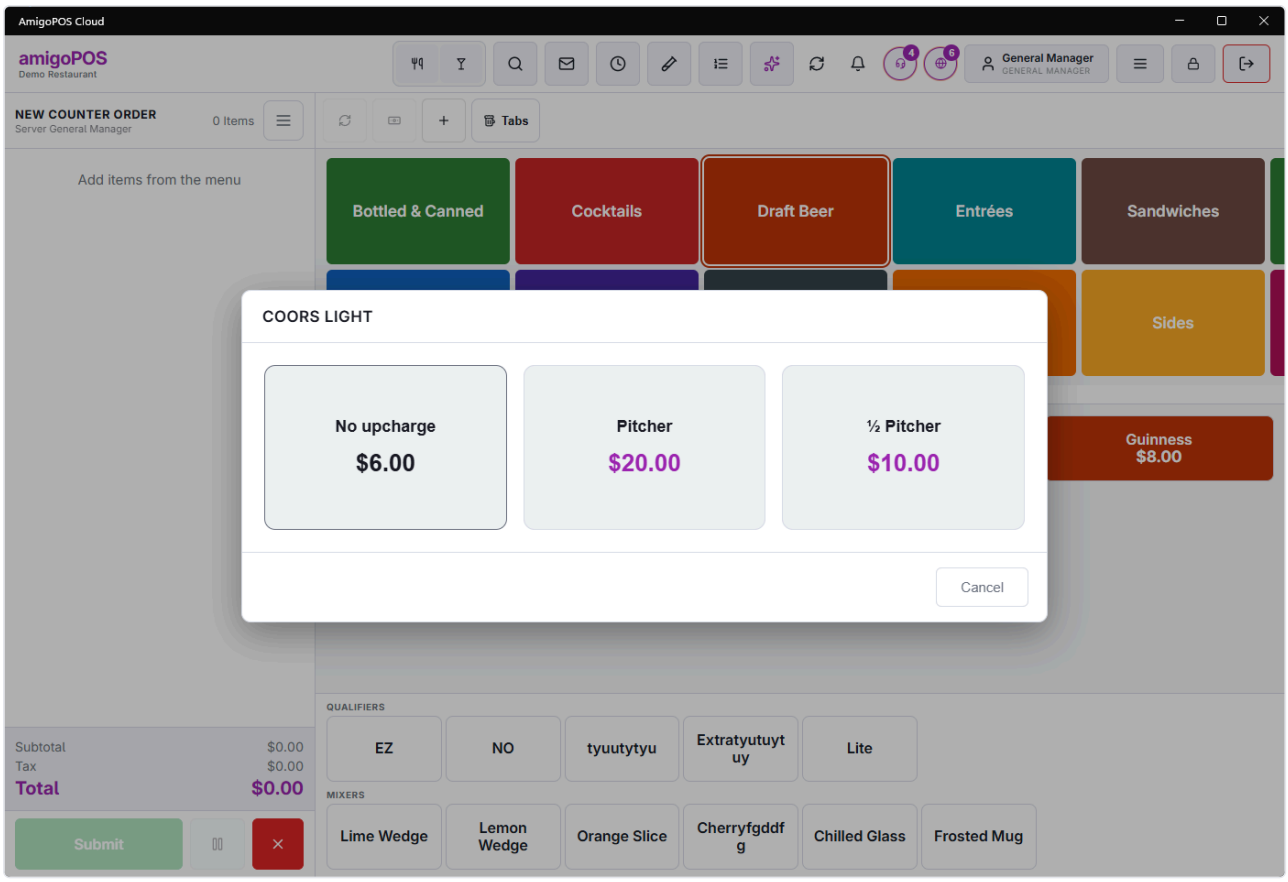
An upcharge means nothing until an item has a price for it. In **Back Office › Menu › Menu Setup › Menu Items**, open the bar item and its **Pricing** tab. Under **Upcharge Prices** there is a box for each of the category's upcharges. The price is the full price of the variation, not an amount added on. These prices save with the item's **Save**.



> Saving **zero or blank** in an upcharge price does not mean “no extra charge” — it **removes the price**, and an item with no price for an upcharge is not offered in it at all. To offer a variation at the same price as the base item, enter the base price. This is the commonest reason a Double or a Virgin will not ring.

At the register

Adding a bar item shows its upcharges, plus a base **no upcharge** choice that is always there. Only upcharges the item has a price for can be picked.



What prints

The upcharge's prefix and suffix are applied to the line name, so "Strawberry Colada" rung as Virgin reads "Strawberry Colada Virgin" on the check and on the prep ticket. An upcharge with neither a prefix nor a suffix puts its name in brackets after the item's name.

> The prep ticket has its own name for a line, which can differ from what the guest sees — see Prep ticket names and abbreviations. Upcharge prefixes and suffixes are applied to both.

- Price rules can treat upcharges separately; see **Exclude upcharges** in Price rules.
- Prices already rung are not changed by editing an upcharge. Changes apply to lines rung afterwards.

CHAPTER 15

Employees

People

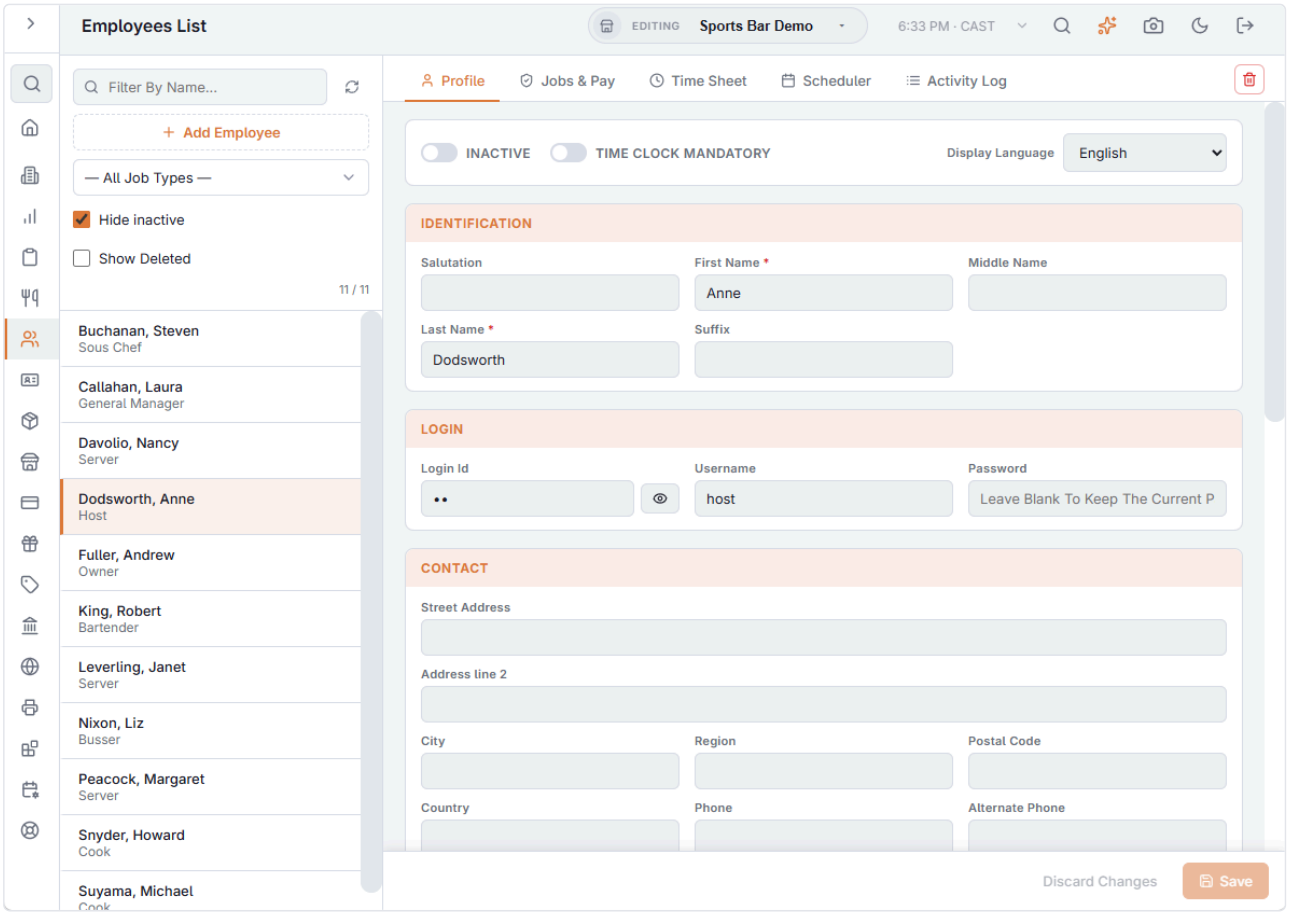
Employees list and profiles

Employees › People

View online ↗

Adding and editing staff records, PINs, jobs and pay rates.

Back Office › Employees › People › Employees List is the staff roster. Each employee's record holds their profile, the jobs they hold and what they are paid, and their punches, shifts and activity. The page appears for jobs that have the **Edit Employees** permission.



The list

- **Filter By Name...** — matches the first or last name.
- **All Job Types** — pick a job to list only the employees who hold it.
- **Hide inactive** — on when the page opens. Turn it off to see inactive employees too; they are shown faded.
- **Show Deleted** — adds deleted employees to the list, with a bin icon. See *Deleting and restoring* below.
- **Refresh** reloads the list, and **Add Employee** creates a new one.

Employees are listed as *Last name, First name*, with their default job underneath.

Adding an employee

Add Employee creates the employee straight away and opens their profile. They get a random four-digit PIN that no one else uses, and one job: the job picked in **All Job Types**, or the first job in the list when no job is picked. Type their name, give them a PIN they will

remember, set their pay on **Jobs & Pay**, and save.

The tabs

Picking an employee opens five tabs: **Profile**, **Jobs & Pay**, **Time Sheet**, **Scheduler** and **Activity Log**. The bin button beside the tabs is **Delete Employee**.

Profile

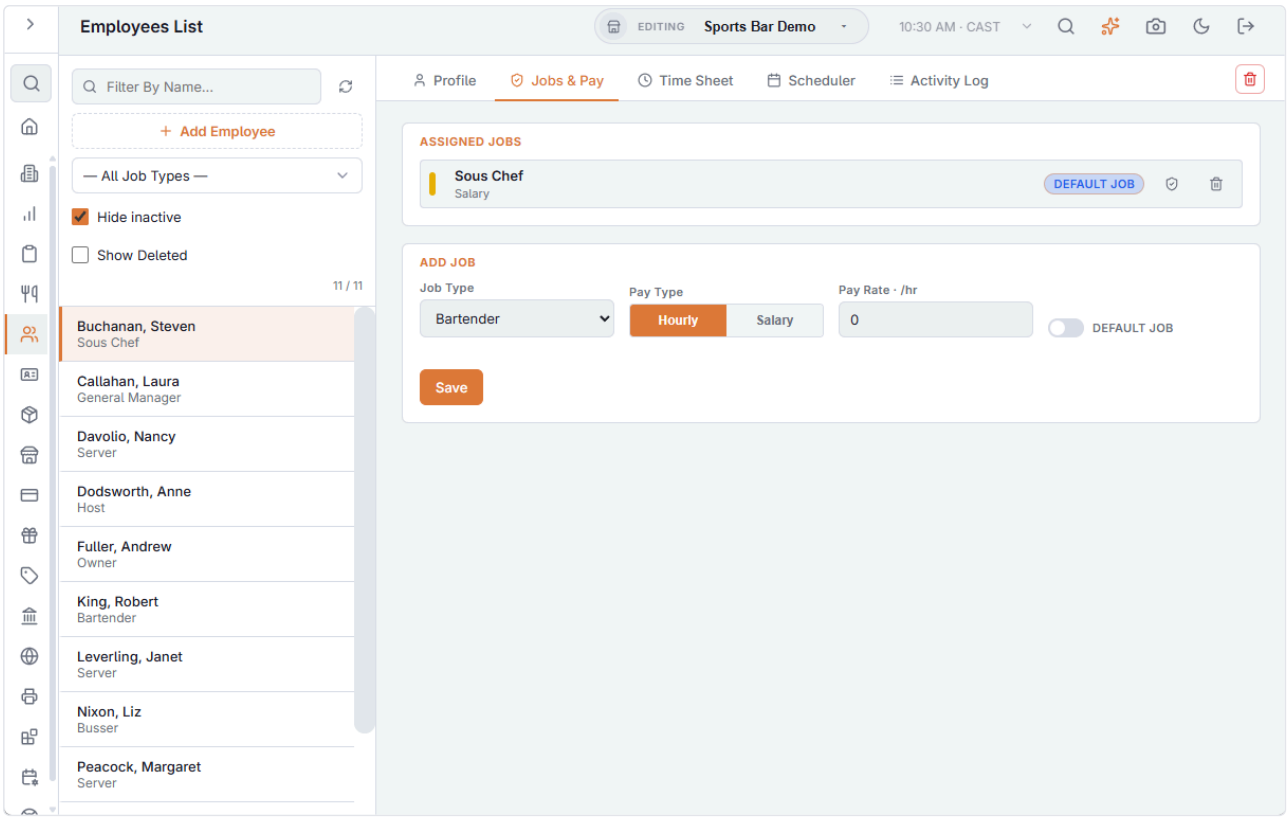
Changes are kept on screen until you press **Save**; **Discard** puts the record back as it was. If you pick another employee or another tab with unsaved changes, the page asks first.

- **Inactive** — the employee can no longer sign in, at the register or on the staff site, and drops out of the lists of active staff. Their history stays.
- **Time Clock Mandatory** — the employee must be clocked in to use the register; signed in without a punch, they are signed out again.
- **Display Language** — the language the register uses while this employee is signed in.
- **Identification** — Salutation, First Name, Middle Name, Last Name and Suffix. First and last name are required.
- **Login**:
  - **Login Id** — the PIN the employee signs in with. It is hidden; the eye button (**Show / Hide**) shows it. A PIN another employee already has is marked **Login Id already in use** and cannot be saved.
  - **Username** and **Password** — for signing in with a username instead of a PIN. The password box is always empty (**Leave Blank To Keep The Current Password**): type to replace the password, leave it empty to keep it.
- **Contact** — address, phones and email. The mobile phone and email are where phone-access invites go.
- **Employment**:
  - **Payroll ID** — the employee's number in your payroll service; the Payroll exports match on it. See Payroll period report and exports.
  - **Date Hired**.
  - **Registered Hours Per Week** — the hours in the employee's contract (four eight-hour days = 32), with the monthly figure shown under it. See Registered hours and the hours variance.
  - **Released**, **Date Released** and **Reason Released** — for someone who has left. A released employee cannot sign in anywhere, and their phone access stops the next time the phone connects.
- **Demographics** — Date of Birth, National Id Number and Notes.
- **Automobile** — driver licence and auto insurance numbers with their expiry dates, for delivery drivers.

> Inactive and Released both stop every sign-in, including the staff site. To end phone access for someone who is staying, use **Revoke** on **Back Office › Employees › People › Phone Access**; see Employee phone access (manager setup).

Jobs & Pay

An employee can hold several jobs — Server on Friday, Bartender on Sunday — and clocks in under one of them. The job decides the permissions for the shift and the pay rate. See Jobs, roles, and permissions.



- **Assigned Jobs** lists each job with its pay; a salaried job reads **Salary**. **Default Job** marks the one used when the employee signs in without clocking in.
- Click a job to load it into the form below, headed **Edit**, to change its pay or make it the default. **Cancel** takes the form back to **Add Job**. The job itself cannot be changed while editing.
- The shield button beside a job (**Jobs & Permissions**) opens that job on the Jobs & Permissions page; the bin button is **Remove Job**.
- **Job Type**, **Pay Type** (**Hourly** or **Salary**) and **Pay Rate · /hr**. When you add a job, the rate starts at the job's **Default hourly rate** and changes with the **Job Type** you pick. A rate of 0 pays the job's default rate. A salaried job has no rate box.
- **Default Job** — the first job an employee gets is the default. Making another job the default takes the mark off the old one.

Clocking in stamps the punch with this rate, so a change applies to punches from then on. With **Salary**, the time clock does not cost the employee's punches at an hourly rate.

Time Sheet

The employee's punches between **From** and **To** (the last seven days when it opens): **Job Type**, **Clock In**, **Clock Out** (or **Still clocked in**), **Hours**, **Labor Cost** and **Cash Tips**, with totals underneath.

- Click a punch to edit its job, times, pay rate, cash tips and non-cash tips. Overtime and labor cost are worked out again when you save.
- **Add Shift** adds a punch by hand, on the employee's default job; the bin button deletes one, after asking.
- Punches in a locked pay period cannot be changed: saving one shows **Save Failed** and the editor stays open. See Locking a pay period.

For the whole store, the review labels and approvals, use **Back Office › Employees › Scheduling › Time Sheet**; see Timesheets.

Scheduler

The employee's shifts for one week, with **This week** and arrows for the weeks either side, and the week's **Total Hours** and **Labor Cost**.

- The **+** under a day adds a shift, on the employee's default job; clicking a shift edits it: **Job Type**, **Date**, **Start Time**, **End Time**, **Pay Rate** and **Notes**, with **Delete**.
- New shifts are drafts. Staff see them once the week is published on the Scheduler page; see Scheduler.

Activity Log

What the employee did at the registers between **From** and **To**, newest first: **When**, **Action**, **Station** and **Order**. **All actions** narrows it to one kind of action. The tab only shows entries; nothing can be deleted here. An entry voided on the User Access Log no longer appears.

The same entries for every employee are on the User Access Log; see User access and activity log.

Deleting and restoring

Delete Employee asks first. Nothing is removed: time sheets, orders and payments keep the employee's name, and their shifts that have not started become open shifts. The employee leaves every list and can no longer sign in, and their PIN and password are cleared.

- You cannot delete the employee you are signed in as, or the last employee.
- To bring someone back, turn on **Show Deleted** and pick them. The page shows when they were deleted and by whom, and **Restore Employee**. They come back **inactive** with a new PIN and no password; switch Inactive off when they return. Shifts that became open shifts stay open.

> For someone who has left, **Released** with the date and reason keeps them on the list for reports and payroll. Delete is for a record made by mistake or a duplicate you do not want to see again.

Documents

Food handler cards, IDs, permits and contracts are kept on **Back Office › Employees › People › Documents**, with their expiry dates and reminders. See Employee documents and certificates.

Jobs, roles, and permissions

Employees › People

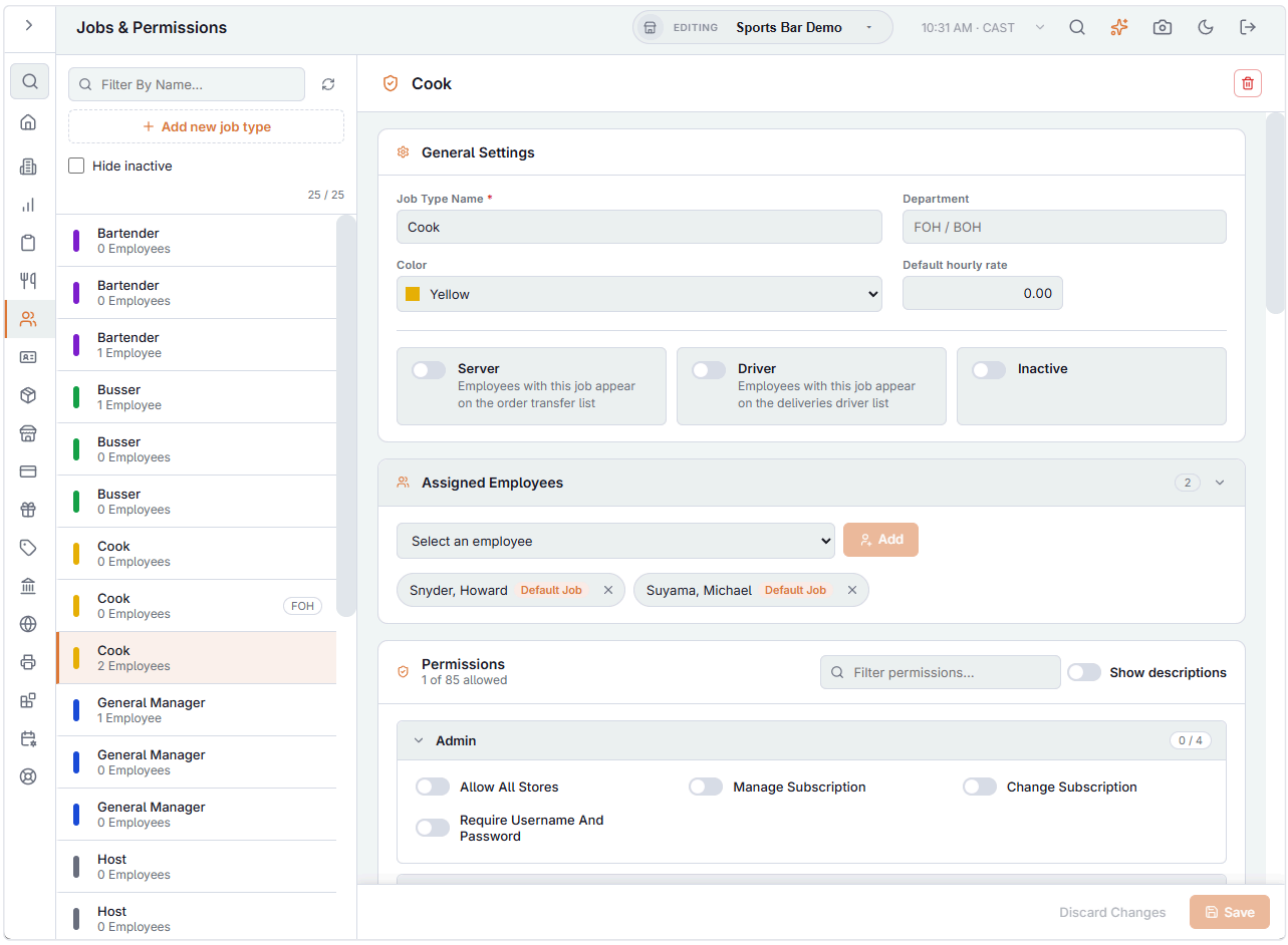
View online ↗

What each job is allowed to do, at the register and in the back office.

Back Office › Employees › People › Jobs & Permissions defines the jobs staff clock in under. Each job type has a name, a color, a department, a default pay rate and its own set of permissions. The page appears for jobs that have the **Edit Permissions** permission.

In one picture: an employee clocks in under a job, the job carries the permissions, and a manager can approve a single action the job does not allow.





The job list

- Each job shows its color, its name, how many employees hold it and its department.
- **Filter By Name...** searches the job names; **Hide inactive** leaves out jobs marked inactive.
- **Add new job type** adds a job named **New Job Type** with every permission off, and opens it; rename it and turn on the permissions it needs. **Refresh** reloads the list.
- The bin button above the job is **Delete job type**. When employees hold the job, the question says how many. Deleting a job also takes it off those employees.

Create one job per real role: Server, Bartender, Cashier, Cook, Shift Manager. Mark a job you no longer use **Inactive** rather than deleting it.

Editing a job

Changes to the job are kept on screen until you press **Save**; **Discard** puts the job back as it was. If you pick another job with unsaved changes, the page asks first.

General Settings

- **Job Type Name** — required.
- **Department** — for example FOH or BOH; the list suggests these and every department already in use. Jobs with the same department are shown together on the scheduler, with their own subtotals.
- **Color** — the job's color on the scheduler, the time sheet and the employee's jobs.
- **Default hourly rate** — paid to anyone in the job whose own rate for it is 0.
- **Server** — employees with this job appear on the order transfer list.
- **Driver** — employees with this job appear on the deliveries driver list.
- **Inactive** — the job is set aside.

Assigned Employees

Who holds the job. Pick an employee in the list and press **Add**, or press × on a name to remove them, after confirming. These changes save at once, not with Save. An employee added here is paid the job's default hourly rate, and it becomes their **Default Job** if they had no job yet. The card folds away with its header.

Pay rates per employee are set on the employee's **Jobs & Pay** tab; see Employees list and profiles.

Permissions

The heading shows how many of the permissions the job allows. **Filter permissions…** finds a permission by name or description, and **Show descriptions** adds a line under each switch. The editor shows only switches that something checks. They are grouped, and each group folds away and shows how many of its switches are on:

Group	Switches
Admin	Allow All Stores, Manage Subscription, Change Subscription, Require Username And Password
Order Entry	Transfer Order, Hold, Cross-Edit, Split Order, Combine Orders, Remove Items, Miscellaneous Items, Manual Weight Entry, Change Order Type, Time Clock Only
Settlement & Payments	Settle Orders, Cash Sale, Void Transactions, Refund, Comp Items, Change Drawer Start Amount, Declare Gratuities, No Sale
Credit Card	Adjust Credit Card Tip, Credit Card Batch, Other Users' Credit Cards
Gift Cards	Gift Cards, Activate Gift Card, Add Gift Card Value, Cash Out Gift Card, Deactivate Gift Card, Adjust And Transfer Gift Card Balances
Discounts & Pricing	Discounts, Manual Discounts, Line Item Discount, Tax Exempt Orders, Price Change, Override, Void Order
Printing	Reprint, Prep Reprint, Manage Coupons, Print Own Shift Report, View My Shift
Cash Handling	Payouts, Reset Drawer, Drawer Count, Cash Drops, Banking
Manager Screen	Manager Screen, End of Day, Reports, View Totals, Light Control, Training Mode
Back Office	Back Office, Summary, Reports, Menus, Employees, Customers, Inventory, Configuration, Delete Records, Void Records, Edit Employees, Edit Permissions, Register Devices, Settled Orders, Archived Orders, Task Lists
Inventory	Inventory Settings, Receive Inventory, Inventory Transfers, Inventory Count, Inventory Shrinkage
Seating	Seating Chart Designer, Seating Chart Statistics
Employee	Messages, Compose messages, Message All Employees, Message Log, Quick Alerts
Customers	Unblock Customer

> Permission changes apply at the next sign-in — staff signed in now keep their session's rights until they sign out. An employee who holds no job signs in with no permissions at all.

When a switch is off

At the register, a switch that is off does not hide the action. The register shows **Manager Override Required**, and a manager whose job has the same switch and **Override** approves that one action with their PIN. The approval is recorded under the switch's name in the override log; see Permission overrides and override log. These switches work this way:

Switch	When the register asks
Hold	**More › Hold All**, and **Hold** on an item. Taking the hold off an item is not asked.
Miscellaneous Items	**More › Misc Item**, before the item is typed.
Change Order Type	**More › Change Order Type** on an order already started. Choosing the type of a new order is not asked.
Manual Weight Entry	**Key In Weight** on the weighing screen, when a scale is connected. While the manager is asked, the scale reading stops. Without a scale the weight is always typed and nothing is asked.

Switch	When the register asks
No Sale	After the No Sale reason is picked. If the approval is refused, or the No Sale cannot be recorded, the drawer stays shut and **No Sale could not be completed.** shows.
Change Drawer Start Amount	Changing the start amount on **More › Cash Drawers**, and the start-amount prompt after a reset. **Skip** leaves the amount as it is and asks nothing.
Reset Drawer	The reset on **Cash Drawers**, also when it is opened with **Reset Here** from End Of Day. It is asked just before the reset is saved, after the count.
Cash Drops	Adding or deleting a drop on **More › Cash Drops**.
Adjust Credit Card Tip	**Adjust Tip** and **Enter Tips** on **More › Credit Cards** (once for the whole Enter Tips list), and saving on **Tip Adjust** (once for **Save All**). Capturing an authorization with its tip counts as a tip adjustment.
Credit Card Batch	**Settle Batch** on **More › Credit Cards**. **Batch Inquiry** is not asked.
Other Users' Credit Cards	Voiding, or changing the tip on, a card payment another employee took, on **More › Credit Cards**. Seeing the list is not asked.
Gift Cards	Opening **More › Gift Cards**, also from a shortcut or the assistant.
Add Gift Card Value	**Add Value** on the Gift Cards screen.
Reprint	**Print** in the orders list, **Reprint** on the deliveries screen, and the assistant's print receipt for an order picked in the orders list.
Prep Reprint	**Reprint Prep** in the orders list.
End of Day	**Run End of Day**. Opening End Of Day and reading its totals is not asked.
Reports	Opening **More › Reports**.
Seating Chart Statistics	**Stats** on a table's panel.
Unblock Customer	**Unblock** on the register's customer screen.

- No Sale, Change Drawer Start Amount, Reset Drawer, Cash Drops, Adjust Credit Card Tip and Credit Card Batch are checked again when the register saves, so another device cannot skip them.
- A manager's approval needs the connection. While the register is offline, Hold, Misc Item, Change Order Type and Key In Weight are not asked: the action goes ahead.
- One approval lasts 5 minutes. On a long Enter Tips list, rows sent after that fail with **Permission required** and can be applied again.
- A job with **Manager Screen** is still asked when one of these switches is off on it.

Two switches act in Back Office, without a manager prompt:

- **Manage Coupons** switched off hides **Discounts & Promotions › Printed Coupons** from the menu.
- **Unblock Customer** switched off makes **Unblock** on a customer show **Permission Denied**; the block stays.

Designing jobs

- Give permissions to the *role*, not the person. When one bartender needs an extra right, ask whether all bartenders do — if only one does, they may hold a second job, such as Bar Lead.
- Grant what the shift needs without a manager present. Everything else stays behind the manager override prompt, which is one PIN away and logged. See Permission overrides and override log.
- Check **Assigned Employees** before loosening a job: it shows who the change reaches.

Permissions worth knowing

- **Require Username And Password** (Admin) — turns off PIN sign-in for the job; see Requiring username and password for a role.
- **View My Shift** and **Print Own Shift Report** (Printing) — let the employee open **My Shift** from My Status and print their own banking slip, without manager access. It shows nobody else's figures and cannot end a shift.
- **Task Lists** (Back Office) — edit task lists and tick or clear tasks from the Back Office overview.
- **Tax Exempt Orders** (Discounts & Pricing) — who may mark an order tax exempt at the register and enter the customer's certificate or tax id.

- **Light Control** (Manager Screen) — opens **More › Lights** on the POS to switch lights and zones and run Last Call. Managers can always. See The Lights panel at the POS.
- **Training Mode** (Manager Screen) — lets the job put a register into training, a practice copy of the store, and reset or refresh it. Managers do not get it automatically; ending a session needs no permission. See Training mode: a practice register.

What manager access carries

Manager Screen governs overrides at the register. It also decides what that person sees on their own phone: the day's roster, approvals for shift changes, time off and availability, announcements and the log book (see Manager tools on the staff site). It follows the job, not the shift: a manager off the clock still approves and still gets the late alerts.

Two things need **Edit Employees** on top of manager access: editing or deleting another manager's log book entry, and unlocking a paid pay period.

Jobs beyond pay and permissions

- **Open shifts** are offered to, and can be picked up by, people who hold the shift's job. Keep job assignments current and the scheduler's employee lists and the staff Open Shifts tab stay right. See Open shifts.
- **Tip pool employee points** are set per job assignment, on **Back Office › Employees › Scheduling › Tip Pooling › Employee Points**. See Tip pooling and tip-outs.

Insight

The **Insight** group holds **Insight (Costs And Margins)**, which opens Table and Order Insight, and **Insight Suggestions**, which shows suggestions without costs or margins. See Setting up Insight and Suggestions.

Inventory Count on the staff site

Inventory Count (Inventory group) also opens the staff site's count screen, so people without Back Office access can count at the shelves on their phones. Tick it on the job of everyone who counts. Posting or discarding a team count needs **Manager Screen**. See Counting inventory as a team on your phones.

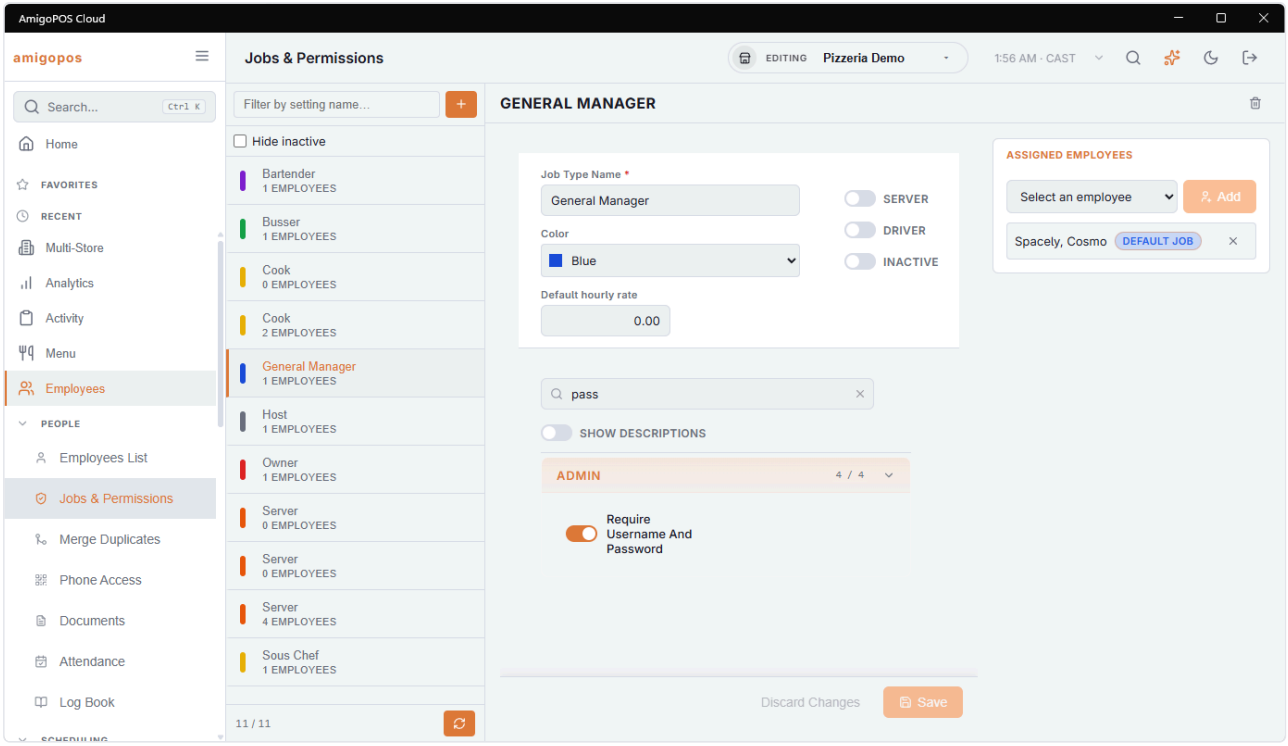
Requiring username and password for a role

Employees › People

View online ↗

Stopping PIN sharing for managers and other elevated roles.

Require Username And Password is a permission in the **Admin** group on **Back Office › Employees › People › Jobs & Permissions**. It turns off PIN sign-in for the people who hold that job: they sign in with their own username and password instead. PINs are quick, which is the point on a busy floor; but a manager's PIN is worth sharing, and a shared PIN makes the audit trail meaningless.



What changes for those employees

- Typing their PIN on the sign-in screen is refused with **Pin Login Is Disabled For This User. Sign In With Your Username And Password.**, and the screen switches to the username form.
- They cannot sign in while the station is offline. Passwords are checked by the server, and only PINs are kept on the station for offline sign-in.
- It counts for every job the employee holds, not only their default job. A job other than the default blocks the PIN only when the employee has a username and password on their profile, so someone who has only a PIN is not locked out by a second job. A job taken off the employee no longer counts.
- Each of them needs a **Username** and **Password** on their profile (**Back Office › Employees › People › Employees List**, **Login** section) before the job is switched over.

> Apply it to the jobs with real power — general manager, anyone with Back Office access — not to servers and bartenders, who sign in many times a shift and need the speed.

How credentials are kept

Passwords are stored as a one-way hash, so nobody can read them back. On the employee's profile the **Password** box is always empty (**Leave Blank To Keep The Current Password**): typing in it replaces the password, leaving it empty keeps it. Passwords saved before hashing was introduced are converted the first time each person signs in.

- A new employee is given a random four-digit PIN that nobody else has. Change it with them to one they will remember.
- An inactive or released employee is refused everywhere — PIN, username and password, offline, and the staff site.
- Repeated wrong PINs pause sign-in on that register; see Sign-in lockout (too many wrong PINs).

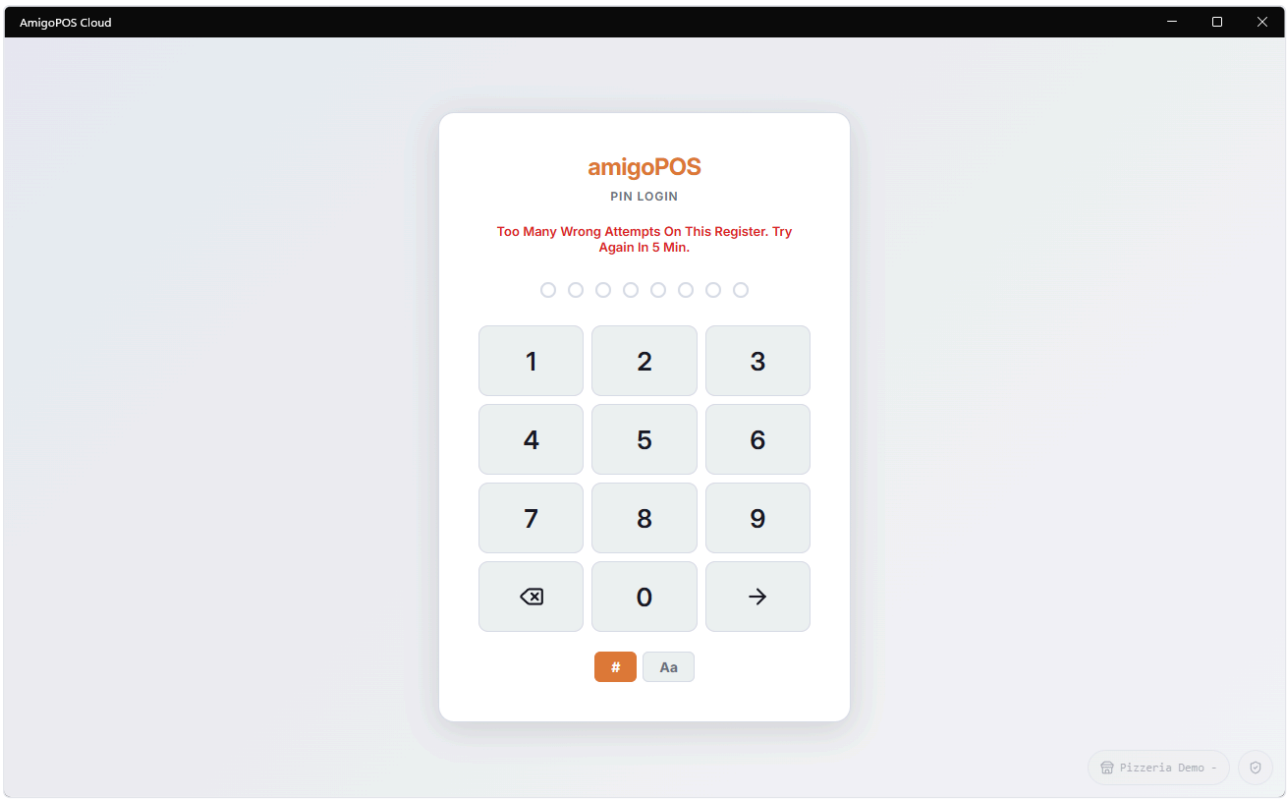
Sign-in lockout (too many wrong PINs)

Employees › People

View online ↗

What happens after repeated wrong PINs or passwords on a register, and the three ways to lift a pause.

A four-digit PIN is guessable if somebody is allowed to keep guessing. After **five wrong attempts within five minutes**, sign-in pauses on that register.

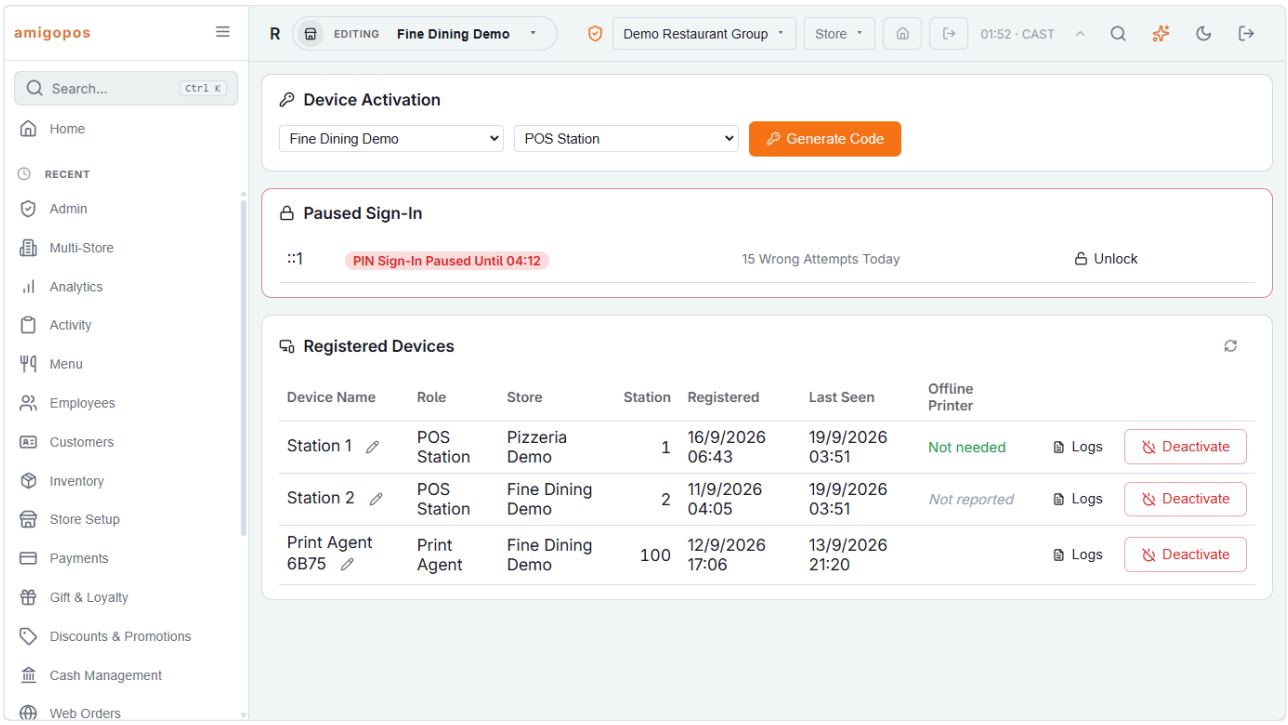


How the pause works

- The first pause is **five minutes**. If the wrong attempts start again once it lifts, the next pauses are 10, 20, 40 and then 60 minutes.
- It is **that register**, not that employee: everyone else can keep working on the other stations, and nobody is locked out of their own account.
- PIN and username/password are counted separately, so a password pause does not stop PIN sign-in and the other way round.
- A correct PIN during a pause does not open it — the pause has to run out or be lifted.
- Managers are told when a register pauses, so somebody knows without being called over.

Lifting it early

- **Back Office › Hardware & Printing › Registered Devices** — a paused register shows a chip with the time it lifts and an **Unlock** button. Managers, whoever registered the devices and Admin can use it.
- **A manager signing in with their username and password** on that register clears a PIN pause.
- **Waiting** — a pause always ends by itself.



> Phones are separate: the staff site locks itself for 15 minutes after five wrong PINs on that phone and nothing else is affected. If a register pauses repeatedly and nobody admits to mistyping, treat it as somebody trying PINs at the till and change the PINs of anyone with real permissions.

In the Security Log

Every wrong PIN, pause and lifted pause is also in **Back Office › Activity › Audit › Security Log**, with the station and the time, next to the sign-ins on the website, the apps and online ordering. See The Security Log.

Employee phone access (manager setup)

Employees › People

View online ↗

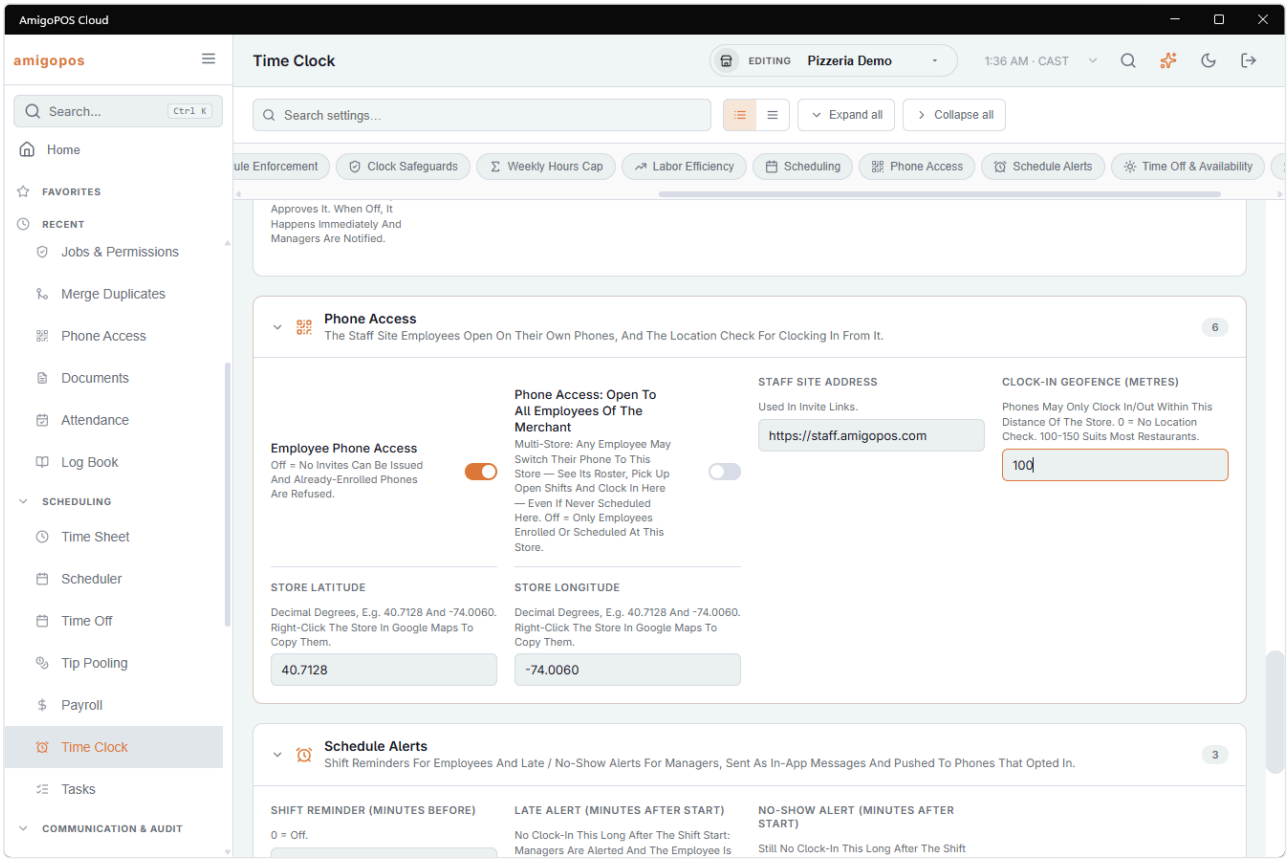
Letting staff use the staff site on their own phones: switching it on, inviting each employee, the location check for clock-in, and cutting access off.

Back Office › Employees › People › Phone Access is where managers invite employees to the **staff site** and see whose phone is set up. The staff site lets employees see their schedule, pick up and give up shifts, tick off their task lists, set availability, request time off, read and answer messages and clock in and out — on their own phones, in the browser, with nothing to install. It shows nothing about sales, other people's pay or the register. The page appears for jobs with the **Manager Screen** permission.

Switching it on

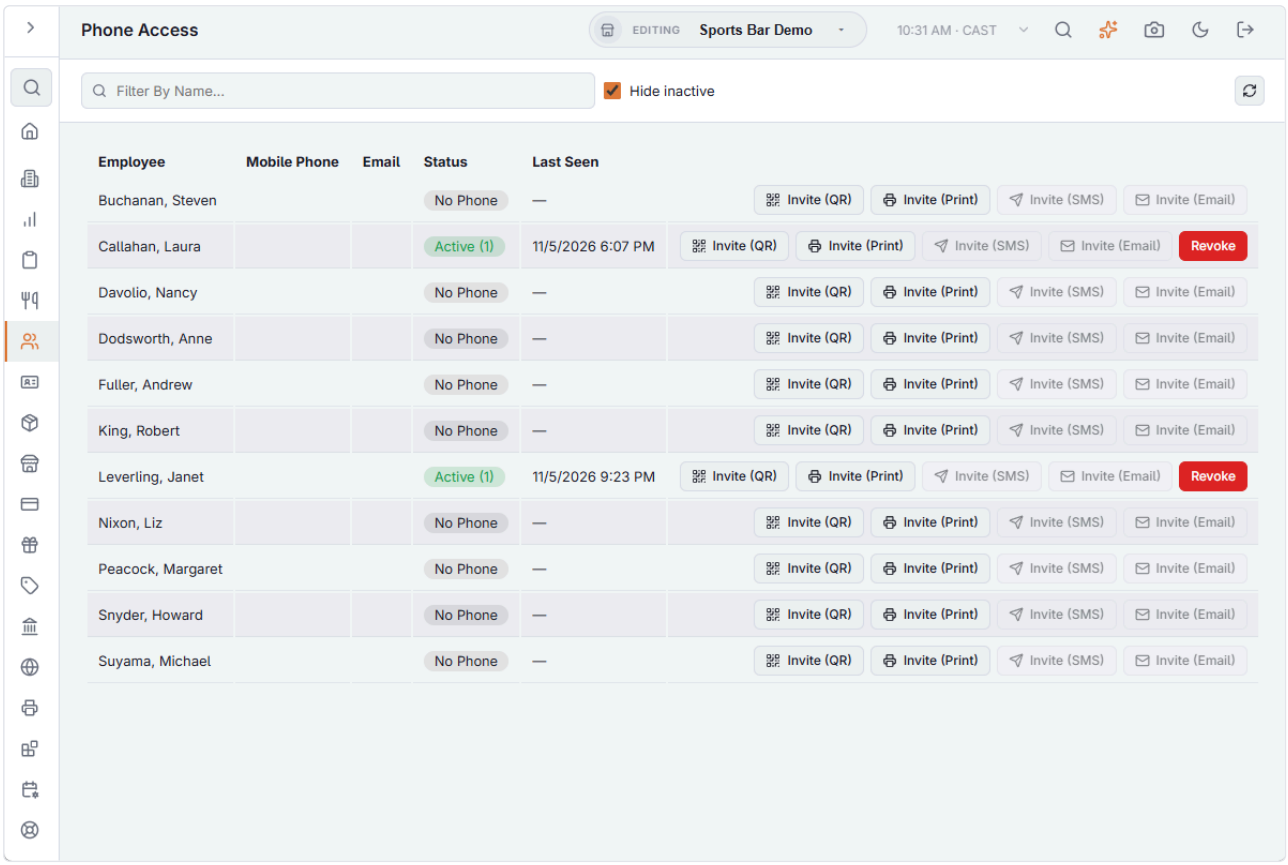
In **Back Office › Employees › Scheduling › Time Clock**, section **Phone Access** (see Time Clock settings):

- **Employee Phone Access** — on. While it is off no invites can be issued, and every phone already set up is refused.
- **Staff Site Address** — the address that goes into invite links. Leave the default unless you have been told otherwise.
- The **location check** fields, below.



The list

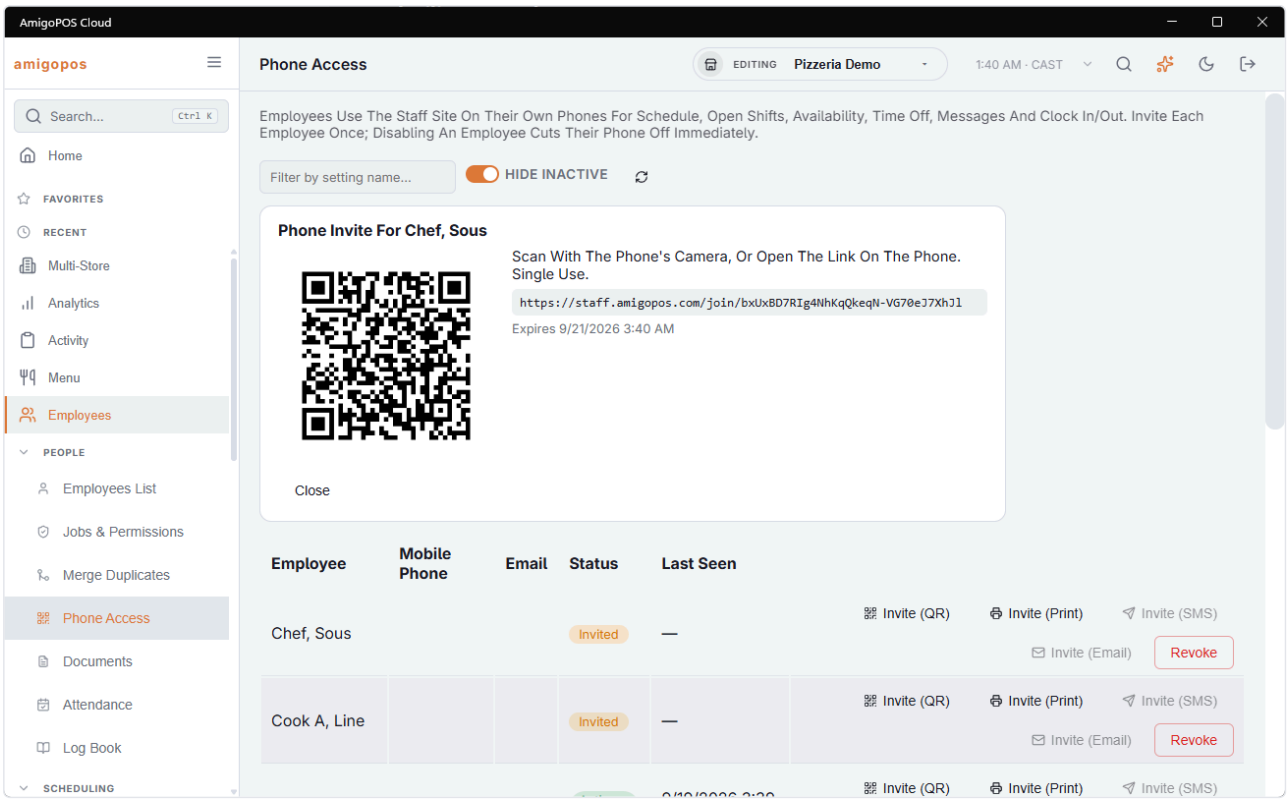
Every employee is listed with their **Mobile Phone**, **Email**, **Status** and **Last Seen** — when one of their phones last connected. **Filter By Name...** finds a person; **Hide inactive**, on when the page opens, leaves out inactive and released employees.



Inviting an employee

- **Invite (QR)** — shows a QR code and a link on screen. The employee scans it with the phone's camera, or opens the link on the phone. It costs nothing and is the quickest way when they are standing in front of you.
- **Invite (Print)** — prints the invite slip with its QR code at this station's receipt printer, to hand to the employee.
- **Invite (SMS)** — texts the link to the employee's mobile number. Each text is charged; staff invites have their own switch, **Employee Phone Access Invites**, on **Back Office › Integrations › SMS**; see SMS settings.
- **Invite (Email)** — emails the link and the QR code to the employee's address.

The SMS and email buttons need a mobile number or an email address on the employee's profile. Inactive and released employees have no invite buttons.



The invite panel shows the QR code, the link and when it expires: an invite works **once** and expires after **48 hours**, and sending a new one cancels the old. Opening it sets up that phone, and from then on the employee signs in with their usual PIN. **Close** hides the panel.

Status

- **No Phone** — never set up, or everything was removed.
- **Invited** — an invite is waiting to be opened.
- **Active (n)** — the number of phones in use. Each employee can have **two**; setting up a third signs out the one used least recently.
- **Revoked** — access was removed. An invite cancelled because a newer one was sent does not count as revoked.

When someone leaves

Marking an employee **Inactive** or **Released** on their profile cuts their phone off the next time it connects — there is nothing else to remember. **Revoke** on this page is for everything else: a lost or replaced phone, or ending phone access for someone who is staying. After you confirm, it removes every phone and any open invite at once, and the page shows **Phone Access Revoked.**, or **Save failed** if it did not work.

Location check for clock-in

- **Clock-In Geofence (Metres)** — how close to the store a phone must be to clock in or out. 0 turns the check off; 100–150 suits most restaurants.
- **Store Latitude** and **Store Longitude** — in decimal degrees, for example 40.7128 and -74.0060. In Google Maps, right-click the store's entrance and click the coordinates to copy them.

Phone punches follow the same time-clock rules as the register. Anything that needs a manager override — clocking in outside the schedule when the schedule is enforced, for example — can't be done from a phone; the employee is told to use the register.

> Each phone holds its own key, signs out after 90 days without use, and asks for the PIN on each visit (unlocked for up to 12 hours; five wrong PINs lock it for 15 minutes). The location check stops casual clock-ins from home; it is not proof against someone determined to fake their phone's location, so reviewing timesheets still matters.

Staff who work at more than one store

Employees belong to the business, not to one location, so one invite is enough for someone who works at two. Their phone shows a store picker once there is a second store they may look at, and everything — roster, open shifts, tasks, clocking in — follows the store they pick. A store is on their list when they have been scheduled there in the last three months, or when **Phone Access: Open To All Employees Of The Merchant** is switched on for that store (Time Clock settings, Phone Access section). Scheduling someone at a second store is usually all it takes; the switch is for groups that pool staff freely.

What else is set on the Time Clock page

- **Schedule Alerts** — shift reminders and late / no-show alerts, and the notifications that carry them to phones; see Phone notifications and schedule alerts.
- **Time Off & Availability** — whether availability changes need approving, and the paid-time-off allowance.
- **Document Expiry Alert (Days Before)** — how far ahead expiring documents are flagged; see Employee documents and certificates.

Managers on their phones

Anyone with a job that has manager access gets the roster, approvals, announcements, the log book, alerts and the day's numbers (Today) on their own phone — see Manager tools on the staff site. Nothing extra to switch on: it follows the job. Managers can also close a forgotten clock-out and approve punches from their phones — see Fixing punches from your phone (managers).

Face ID, calendar links and breaks

- **Face ID / fingerprint unlock** and the **calendar link** need nothing switched on: each employee turns them on for their own phone. Both stop with that phone's access — Revoke, marking the employee Inactive or Released, or the phone signing out — and pause while Employee Phone Access is switched off. See Unlocking with Face ID or fingerprint and Your shifts in your phone’s calendar.
- Face ID and fingerprint unlock is tied to the **Staff Site Address**. Change that address and everyone who uses it has to turn it on again.
- **Breaks** on the phone follow the **Breaks** section of the Time Clock page: with **Enable Breaks** off, the phone shows no Start Break button (a break already running can still be ended).

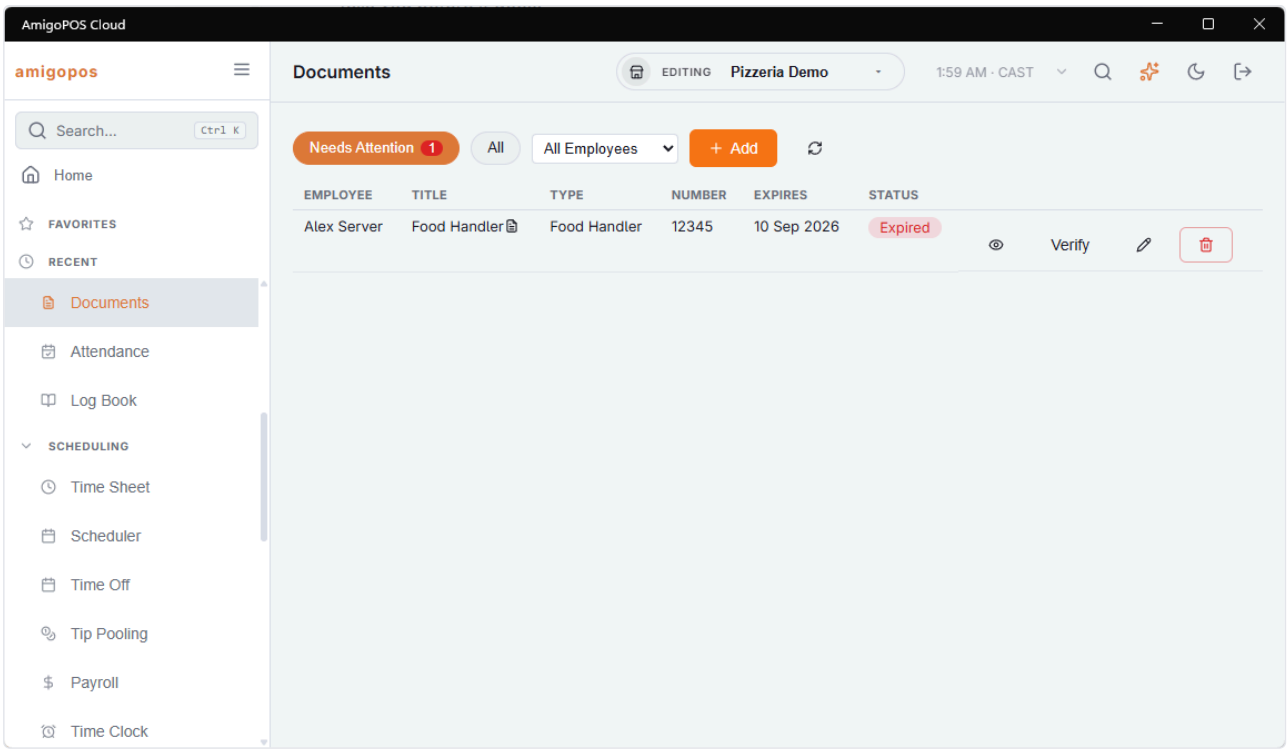
Employee documents and certificates

Employees › People

View online ↗

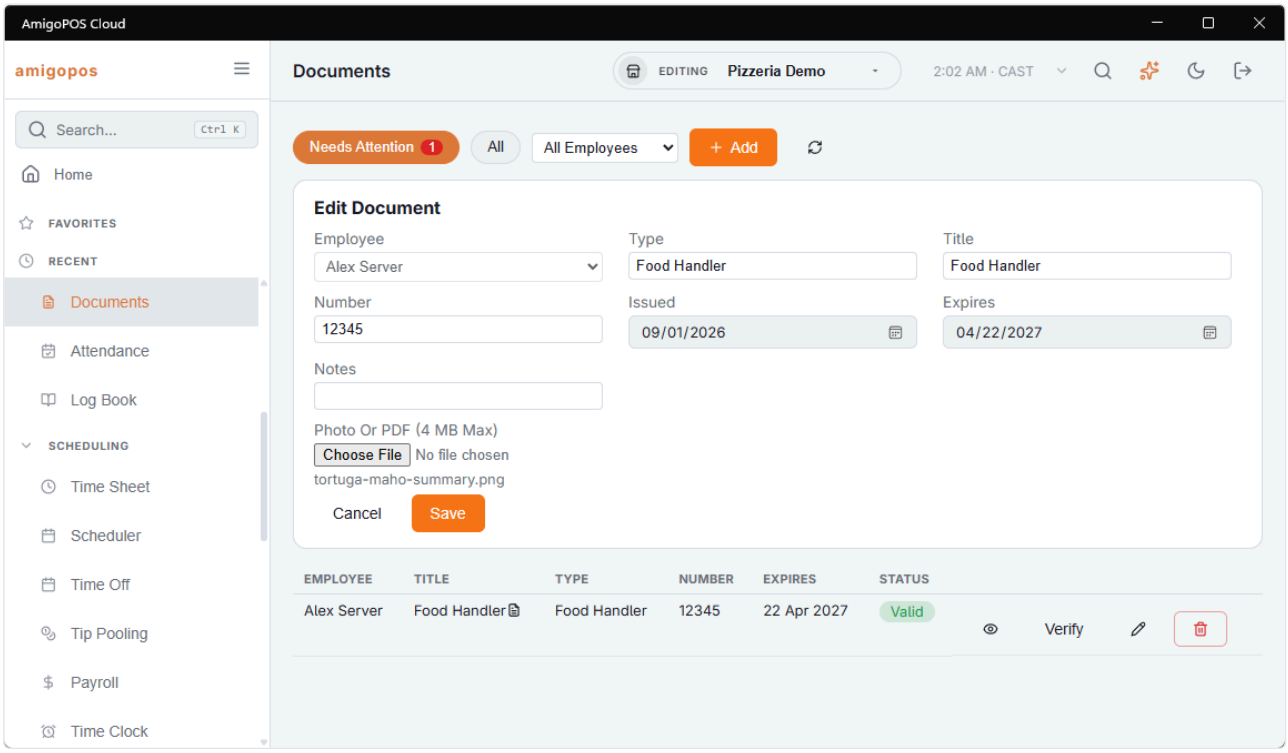
Food handler cards, IDs, permits and contracts on each employee, with reminders before they expire.

Most of what a health inspector asks for lives in somebody's wallet or a folder in the office. **Back Office › Employees › People › Documents** keeps a copy against the employee, with the date it runs out, and tells you before it does.



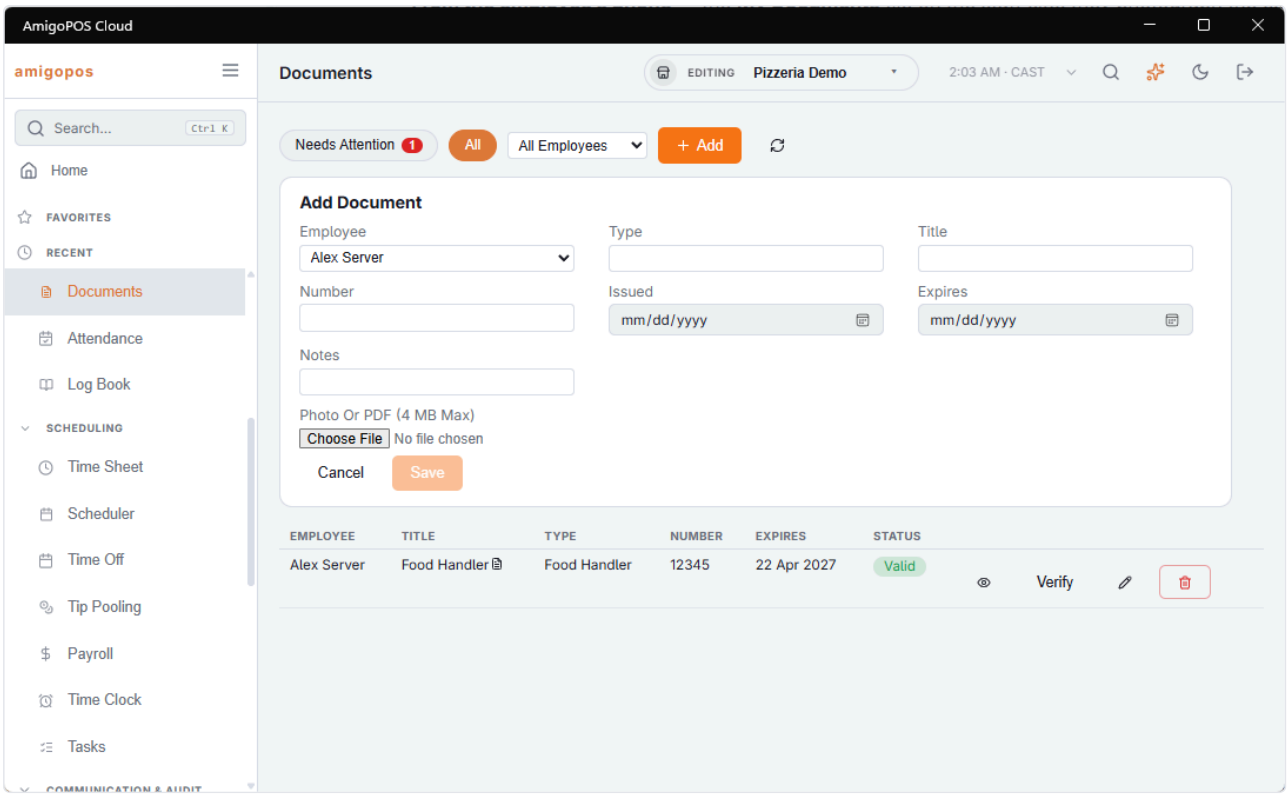
What a document is

A type (*Food Handler Card*, *ID*, *Work Permit*, *Contract* — your own words; the ones already used are suggested), a title, an optional number, the dates it was issued and expires, a note, and optionally a photo or a PDF up to 4 MB.



Adding one

- **In Back Office** — **Add**, pick the employee, fill it in, choose the file.
- **From the employee's phone** — the **My Documents** tile on the staff site: they photograph the card with the phone camera and it arrives against their record. They see only their own.



Verifying

Verify is you saying you have seen the real thing. A verified document can no longer be changed or deleted by the employee, and replacing the file clears the verification — a new photo is a new document to check. The page opens on **Needs attention**: expiring, expired, or waiting to be verified. **All** shows everything, and the employee filter narrows it to one person.

Expiry reminders

Document Expiry Alert Days (Back Office › Employees › Scheduling › Time Clock, with the time-off settings) sets how far ahead the warnings start — 30 days out of the box, 0 to switch them off. The employee and the managers are told once when the document enters that window, again in its last week, and once more the day after it expires. The employee gets theirs in their own language. Change the expiry date and the reminders start again from the new date.

> Files are kept in the store's own database, not on a public link. Documents stay on the record when someone is released — that is the point of a record — but released and inactive employees drop out of the lists and the reminders.

Scheduling & Time Clock

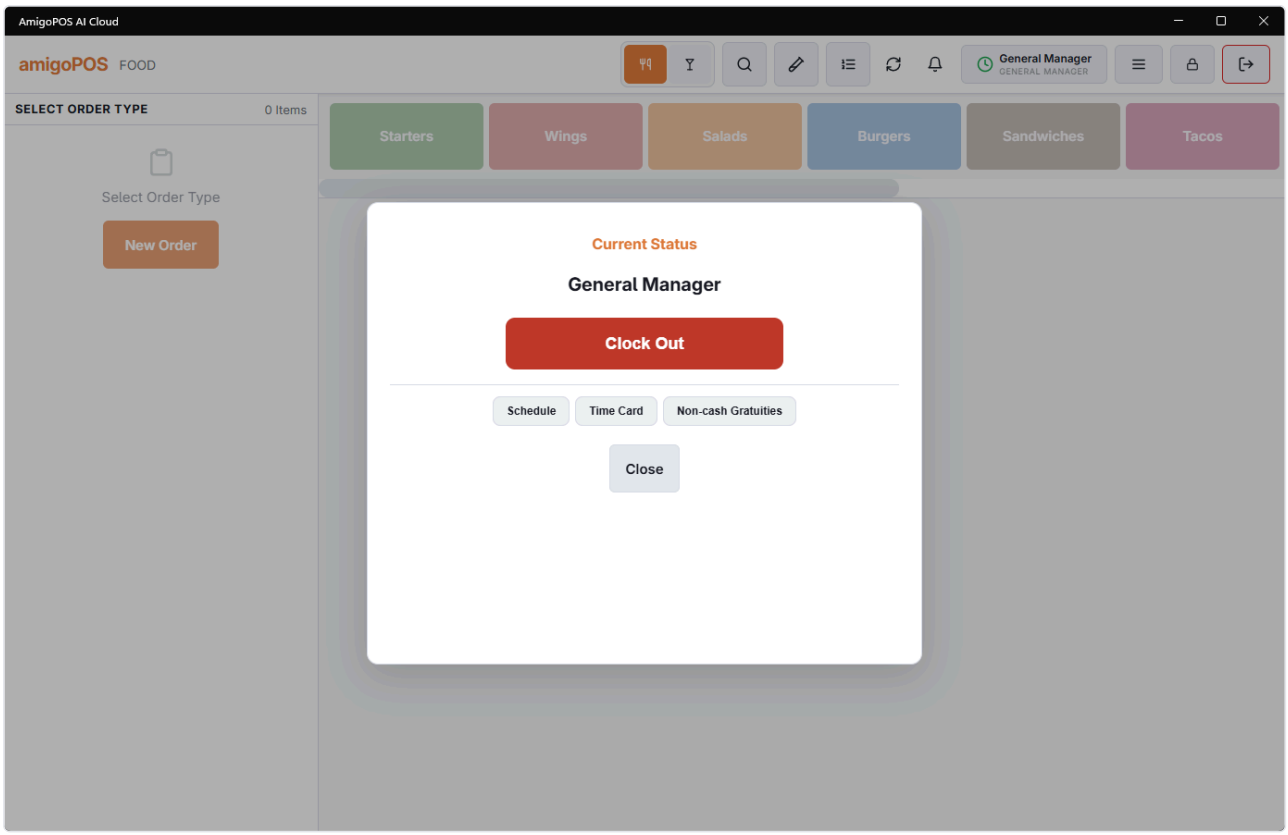
Time clock (punch in/out, breaks)

Employees › Scheduling & Time Clock

View online ↗

Punching in and out and taking breaks, from the staff side of the till.

The **time clock** is where shifts begin and end: clock in under a job, take breaks, clock out — every punch feeding timesheets, labor cost, and (per job) the drawer-claim flow.



Punching

- **Clock in** — sign in with your PIN and clock in; with multiple job assignments, pick which job this shift is (the job decides the pay rate *and* the permissions for the shift). Employees flagged **time clock mandatory** can't use the register without an open shift.
- **Breaks** — punch out to break and back in; break time records separately for labor-rule compliance.
- **Clock out** — ends the shift. Cash-handling jobs run their closing steps here: the clock-out drawer count, declared gratuities, or the banked employee's end-shift flow.

Behavior settings

Back Office › Employees › Scheduling › Time Clock holds the store's time-clock behaviors — prompts, rounding, and enforcement — each described inline and searchable via *All program settings*. See Time Clock settings.

Notes

- Forgot to clock out? The open shift shows in *Timesheets* (filter **open shifts only**) — a manager closes and corrects it there.
- Clocking in under the wrong job is a pay-rate *and* permissions error — clock out and back in under the right one; fix the stray minutes in Timesheets.

Why breaks matter beyond payroll

Recorded breaks are subtracted from the hours used to share tips, so a store running a tip pool by hours wants breaks punched properly — not because payroll demands it, but because the pool does.

Clocking in from a phone

Where the store has switched on phone access, employees can clock in and out on the staff site. Three things differ from the register:

- **Location** — if the store set a clock-in geofence, the phone shares its location and the punch is refused outside the radius ("You must be at the store to clock in").
- **No overrides** — the same time-clock rules apply, but a punch that needs a manager's override can't be made from a phone; the employee is told to use the register.
- **Job** — employees with several jobs pick the job on the phone before clocking in, exactly as at the register.

Phone punches land in *Timesheets* like any other. Setup is in *Employee phone access (manager setup)*.

Too many wrong PINs

Five wrong PINs within five minutes pause PIN sign-in on that register — five minutes the first time, longer if it keeps happening. Other registers carry on, and nobody is locked out of their own account. A manager can lift it from Back Office or by signing in with their username and password on that register; see *Sign-in lockout*.

The pay rate on a punch

Clocking in stamps the punch with the rate of the employee's assignment for that job, or the job's default pay rate — the same from the register or the phone. Labor cost and overtime are worked out at clock-out from that rate and the store's overtime settings. Details in *Timesheets*.

Forgot to clock in?

If the shift was published, it shows on Timesheets as a **No Punch** row once it has ended, and a manager adds the punch from there with the scheduled times filled in — see *Reviewing and approving punches*.

Weekly hours at clock-in

The overtime warning and weekly hours cap at clock-in count every punch since the store's business week started, including earlier days already closed by end of day, using the store's own week start day. A punch still open counts only if it started in the last 24 hours. See also Overtime alerts.

Checking your hours at the register

Employees can see their punches for the week, approve them and dispute a wrong one from **My Status › My Hours**. See My Hours at the register.

During an outage

Clocking in and out still works when the register is offline. The punch is kept on the station and sent when the connection returns. Breaks and the time clock reports wait for the connection. See Clocking in and out while offline.

Drivers: deliveries still out

Clock Out is unavailable while you have deliveries out, or delivered and not banked. The screen says **You Still Have Deliveries Out. Bank Them Before Clocking Out.** Bank them at the delivery board, or with Back At Store on your phone. There is no manager override.

Breaks on a phone

Employees can start and end breaks on the staff site, under the same rules as the register: **Enable Breaks** must be on (Back Office › Employees › Scheduling › Time Clock, *Breaks*), only one break runs at a time, the clock-in location check applies, and Clock Out is refused until the break has ended. Phone breaks are recorded exactly like breaks taken at the register.

A forgotten clock-out, from a manager's phone

A manager can close someone's open punch from the staff site — **Clock Out** on the Team tab, at the time the person left — without waiting for Back Office. A running break ends at the same time, the employee is told, and the override log records it. Managers cannot do this for their own punch. See Fixing punches from your phone.

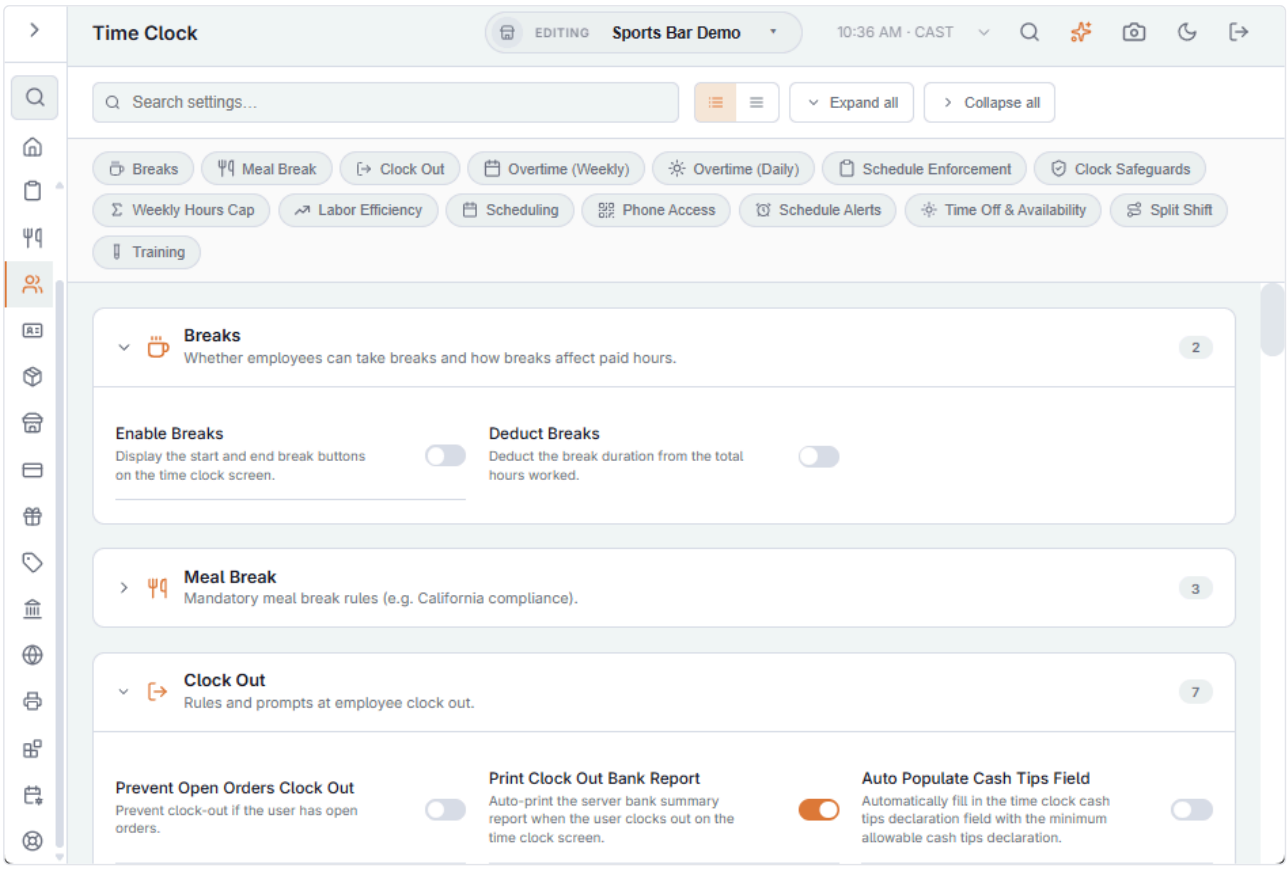
Time Clock settings

Employees › Scheduling & Time Clock

View online ↗

The store's time-clock rules: breaks, clock-out prompts, overtime, schedule enforcement, safeguards, and the staff site, alert and time-off settings.

Back Office › Employees › Scheduling › Time Clock holds the store's time-clock rules: breaks, what happens at clock-out, overtime, how strictly punches follow the schedule, the safeguards against forgotten clock-outs, and the settings for the staff site, schedule alerts and time off.



There is no Save button. A switch or drop-down saves as soon as you change it; a box saves when you leave it, with a tick to confirm. **Search settings** at the top finds a setting by name. Some sections open folded; click a section's title to open it.

Breaks

- **Enable Breaks** — shows the start and end break buttons on the time clock screen, and on the staff site.
- **Deduct Breaks** — takes the break time off the hours worked.

Meal Break

- **Meal Break Required** — every shift needs a meal break. A shift without a qualifying break is flagged **Missed Meal Break** on the Time Sheet.
- **Required After (Hours)** — the hours worked by which the break must be taken.
- **Minimum Duration (Minutes)** — how long a break must be to count as the meal break.

Clock Out

- **Prevent Open Orders Clock Out** — an employee with open orders cannot clock out.
- **Print Clock Out Bank Report** — prints the employee's bank summary when they clock out on the time clock screen.
- **Auto Populate Cash Tips Field** — fills the cash tips box with the minimum declaration.
- **Display Tips Declaration Summary** — shows the day's sales and the minimum declaration on the cash tips screen.
- **Blind Tip Declaration** — the employee enters card tips and cash tips first; the shift's sales, tip percentage and sales per hour appear only after.
- **Enforce Minimum Cash Tips Declaration** — refuses a cash tips amount below the minimum.
- **Tips Declaration Percentage** — the whole-number percentage used to work out the minimum declaration.

See Declaring cash gratuities.

Overtime

Setting	What it does
Overtime Hours 1 and **Overtime Hours Rate 1**	Weekly hours after which the first overtime multiplier applies, and the multiplier (1.5 for time and a half).
Overtime Hours 2 and **Overtime Hours Rate 2**	A second, higher weekly tier and its multiplier.
Enable Daily Overtime	Overtime is also counted per day, as some US states require.
Daily Overtime After (Hours)	Hours in one day after which Overtime Rate 1 applies.
Daily Double-Time After (Hours)	Hours in one day after which Overtime Rate 2 applies.

Overtime and labor cost are worked out when a punch is clocked out or saved. After changing these settings, use **Recalculate** on the Time Sheet for punches already closed; see Timesheets.

Schedule Enforcement

- **Enforce Schedule** — the master switch. When on, clock-in and clock-out are checked against the employee's published shifts.
- **Early Clock-In Grace (Minutes)**, **Late Clock-In Grace (Minutes)**, **Early Clock-Out Grace (Minutes)** and **Late Clock-Out Grace (Minutes)** — how far before or after the scheduled start and end a punch is still allowed.
- **Unscheduled Clock-In Policy** — an employee with no shift tries to clock in.
- **Out-Of-Window Policy** — a punch outside the grace windows.
- **Enforce Scheduled Job Code** — the job clocked in under must be the one on the shift.
- **Require Manager To Be Clocked In** — a manager approving an override must be clocked in.

Each policy is **Block** (refused), **Require Manager** (a manager override) or **Allow**. A punch that needs a manager cannot be made from the staff site; the employee is told to use the register.

Clock Safeguards

- **Auto Clock-Out After (Minutes)** — closes a forgotten shift this many minutes after its scheduled end, or after the maximum shift length when there is no schedule. 0 turns it off.
- **Minimum Rest Between Shifts (Hours)** — refuses a clock-in this soon after the last clock-out. 0 turns it off.
- **Maximum Shift Length (Hours)** and **Maximum Shift Policy** — what happens when a shift runs longer: **Warn** (a flag on the manager screen), **Auto Clock-Out** or **Require Manager**.
- **Overtime Warning Threshold (Weekly Hours)** — warns the employee at clock-in once their hours this week reach it; the scheduler marks shifts past it too. 0 turns it off.
- **Rounding Interval (Minutes)** — rounds punch times to the nearest 5, 6 or 15 minutes, or **Off**. Check your local rules before using it.

Weekly Hours Cap

Weekly Hours Cap is the most hours an employee may build up in a week, and **Weekly Hours Cap Policy** what happens when they reach it: Block, Require Manager or Allow. 0 turns the cap off. The scheduler marks shifts past it in red.

Labor Efficiency

- **Enable Labor Warnings**, **Labor Warning Threshold (%)** and **Minimum Shift Before Warning (Minutes)** — a warning on the manager screen when a clocked-in employee's labor cost passes this share of their own sales, once they have been on the clock for the minimum.
- **Scheduled labor target %** — the target for scheduled labor cost as a share of forecast sales, used by the scheduler and Draft From Forecast. 0 turns it off.

Scheduling

- **Manager Approval For Shift Changes** — when on, a pick-up or hand-over waits in the scheduler's **Approvals** until a manager approves it. When off, it happens at once and managers are told. See Picking up, giving up and swapping shifts.
- **Hide Tips Until A Manager Approves** — employees see their net tips in My Hours only after every punch in that week is approved. See Reviewing and approving punches.

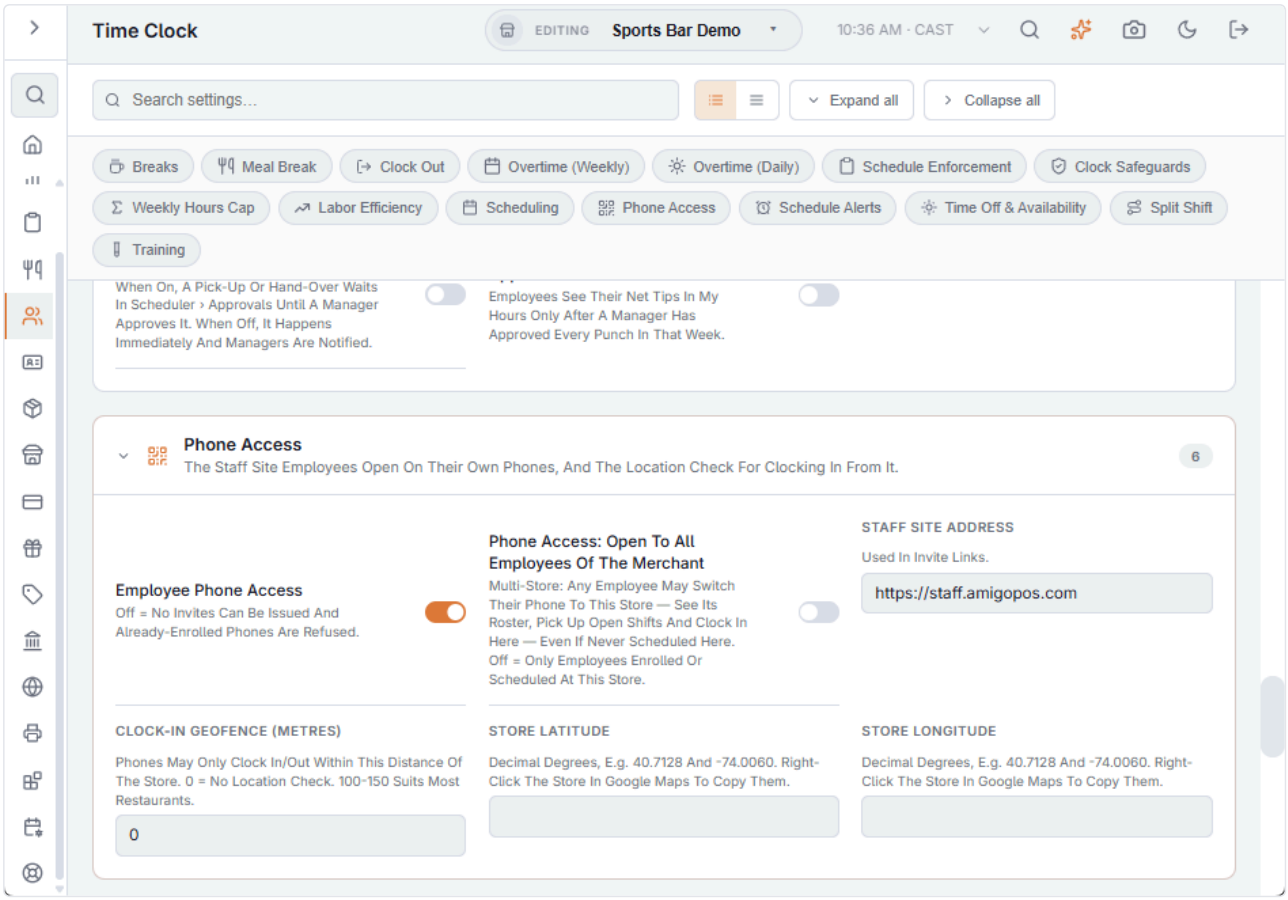
Phone Access

Employee Phone Access, **Phone Access: Open To All Employees Of The Merchant**, **Staff Site Address**, **Clock-In Geofence (Metres)**, **Store Latitude** and **Store Longitude** set up the staff site. See Employee phone access (manager setup).

Schedule Alerts

- **Shift Reminder (Minutes Before)** — reminds the employee before their shift starts.
- **Late Alert (Minutes After Start)** — no clock-in this long after the start: managers are alerted and the employee is reminded. It is also the grace for *late* on Attendance and the Time Sheet.
- **No-Show Alert (Minutes After Start)** — still no clock-in: managers are alerted.

Each is 0 to turn it off. The alerts arrive as messages and as notifications on phones that have them on; see Phone notifications and schedule alerts.



Time Off & Availability

- **Availability Changes Need Approval** — an employee's availability change waits for a manager.
- **Paid Time Off Per Year (Days)** — the standard allowance; 0 means no balances.
- **Time-Off Year Starts In Month** — 1 is January; balances start again that month.
- **Hours Worked To Earn One Day Off** and **Most Days Earned Per Year** — days off earned from hours worked, on top of the allowance.
- **Document Expiry Alert (Days Before)** — how far ahead employees and managers are told a document expires. See Employee documents and certificates.

See Time off and availability (manager).

Split Shift

Detect Split Shifts marks a shift as split when the same employee clocks in twice or more in one business day with more than an hour between. It only marks the shift; any split-shift premium is paid in your payroll service.

Training

Print Kitchen Tickets In Training — when on, a register in training sends its practice tickets to the kitchen printers, marked TRAINING. When off, it prints receipts and labels only. See Training mode: a practice register.

> Clocking in and out at the register is described in Time clock (punch in/out, breaks).

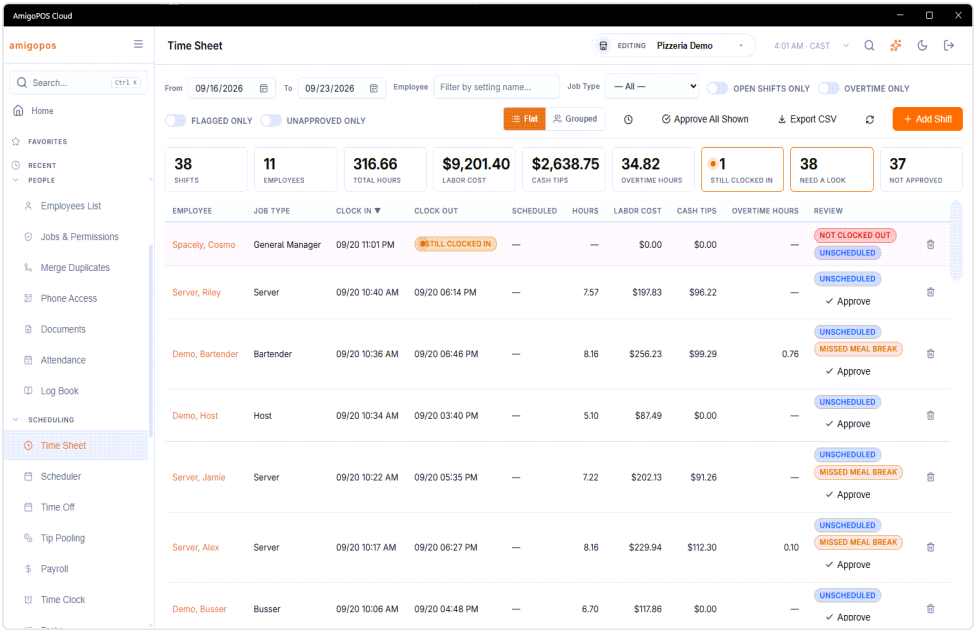
Timesheets

Employees › Scheduling & Time Clock

View online ↗

Reviewing and correcting punches before payroll, including missed punches.

Back Office › Employees › Scheduling › Time Sheet is where punches become payroll-ready hours: review them, correct them and export them, for the whole store.



Choosing what to see

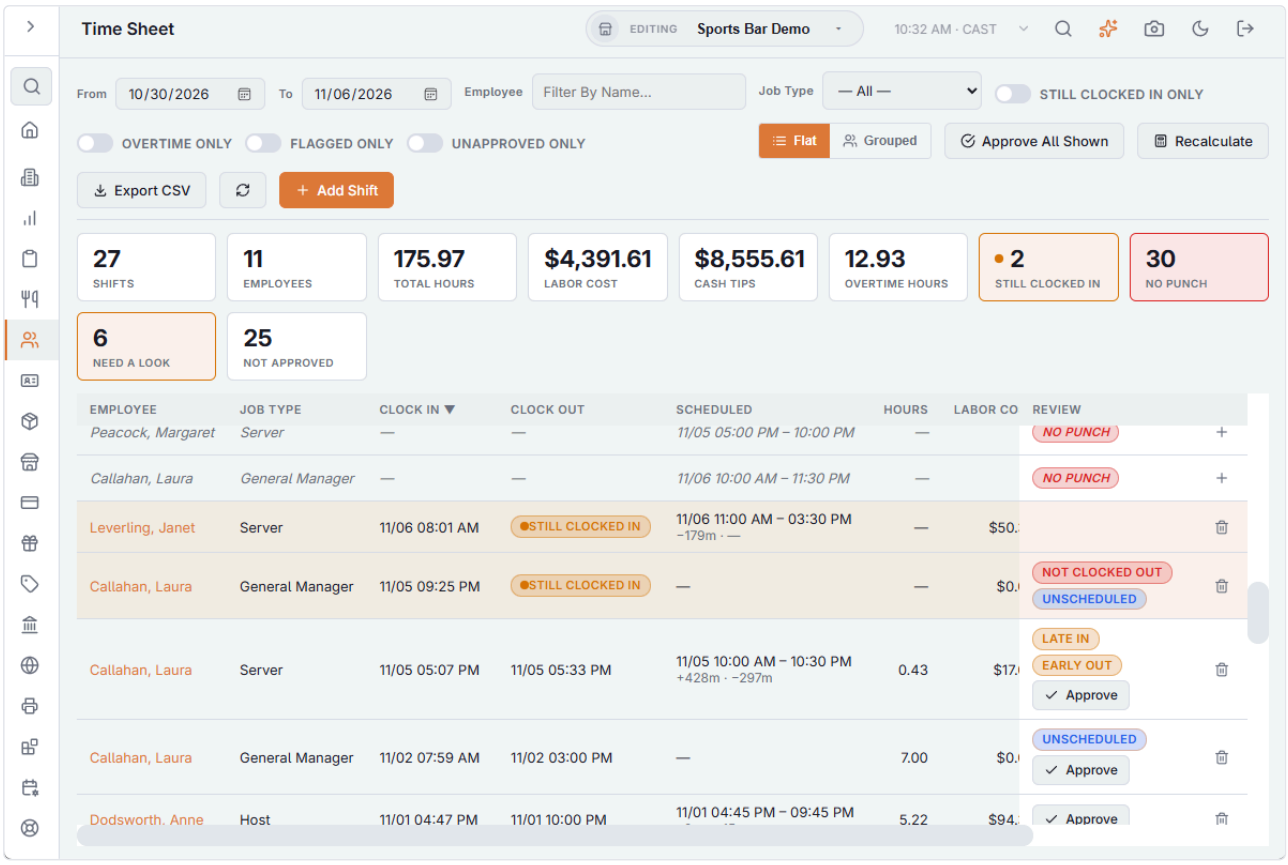
- **From** and **To** — the last seven days when the page opens.
- **Employee** — **Filter By Name...** narrows the list to matching names. Opened from Payroll, the page shows that one employee instead, with an × to show everyone, and a **Payroll** button that takes you back to the same period.
- **Job Type** — one job, or all.
- **Still Clocked In Only** — only punches still clocked in: the forgotten clock-outs.
- **Overtime only** — only punches with overtime hours.
- **Flat** or **Grouped** — every punch as a row, or grouped by employee with their totals.

Managers also see **Flagged Only** and **Unapproved Only**, the review columns and the approval buttons; see Reviewing and approving punches.

The summary and the breakdown

The strip above the list counts the shifts and employees, and totals the hours, labor cost, cash tips and overtime hours for what is shown. It also counts punches still clocked in and, for managers, published shifts with no punch, punches over 12 hours, punches that need a look and punches not approved.

Under the list, **Breakdown** totals the same punches **By Employee**, **By Job Type** and **Hours by Day**.



Correcting punches

Click a punch to edit it: the job, the clock-in and clock-out times, **Clocked out**, the pay rate and the cash and non-cash tips. **Add Shift** adds a punch that never happened at the clock, in the same form with an employee picker; the bin button deletes a punch, after asking. Clicking an employee's name opens their profile.

Corrections are what make the labor numbers trustworthy: close punches still clocked in and fix obvious errors *before* reading the labor reports or running payroll.

Pay rate and labor cost

Every punch carries the hourly rate it is paid at. It is taken when the employee clocks in — at the register or on the phone — from their pay for that job on the employee's **Jobs & Pay** tab, or from the job's **Default hourly rate** when their own rate is 0. Labor cost and overtime are worked out when the punch is clocked out, or saved here, from that rate and the store's overtime settings; there are no overtime fields to fill in.

In the editor, leave **Pay Rate** empty — it shows *Employee's Job Rate* — and the rate is taken the same way when you save. Type a rate only for a one-off exception. Changing the employee or the job empties it again, so the new rate is used.

A finished punch that was saved without a rate, or whose overtime or labor cost does not add up, is recalculated the next time Time Sheet or Payroll shows it, unless it sits in a locked pay period.

Recalculate

Managers have **Recalculate** in the toolbar. After asking, it works out the overtime hours and labor cost of every closed punch from **From** to **To** again, with the current Time Clock settings — for after the overtime settings change. Rates and approvals are kept, and punches in a locked pay period are skipped; the page says how many punches changed.

Overtime

The thresholds and multipliers are on **Back Office › Employees › Scheduling › Time Clock**: two weekly tiers, **Overtime Hours 1** and **Overtime Hours 2**, each with its rate — for example 1.5× past 40 hours and 2× past 60 — and optional daily overtime; see Time Clock settings. Computed overtime shows per punch and in the totals.

Export

Export CSV downloads the punches in the dates shown: one row per punch with the employee, job, clock-in and clock-out, hours, labor cost, cash and non-cash tips and the two overtime tiers, followed by the review columns described in Reviewing and approving punches. Times are the store's local time, as everywhere on this page. For the payroll service's own file, use the Payroll page; see Payroll period report and exports.

Locked pay periods

Once a period has been paid it can be locked, and finished punches inside it become read-only. A banner appears while the dates you are looking at touch a locked period, and clicking one of those punches says so instead of opening the editor. Corrections then start with an unlock on the Payroll page; see Locking a pay period.

Who was late

Time Sheet answers "how many hours". For "who keeps arriving late", use Attendance history (late and no-shows), which compares the same punches with the schedule.

Reviewing and approving punches

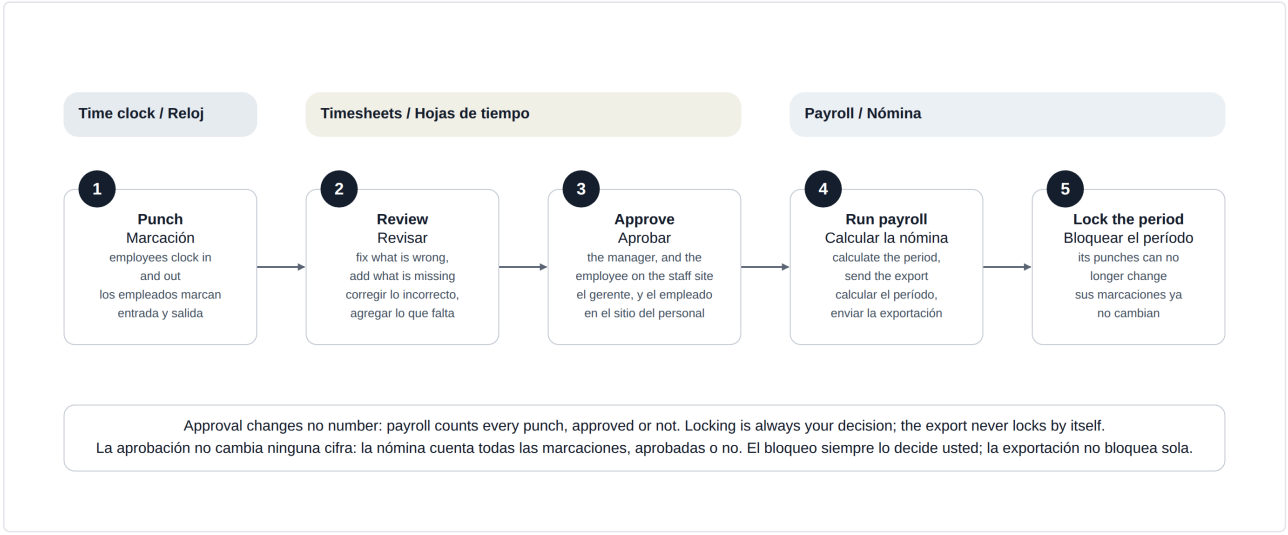
Employees › Scheduling & Time Clock

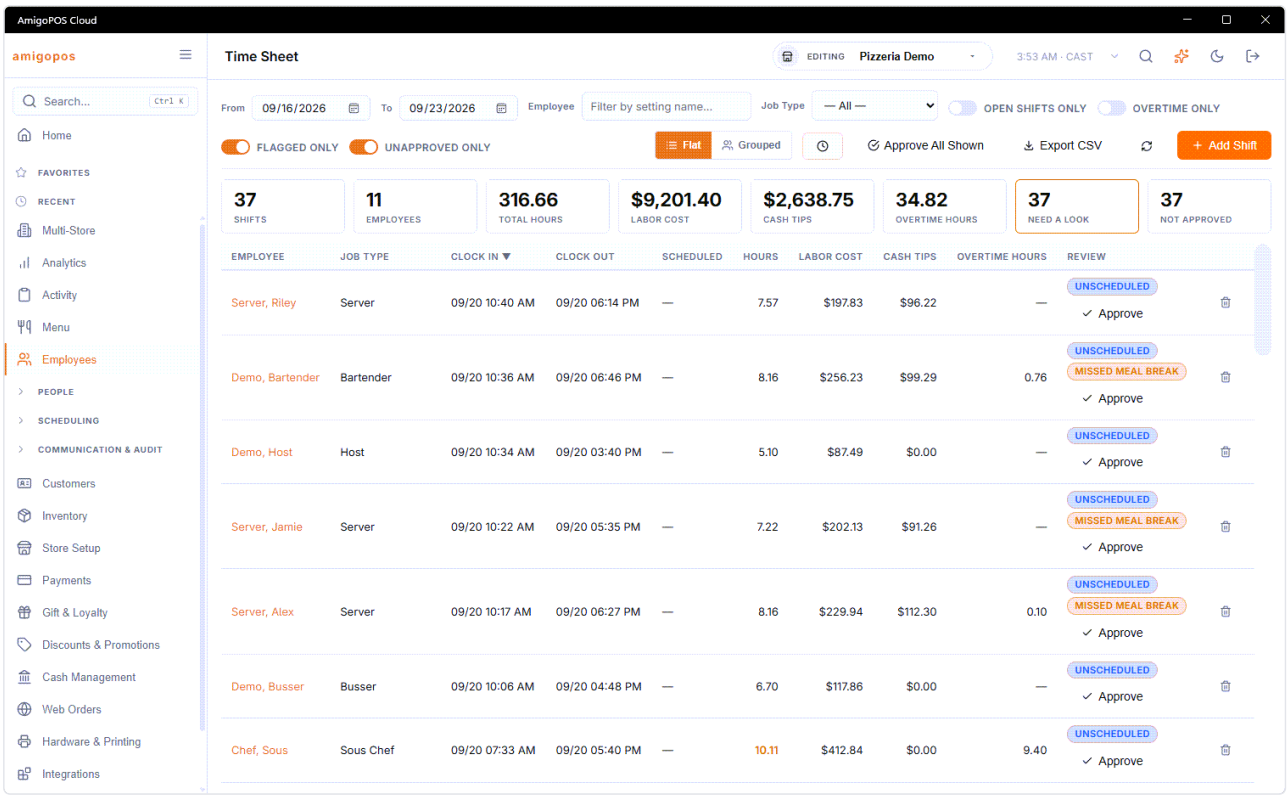
View online ↗

The weekly punch review on Timesheets: schedule variance, labels for forgotten or unusual punches, missed clock-ins, and manager and employee approval before payroll.

Once a week, before payroll, a manager goes through the week's punches on **Back Office › Employees › Scheduling › Time Sheet**: fix what is wrong, add what is missing, approve the rest. The review columns and the approval buttons appear for managers only — employees whose job has the manager permission.

In one picture: the week's punches, from the time clock to the locked pay period.





What the review adds

- **Scheduled** — the published shift the punch served, and underneath it how far the punch was from it: clock-in against the scheduled start, then clock-out against the scheduled end, in minutes. *+12m · −35m* means twelve minutes late in and thirty-five minutes early out.
- **Review** — a label for anything worth a second look, and the approvals.
- **No Punch** rows at the top of the list — published shifts that ended without any punch.
- **Flagged Only** and **Unapproved Only** switches in the toolbar, and **Need A Look** and **Not Approved** counts in the summary strip.

The Scheduled and Review columns and the No Punch rows are part of the flat view. A punch is matched to its shift the way *Attendance history* does it: the shift it was clocked in for, otherwise the employee's nearest shift starting within four hours of the clock-in.

The labels

- **Not Clocked Out** — still clocked in from an earlier business day, an hour past the end of the shift, or for more than 12 hours. Almost always a forgotten clock-out.
- **Auto Clock-Out** — the time clock closed the shift by itself (automatic clock-out or the maximum shift length), so the clock-out time is the scheduled end or the limit, not when the person left.
- **Late In** — clocked in later than the scheduled start plus the grace in *Late Alert (Minutes)* (Employees › Scheduling › Time Clock › Schedule Alerts), ten minutes if that is off.
- **Early Out** — clocked out more than 15 minutes before the scheduled end.
- **Late Out** — clocked out an hour or more after the scheduled end. The usual story is a clock-out that was forgotten and done later.
- **Over 12 hours** — a finished punch longer than twelve hours.
- **Unscheduled** — no published shift near the punch. It only appears when the store publishes schedules for those dates, so a store that does not schedule is not flooded with it.
- **Missed Meal Break** — the store's meal-break rule was not met on that shift.

> A label is a prompt, not a verdict. An early out the manager sent home is fine as it is — approve it and move on.

Missed clock-ins

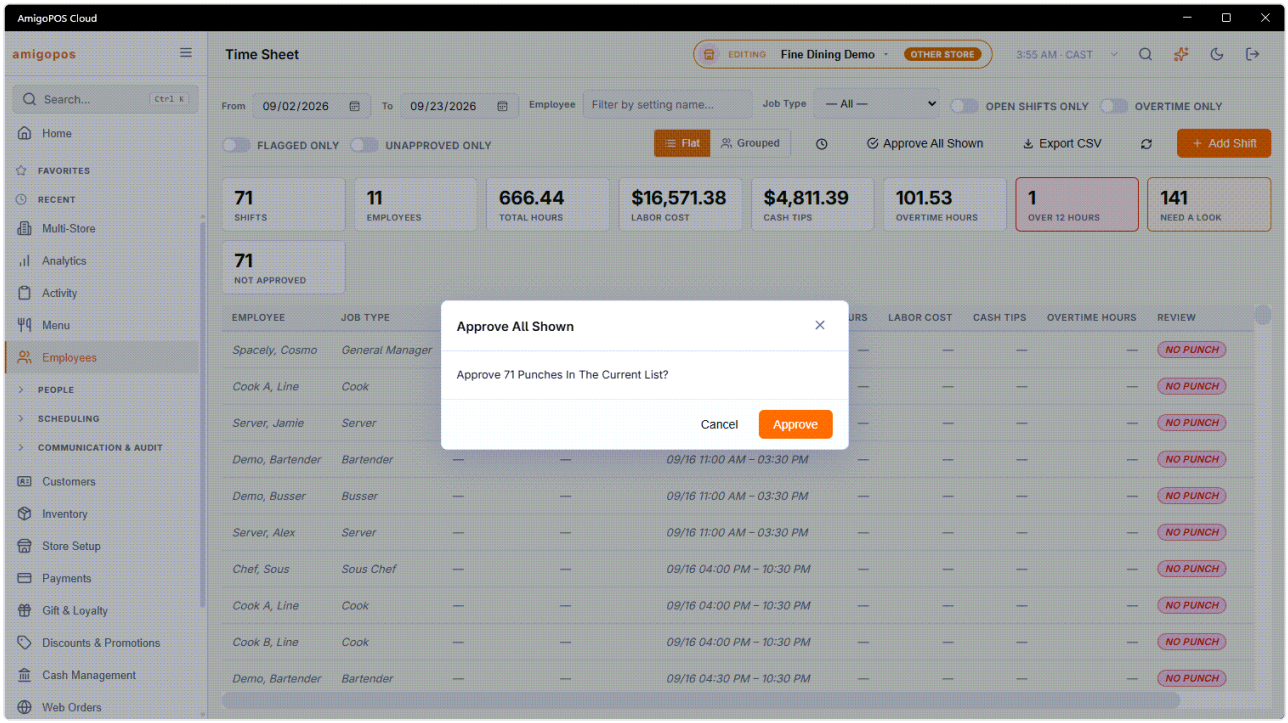
A **No Punch** row is a published shift that has ended with no punch at all. Either the employee did not come in, or they worked and forgot to clock in. For the second case, the **+** button on the row (*Add Punch*) opens Add Shift with the employee, job and scheduled times already filled in and linked to that shift — set the times actually worked and save.

EMPLOYEE	JOB TYPE	CLOCK IN ▼	CLOCK OUT	SCHEDULED	HOURS	LABOR COST	CASH TIPS	OVERTIME HOURS	REVIEW	
Spacely, Cosmo	*General Manager*	—	—	*09/16 10:00 AM – 10:30 PM*	—	—	—	—	NO PUNCH	+
Cook A, Line	*Cook*	—	—	*09/16 10:30 AM – 03:30 PM*	—	—	—	—	NO PUNCH	+
Server, Jamie	*Server*	—	—	*09/16 11:00 AM – 03:30 PM*	—	—	—	—	NO PUNCH	+
Demo, Bartender	*Bartender*	—	—	*09/16 11:00 AM – 03:30 PM*	—	—	—	—	NO PUNCH	+

Approving

- **Approve** on a row signs off that punch. It becomes **Approved · name**, naming the manager who approved it.
- **Approve All Shown** in the toolbar approves every finished punch in the list as it is filtered right now, after asking. Narrow the list first — one week, one employee, or Unapproved Only.
- Clicking an **Approved** label withdraws that approval.
- A person icon with a check means the employee approved the punch themselves on the staff site.

Punches still running cannot be approved, and neither can punches inside a locked pay period. Approve All Shown skips them and says how many it skipped.

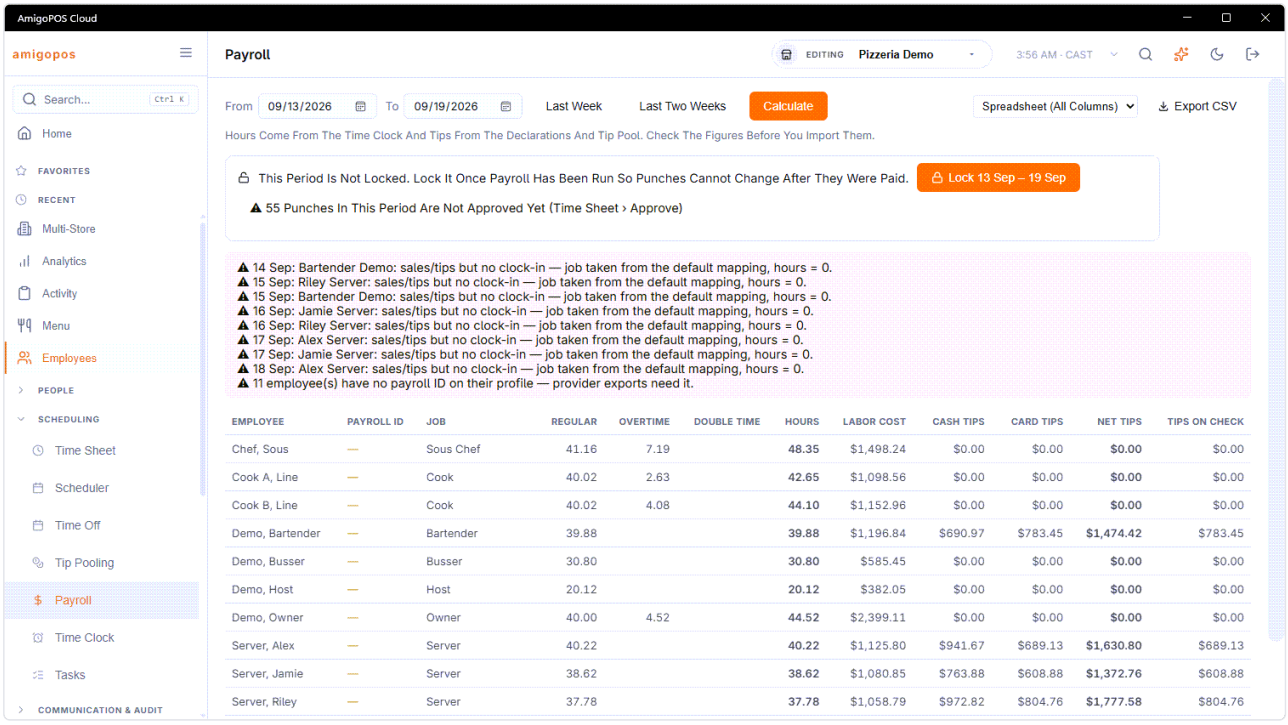


When an approved punch is edited

An approval is for the punch as it was. Changing the employee, job, clock-in or clock-out time, pay rate or tips — here, or from the time clock at the register — clears both the manager's and the employee's approval, so the corrected punch comes back as not approved and goes through the review again.

Approval and payroll

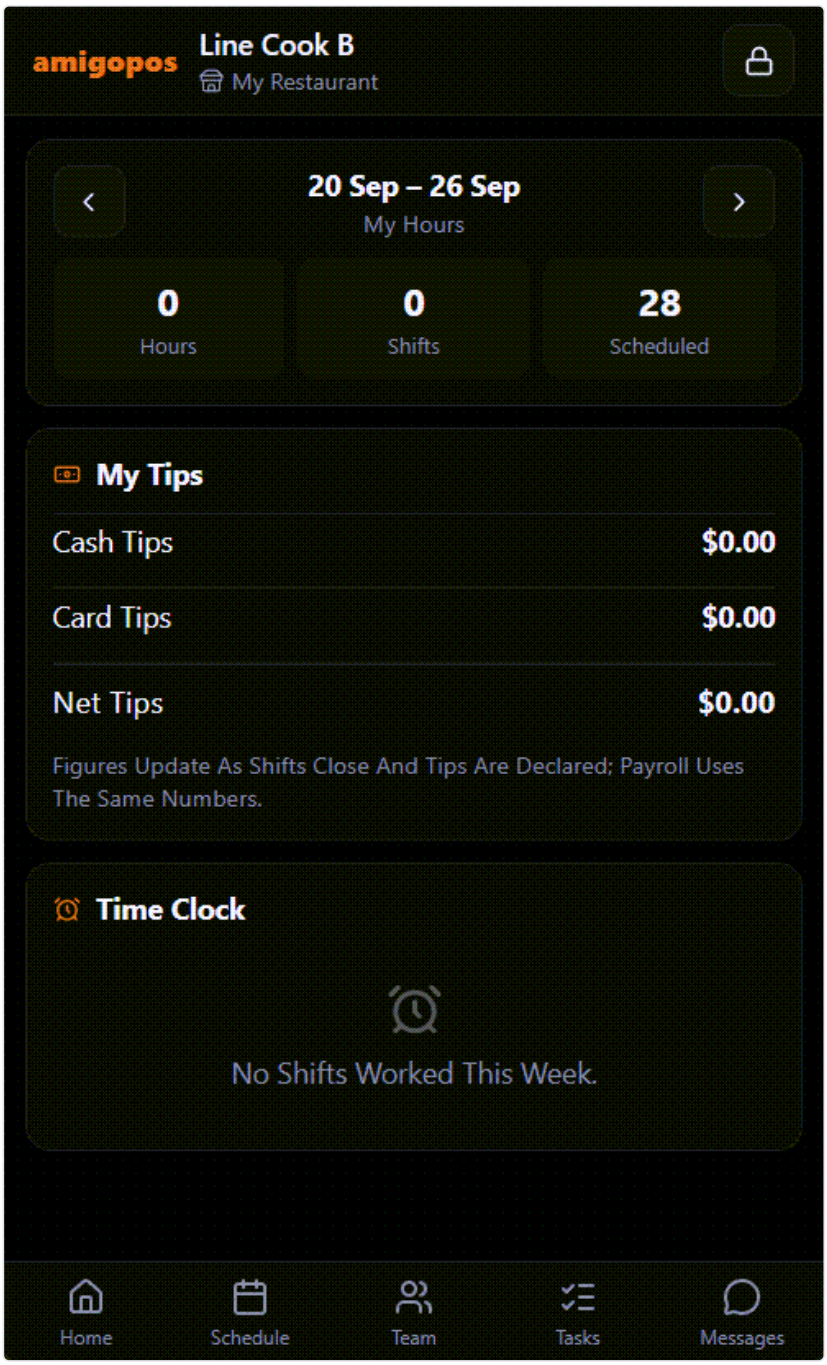
Approval changes no number. Hours, labor cost and tips are the same approved or not, and Payroll calculates from every punch; what approval adds is a record that each punch was looked at. When you lock the period on the Payroll page, the lock panel says how many finished punches are still not approved — a reminder, not a block.



Export CSV on Timesheets carries the review too, in five extra columns: Scheduled, Flags, EmployeeApproved, ManagerApproved and ApprovedBy.

Employees approving their own hours

Employees with phone access approve their week on the staff site, under *My Hours & Tips*, with **Approve My Hours**. It confirms their finished punches for that week. The employee's approval and the manager's are separate — neither needs the other.

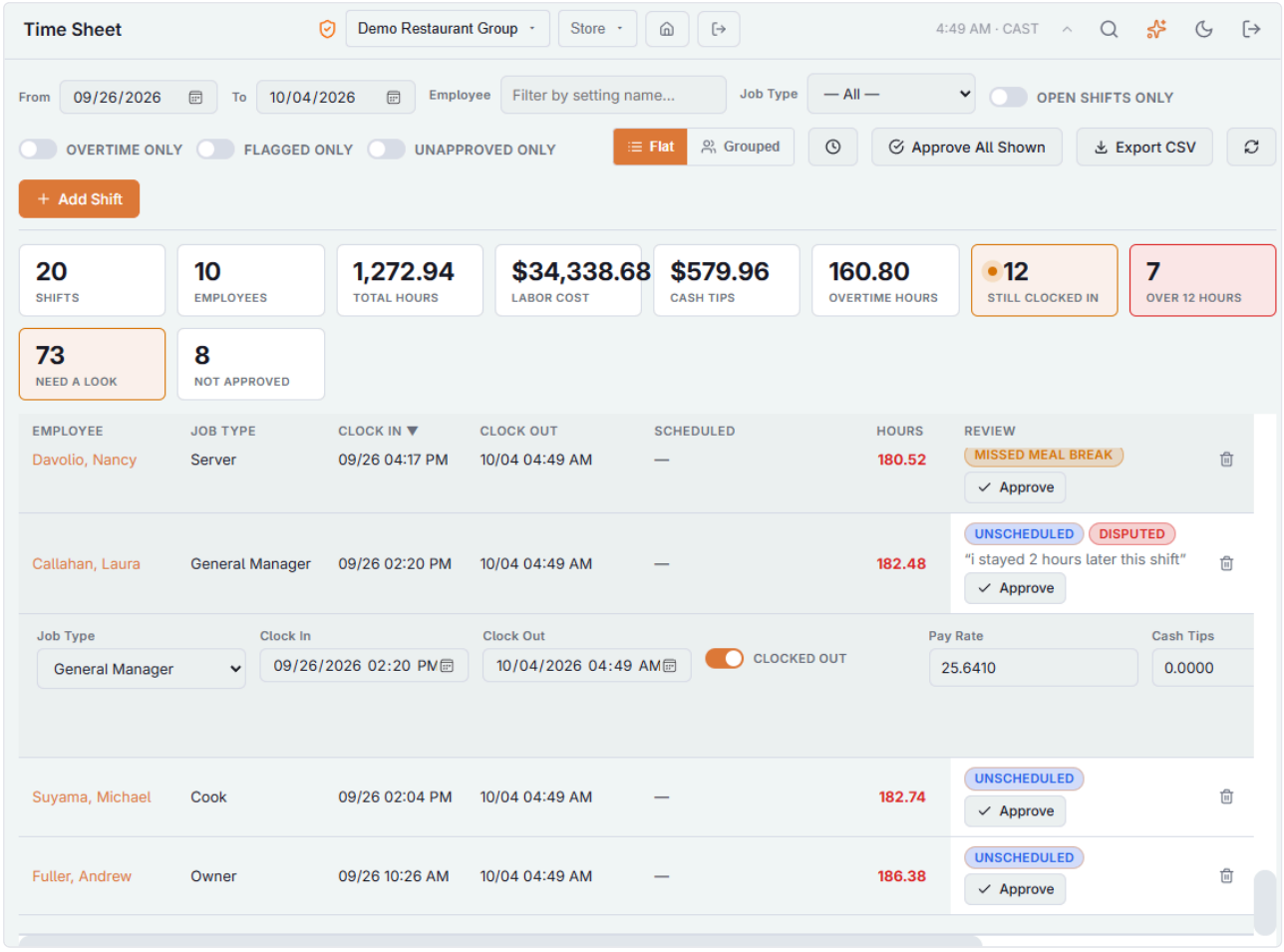


A weekly routine

1. Set the dates to last week, in the flat view.
2. Switch on **Flagged Only** and work through the list: correct the times, add the missing punch from a No Punch row, or leave a punch that was right.
3. Switch Flagged Only off and **Unapproved Only** on, look down the list, and press **Approve All Shown**.
4. If your staff approve their own hours, check that they have before payroll.
5. Run Payroll, send the export and lock the period.

Disputed punches

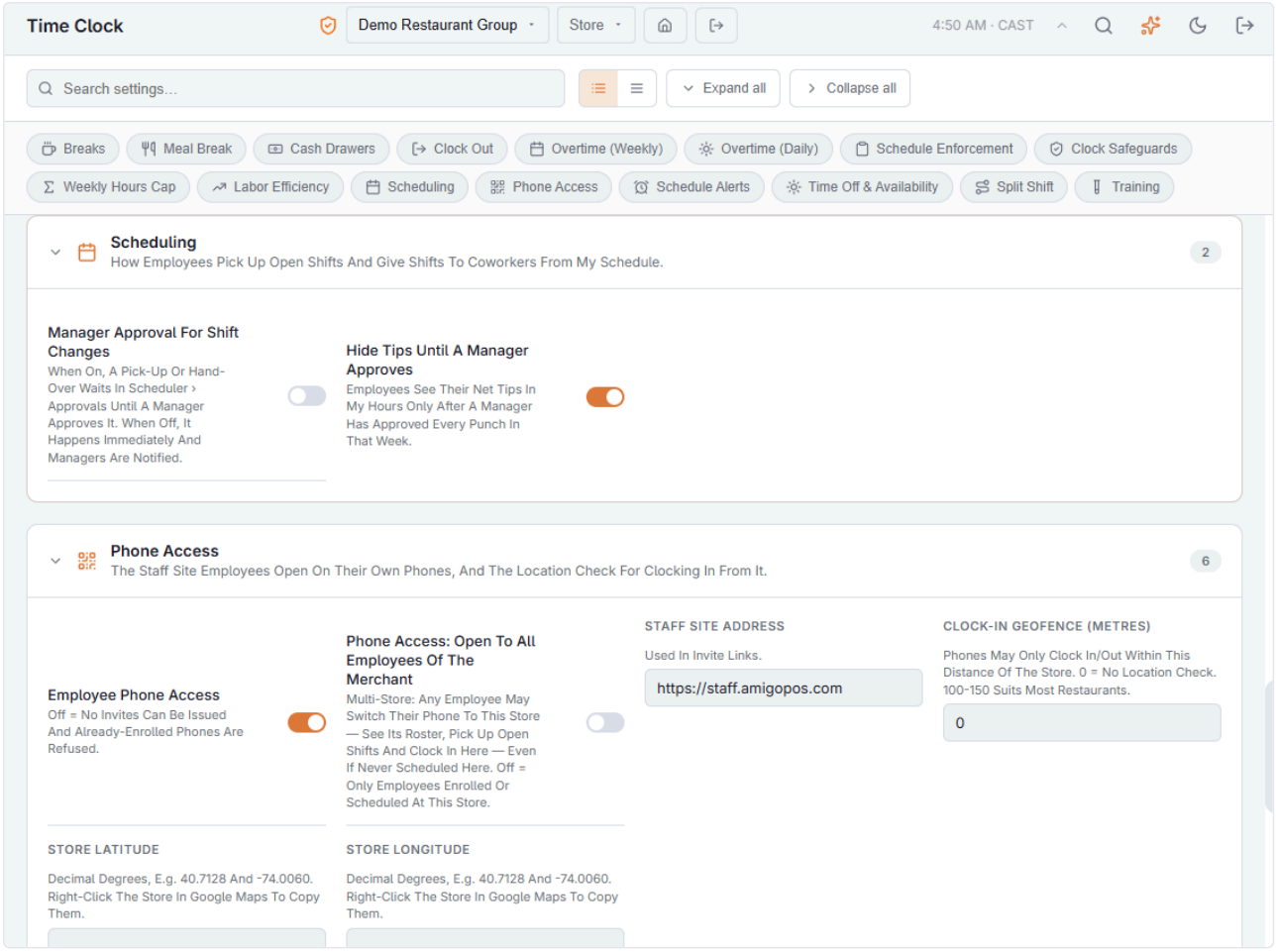
Employees can dispute a punch from My Hours — at the register or on the staff site — with a note. Every manager gets a message, the punch's approvals are cleared, and the Review column shows a red **Disputed** tag with the employee's note.



- **Approve** on a disputed punch keeps it as it is and closes the dispute.
- **Editing** the punch closes the dispute too, and sends it back to the employee to review.
- **Approve All Shown** leaves disputed punches out, so each one is decided on its own.

Hiding tips until you approve

Hide Tips Until A Manager Approves (Back Office › Employees › Scheduling › Time Clock, under Scheduling) keeps employees' net tips off My Hours until every punch in the week is manager-approved. It is off by default.



From a manager's phone

The staff site's **Time Punches** page shows the same review for a week — labels, disputes, approvals, locked periods and the No Punch shifts — and its **Approve** and **Approve All Shown** are the same approvals as here, under the same rules. It also closes a forgotten clock-out at the time the person left. Editing, adding and deleting punches stay on this page. See Fixing punches from your phone.

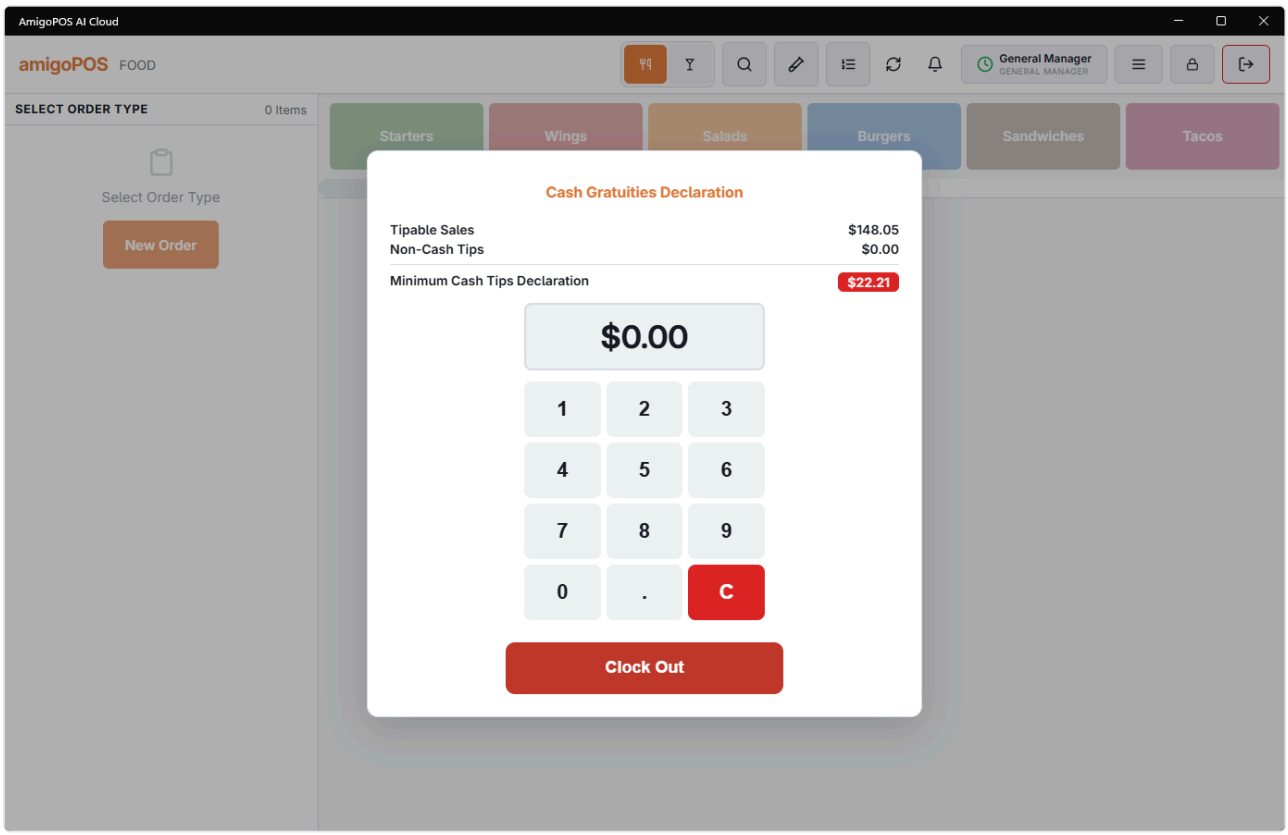
Declaring cash gratuities

Employees › Scheduling & Time Clock

View online ↗

Tip declaration at clock-out.

Declared gratuities capture the cash tips the system can't see. Card tips record themselves at settlement; cash tips exist only if the employee declares them — typically prompted at clock-out.



Why declare

- **Tax compliance** — most jurisdictions require tip reporting; the declaration is the store's record that it happened.
- **True earnings** — *Employee analytics*' tips and tip-% columns are only honest when cash tips are in them; a server's real performance is invisible otherwise.
- **Payroll** — declared tips flow to the payroll export alongside hours.

The flow

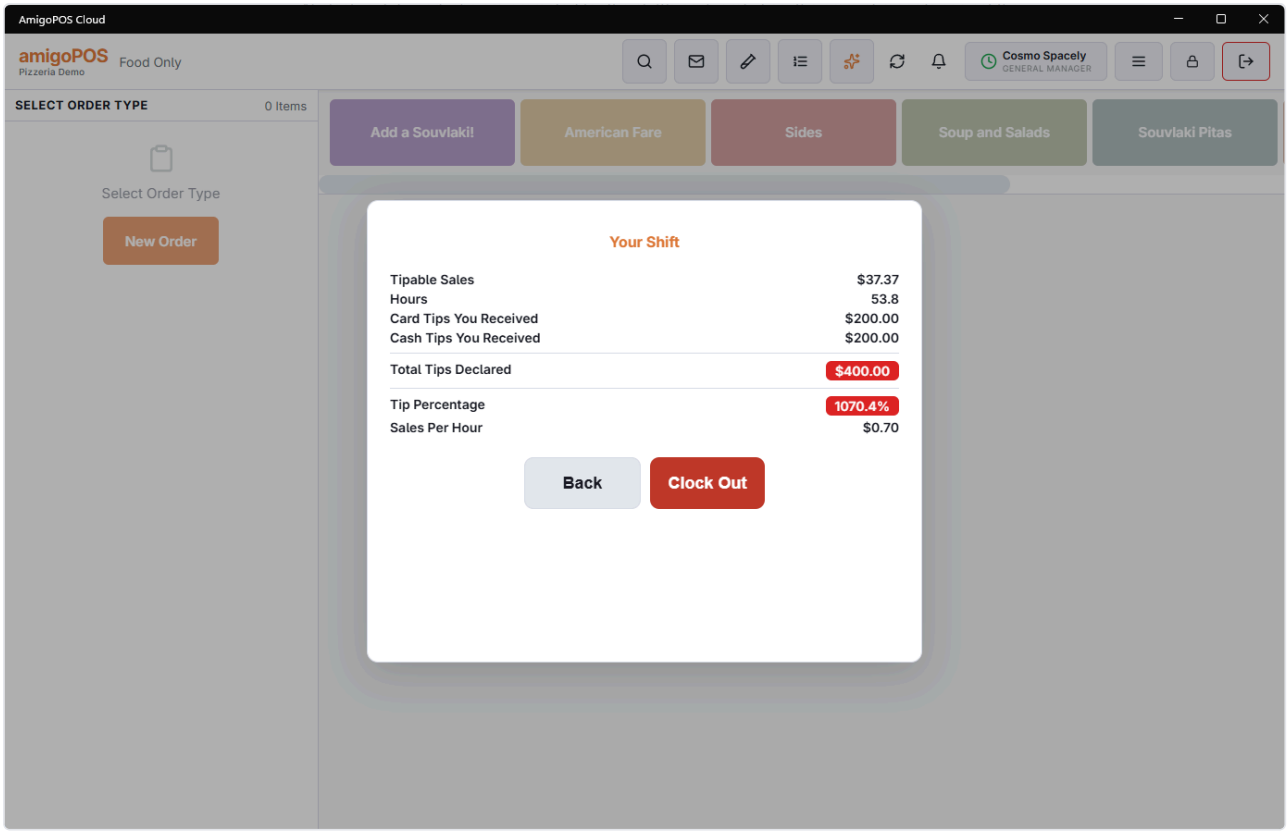
At clock-out, tipped jobs are prompted for the shift's cash gratuities; the amount records against the shift. Managers can review declarations in the timesheet detail — a tipped role declaring zero night after night is a compliance conversation waiting to happen.

> Declarations are the employee's money, reported — not money the house collects. Nothing moves through the drawer; the number is a record. Card tips owed to banked employees are a different mechanism entirely (*Server banking vs. driver banking*).

Blind entry

With **Blind Tip Declaration** switched on (Back Office › Employees › Scheduling › Time Clock, next to the other tip declaration settings), clock-out asks for tips before showing any figures, in three steps:

1. **Card tips you received.**
2. **Cash tips you received.**
3. **Your shift** — only now does the screen show the shift's tipable sales, hours, the tips declared, the total, the **tip percentage** and **sales per hour**. If the card tips on record are higher than what was typed, a *Card tips on record* line shows the system's figure.



Back steps back to correct an amount; **Clock Out** on the review saves the cash tips as before. Declaring before seeing the sales is what tip pools want: the number reflects what was actually received, not what the sales suggest. Stores that leave the setting off keep the classic screen.

From a phone

Employees clocking out on the staff site see **Card Tips** and **Cash Tips** boxes above **Clock Out** when blind entry is on; what they enter is saved with the shift the same way.

Declared tips also feed the tip pool and the payroll report — see *Tip pooling and tip-outs* and *Payroll period report and exports*.

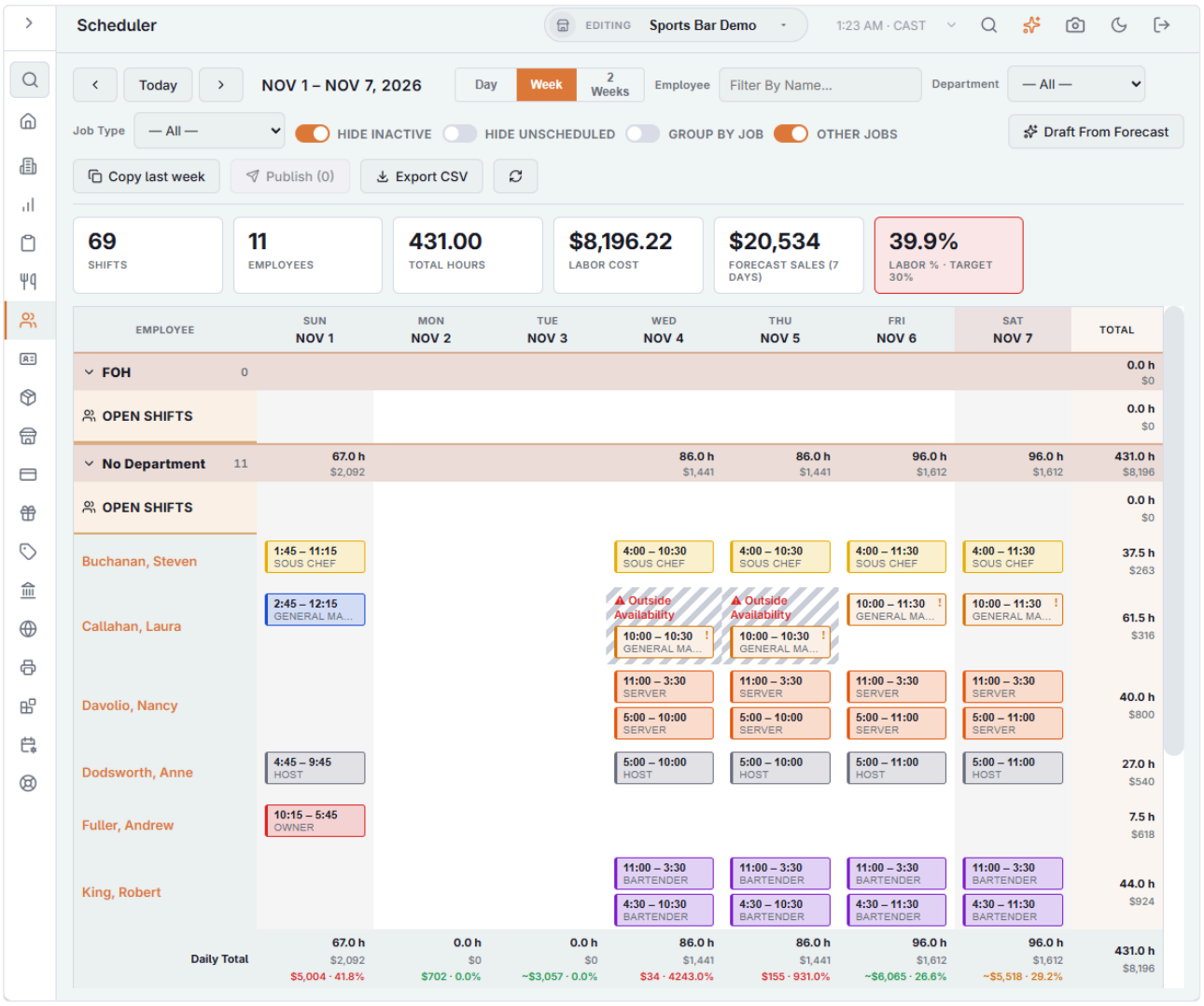
Scheduler

Employees › Scheduling & Time Clock

View online ↗

Building the weekly staff schedule and publishing it to employees.

Back Office › Employees › Scheduling › Scheduler is the staff schedule: a grid of employees against days, with shifts as colored blocks. Shifts are drafts until you publish them.



Finding your way

- The arrows and **Today** move between periods; **Day**, **Week** and **2 Weeks** choose how much is shown.
- **Employee** (**Filter By Name...**), **Department** (when jobs have departments) and **Job Type** narrow the rows. Job Type and Department list only the people concerned: those who hold the job, plus anyone with a shift in it in the period.
- **Hide inactive** and **Hide unscheduled** leave out inactive employees and employees with no shifts in the period.
- **Group By Job** and **Other Jobs** are described below. Clicking an employee's name opens their profile.

The grid normally bands employees by department, each band with its own subtotals; a band folds away with its header.

Building the week

Click the **+** in a day to add a shift: job, date, times, pay rate and notes. The job's color codes the block, so the grid reads at a glance. Click a shift to open its editor, where it can be changed, copied, moved or deleted. Choosing the job fills in its default hourly rate while the pay rate is still 0.

The **summary strip** above the grid totals the shifts, employees, hours and labor cost, and counts open shifts, unpublished shifts, people over their hours and conflicts. Each day has its own total.

Scheduling against the forecast

When a sales forecast is available, each day shows its forecast sales and the scheduled labor as a percentage of them, colored against **Scheduled labor target %** (Time Clock settings); the summary strip adds the forecast and labor % for the period.

- If the plan is already above your labor target, the week will be worse.
- Employees with several jobs are scheduled under the job the shift needs — it is the rate and role that clock-in should match.

> The schedule is the plan; the time clock is the truth. *Labor performance* compares them in cost terms — a steady gap between scheduled and punched hours is a finding of its own.

Availability and time off on the grid

What staff set in *My Schedule* shows up here: an unavailable day is marked **Unavailable**, a day with limited hours shows the window, approved time off shows **Time Off** and a pending request **Time Off?**. A shift placed outside someone's availability is flagged **Outside Availability** — a warning, never a block. Overlapping shifts, less than an hour of rest before a shift and more than 12 hours in a day are flagged the same way.

Publishing

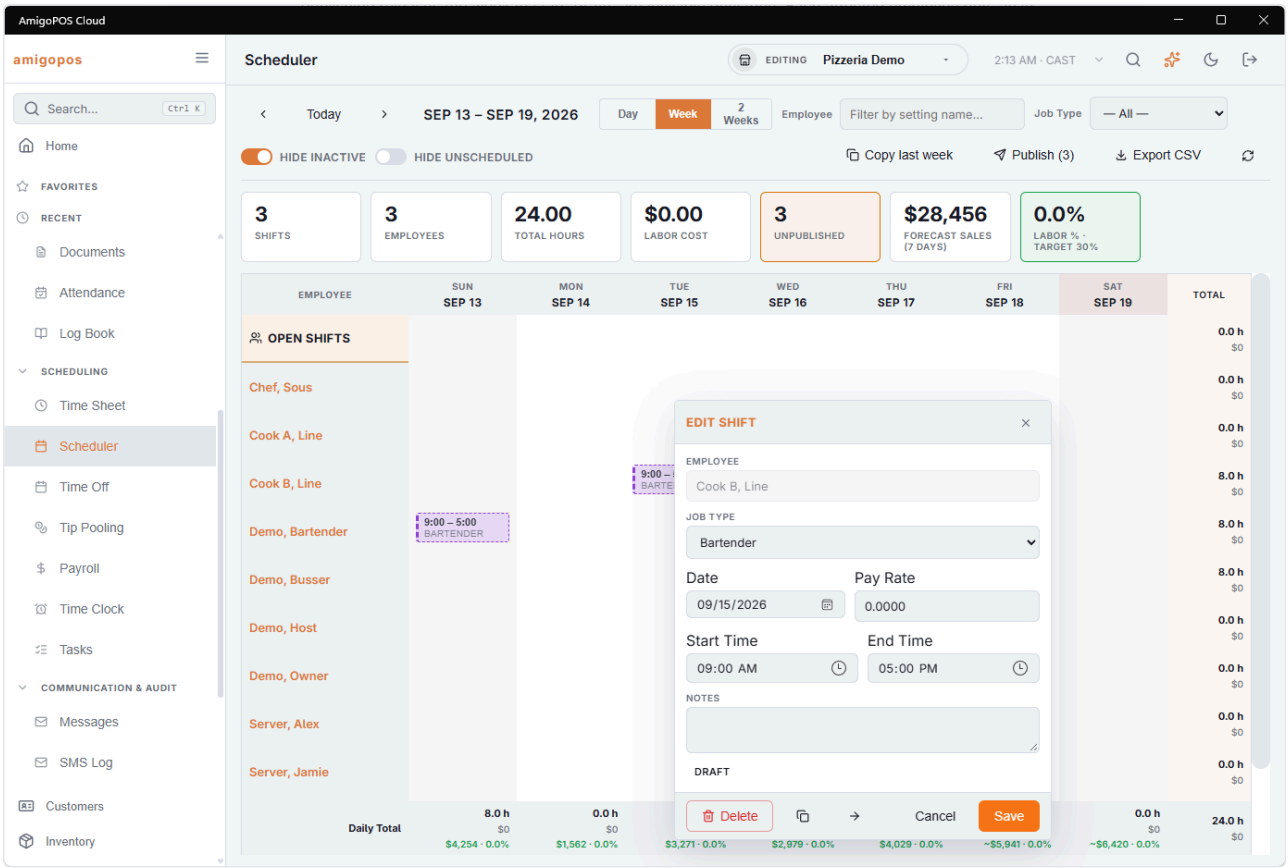
Publish shows how many drafts there are in the period. Publishing releases them to staff, who do not see drafts until then. Each affected employee gets an in-app message, and — where **Schedule Published** is switched on at **Back Office › Integrations › SMS** (see SMS settings) — a text listing their shifts for the week.

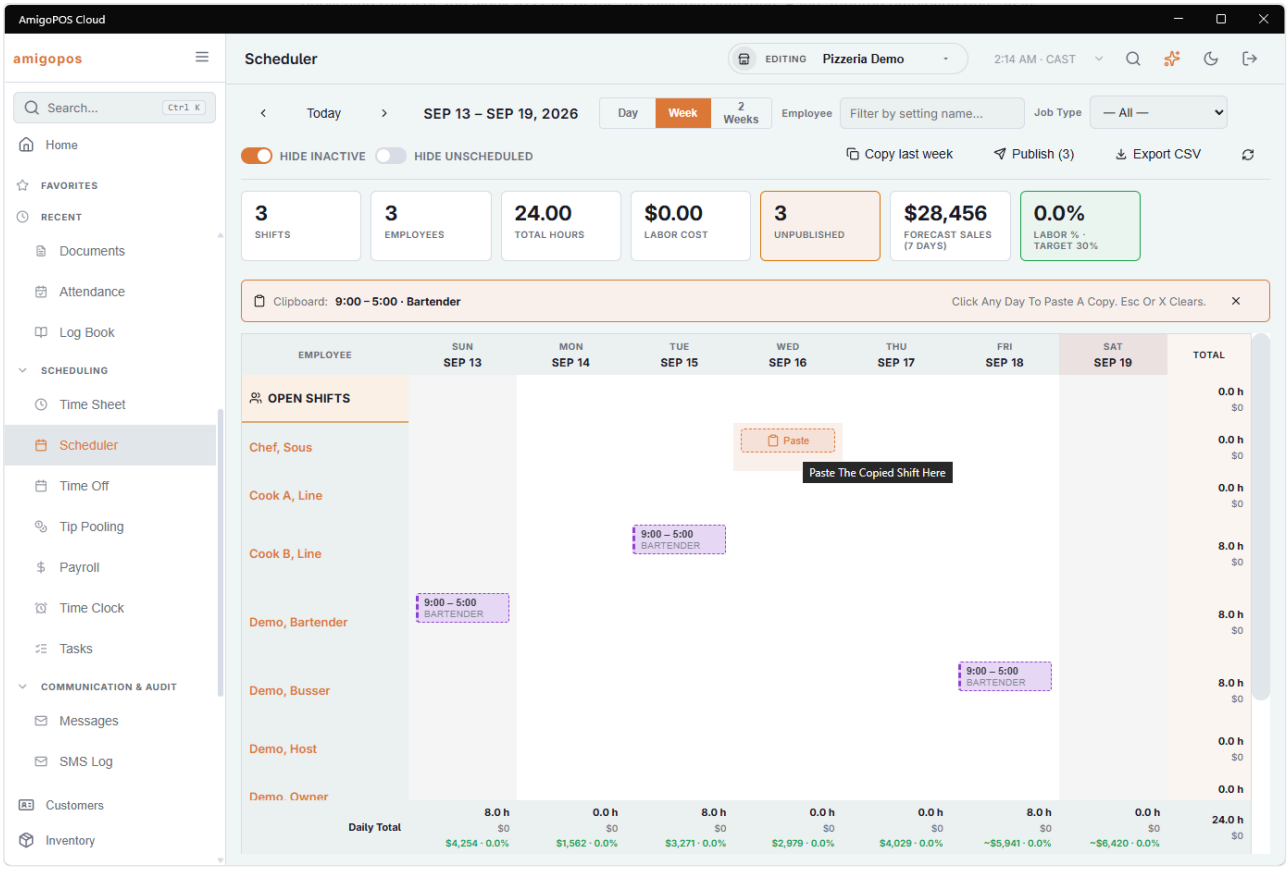
Copy last week copies every shift of the previous period into this one as drafts; days that already have shifts are skipped. **Export CSV** downloads the period's shifts with their hours, pay, labor cost, published state, notes and department.

Copying and moving shifts

Open a shift and use the two buttons beside **Delete**:

- **Copy** (Ctrl+C) — a strip under the summary shows what is on the clipboard. Click any day, for any employee, to paste a copy; every day shows a **Paste** button while the clipboard is loaded, and you can paste as many times as you need.
- **Move** (Ctrl+X) — the original dims. Click the day, or another employee's day, to put it there (**Move Here**). Clicking its own day cancels.





Pasted and moved shifts keep their start time and length, overnight shifts included. A pasted copy is a new draft, so it goes out with the next **Publish**. A moved shift keeps its state: moving a published shift changes it straight away, and the employee is told (see *Changing a published shift* below). **Esc** or the × on the strip clears the clipboard. Everything works by tapping, so it behaves the same on a tablet.

Open shifts and approvals

The **Open Shifts** row at the top holds shifts with a job but nobody on them yet — see Open shifts. When **Manager Approval For Shift Changes** is on, an **Approvals** button with a count appears in the toolbar while staff requests are waiting: **Approve** or **Decline** each one — see Picking up, giving up and swapping shifts.

Overtime warning while you build

Hours add up across the week as you place shifts. A shift that takes someone past the overtime warning threshold gets an amber **OT** mark, and one past the weekly hours cap gets a red one; that employee's hours in the totals column turn the same color, and the summary strip counts how many people are over. It is a warning, never a refusal — sometimes the overtime is the cheapest answer, and you want to know you are choosing it.

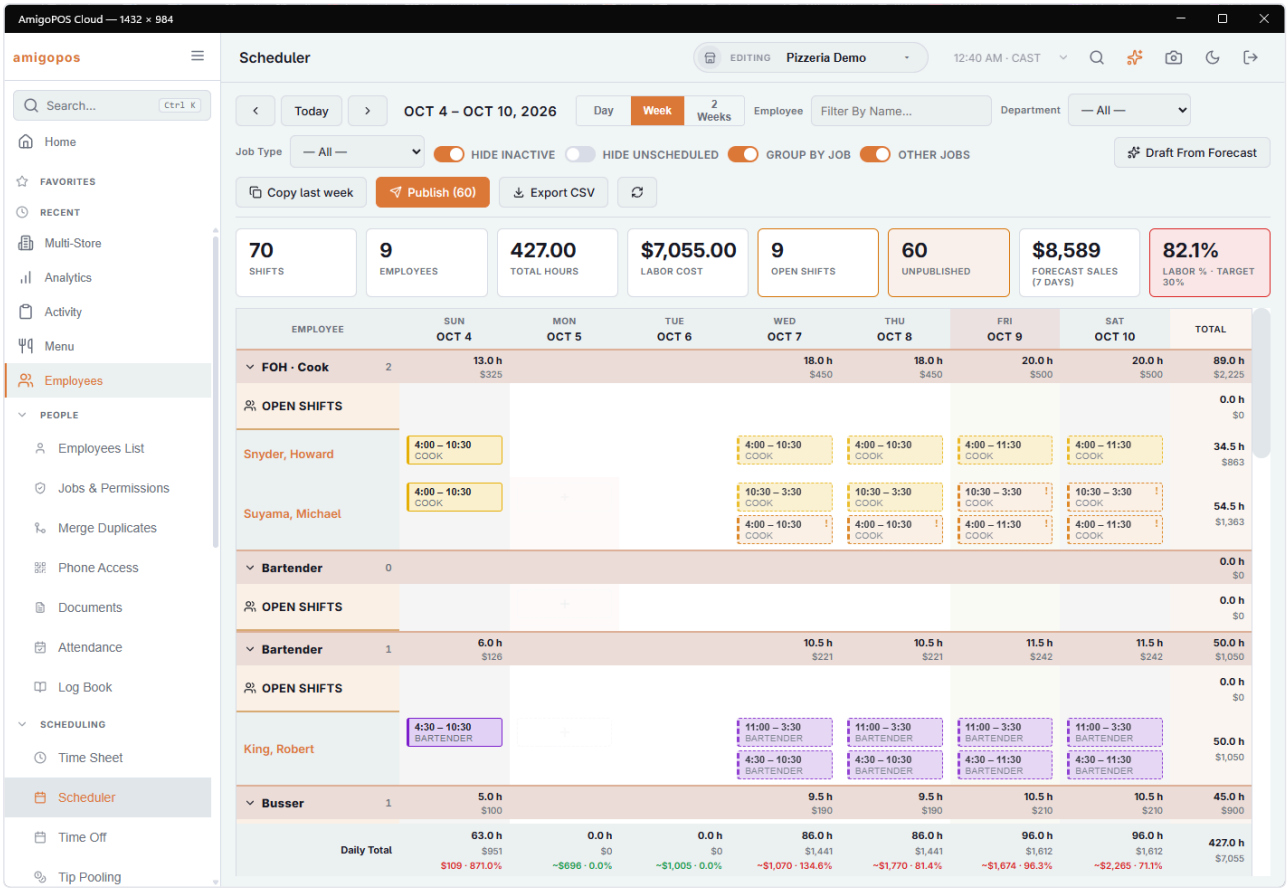
The two thresholds are the ones the time clock already uses: **Overtime Warning Threshold (Weekly Hours)** and **Weekly Hours Cap** (Back Office › Employees › Scheduling › Time Clock), either of them 0 to switch that warning off. Only scheduled hours count — hours already worked this week are the clock's business. The day view has no week to add up, so nothing is marked there.

Drafting from the forecast and overtime alerts

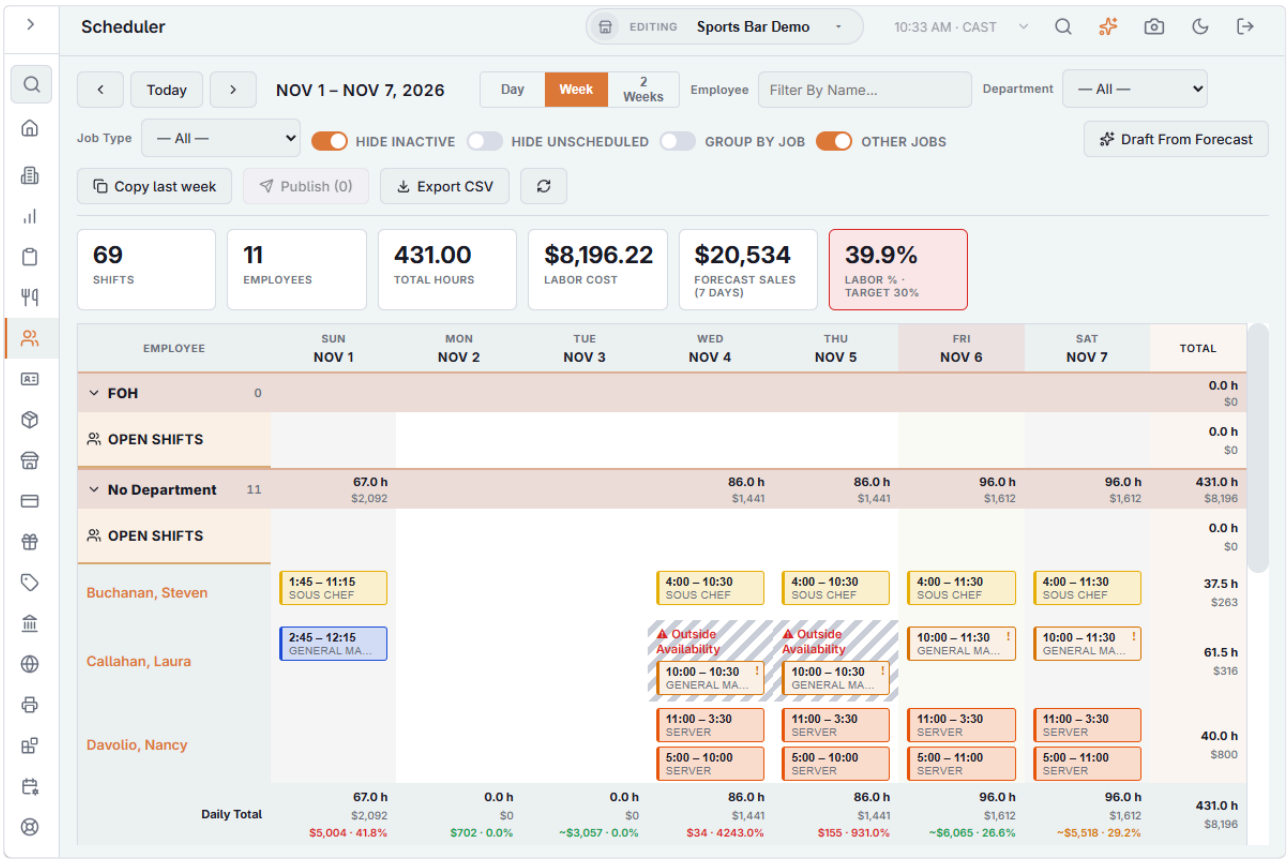
In the week view, **Draft From Forecast** copies last week as drafts and adds open shifts where the forecast needs more — see Drafting the schedule from the forecast. Managers are warned before a published shift takes someone into overtime — see Overtime alerts.

Grouping by job, and other jobs

Switch on **Group By Job** and the grid bands employees by job instead of department — *FOH · Bartender*, *FOH · Server*, *BOH · Cook*… — each band with its own Open Shifts row and the employees who hold that job or have a shift in it, showing only that job's shifts. All the bartenders sit together, so one glance down a column confirms every day has one. Someone with two jobs appears in both bands; every shift is in exactly one, so the totals do not change. A **+** inside a band starts a shift with that band's job.

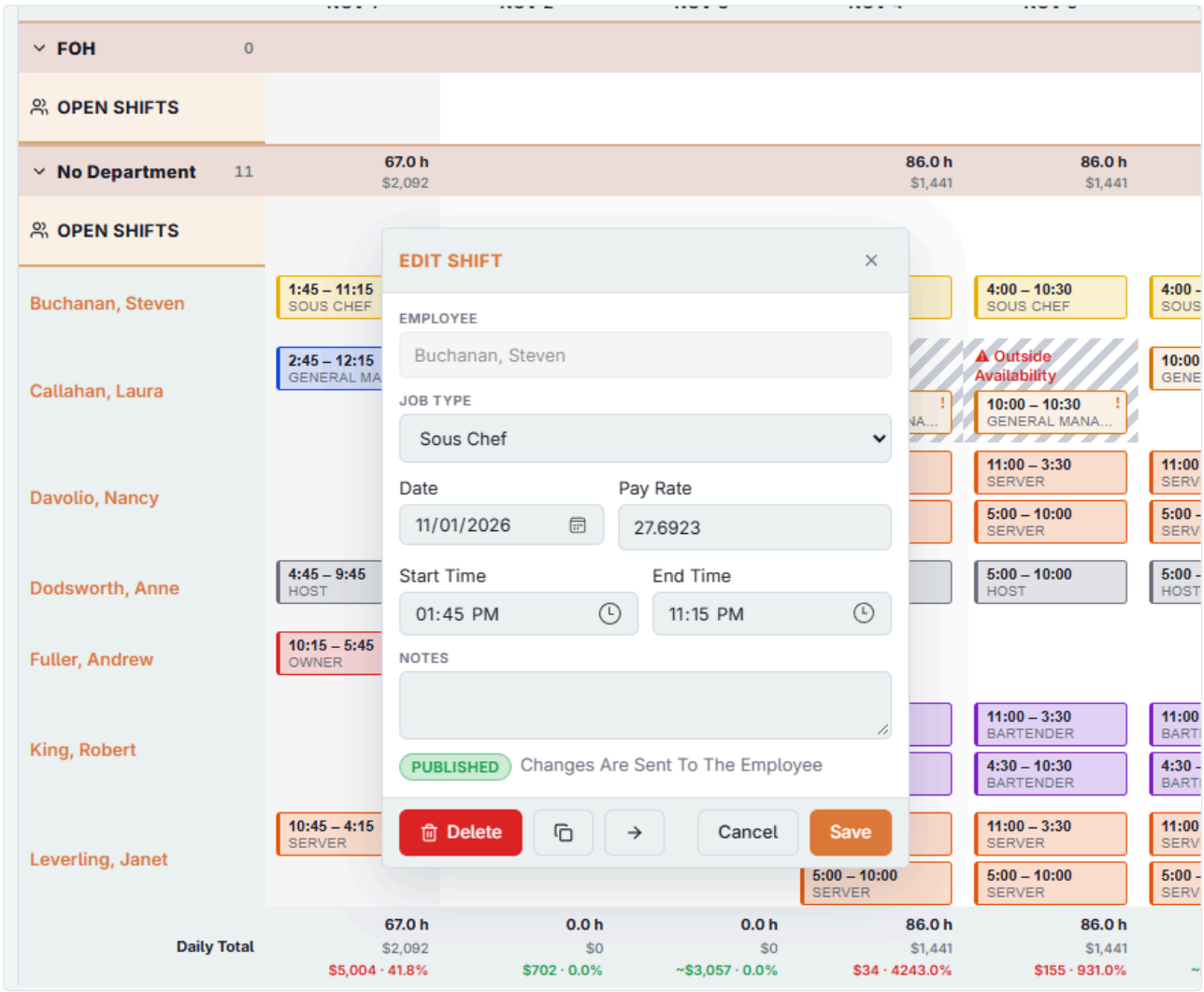


With a band or a Job Type filter, **Other Jobs** (on when the page opens) also shows each employee's shifts in other jobs, greyed out and not counted in the totals, so you can see they are busy elsewhere.



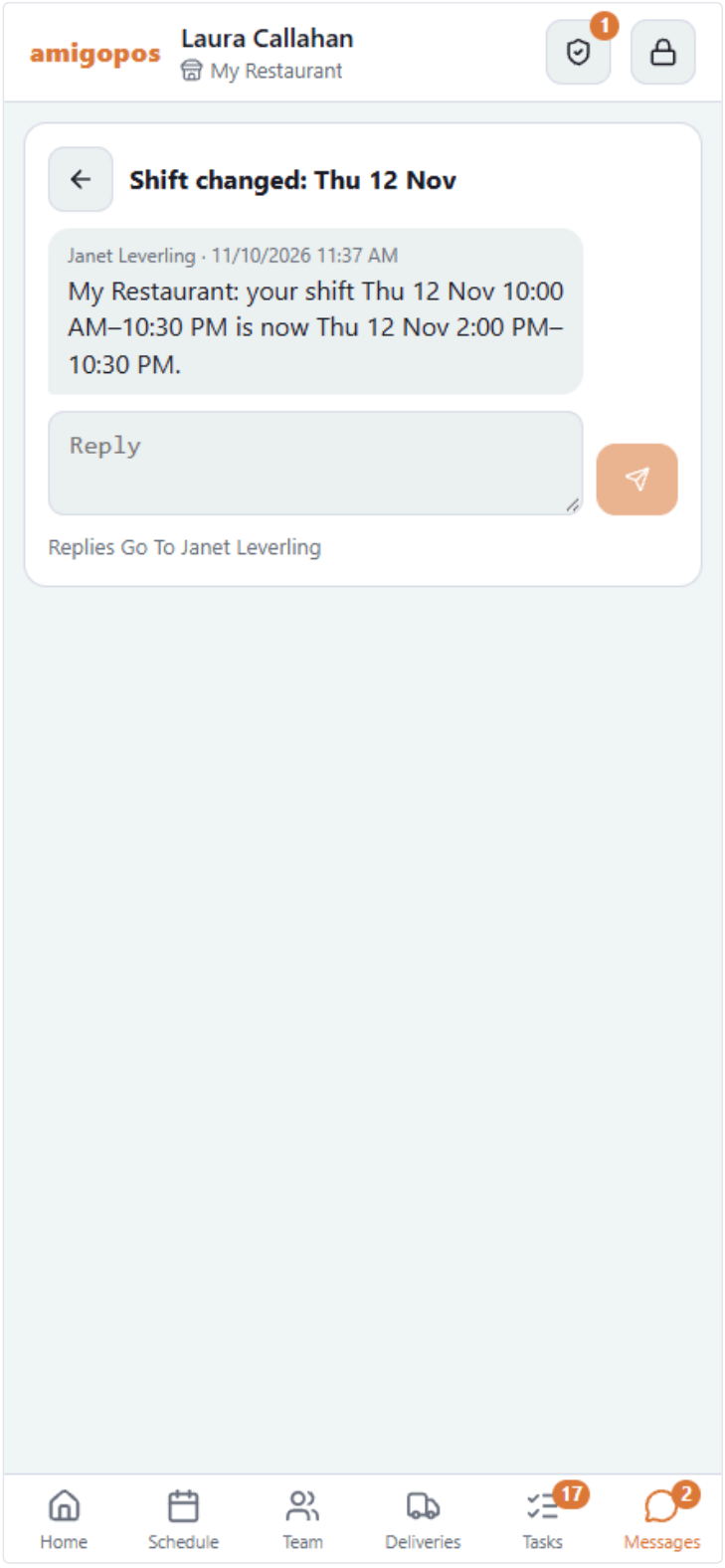
Changing a published shift

Once a shift is published, its editor says **Changes Are Sent To The Employee**. Saving a change to it — new times, another day or job, another employee, moved to Open Shifts, or deleted — sends a message straight away, in each person's own language, with the old and the new times:



- **Shift changed** — to the employee, when the times, day or job change.
- **New shift** and **Shift removed** — when a shift goes from one employee to another, both hear. A shift moved to Open Shifts, or deleted, tells its employee it was removed.

The message comes from the manager who made the change, so a reply reaches them; a change saved by a sign-in that is not one of the store's employees goes out as a system notice instead. It is marked important when the shift is less than a day away, and it arrives in Messages at the register and on the staff site, with a notification on phones that have them switched on.



Nothing is sent for drafts (Publish does that), for shifts that are already over, for a change to your own shift, or for an edit that only touches the notes or the pay.

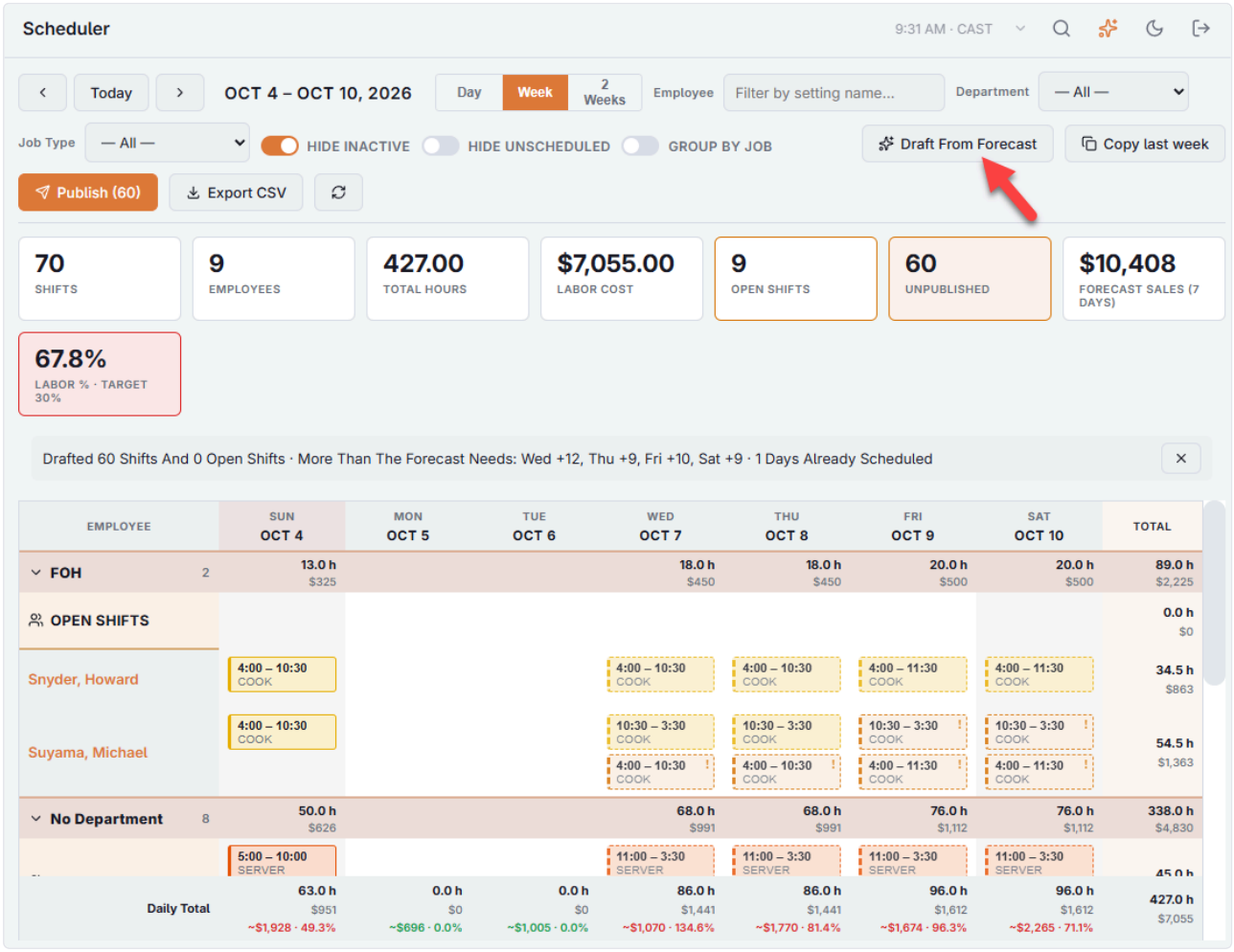
Drafting the schedule from the forecast

Employees › Scheduling & Time Clock

View online ↗

Copy last week as drafts, then add open shifts where the forecast needs more.

In the Scheduler week view, choose **Draft From Forecast** (next to **Copy Last Week**) and confirm.



What it does

1. Copies last week's shifts into this week as **drafts**. A shift belonging to someone who has since been disabled or released becomes an open shift.
2. Compares each day with the forecast. When a labor target and pay rates are set, a day needs its forecast sales times the labor target percentage. Otherwise it needs last week's labor scaled by how this week's forecast compares with last week's sales.
3. Where a day is short by about three quarters of a typical shift or more, it adds up to three **open shifts** of that day's most common job at its usual times, for staff to claim.
4. Where a day has more than the forecast needs, it only reports it — for example *More Than The Forecast Needs: Fri +2*. Nothing is removed.

Closed days and days that already have shifts are skipped. Nothing is published: review the week, adjust it, then publish as usual.

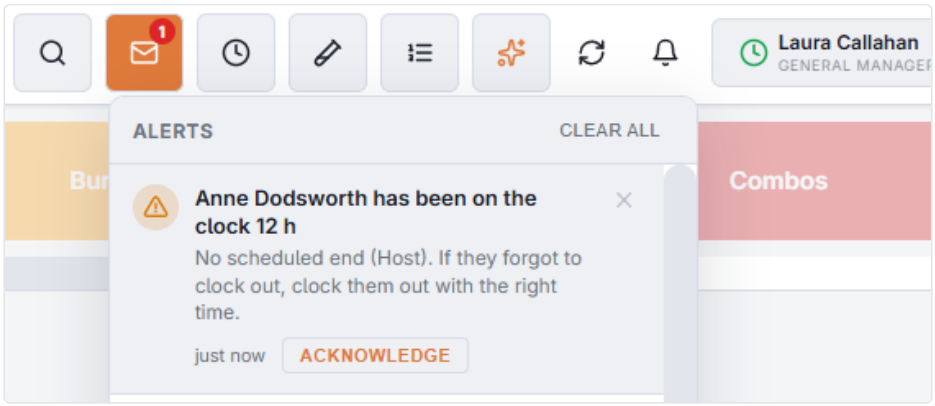
Overtime alerts

Employees › Scheduling & Time Clock

View online ↗

Managers are warned before a published shift takes someone into overtime.

When a published shift will take an employee past the store's **Overtime Warning Threshold** for the business week, managers get a quick alert in the app (also pushed to phones that opted in), up to 36 hours before that shift starts. Each shift is alerted once.



How the hours are worked out

- Hours clocked since the business week started (Business Week Start Day at the Business Day Start Time), plus the published shifts still to come this week.
- A punch still open counts up to now only if it started in the last 24 hours, so a forgotten clock-out does not fill the week.
- The threshold is the Time Clock setting **Overtime Warning Threshold**; when it is not set, 40 hours.

The alert names the shift that crosses the line, the projected hours and the hours worked so far, so you can swap the shift before it starts. Alerts are in English, Spanish or Arabic following the store's language.

To check the week at any time, ask the assistant — see Overtime questions. The clock-in overtime warning uses the same weekly hours — see Time clock.

Live overtime alerts

These alerts warn from the schedule, before the shift. Manager alerts add a live one for people already on the clock: who is in overtime now, or will be if they finish today's shift, and at what time. See Labor alerts.

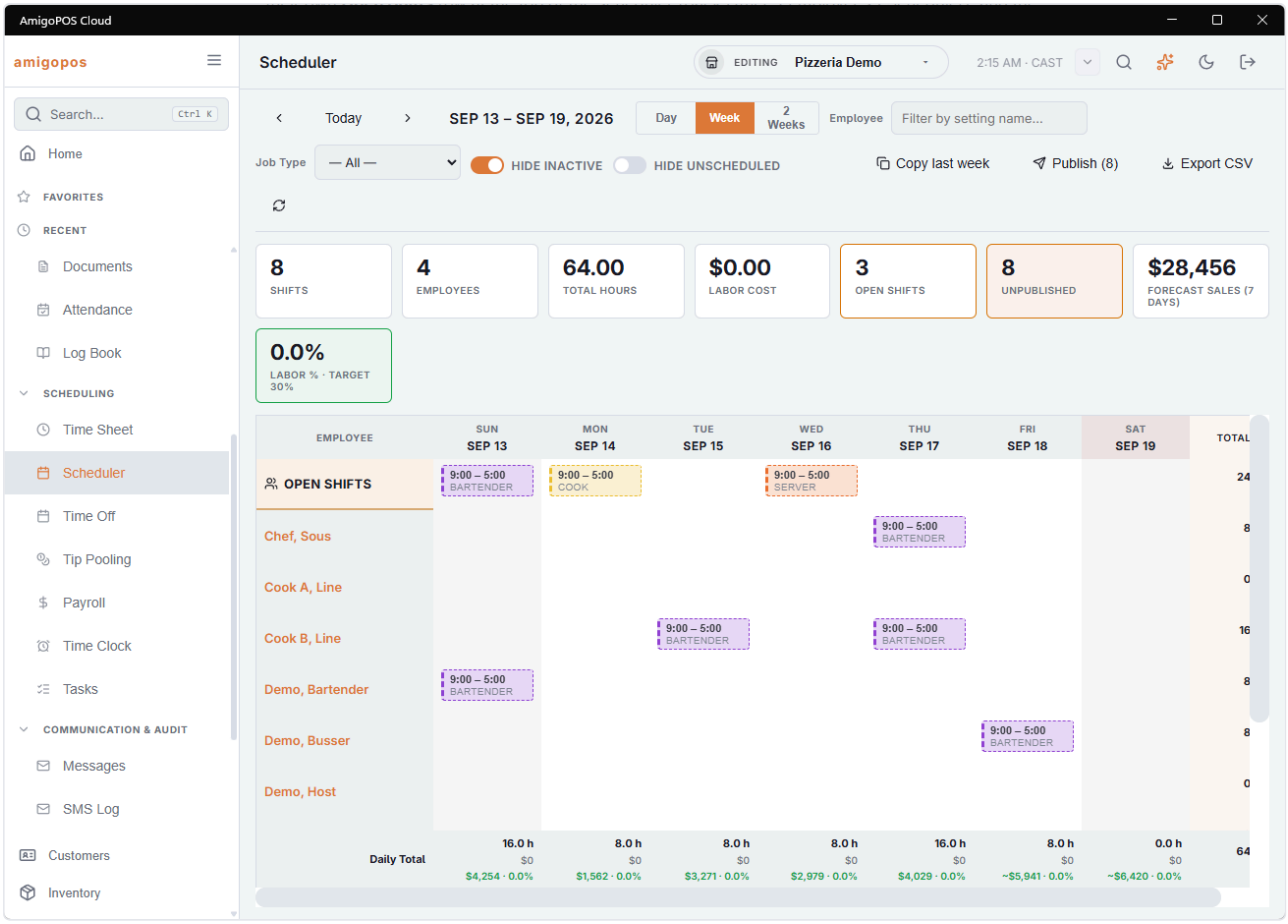
Open shifts

Employees › Scheduling & Time Clock

View online ↗

Shifts with a job but nobody on them yet: building the week by role, assigning people and publishing.

An **open shift** is a shift for a job with nobody on it yet — "a cook, 15:00 to 22:00". Open shifts sit in their own **Open Shifts** row at the top of the scheduler (Back Office › Employees › Scheduling › Scheduler), and the summary strip counts them.

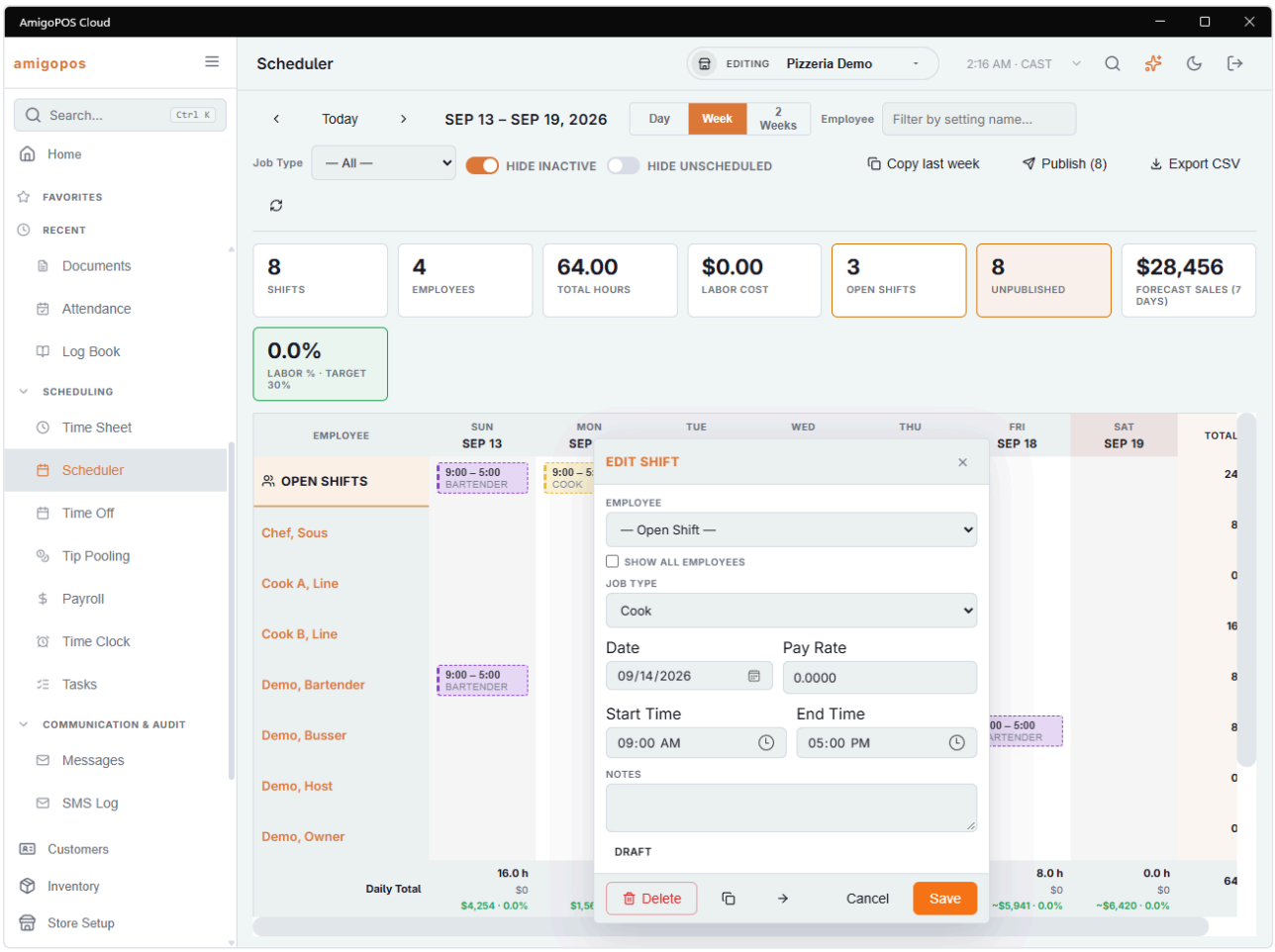


Creating one

Click the **+** in the Open Shifts row on the day you need covered. The editor opens with Employee set to **— Open Shift —**; choose the job, the date and the times, and save. Any shift can also be turned into an open shift by picking **— Open Shift —** in its editor.

Assigning it

- **From the editor** — open the shift and pick an employee. The list shows only people who hold the shift's job (their job assignments in *Jobs & Permissions*); tick **Show All Employees** to see everyone. Choosing someone without the job asks you to confirm.
- **By moving it** — use **Move** on the open shift and click the employee's day (see *Scheduler* › Copying and moving shifts). The same job check applies.
- **Taking someone off** — move their shift onto the Open Shifts row and it becomes open again.



Build the week by role, then add names

Most kitchens and bars run the same pattern every week: 6:30–15:00 dishwasher, 7:00–15:00 chef, 15:00–22:00 cook, and so on. Build that pattern once as open shifts; **Copy Last Week** brings it forward each week, and you only fill in names — or let staff pick the shifts up themselves.

Publishing

Open shifts are published with the rest of the week. Once published, everyone who holds the job sees them on the **Open Shifts** tab of *My Schedule* (on the register or on their phone) and can pick them up — see *Picking up, giving up and swapping shifts*. Nobody is texted about an open shift at publish time, because nobody is on it.

> Open shifts count in the scheduled hours and labor cost — they are coverage you plan to pay for — but they are left out of the overlap and short-rest warnings. The Open Shifts row is hidden while you filter by name, or when *Hide Unscheduled* is on and there are none.

Picking up, giving up and swapping shifts

Employees › Scheduling & Time Clock

View online ↗

How staff pick up open shifts, give theirs away or offer them to a coworker, and how optional manager approval works.

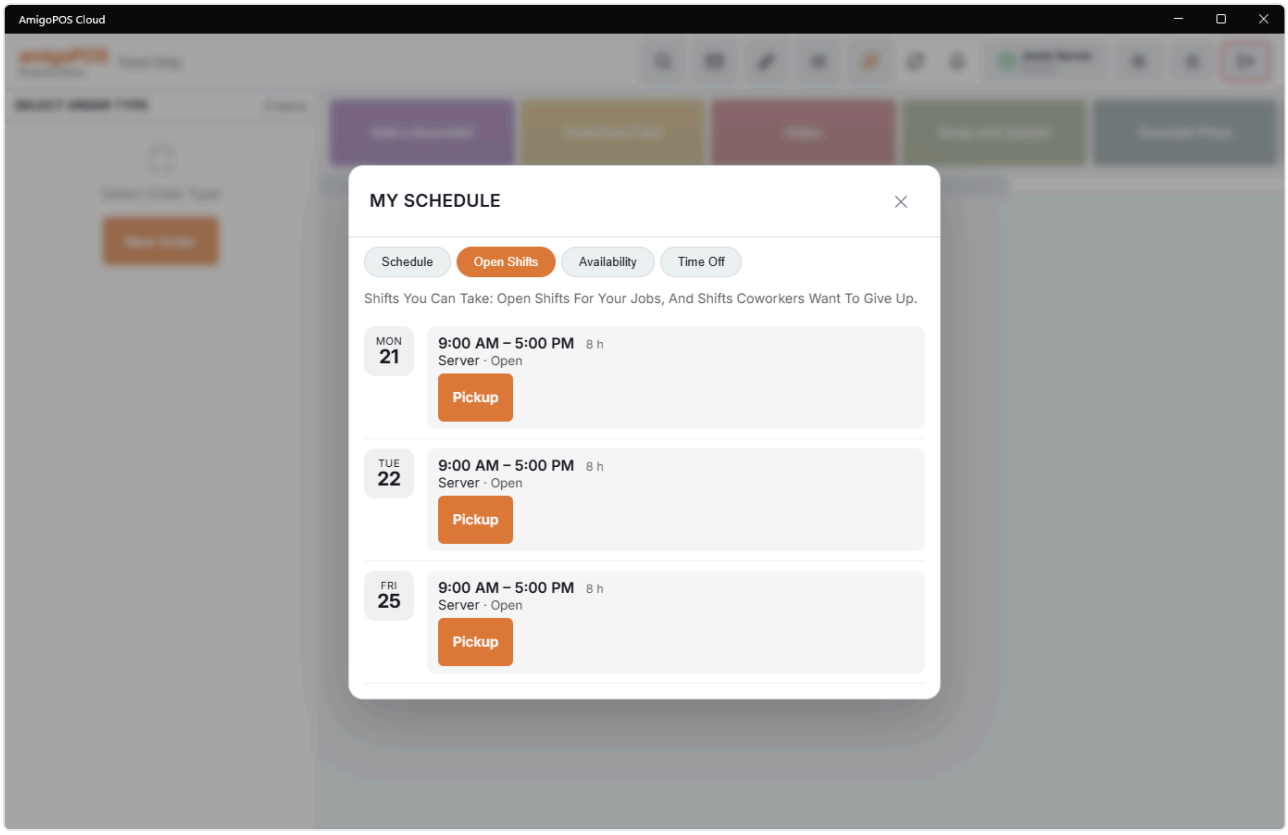
Staff handle their own coverage from **My Schedule** — on the register (tap your name in the top bar) or on their phone through the staff site. Everything here works on published shifts only.

Picking up a shift

The **Open Shifts** tab lists what the employee can take, from today to four weeks ahead:

- **Open** — open shifts for any job they hold.

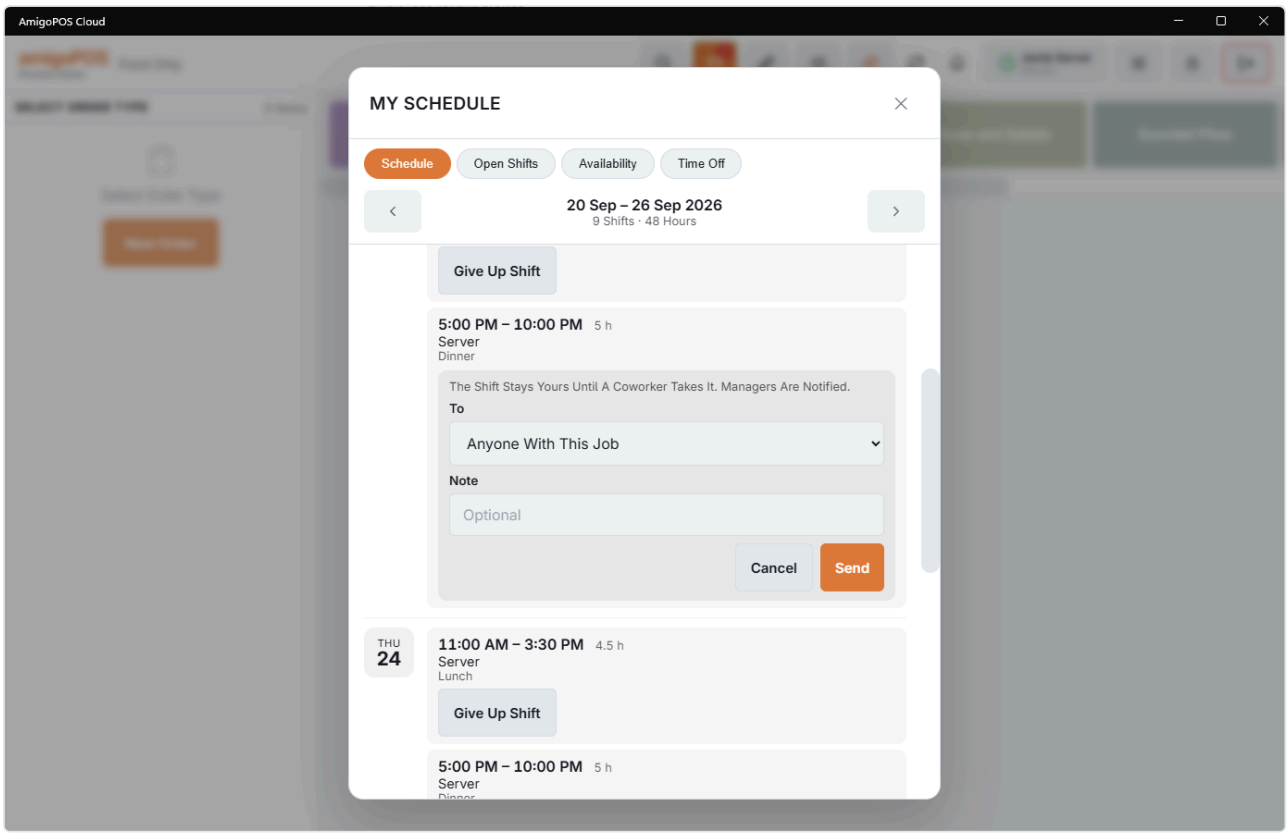
- **… is giving this up** — a coworker with the same job wants rid of a shift.
- **… offered this to you** — a coworker offered a shift to them by name; it can be accepted or declined.



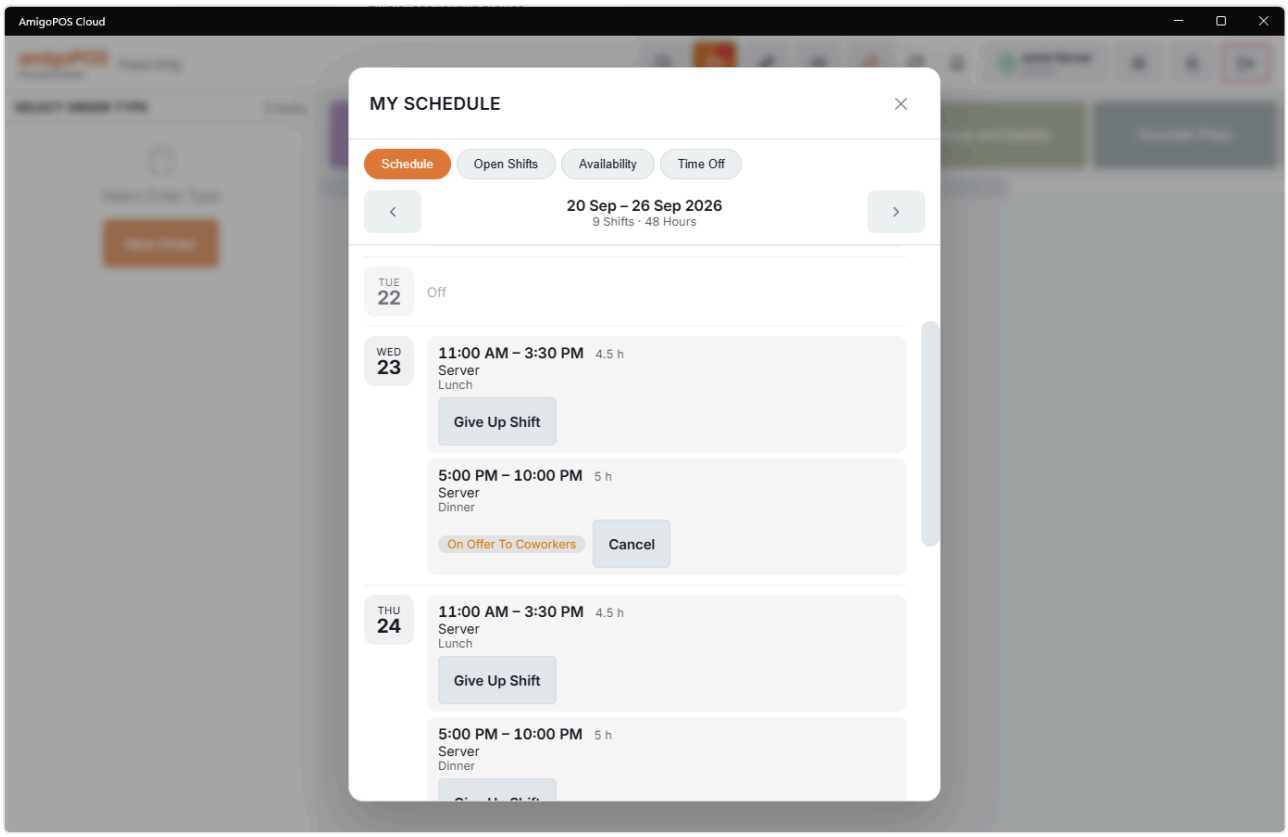
Pick Up (or **Accept**) takes the shift, after four checks: the employee holds the job, it doesn't overlap one of their own shifts, it isn't in the past, and nobody got there first — if two people tap at once, only the first gets it.

Giving up a shift

On the **Schedule** tab every future shift has **Give Up Shift**. Choose who it goes to — **Anyone With This Job**, or one named coworker (only coworkers holding the job are listed) — add a note if you like, and **Send**.



The shift stays yours until somebody takes it. It shows an “On Offer” badge with a **Cancel** button in the meantime; if nobody picks it up, you are still expected at work. That is deliberate: a give-up never leaves a hole in the schedule that nobody knows about.



Swapping

A swap is two offers: offer your shift to your coworker by name, they offer theirs to you, and each of you accepts the other's.

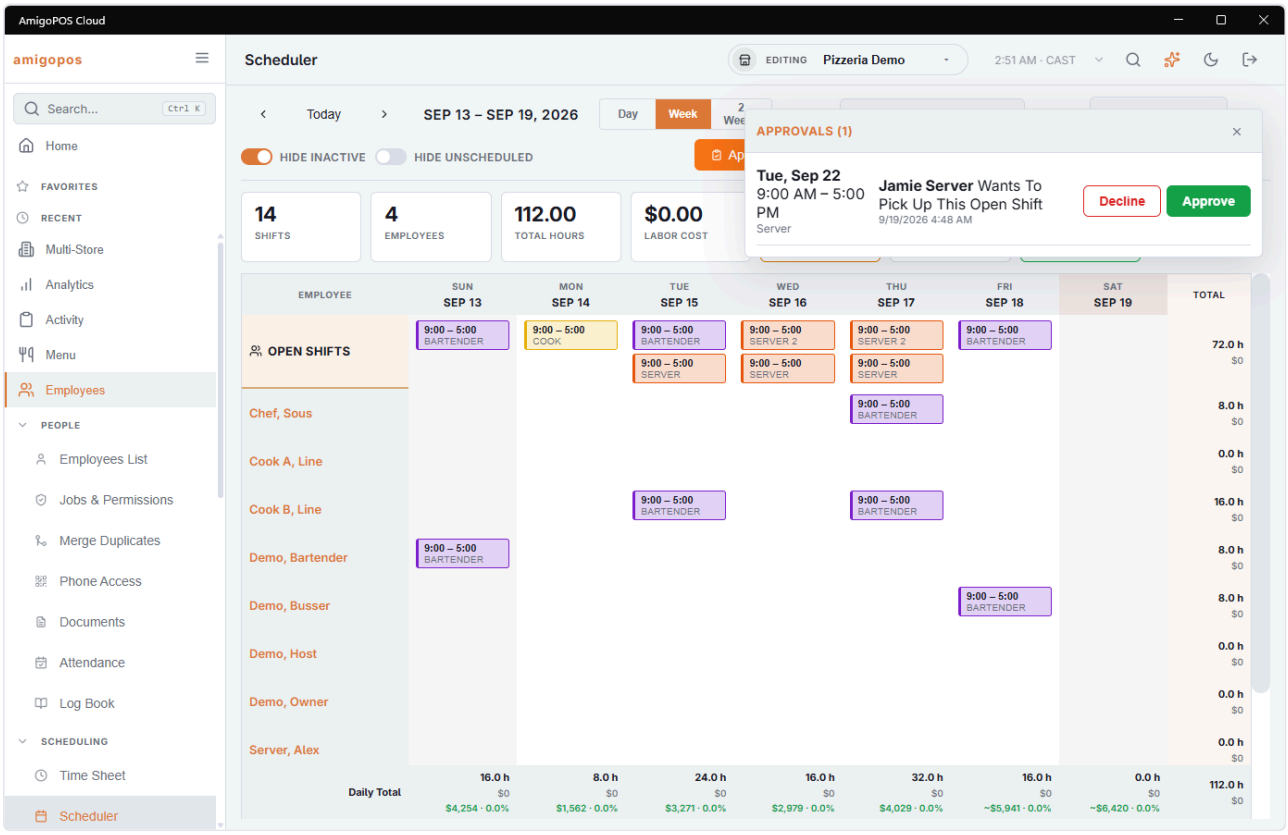
Who is told

- **Managers** — everyone whose job has manager access gets an in-app message when a shift is given up, picked up or changes hands.
- The **named coworker** gets the offer; the **previous owner** is told when the shift is taken or declined.

Manager approval (optional)

With **Manager Approval For Shift Changes** switched on (Back Office › Employees › Scheduling › Time Clock, *Scheduling* section), Pick Up and Accept become requests. The employee sees **Awaiting Manager Approval** with a **Withdraw** button, other staff stop seeing the shift, and the managers get a message.

The scheduler then shows an **Approvals** button with a count — only while something is waiting. **Approve** moves the shift, running the same checks again; **Decline** puts a given-up shift back on offer, or closes a request for an open shift. The employee is told either way, and the previous owner is told when a hand-over is approved.



> Approval applies to the hand-over, not to posting a give-up: nothing changes until someone takes the shift, so there is nothing to approve before that. Shifts that change hands this way are already published — there is no need to publish again.

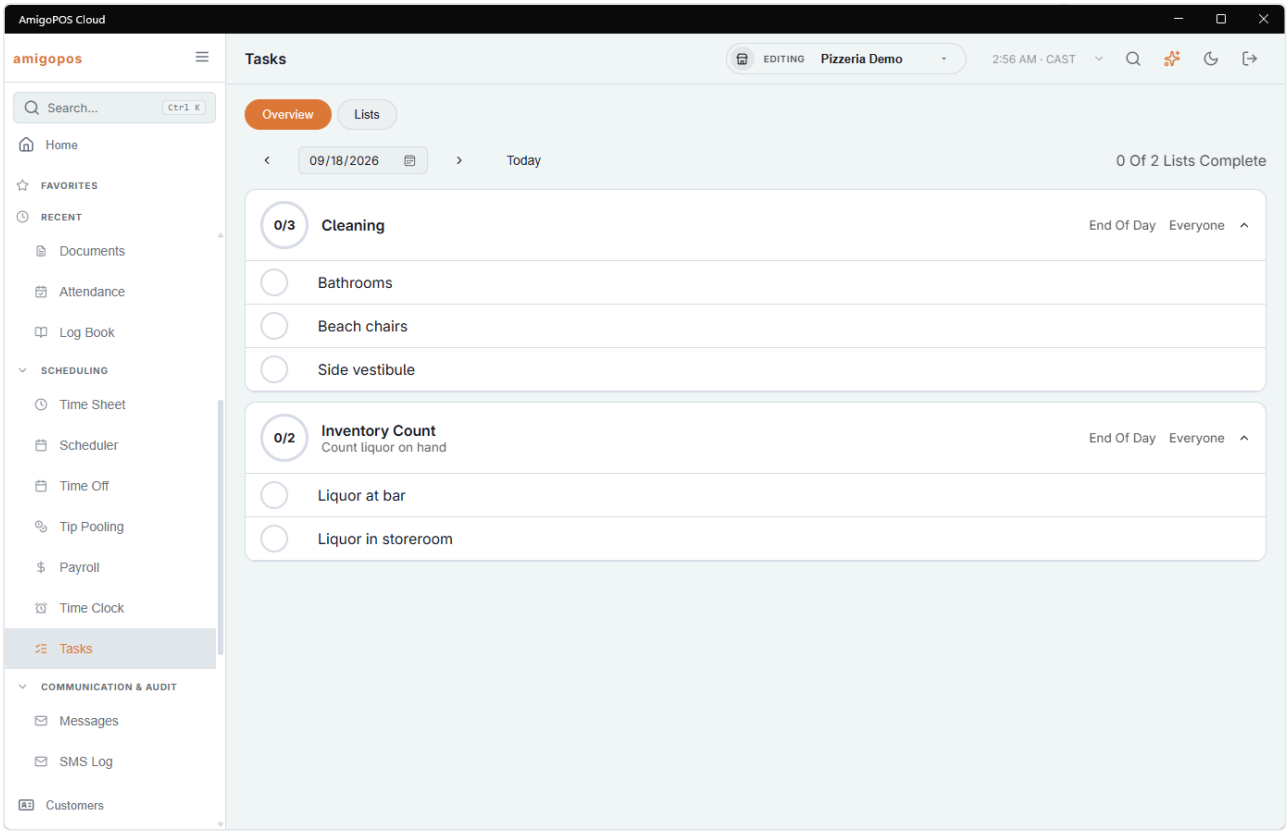
Task lists (checklists)

Employees › Scheduling & Time Clock

View online ↗

Opening and closing lists, prep lists and temperature logs — built in Back Office, completed on the POS.

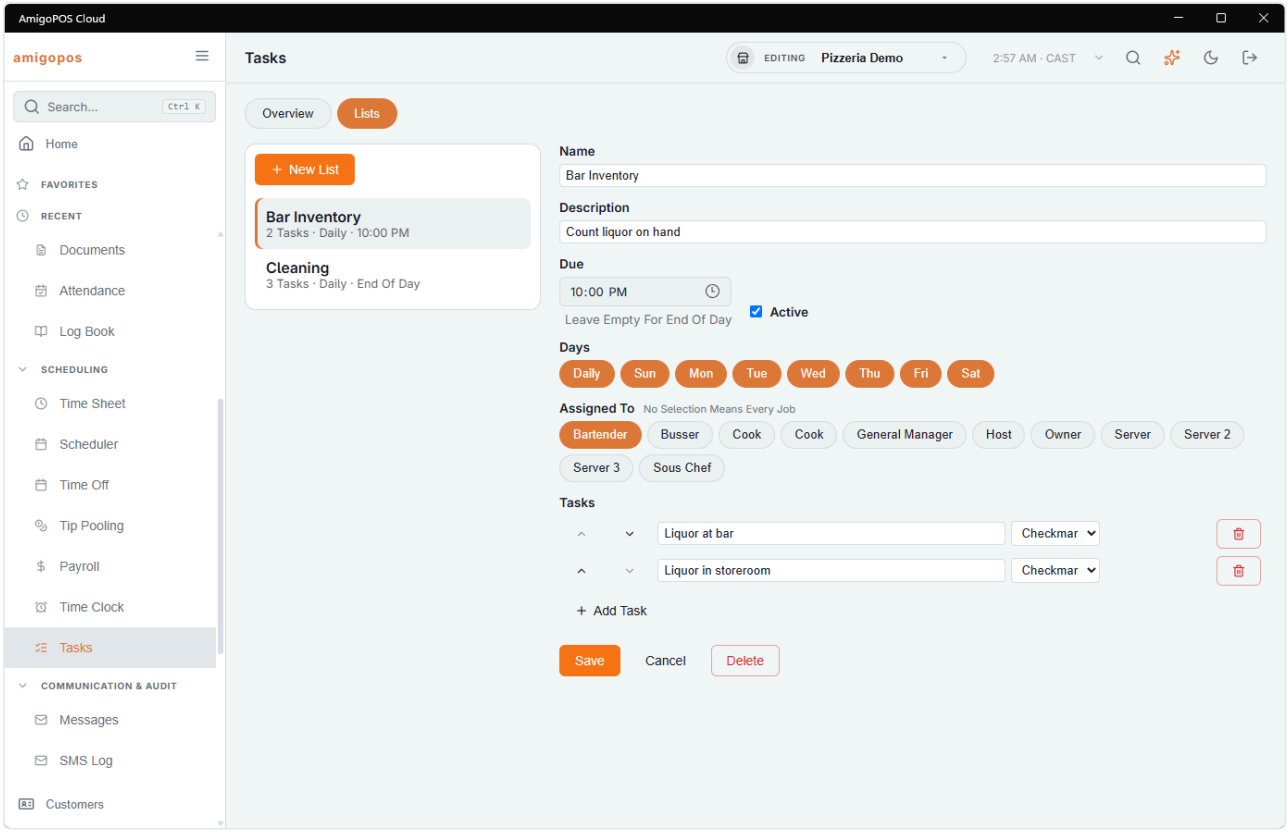
Task lists are the store's recurring checklists: the bartender's opening list, the closing list for the dish pit, daily prep for the cooks, the food-safety temperature log. A list is built once in Back Office and appears on the POS for the staff whose job it belongs to, every day it is due.



Building a list

Back Office › Employees › Scheduling › Tasks › Lists. A list has a name, an optional description, the days it runs (daily, or particular weekdays), and a due time — leave the time empty and the list is simply due by the end of the business day.

Assigned to picks the jobs that see the list. Choose Bartender and only bartenders get it; choose nothing and everyone at the store does. Assignment is by job, so a list keeps working when staff change; for a single day, a list can also be given to one person (see below).

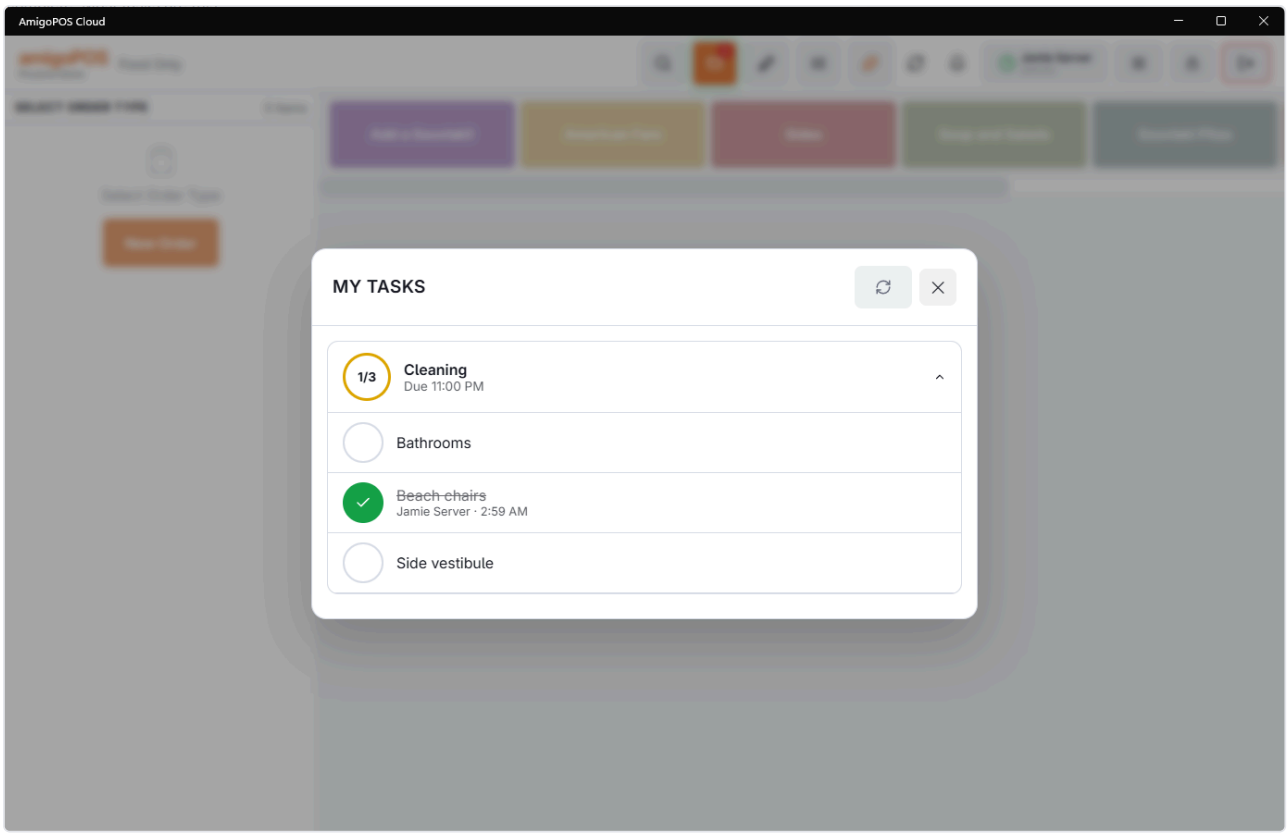


Task types

- **Checkmark** — tap to complete. Most tasks are this.
- **Number** — a figure is entered, with an optional unit (cases, bags, litres).
- **Temperature** — a reading in °C or °F. This is what turns a cleaning list into a food-safety log.
- **Text** — a short note, for anything that needs describing rather than counting.

Completing tasks on the POS

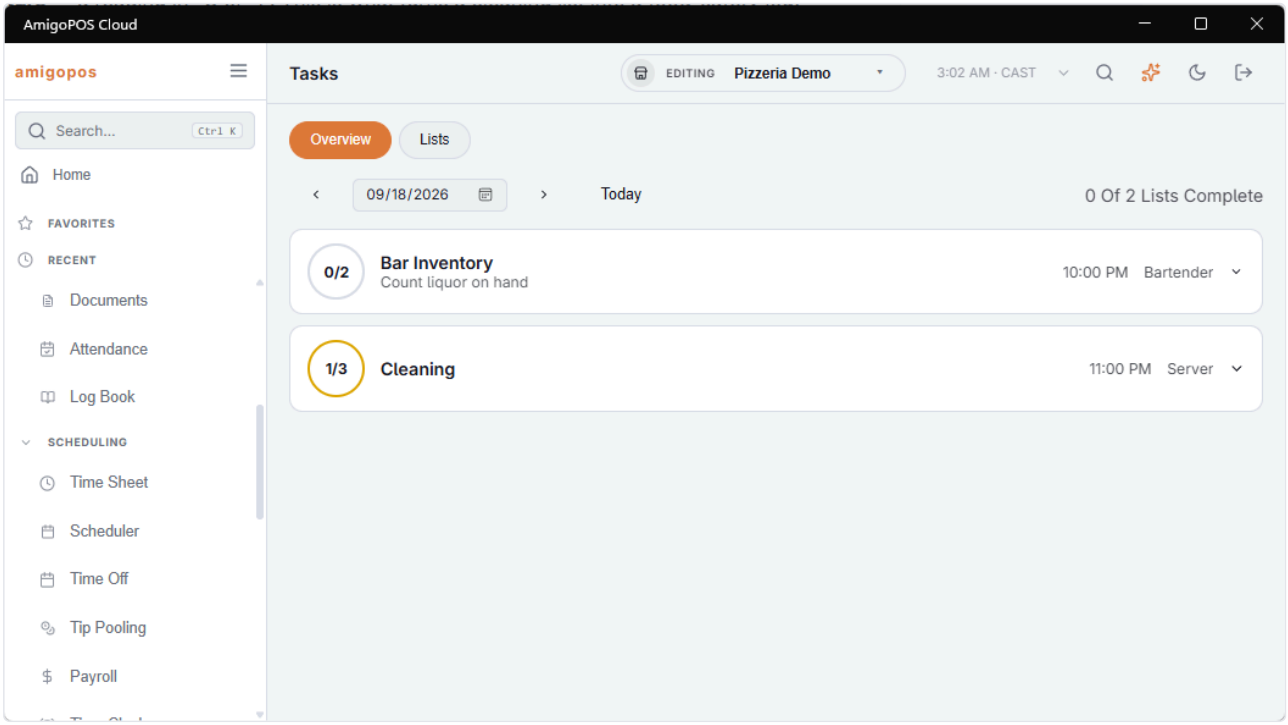
Staff open **My Tasks** from the user panel (tap your name in the top bar). Today's lists appear with a progress ring; the first incomplete list opens automatically. Tap a task to complete it — value tasks open a small input first. Each completion records who did it and when.



Tap a completed task again to clear it. Staff can clear their own completions; managers can clear anyone's.

Watching the day

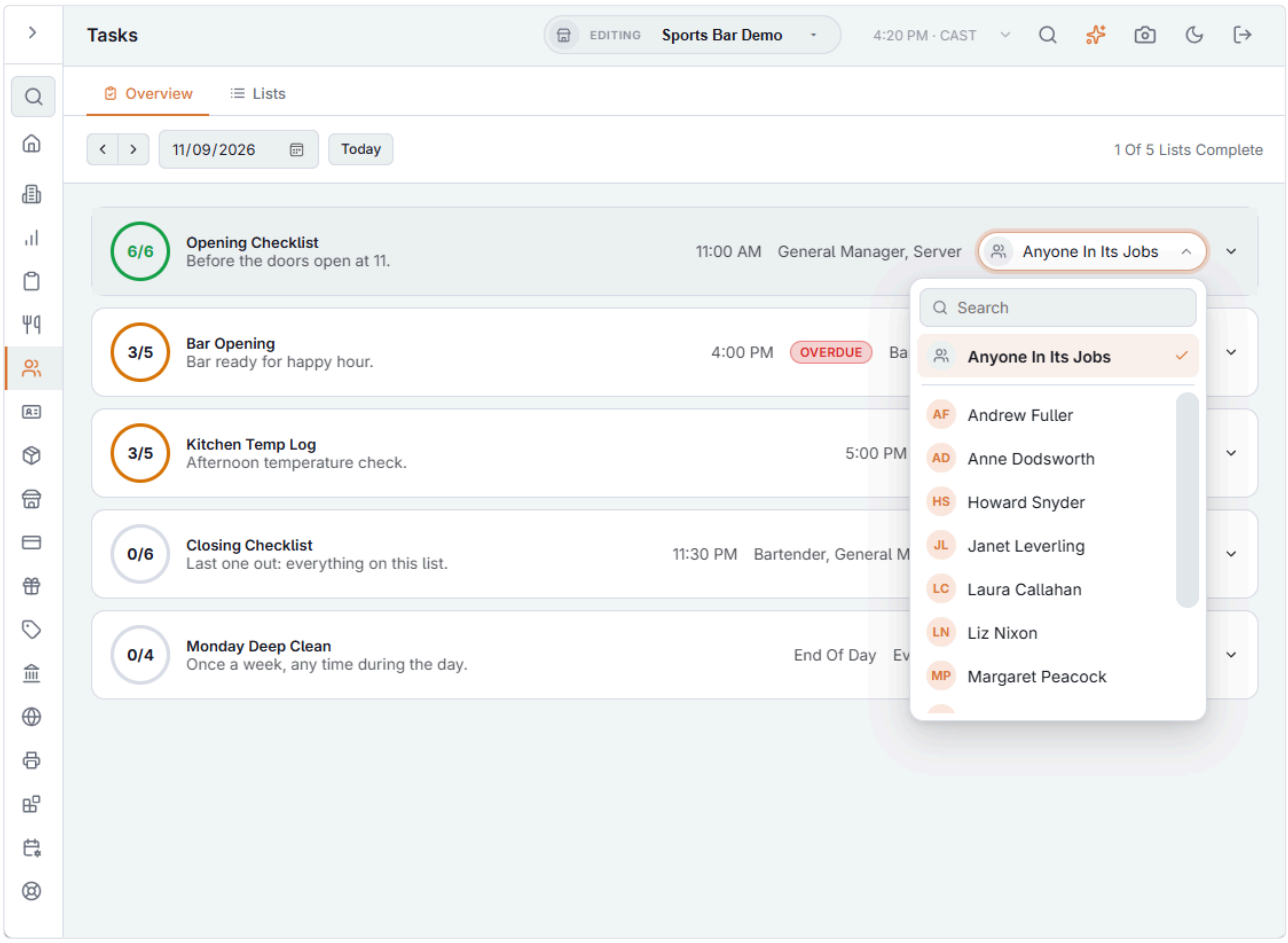
The **Overview** tab shows any date: every list due that day, how far it got, and — expanded — each task with the person, the time and the value recorded. A manager can tick or clear checkmark tasks from here; value tasks are completed on the POS where the value is entered.



> Start with five to ten tasks per list, not forty. A list that can be finished is a list that gets used; the temperature log is the one worth being strict about, because it is the one an inspector asks for.

Giving a list to one person for the day

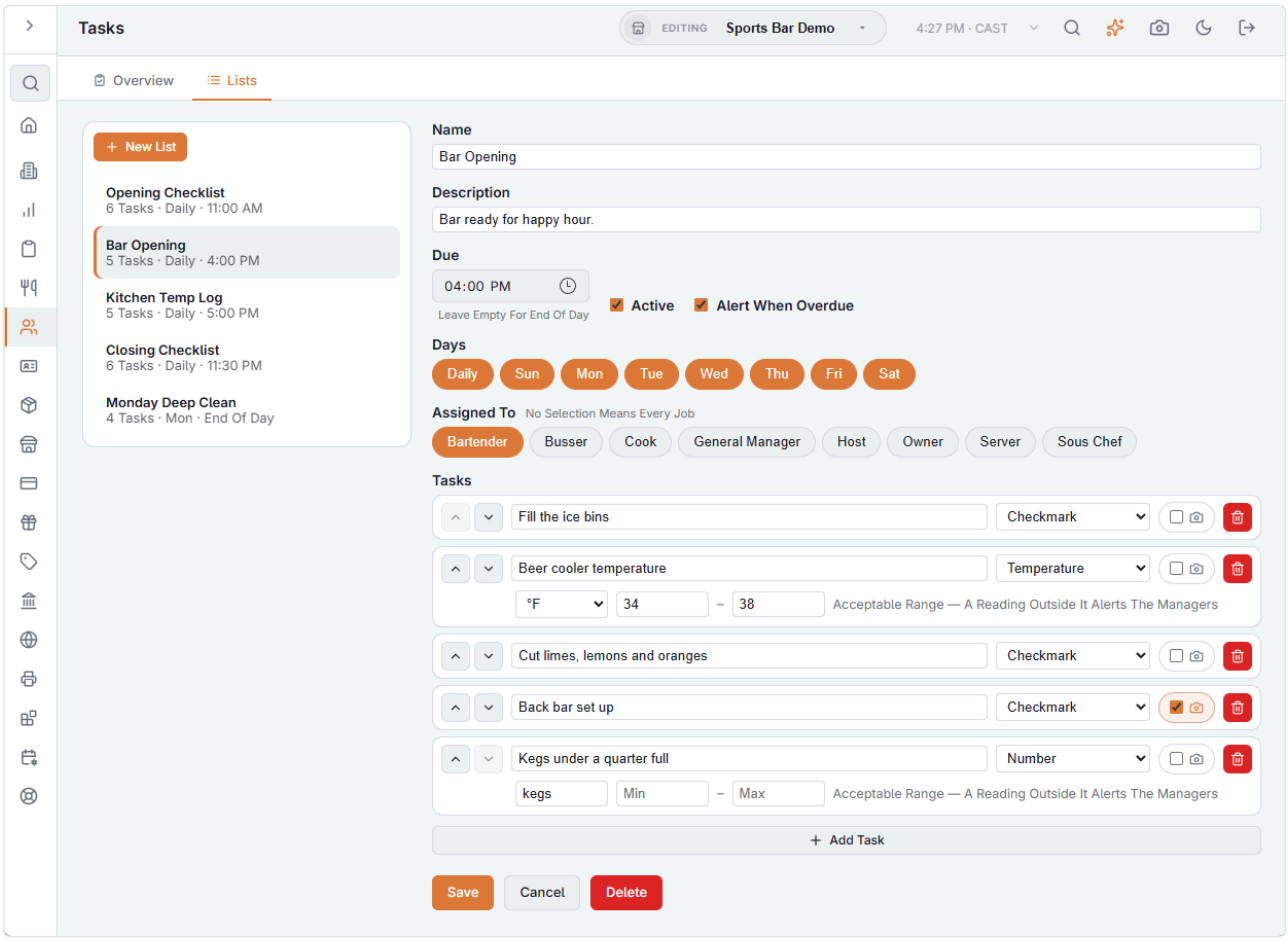
On the **Overview** tab, each list has a person picker. Pick an employee and only they see the list that day in My Tasks — at the register and on the staff site — whatever their job. They get a message (for today or a later day), and the overdue message goes to them. **Anyone In Its Jobs** puts it back. It lasts one business day: the next day the list is back with its jobs.

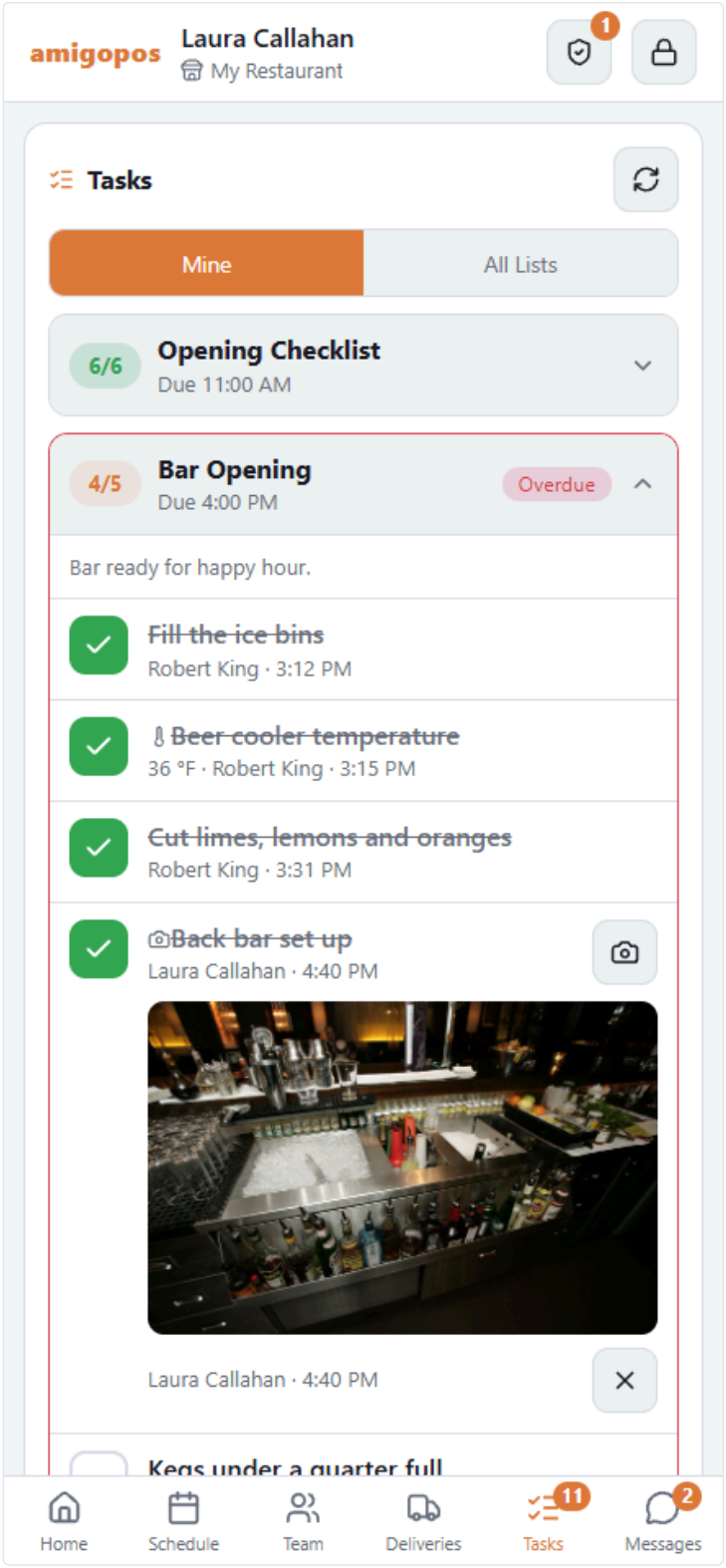


Managers can do the same from their phone, under **All Lists** on the Tasks tab, choosing from the day's team.

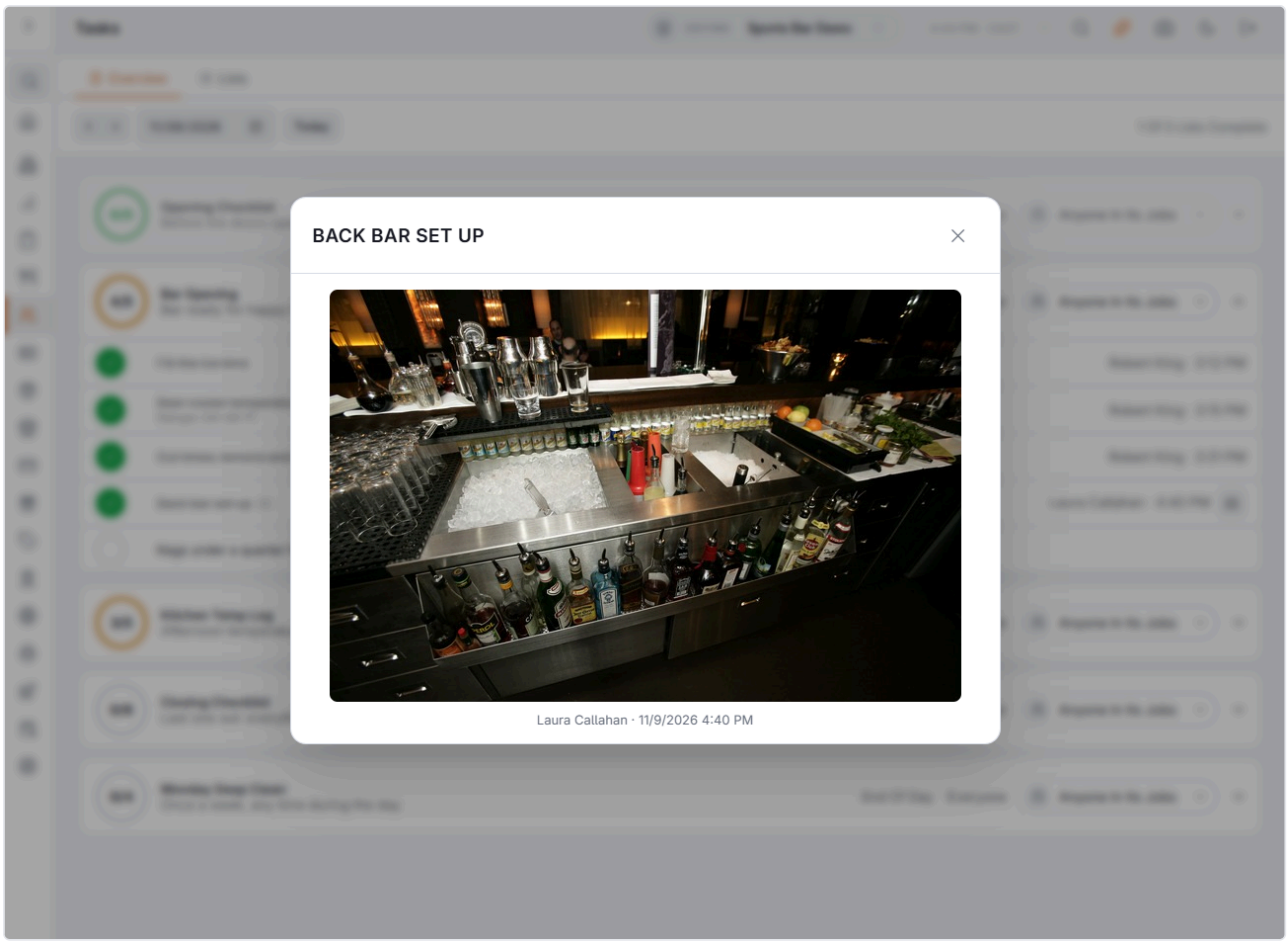
Photo proof

Tick the camera box on a task's row in the list editor to make the task need a photo. It is completed on the staff site: tap the task, then **Take Photo** to open the phone's camera; the picture is made smaller before it is sent. A checkmark task is done as soon as the photo is taken; a number, temperature or text task needs its value as well.


Tasks
EDITING Sports Bar Demo
4:27 PM · CAST
Overview
Lists
New List
Opening Checklist
6 Tasks · Daily · 11:00 AM
Bar Opening
5 Tasks · Daily · 4:00 PM
Kitchen Temp Log
5 Tasks · Daily · 5:00 PM
Closing Checklist
6 Tasks · Daily · 11:30 PM
Monday Deep Clean
4 Tasks · Mon · End Of Day
Name
Bar Opening
Description
Bar ready for happy hour.
Due
04:00 PM
Leave Empty For End Of Day
Active
Alert When Overdue
Days
Daily
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Assigned To
No Selection Means Every Job
Bartender
Busser
Cook
General Manager
Host
Owner
Server
Sous Chef
Tasks
Fill the ice bins
Checkmark
Beer cooler temperature
Temperature
°F
34
38
Acceptable Range — A Reading Outside It Alerts The Managers
Cut limes, lemons and oranges
Checkmark
Back bar set up
Checkmark
Kegs under a quarter full
Number
kegs
Min
Max
Acceptable Range — A Reading Outside It Alerts The Managers
Add Task
Save
Cancel
Delete

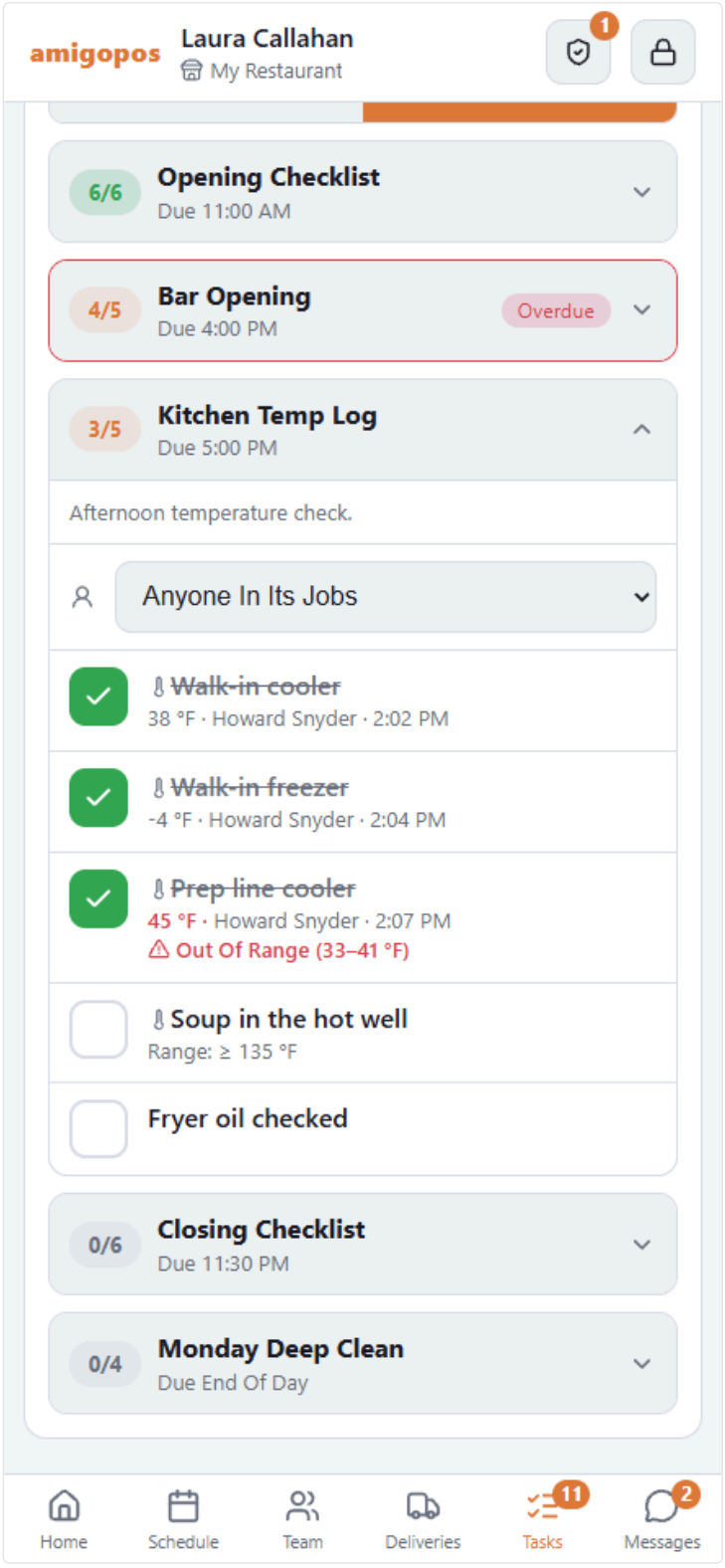


- At the register and in Back Office such a task cannot be ticked; it says to use the staff app.
- The photo opens from the camera button on the task, in the Overview and for managers on their phones, with who took it and when.
- Photos are kept for 90 days.



Acceptable range

Number and temperature tasks can have a **Min** and a **Max** in the list editor; one alone works too. The range shows under the task. A reading outside it is still saved, is shown in red with **Out Of Range**, and every manager gets a message straight away, in their own language.



Overdue message

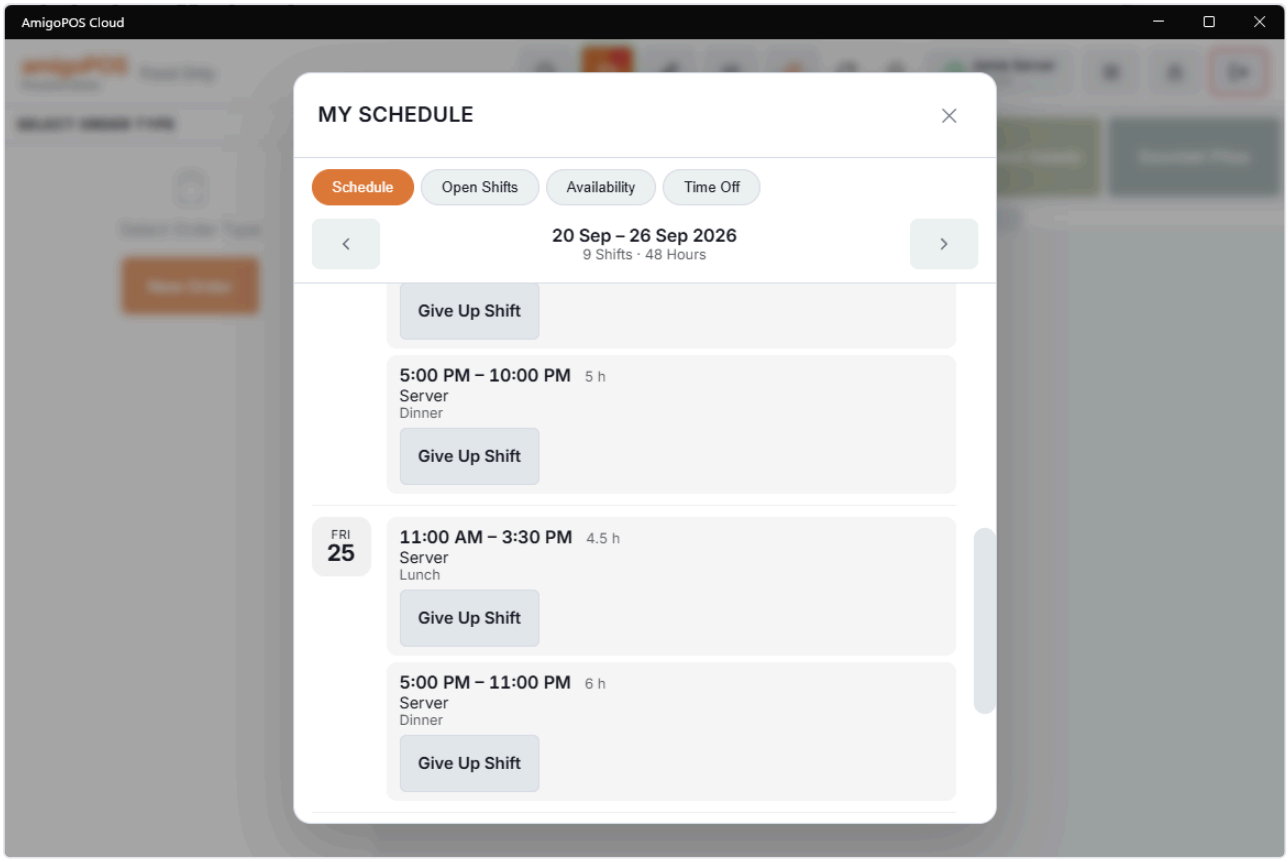
A list with a due time sends a message 10 minutes after that time if it is not finished: to the person it was given to, or to whoever is on the clock in its jobs, and to the managers on the clock. It is sent once per list and day, and a list past its due time shows **Overdue**. It is on for every list with a due time; untick **Alert When Overdue** in the list editor to stop it. A list due in the last minutes of the business day still alerts after the day has rolled over, to the managers only.

My Schedule (staff view)

View online ↗

How employees see their published shifts, set their weekly availability and request time off.

My Schedule is the employee's side of the scheduler. Staff open it from the user panel (tap your name in the top bar) and see their own week — and nothing about anyone's pay.

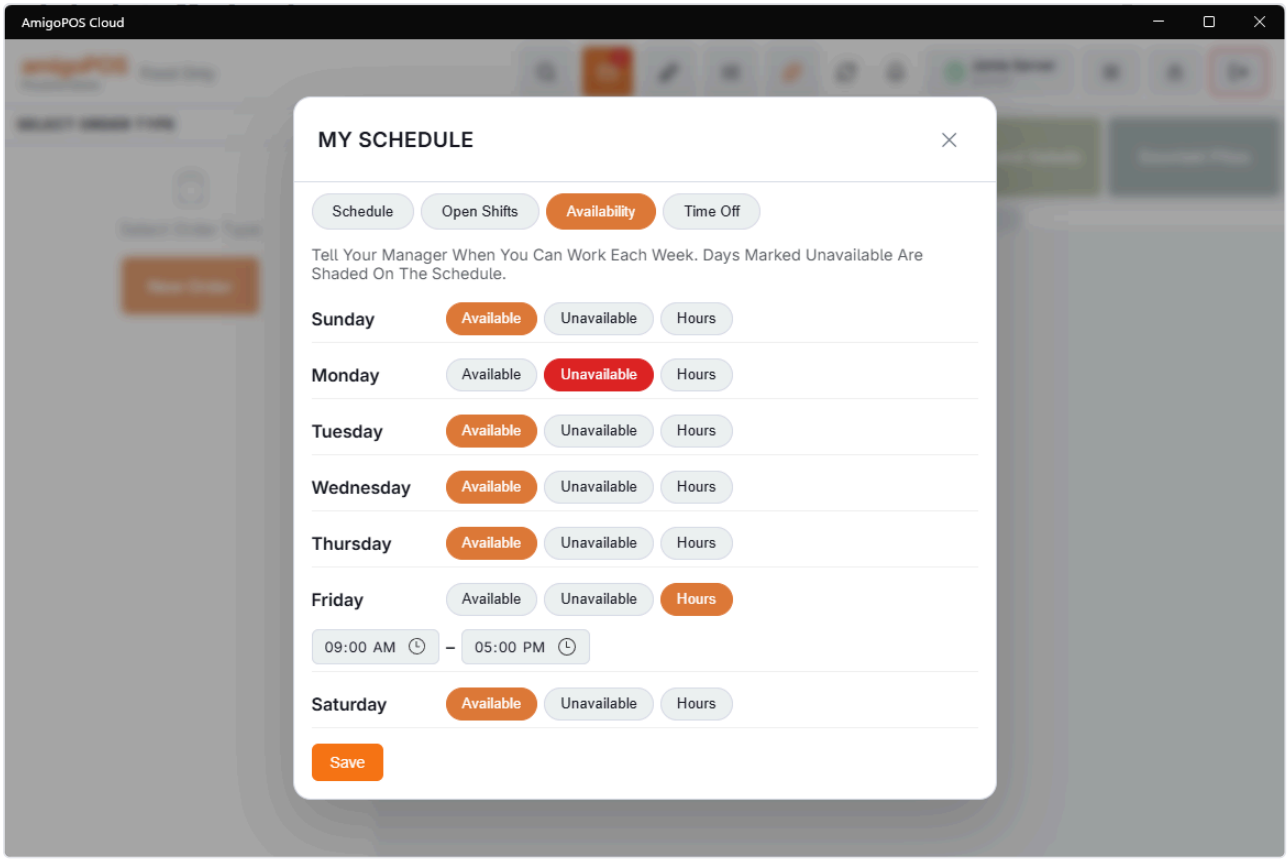


Schedule

One week at a time, arrows for other weeks, days off shown as such, with the week's shift count and hours at the top. **Only published shifts appear** — drafts stay invisible until the manager publishes, which is what makes it safe to build next week in the open.

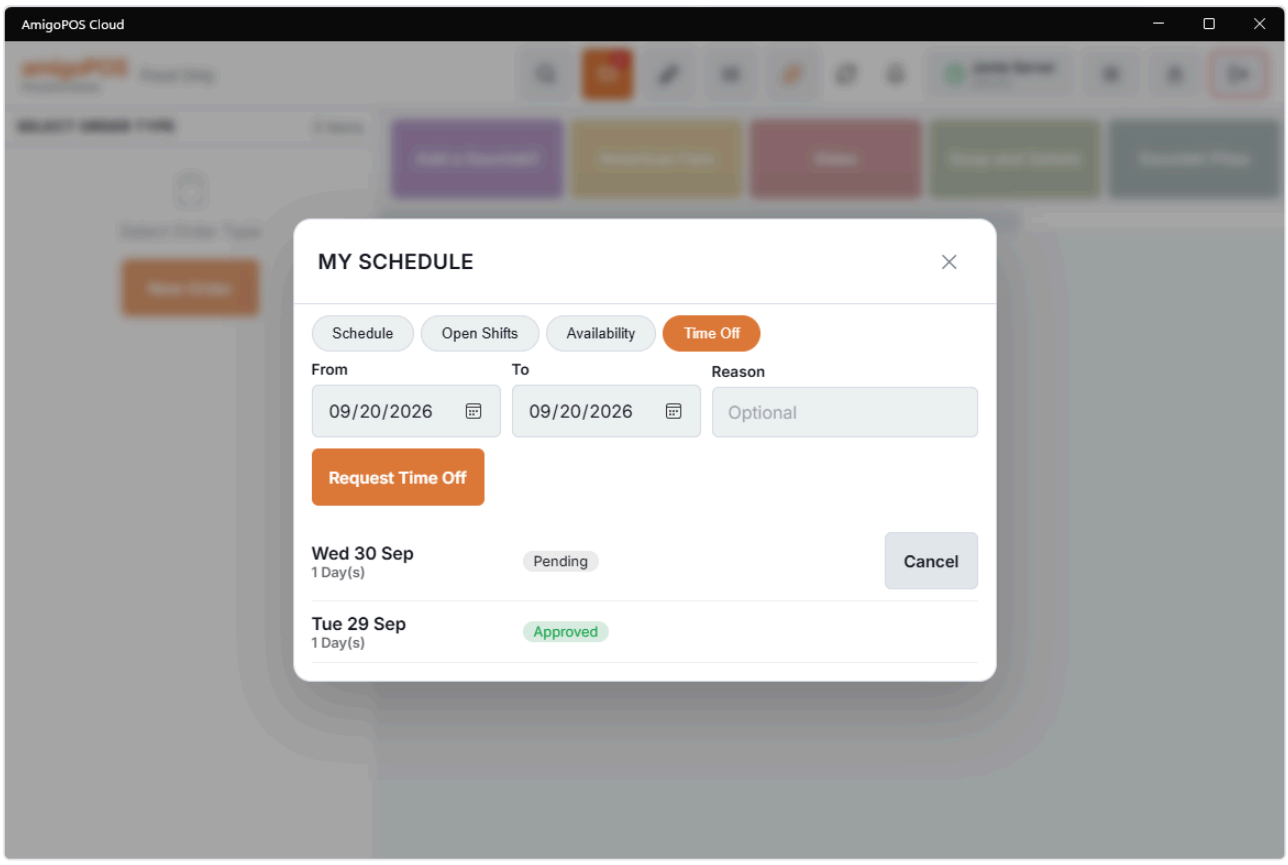
Availability

Each weekday is set to **Available**, **Unavailable**, or **Hours** with a from–to window. Those choices shade the scheduler grid for the manager: an unavailable day is hatched, a limited day shows the window, and a shift placed outside it is flagged. It is guidance for the person building the schedule, not a hard block.



Time off

Requests take a date range and an optional reason. While a request is pending it can be withdrawn; once a manager decides, the answer and any note arrive as a message, and the day is marked on the scheduler — red once approved, amber while pending.



Schedule texts

With *Text employees when a schedule is published* switched on (Back Office › Employees › Scheduling › Time Clock), publishing a week also sends each affected employee their own shifts by text, in their own language, to their mobile number. Each text is charged and billed monthly — see *SMS log and message costs*.

> An employee with no mobile number on file simply doesn't get the text; the in-app message is sent either way.

Open shifts and giving up a shift

An **Open Shifts** tab lists shifts the employee can pick up — open shifts for their jobs, and shifts coworkers are giving up or offering to them — and every future shift on the Schedule tab has **Give Up Shift**. How both work, and the optional manager approval, is in *Picking up, giving up and swapping shifts*.

On a phone

Where the store has switched on phone access, the same schedule, open shifts, availability and time off are on the staff site — see *Using the staff site on your phone*.

Part days, unpaid days and your balance

A time-off request can cover part of a day — one date, from a time to a time — and can be marked unpaid. Where the store gives paid days off, the screen shows how many you have left and what this request would leave; part days count as hours against it.

If your store has managers approve availability, saving your weekdays sends them for approval rather than changing them straight away, and the screen says so until the answer arrives in Messages.

When a published shift changes

After the week is published, a manager can still change it. If one of your published shifts gets new times, another day or job, goes to someone else or is deleted, a message tells you straight away, with the old and the new times — marked important when the shift is less than a day away. Changes to drafts are not sent; they come with the next Publish.

In your phone's calendar

With phone access, the staff site can also put your published shifts and approved time off in your phone's calendar app — see Your shifts in your phone's calendar.

Using the staff site on your phone

Employees › Scheduling & Time Clock

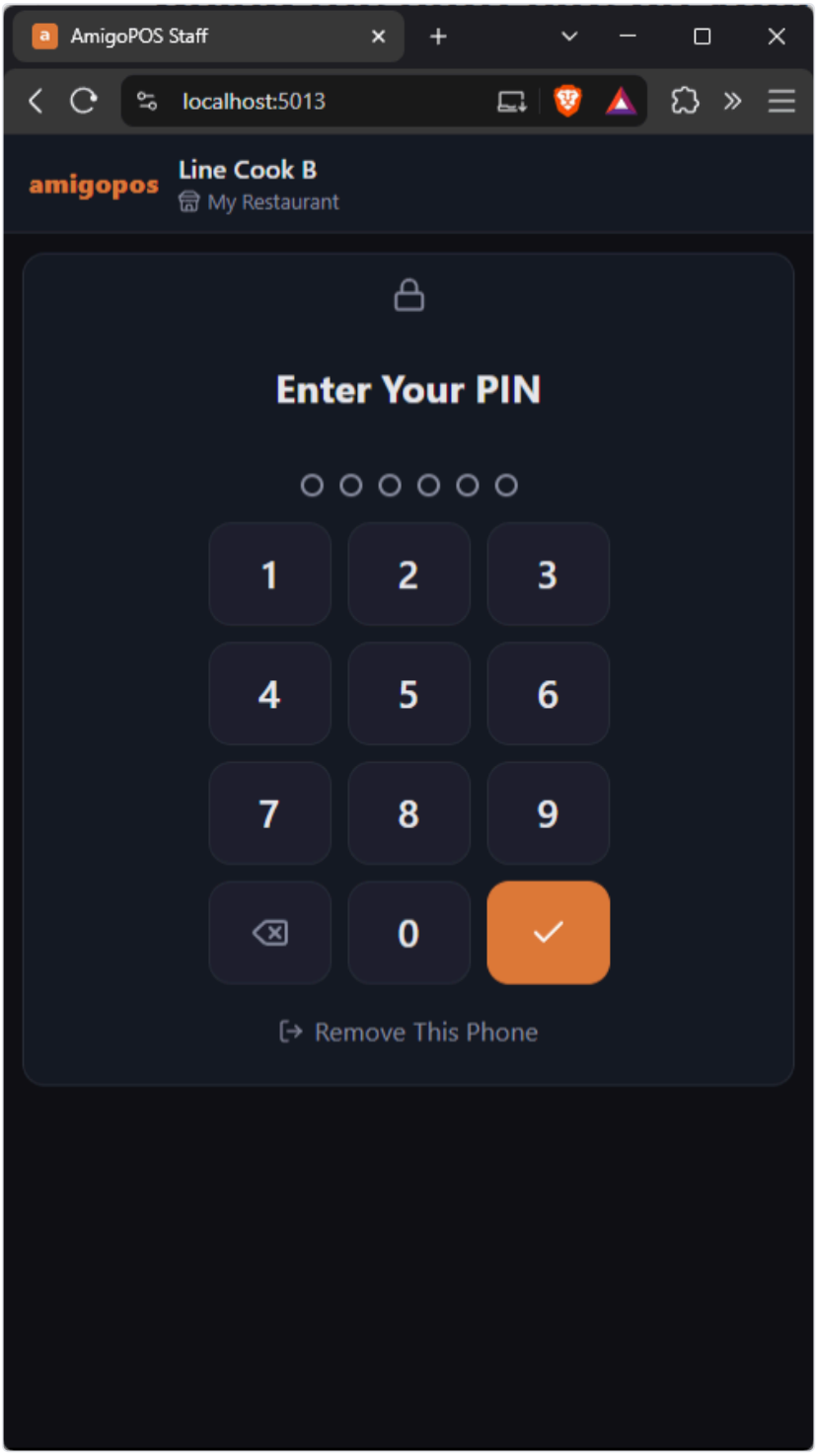
View online ↗

For employees: setting up your phone, signing in with your PIN, clocking in and out, and what each tab does.

The staff site is your schedule and time clock on your own phone. It runs in the phone's browser — there is no app to install.

Setting up your phone

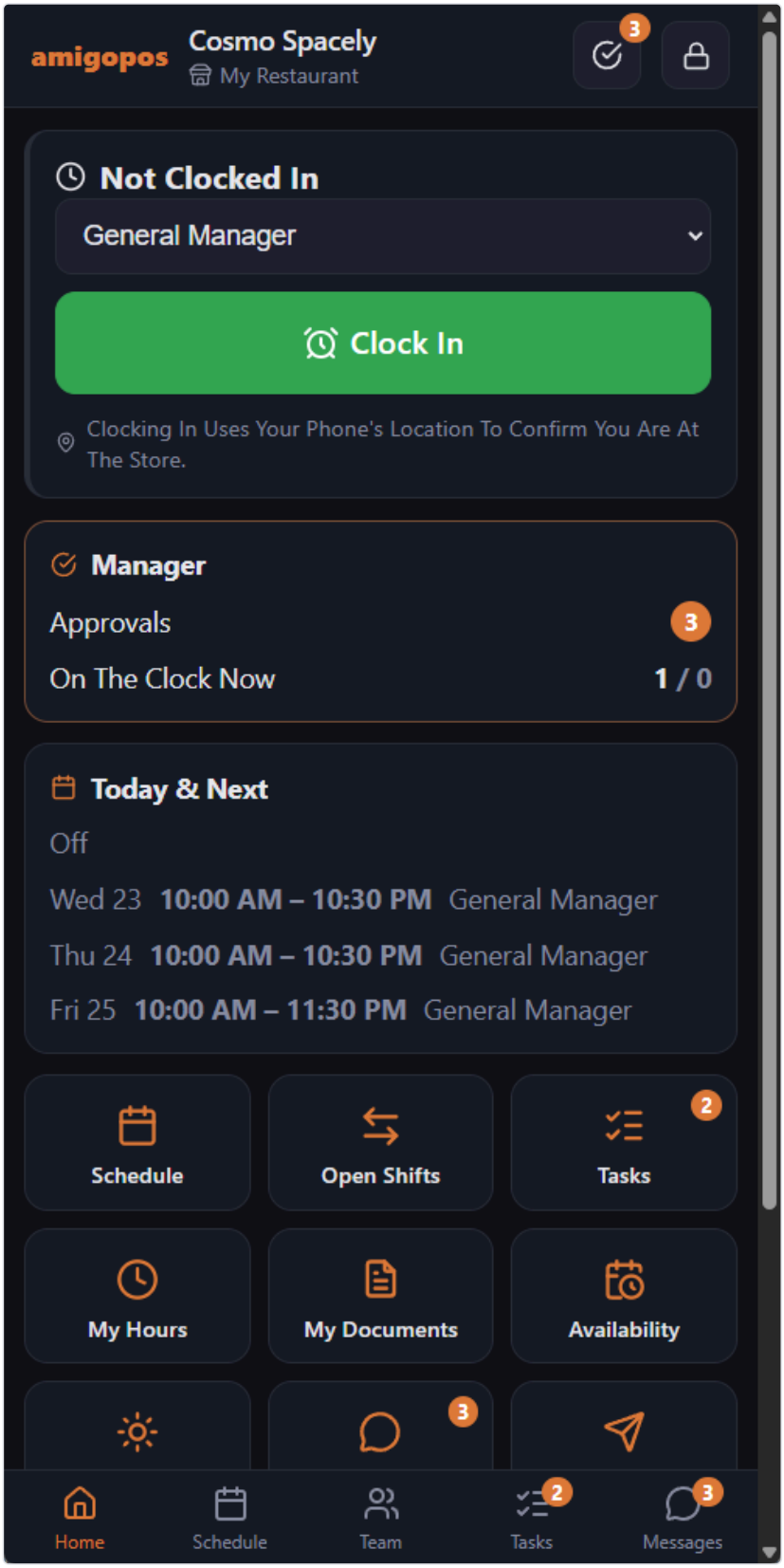
1. Your manager gives you a QR code or texts you a link. Scan the code with your phone's camera, or tap the link. The link works once, within 48 hours.
2. The phone is now set up. Enter your **PIN** — the same one you use at the register.
3. Optional: use your browser's *Add to Home Screen* so it opens like an app.



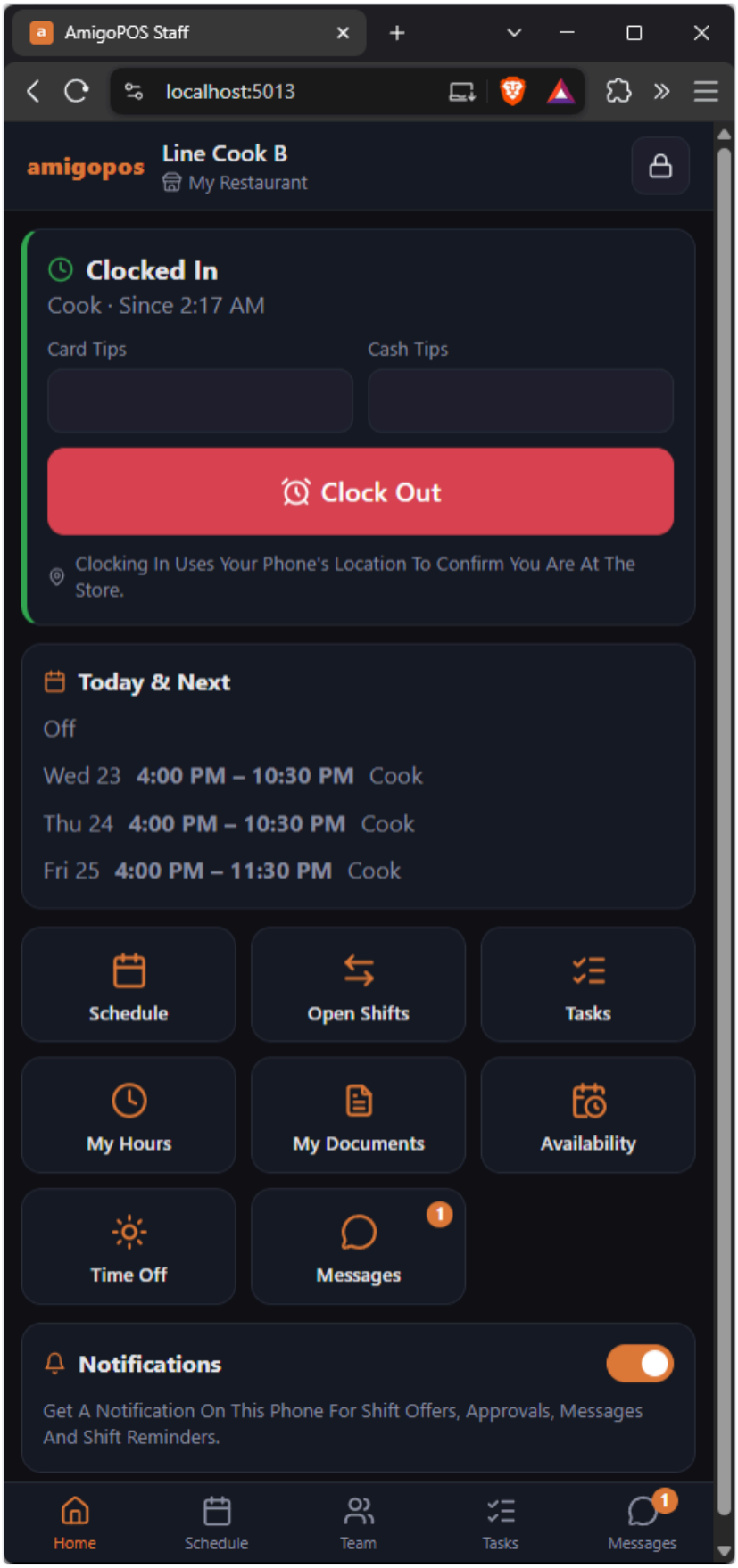
After that, open the site and enter your PIN. It stays unlocked for up to 12 hours; the 🔒 button in the top corner locks it sooner. Five wrong PINs lock it for 15 minutes.

My Day

The home screen shows whether you are clocked in, today's shift and the next few, and buttons for everything else.



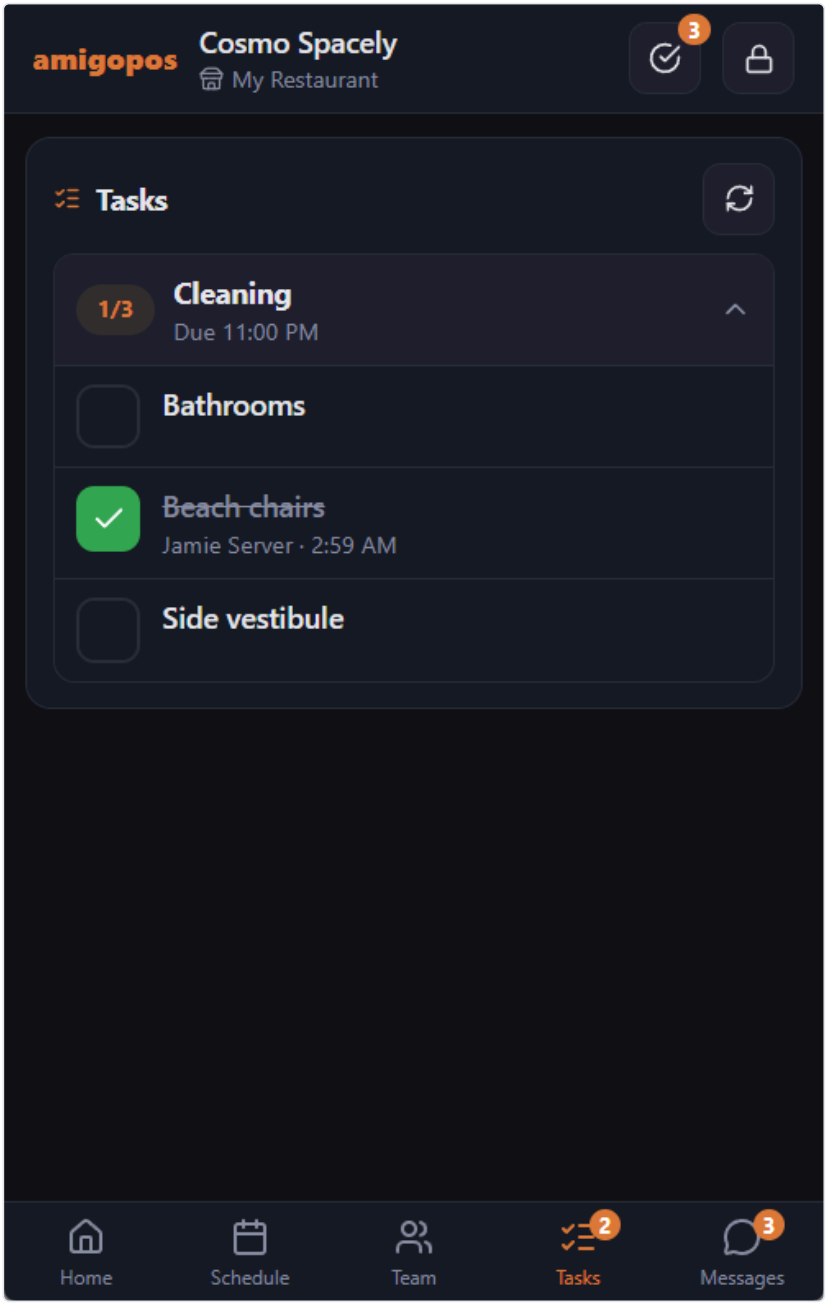
- **Clock In** — if you have more than one job, pick the one you are working first. If your store checks location, your phone asks to share it: allow it, and be at the store.
- **Clock Out** — if your store asks for tips at clock-out, enter your card tips and cash tips first, then tap Clock Out.

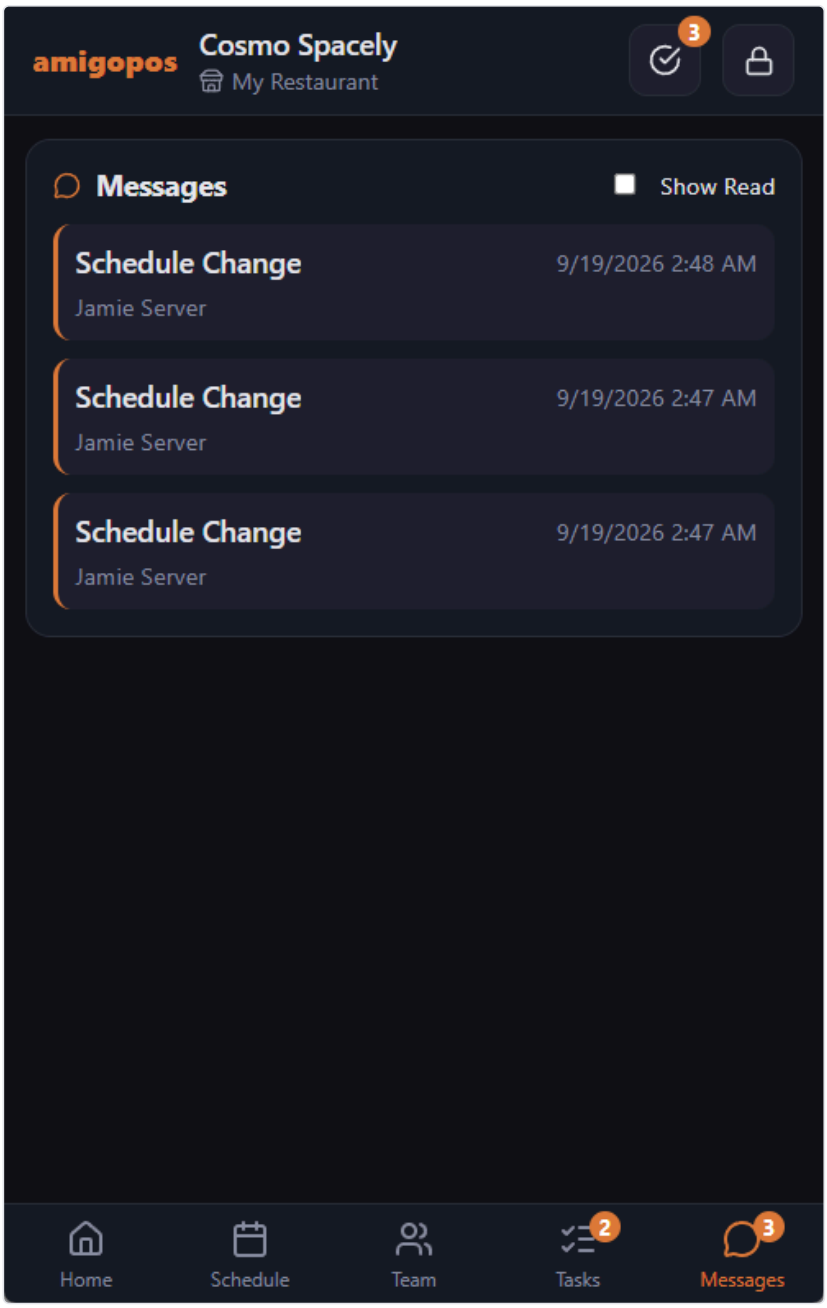

AmigoPOS Staff
localhost:5013
amigopos
Line Cook B
My Restaurant
Clocked In
Cook · Since 2:17 AM
Card Tips
Cash Tips
Clock Out
Clocking In Uses Your Phone's Location To Confirm You Are At The Store.
Today & Next
Off
Wed 23 4:00 PM – 10:30 PM Cook
Thu 24 4:00 PM – 10:30 PM Cook
Fri 25 4:00 PM – 11:30 PM Cook
Schedule
Open Shifts
Tasks
My Hours
My Documents
Availability
Time Off
Messages
1
Notifications
Get A Notification On This Phone For Shift Offers, Approvals, Messages And Shift Reminders.
Home
Schedule
Team
Tasks
Messages
1

Getting around

The bar at the bottom holds **Home**, **Schedule**, **Team**, **Tasks** and **Messages**. Everything else — Open Shifts, My Hours & Tips, My Documents, Availability and Time Off — is a tile on the Home screen.

- **Schedule** — your published shifts, a week at a time, with **Give Up Shift** on future shifts.
- **Tasks** — today's checklists for your jobs. Tap a task to tick it off; a task that needs a number, a temperature or a note asks for it first. Tap a task you ticked by mistake to undo it — a task somebody else ticked can only be undone at the register.
- **Open Shifts** — shifts you can pick up; see *Picking up, giving up and swapping shifts*.
- **Messages** — messages from your managers and from the system (time-off answers, shift offers). Tap one to open the conversation and reply. A reply to a message sent to the whole team goes to the person who sent it and anyone who has already answered, not to everyone — the line under the reply box says who will get it. Messages that need it have an **Acknowledge** button.
- **Availability** — for each weekday: Available, Hours (from–to) or Unavailable. Save when done.
- **Time Off** — request dates off, see the answer, and cancel a request that hasn't been decided.





Language

The site uses the language set on your employee profile — the same one the register uses for you. If none is set, it follows your phone's language. Arabic is shown right to left.

If something goes wrong

- **"This phone is not set up yet"** — ask your manager for a new invite. This happens after 90 days without using the site, after *Remove This Phone*, or if your access was removed.
- **"You must be at the store to clock in"** — your phone's location is too far away. Step outside or near a window so the phone gets a better fix, and try again.
- **"Allow location access"** — the browser was told not to share location. Allow it for this site in your browser's settings.
- **"This punch needs a manager"** — the store's rules need a manager to approve this punch (for example, clocking in well before your shift). Use the register.

> **Remove This Phone** (under the PIN pad) signs this phone out for good. Use it before you hand a phone to someone else.

The rest of the Home screen

- **My Hours & Tips** — your hours and tips for the week, and the punches behind them; see *My Hours & Tips*.
- **My Documents** — your food handler card, ID or permit, with a photo you take on the phone. You are reminded before one expires; see *Employee documents and certificates*.
- **Team** — who is working today. Managers see more here; see *Manager tools on the staff site*.
- **Notifications** — switch on to be told about messages and shifts even when the site is closed; see *Phone notifications and schedule alerts*.

Time off and availability

A time-off request can be a whole day or part of one — pick the date and the hours — and you can mark it unpaid. If your store gives paid days off, the screen shows the days you have left and what the request would leave. Where your store asks managers to approve availability changes, saving your weekdays sends them for approval instead of applying at once, and the screen says so until the answer arrives.

More than one store

If you work at more than one location, the store name in the header becomes a picker. Switching stores changes everything on the site — schedule, open shifts, team, tasks, hours — and clocking in then belongs to that store. One invite is enough; you do not set the phone up twice.

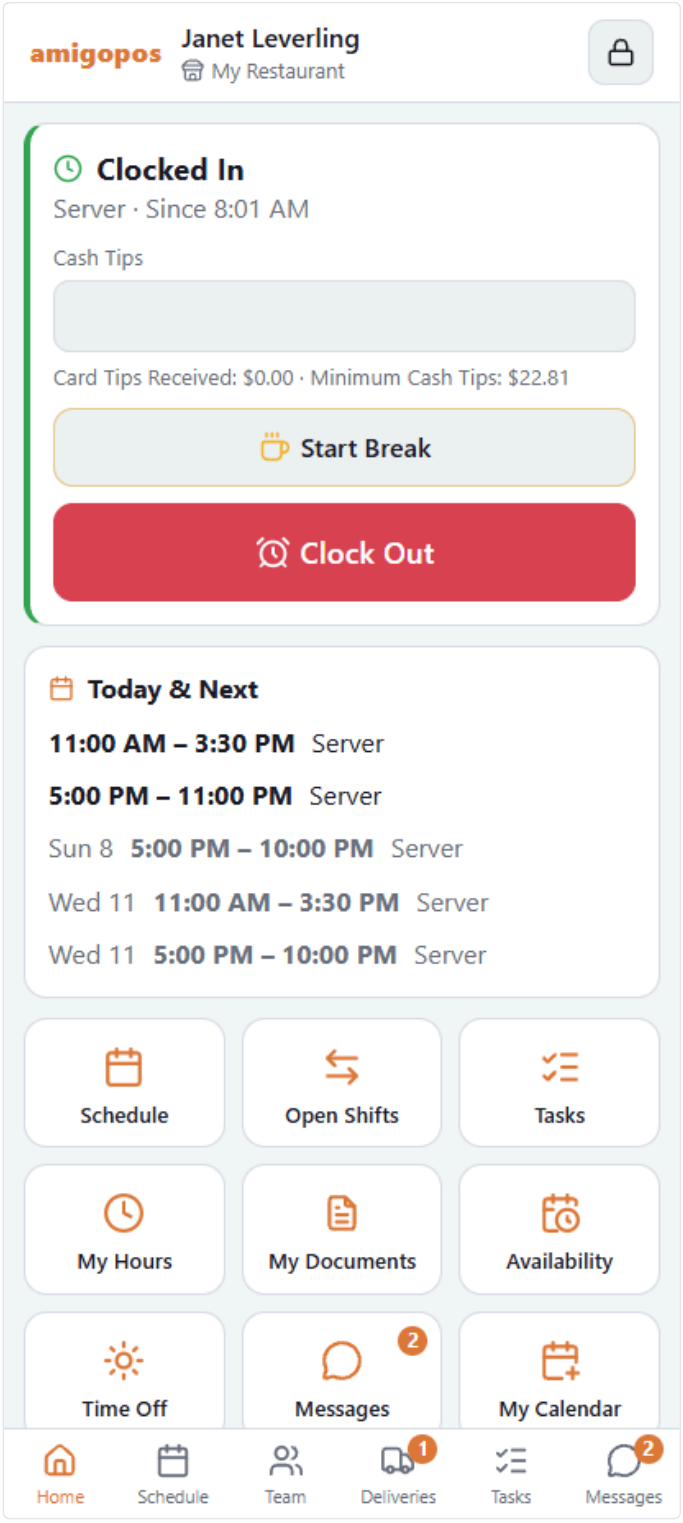
Deliveries (drivers)

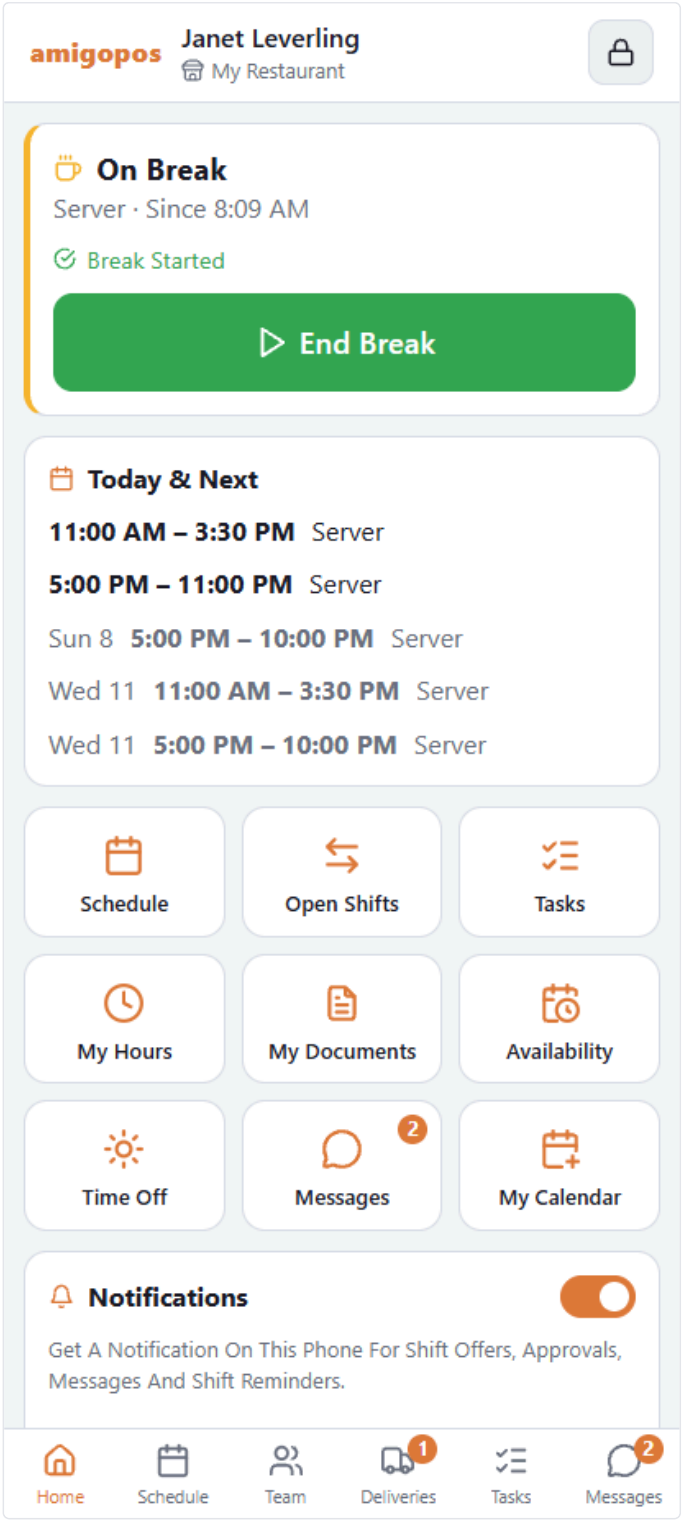
If you hold a driver job, the bar at the bottom also has **Deliveries**: your run, stop by stop, with a badge for the stops still out. See Deliveries on the driver's phone.

When Clock Out is refused, the reason is shown in words — for a driver, usually deliveries that are not banked yet.

Breaks

Where the store uses breaks, the clock card has **Start Break** above Clock Out while you are clocked in. During the break the card says **On Break** and since when, and its one button is **End Break**. Once you have taken a break, the card also shows **Breaks Taken** with the minutes.


amigopos
Janet Leverling
My Restaurant
Clocked In
Server · Since 8:01 AM
Cash Tips
Card Tips Received: $0.00 · Minimum Cash Tips: $22.81
Start Break
Clock Out
Today & Next
11:00 AM – 3:30 PM Server
5:00 PM – 11:00 PM Server
Sun 8 5:00 PM – 10:00 PM Server
Wed 11 11:00 AM – 3:30 PM Server
Wed 11 5:00 PM – 10:00 PM Server
Schedule
Open Shifts
Tasks
My Hours
My Documents
Availability
Time Off
Messages
2
My Calendar
Home
Schedule
Team
Deliveries
1
Tasks
Messages
2



- One break at a time, with the same location check as clocking in.
- **"End Your Break Before Clocking Out"** — a break is still running, for example one started at the register: end it first, then clock out.

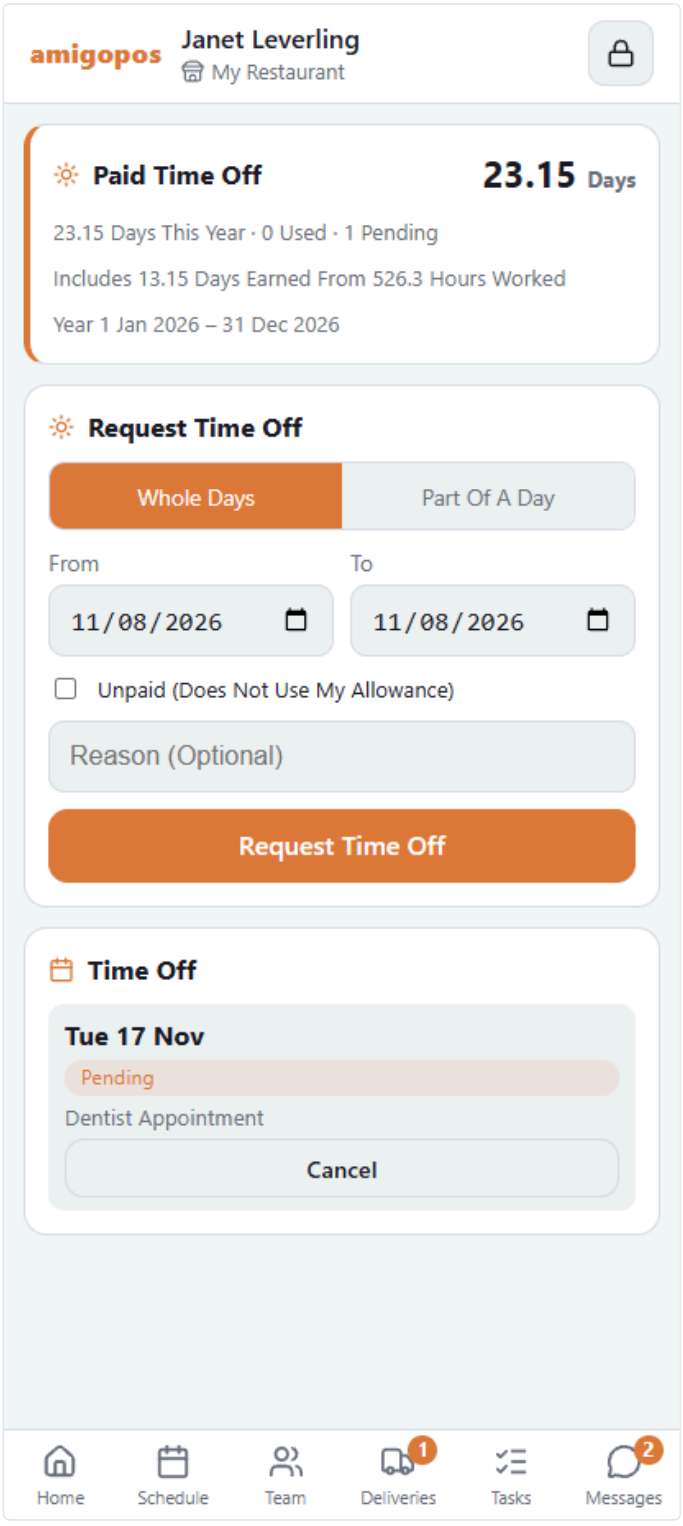
Tasks with a photo or a range

- A task with a camera icon needs a photo. Tap it, then **Take Photo**: the camera opens, and a task that only wants the photo is done as soon as you take it. If it also asks for a number or a note, enter that too and tap the tick. Tasks that need a photo can only be done here, not at the register.

- **Range:** under a task shows the readings that are fine. A reading outside it is saved anyway, shown in red, and your managers are told straight away.
- A list a manager gave you for the day says **Assigned To You**, and a list past its due time says **Overdue**.

Your time-off balance

Where your store gives days off for hours worked, the balance on **Time Off** says how many of its days you earned that way, and from how many hours — for example *Includes 2.5 Days Earned From 75 Hours Worked*.



When a published shift changes

If a manager changes one of your published shifts — new times, another day or job, given to someone else, or deleted — you get a message in **Messages** with the old and the new times, and a notification if you switched them on.

Also on the Home screen

- **My Calendar** — your shifts in your phone's calendar app; see Your shifts in your phone's calendar.
- **Face ID / Fingerprint** — unlock with your face or finger instead of the PIN; see Unlocking with Face ID or fingerprint.

Inventory Count

If your job lets you count inventory, Home has an **Inventory Count** tile; while a count is open it shows how many items have been counted. Pick your aisle, type what is on the shelf, and each item saves as you go. See Counting inventory as a team on your phones.

Fixing punches from your phone (managers)

Employees › Scheduling & Time Clock

View online ↗

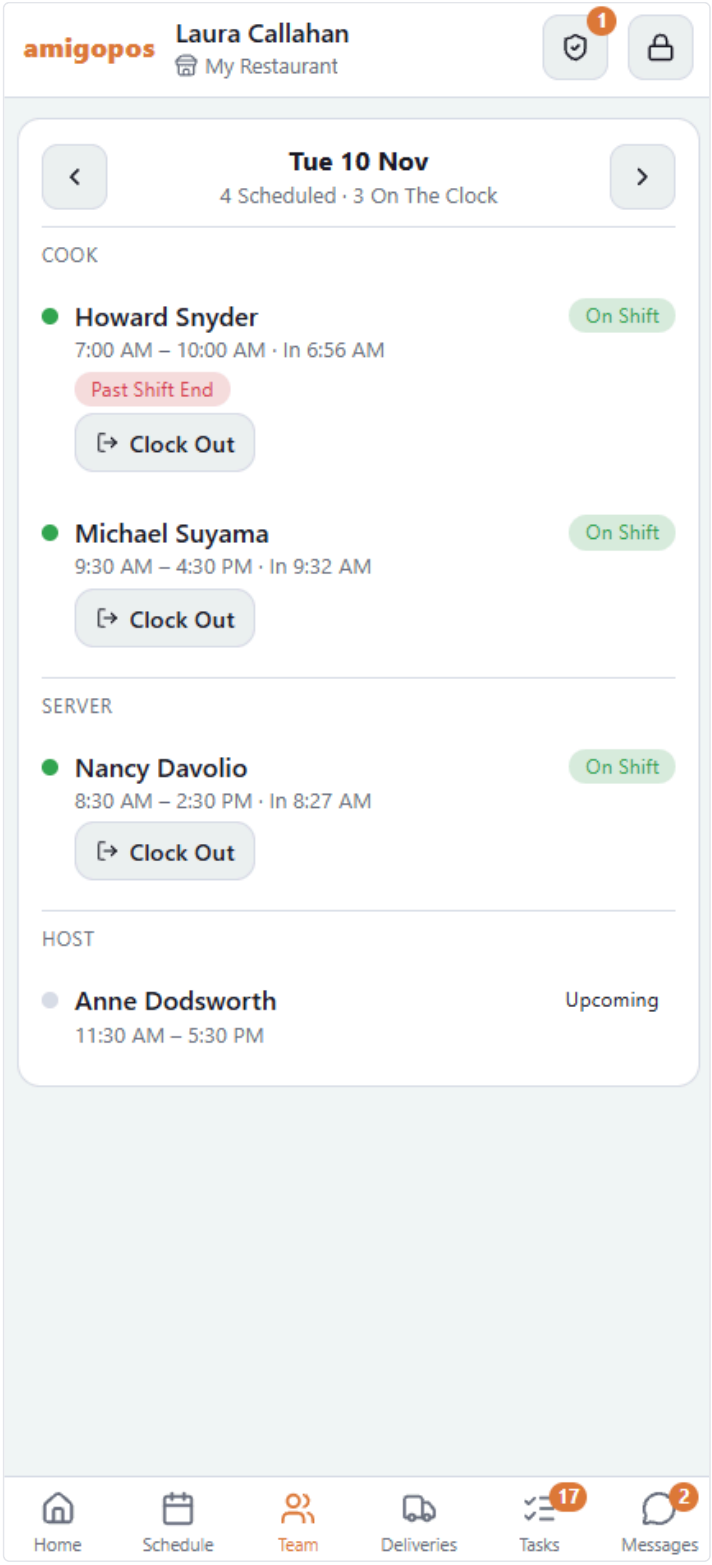
For managers: clock out someone who forgot, and review and approve the week’s punches, on the staff site.

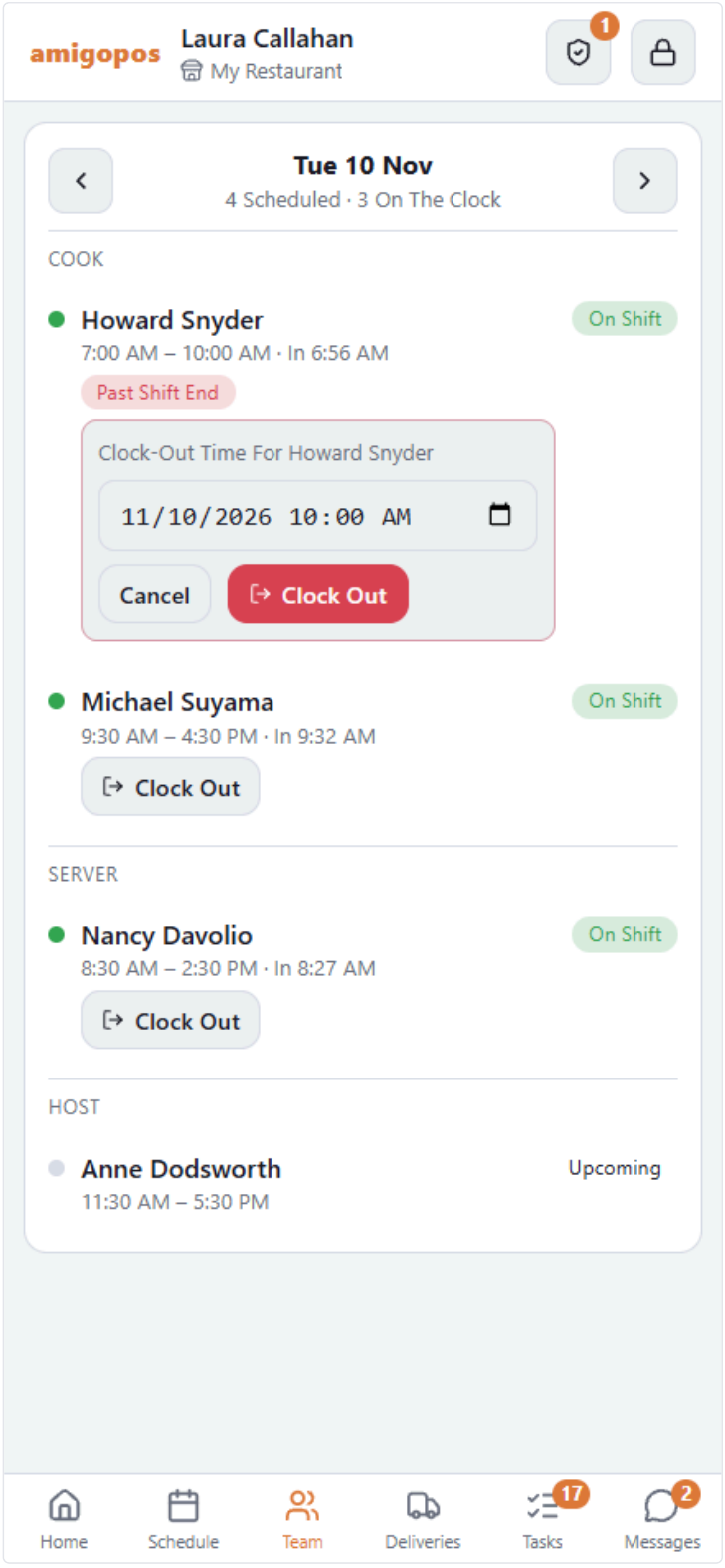
Two punch fixes can be made from a manager's phone: closing the punch of someone who forgot to clock out, and approving the week's punches. Everything else about punches — changing times, adding a missing punch, deleting one — stays on Timesheets in Back Office; see Reviewing and approving punches.

Both need a job with manager access, which the server checks on every request, and neither works on your own punches: another manager, or Back Office, looks after those.

Clocking out someone who forgot

1. Open the **Team** tab. Everyone else still on the clock has a **Clock Out** button under their name.
2. Tap it and set the time the person actually left. It must be after their clock-in and after any break, and not in the future.
3. Tap **Clock Out** to confirm.


amigopos
Laura Callahan
My Restaurant
1
Tue 10 Nov
4 Scheduled · 3 On The Clock
COOK
Howard Snyder
On Shift
7:00 AM – 10:00 AM · In 6:56 AM
Past Shift End
Clock Out
Michael Suyama
On Shift
9:30 AM – 4:30 PM · In 9:32 AM
Clock Out
SERVER
Nancy Davolio
On Shift
8:30 AM – 2:30 PM · In 8:27 AM
Clock Out
HOST
Anne Dodsworth
Upcoming
11:30 AM – 5:30 PM
Home
Schedule
Team
Deliveries
Tasks
17
Messages
2

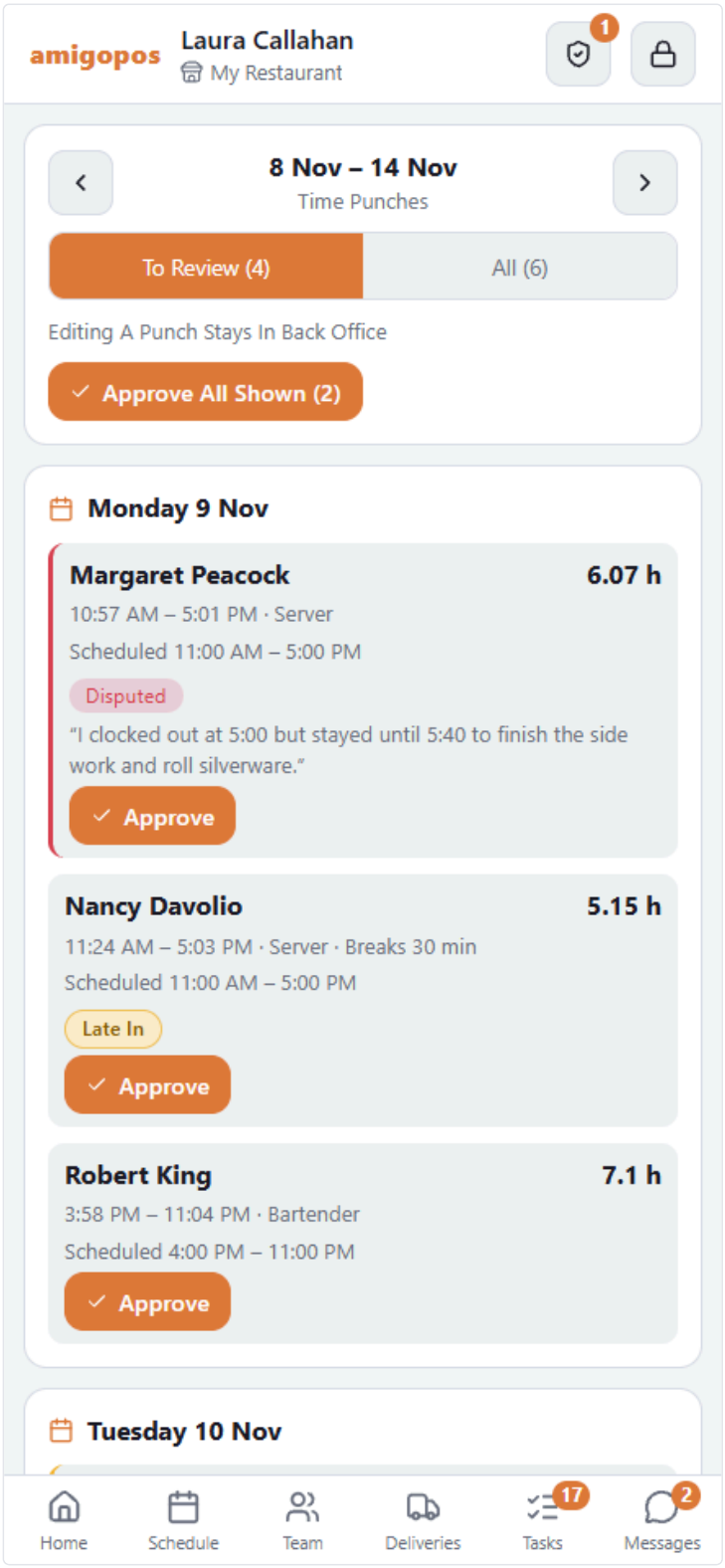


- A break still running ends at the same time, and the time follows the store's punch rounding, as at the register.
- The employee gets a message saying who clocked them out, and at what time.
- The override log records it as **Manager Clock-Out (Phone)**, with the employee as the user and you as the one who authorized it.
- The closed punch is on Timesheets like any other, ready for the weekly review.
- A driver with deliveries still out, or delivered and not banked, can't be clocked out until they are banked; the phone shows **"You Still Have Deliveries Out. Bank Them Before Clocking Out."**

On Today, the **Past Shift End** chip and the warning about someone still clocked in from yesterday open the Team tab showing only who is **Still On The Clock**; the chip beside it shows the whole day again.

The Time Punches page

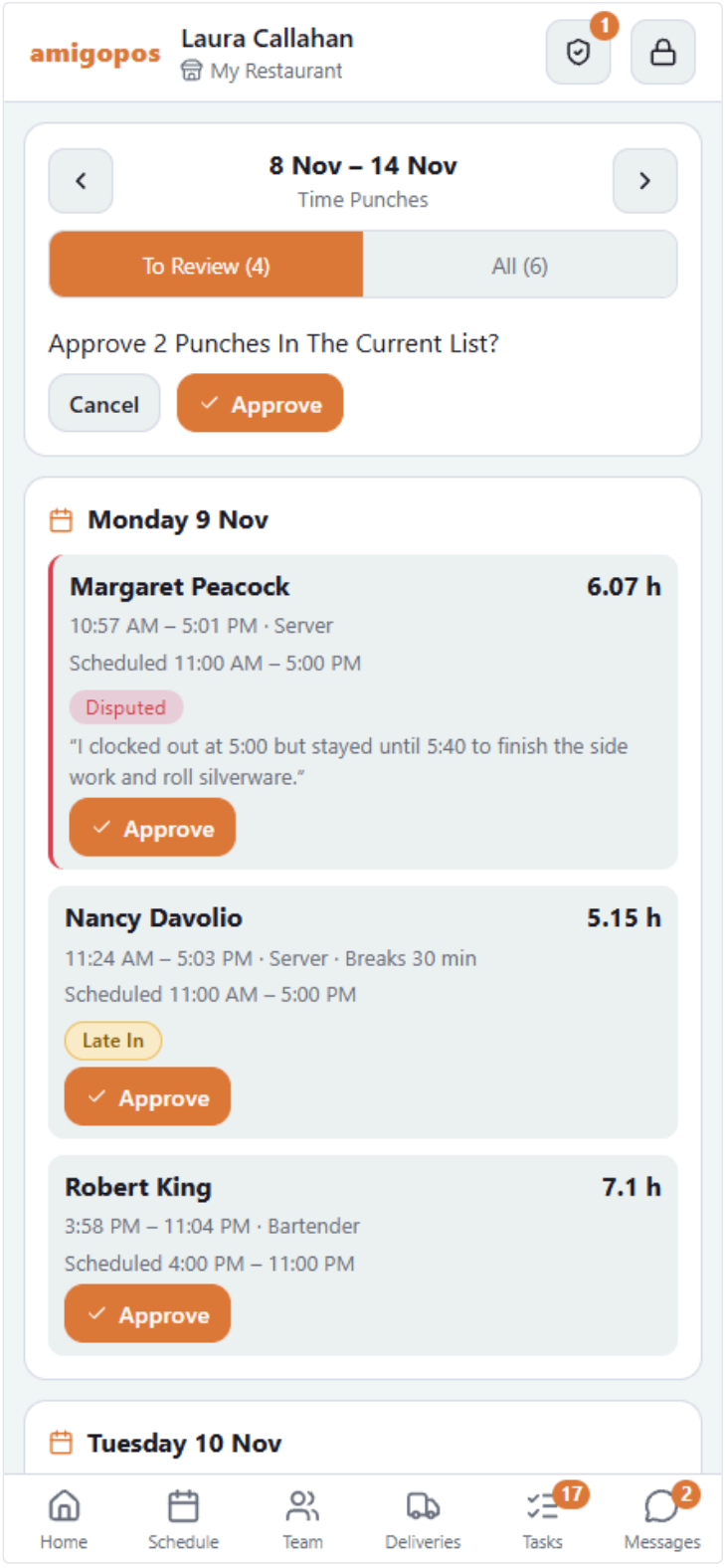
The **Time Punches** tile on Home, and the link at the bottom of the Labor card on Today, open a week of punches as the Back Office review sees them, by the store's business week. The arrows change the week.



- **To Review** — the punches that need you: finished and not approved yet, disputed, or still running from an earlier day or long past the shift. Your own punches and those in a locked pay period are left out.
- **All** — every punch of the week, those included.
- Each punch shows its times, job, breaks and scheduled shift, with the same labels as Timesheets (Not Clocked Out, Late In, Early Out and the rest), **Disputed** with the employee's note, and **Locked** inside a locked pay period.
- A punch still running has **Clock Out** here too.

Approving

- **Approve** signs off one finished punch, exactly as on Timesheets, where it then shows as approved with your name.
- **Approve All Shown** approves every finished punch in the list, after asking. As on Timesheets, it leaves disputed punches out: approve each of those on its own, which also closes the dispute.
- Punches still running and punches in a locked pay period cannot be approved.



Published shifts that ended with no punch at all are listed at the bottom under **No Punch**. Add the missing punch in Back Office.

> No pay rates and no labor cost on this page. Editing a punch, adding or deleting one, and locking a pay period stay in Back Office.

Manager tools on the staff site

View online ↗

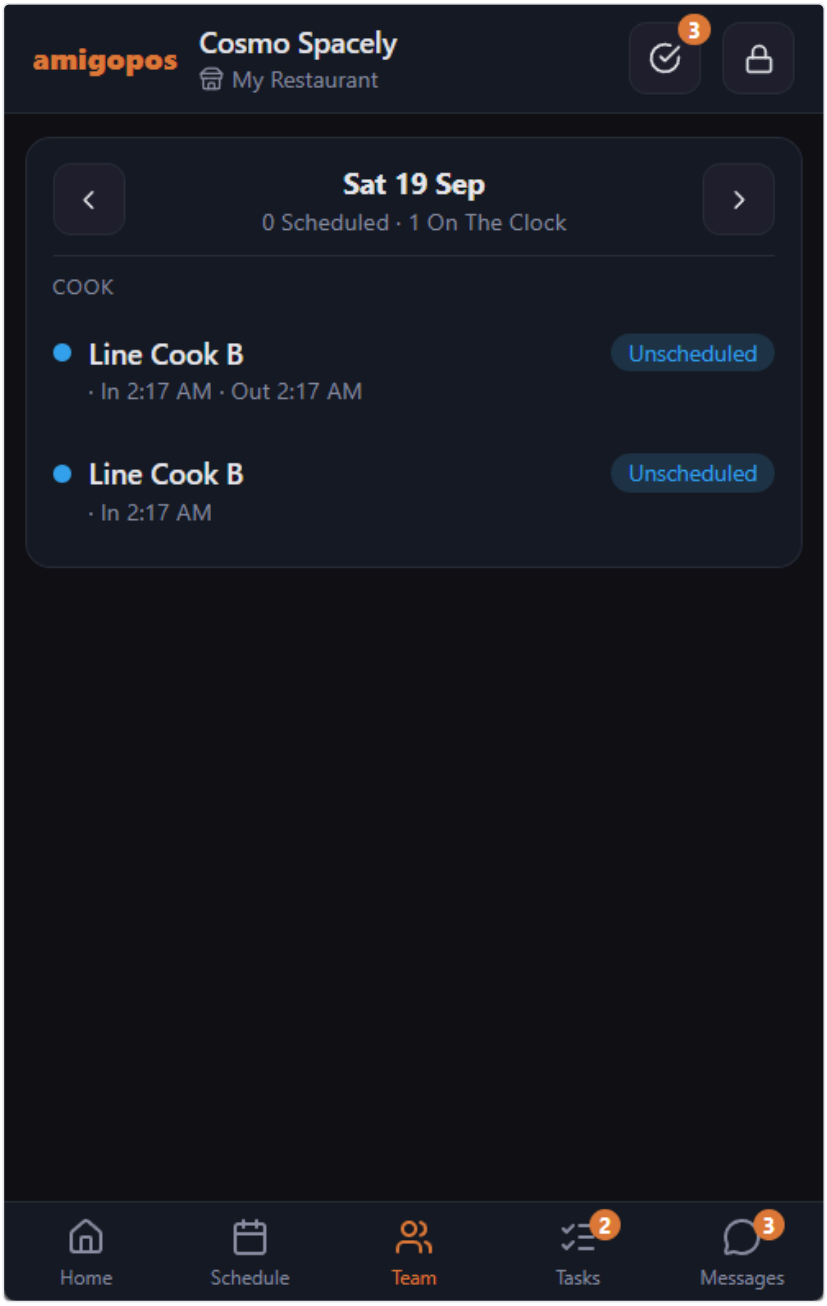
What a manager sees on their own phone: the day's roster, approvals, announcements and the log book.

A manager holds the staff site like everybody else — same invite, same PIN — and sees a few things nobody else does. The test is the job: anyone with a job that has **manager access** (*Allow Manager* in Jobs & Permissions) gets them, on every job they hold, whether or not they are clocked in. The server checks it on every request, so a phone cannot talk its way in.

Team

The **Team** tab is today's roster, grouped by job, with the day arrows at the top for yesterday and tomorrow. Each person shows their shift times and where they stand:

- **Upcoming** — scheduled, not due yet.
- **On Shift** — clocked in.
- **Late** — more than ten minutes past the start with no punch.
- **No-Show** — the shift ended and they never clocked in.
- **Done** — worked and clocked out.
- **Unscheduled** — clocked in with no shift today.

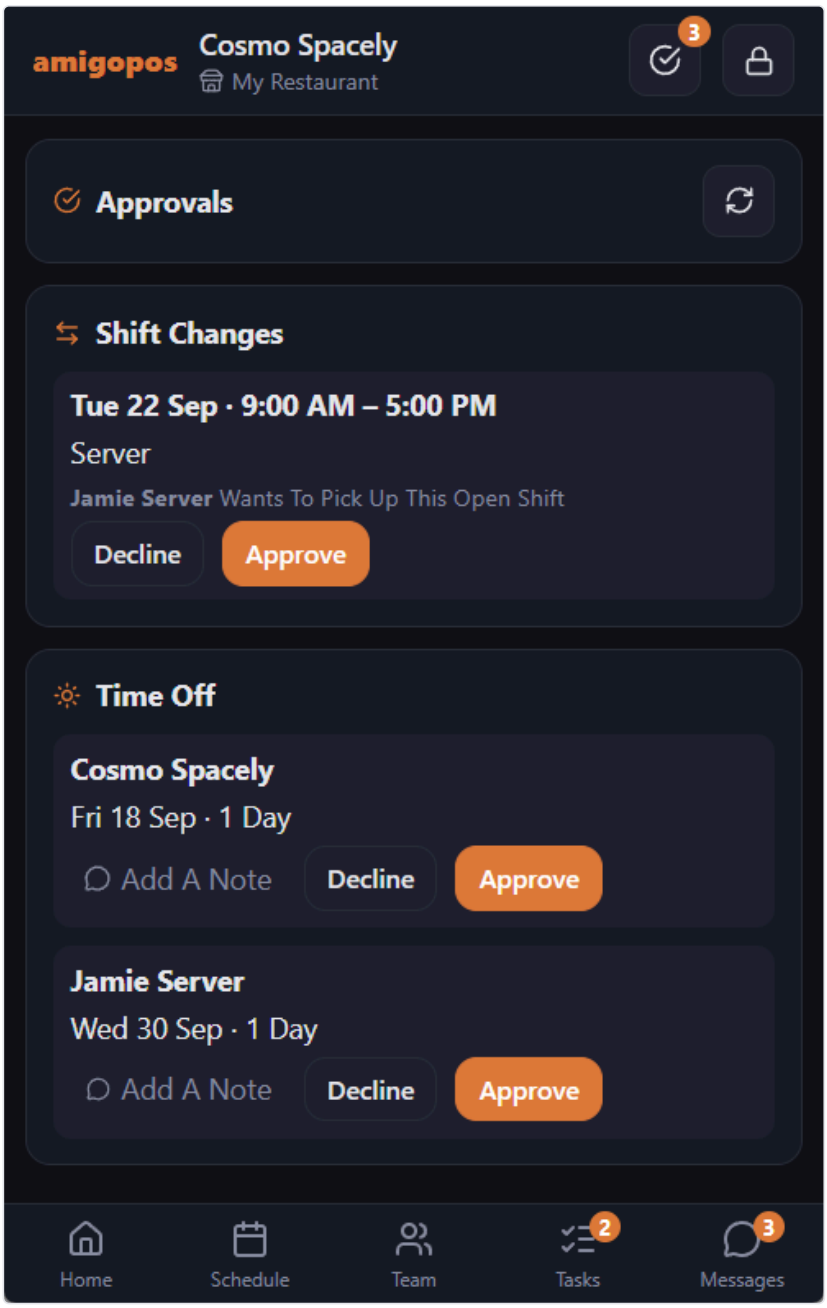


Names, jobs and times only — the Team tab is for knowing who is on the floor. The day's numbers live on **Today**, below.

Approvals

The Home screen carries a manager card with what is waiting; tapping it opens **Approvals**:

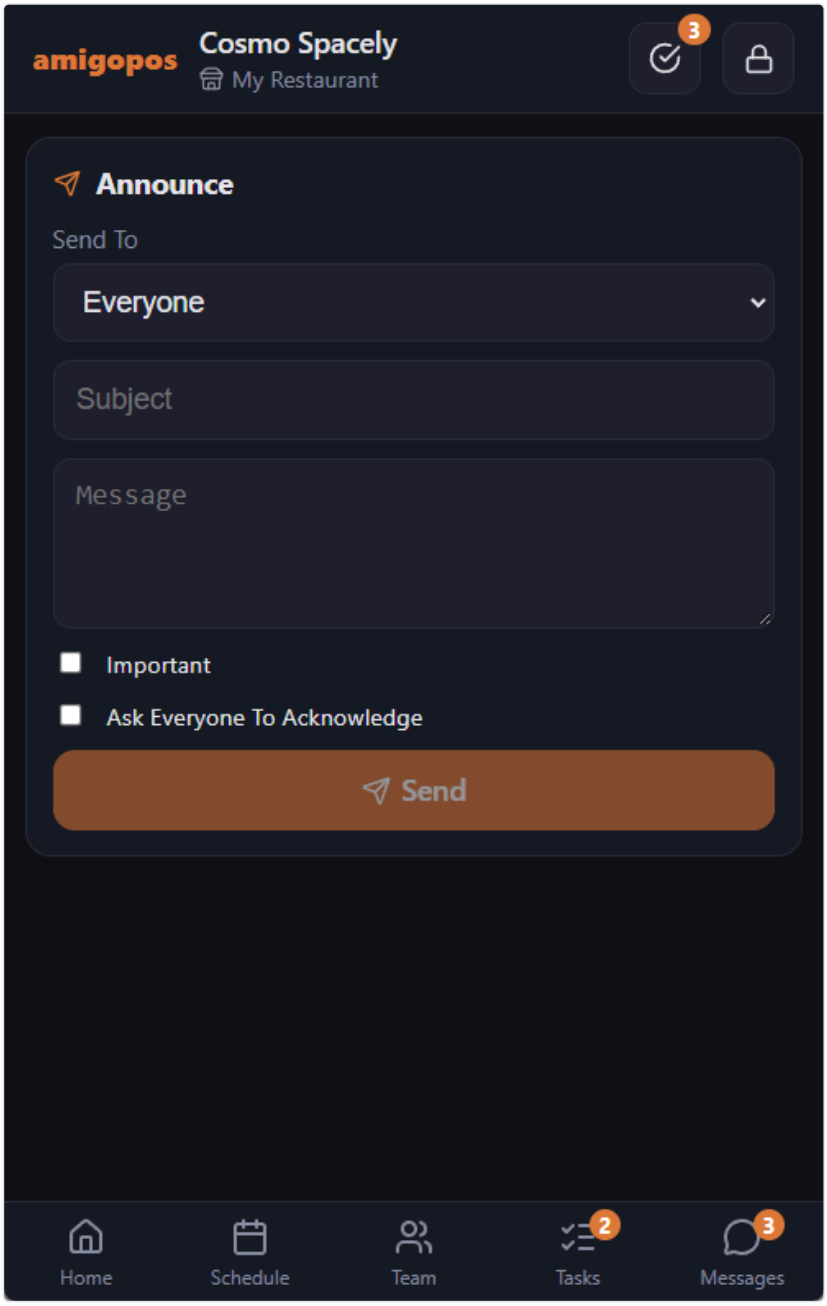
- **Shift changes** — pick-ups and hand-overs when manager approval for shift changes is on.
- **Time off** — with the dates, whether the days are paid, and the employee's balance after the request if balances are switched on.
- **Availability changes** — the employee's current week beside what they are asking for, when availability needs approval.



Approve or decline with an optional note. The employee is told in *Messages* either way, and the same items are waiting in Back Office — whoever gets there first decides it.

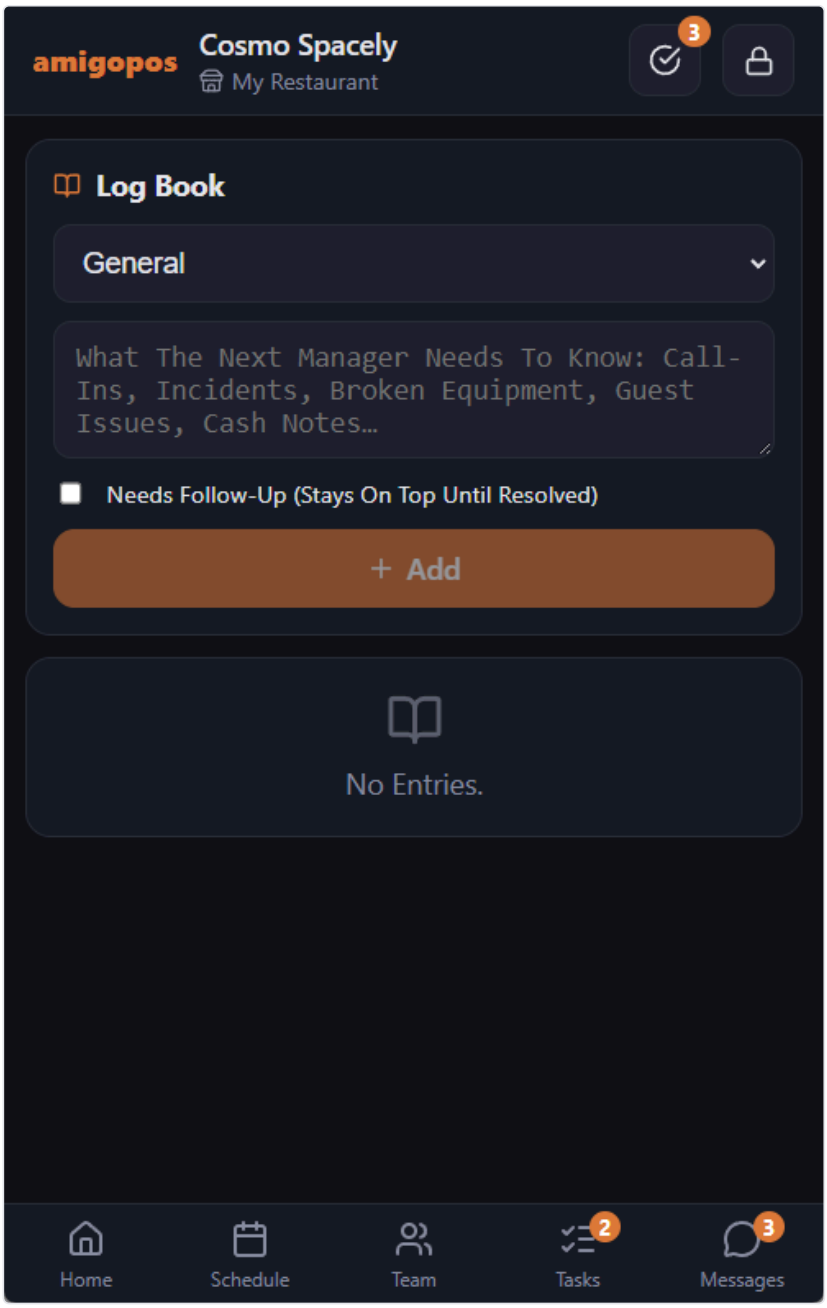
Announce

Announce sends a message to **everyone**, to **today's roster**, to whoever is **clocked in**, or to **one job**. Mark it *Important* to push it to the top of their Messages, or *Require acknowledgement* to get an Acknowledge button and know who has read it. Announcements reach phones and registers alike, and go out as push notifications where those are switched on.



Log Book

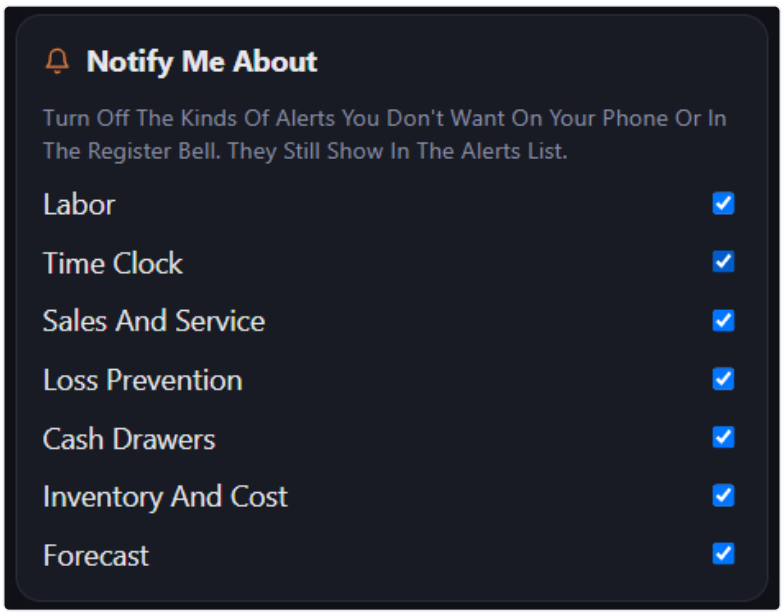
The **Log Book** tile holds the shift hand-over notes — see *Manager log book*.



What is deliberately not on the phone: editing the schedule, editing punches (the phone only closes a forgotten clock-out and approves punches — see *Fixing punches* below), pay rates and anyone's individual pay, and employee records. Those belong on a proper screen with the history in front of you, in Back Office.

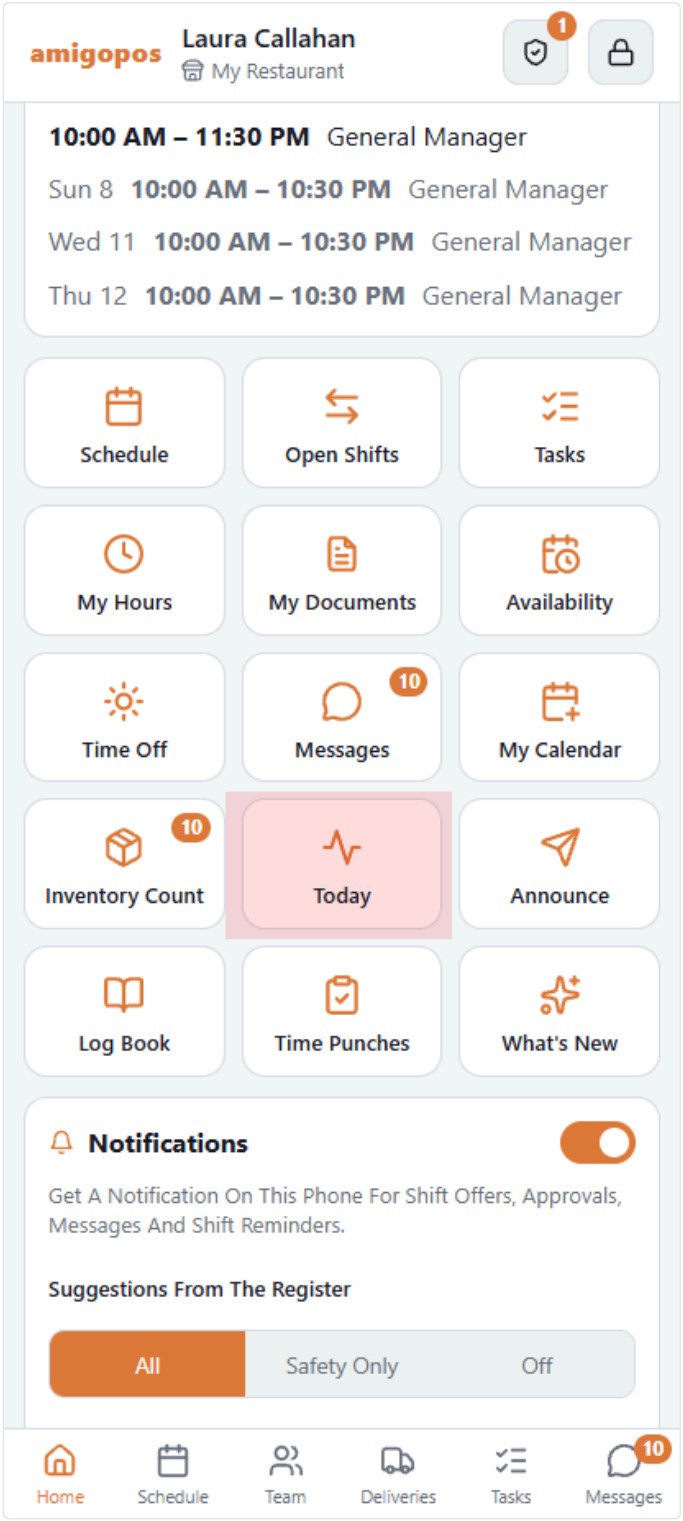
Alerts

Managers have a bell in the staff site header with the number of open manager alerts. It opens the Alerts page — labor, sales, losses and stock, each with a suggested fix — where you acknowledge or snooze them and choose which kinds you are notified about. See Getting and handling alerts.



Today

The pulse icon in the header and the **Today** tile open the manager's page for the business day so far: sales against what is usual by this time and where the day is heading, labor against its target, open checks, deliveries and bookings, voids and discounts against normal, what may run out, the open alerts and the day's events, with a short written briefing on top. See Today: the manager's day on their phone.

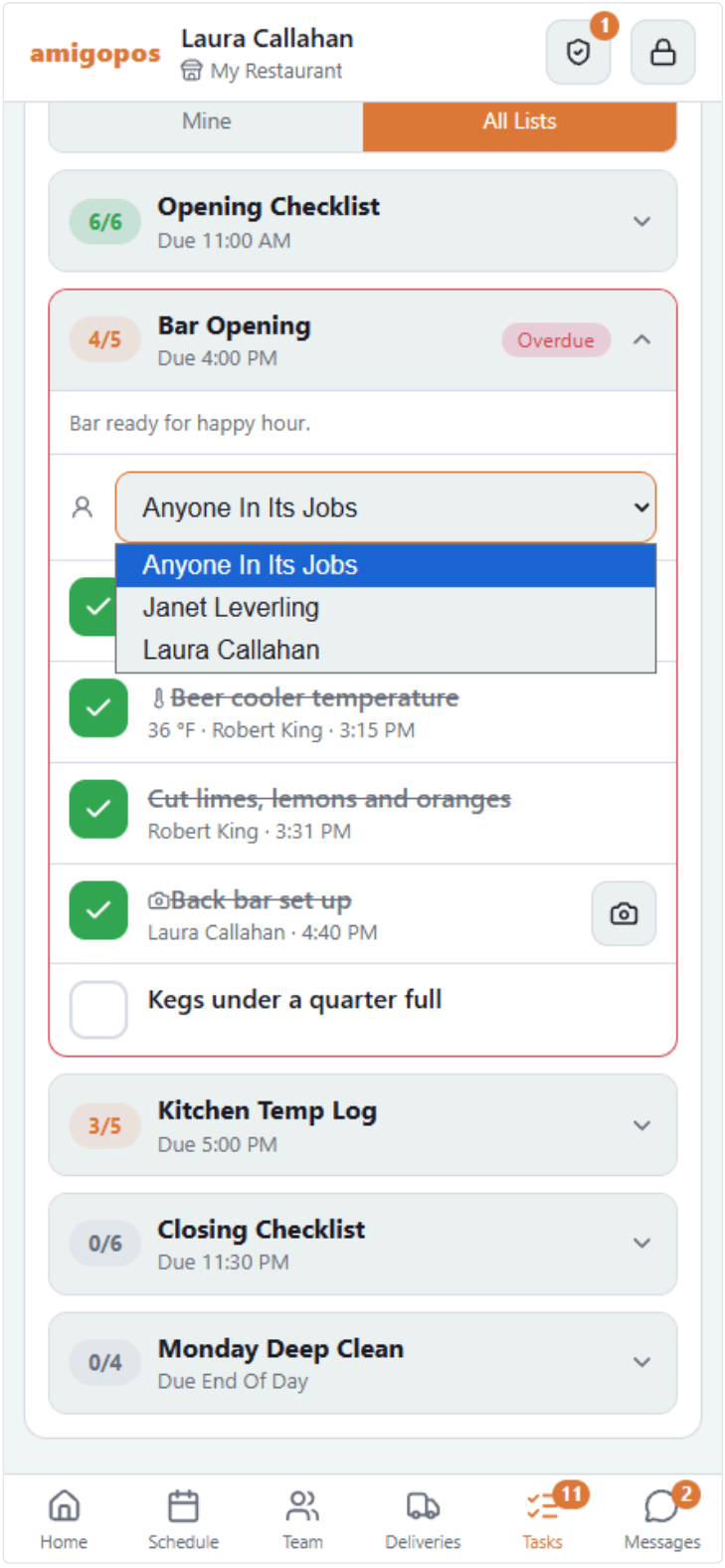


Fixing punches

Under each person still on the clock, the **Team** tab has **Clock Out**, for the punch someone forgot to close. The **Time Punches** tile opens the week's punches with the Timesheets labels, to approve one by one or with **Approve All Shown**. Neither works on your own punches. See Fixing punches from your phone.

Task lists

On the **Tasks** tab, **All Lists** shows every list due today at the store, not only yours. Open a list to give it to one person for the day — pick from today's team, or **Anyone In Its Jobs** to put it back — and to see the photos taken for it. See Task lists.



Dispatch

At a store that delivers its own orders, managers also get **Dispatch**: the delivery board on the phone. See dispatching from a manager's phone.

Inventory counts

Managers can start a team inventory count from the **Inventory Count** tile, and when the shelves are done, tap **Review & Post** to see every difference and its value, then **Post Count** to apply it to stock or **Discard Count** to close it without changes. See Counting inventory as a team on your phones.

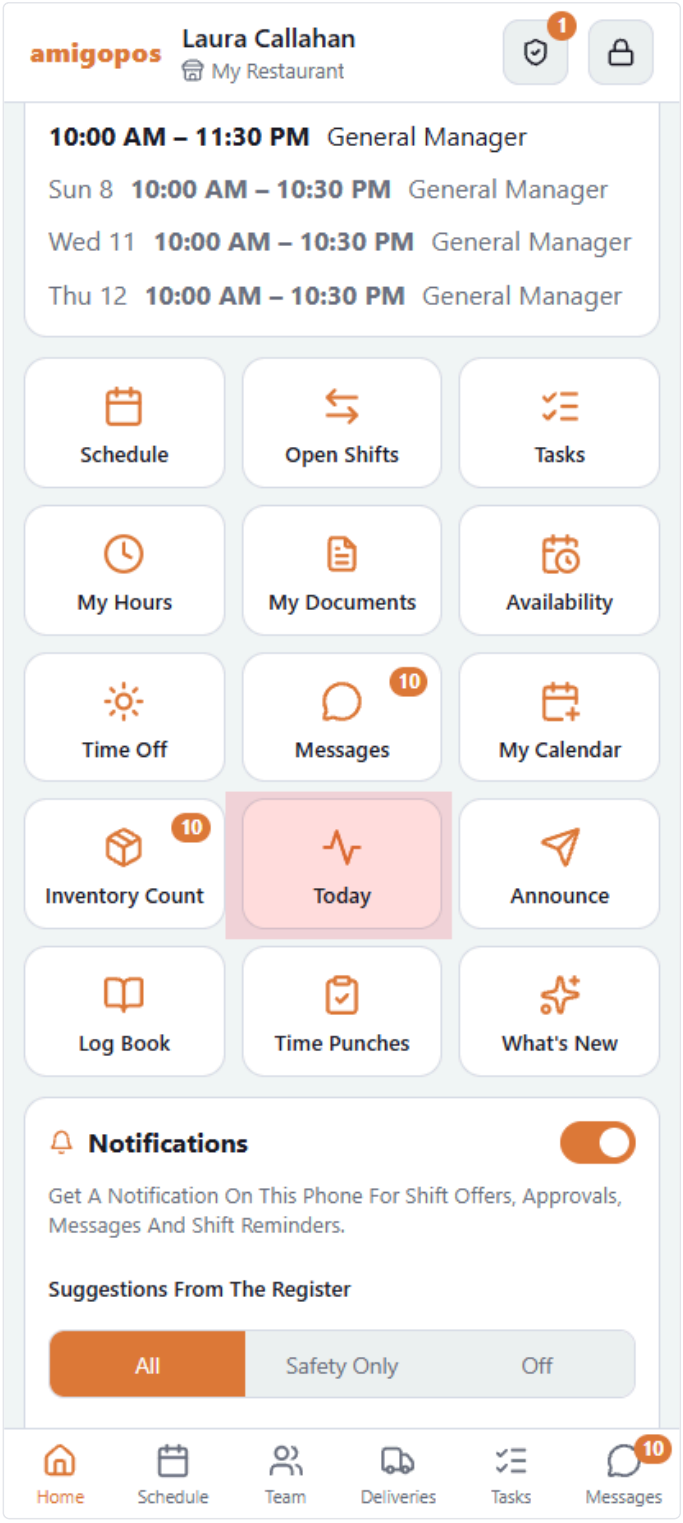
Today: the manager’s day on their phone

Employees › Scheduling & Time Clock

View online ↗

The business day so far on one screen: sales against the usual and the forecast, labor, service, losses, stock, alerts and events, with a written briefing.

Today is the manager’s page on the staff site: the business day so far on one phone screen — sales against what is usual by this time of day and where the day is heading, who is on the clock and what labor is costing, open checks, deliveries and bookings, voids and discounts against normal, what may run out, and the day’s notable moments — with the open manager alerts on top and a short written briefing.



Who sees it and where it is

Anyone whose job has **manager access** (*Allow Manager* in Jobs & Permissions) — the same test as the Alerts bell and the other manager tools, checked by the server on every request. Open it from the pulse icon in the header or the **Today** tile on the Home screen. The page re-reads every two minutes while it is open, and the arrow at the top refreshes it now. The figures are built once per store, at most every 90 seconds, so every manager looking at the same store sees the same numbers.

The page follows the store's **business day** — the day the register is still on, from the last close until now — and, for a manager who works at more than one store, the store picked in the header.

The briefing

At the top, a few plain sentences in your own language: sales so far against the usual and the forecast, labor, and what needs attention right now, with the suggested fix for each open alert. It is written by the same AI that writes the summary at the top of the End of Day email, from the page's own figures only, at most once every fifteen minutes per store. The numbers show first; the paragraph fills in a few seconds later. Where the AI is not available, or the day's allowance has been used, the page simply has no paragraph.

Alerts

Open manager alerts come next — the three most urgent, with the total count. Tap the card to open the Alerts page, where you acknowledge or snooze them. See Getting and handling alerts.

Sales

- **Net Sales**, **Orders** and **Avg Check** — settled sales so far, after discounts and without tax: the figures the End of Day will report.
- **Usual By Now** — what the store has usually taken by this time on this weekday over the last eight weeks, with a green or red chip for how far ahead or behind today is. It appears once there are two such days to compare with.
- **Incl. Open Checks** — sales so far with the checks still open added in, which is what the pace is measured on; shown while checks are open.
- **Projected Close** — where the day lands at today's pace, beside the day's forecast from Demand forecast when there is one. It needs three comparable days, and it is only offered once at least 15% of a usual day is done — before that the row says it is too early.
- **Same Day Last Week** (from the stored End of Day close) and **Covers**.
- A bar for each hour of the day so far with the best hour highlighted, then the top five items by sales and, where more than one is in use, sales by channel: register, web, call center, marketplace.

Labor

- **On The Clock Now** against scheduled, with chips for who is **late**, a **no-show**, or **still to come** — the same roster as the Team tab.
- **Labor %** and **Labor Cost** — cost so far at the employees' pay rates, counting people still on the clock up to this minute, as a share of sales so far including open checks. It turns red above the store's target: the labor target from the Manager Alerts settings, or the scheduler's labor target where alerts are not set up.
- **Projected Labor %** — with the rest of today's published shifts added, against the larger of sales so far and the forecast; shown when the store has a forecast or a projection.
- The usual day's labor (from stored End of Day closes of the same weekday), overtime hours, tips declared so far, and a warning when someone is still clocked in from yesterday.

Service

Open Checks (orders already banked by a server or driver are not counted) with their value and the oldest one — its table and server and how long it has been open, red after an hour and a half. Where the store delivers: orders **waiting** for a driver, **out**, **late** against their promised time, and done today. Where the store takes bookings: **upcoming**, **seated**, **no-show** and the **waitlist**. Rows the store does not use are hidden.

Loss prevention

Voids, **Comps**, **Discounts**, **Refunds**, **Removed After Send** and **No Sales**, each with its count and each against what is usual by this time of day — the average of the store's stored End of Day closes for this weekday, scaled to the share of the day done so far. A figure turns red when it is at least one and a half times the usual. Below them: **Manager Overrides** and price changes, **Drawers Over/Short** for the drawers counted so far, and a warning when the day's figures do not tie out — the same checks the End of Day report runs.

Inventory

May Run Out Today — ingredients whose forecast use for the rest of the day is more than what is on hand plus the deliveries due today; this is the forecast behind the daily inventory alert. **Sold Out (86)** and **Running Low** — menu items whose counters are at zero or down to the last few, where counters are switched on. **Waste Logged** — the cost of the waste entered today. The card is hidden when there is nothing to show.

Events

The newest thirty notable moments of the day, with the time and who did it: voids (red when the order had already gone to the kitchen), refunds, manager overrides, cash drops, paid outs and drawer counts. The full detail is in the end-of-day report.

Where the numbers come from

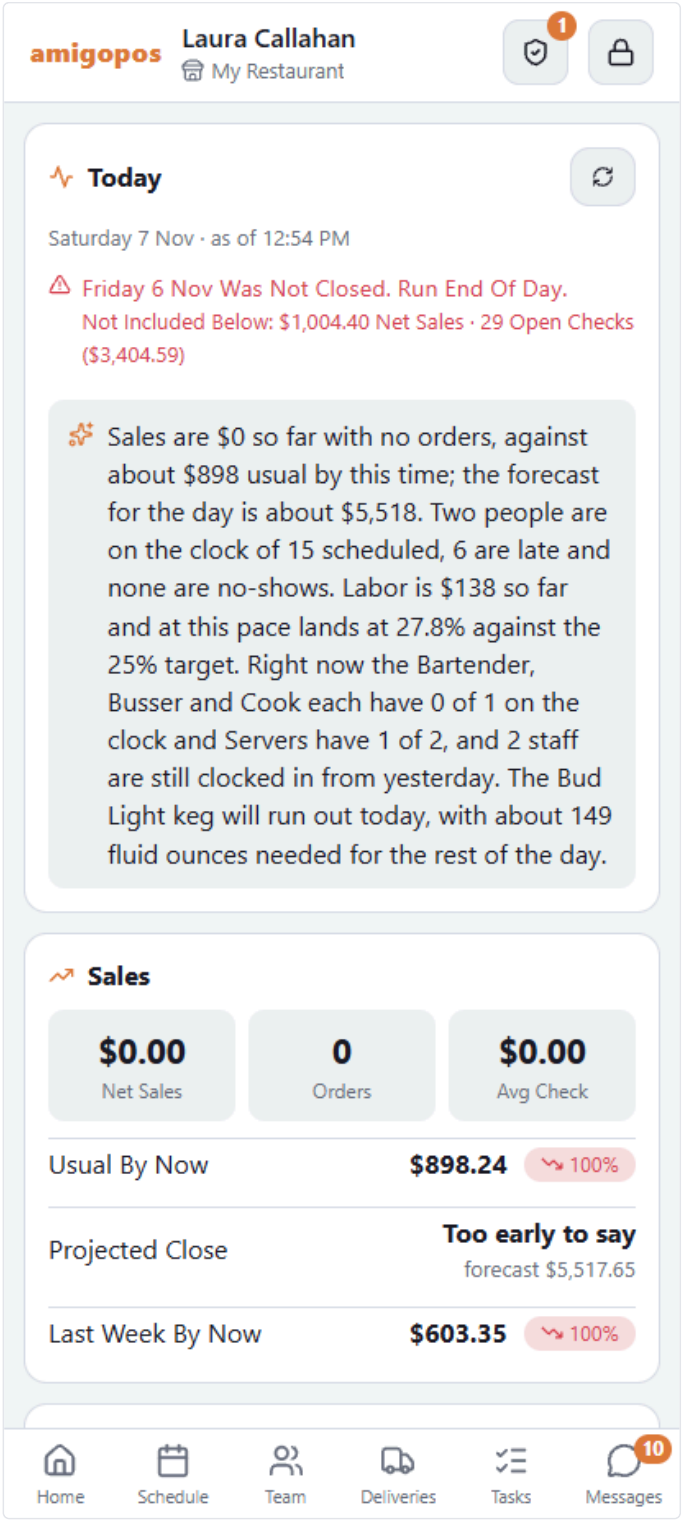
Sales and loss figures are the ones the End of Day uses; labor is costed at pay rates, like the timesheet; “usual” means the same weekday over the last eight weeks, and it is left out until there is enough history. Totals can differ from the Back Office dashboards, which have their own definitions — see Manager alerts: questions and fixes. Nothing on this page is stored; it is rebuilt from the day’s transactions each time.

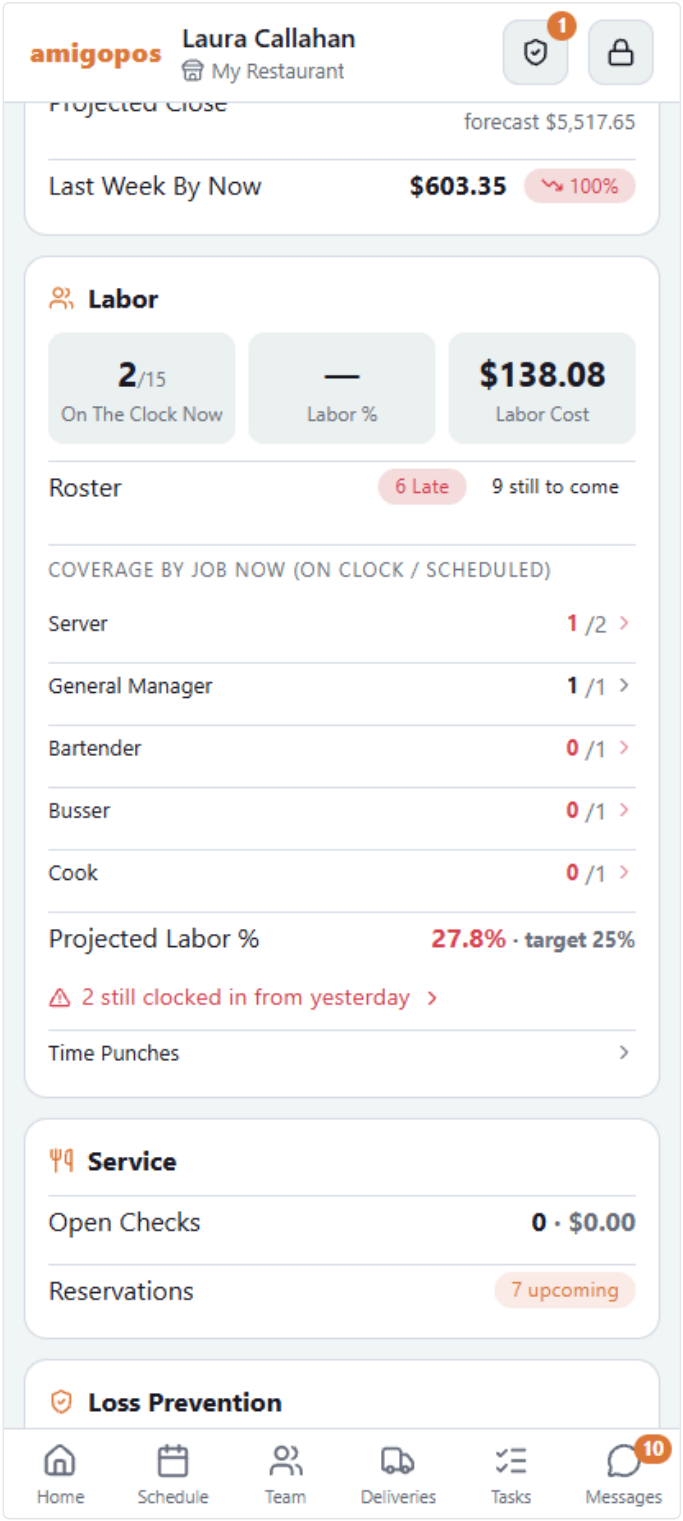
> The phone shows totals only. Pay rates, anyone’s individual pay, and the editing of schedules, punches (beyond closing a forgotten clock-out and approving) and employee records stay in Back Office. For charts, comparisons and history, use **Back Office › Analytics**.

Cash, coverage and a few more lines

The page gained a card and several lines; each shows only when it has something to say.

- **Cash** — a card after Service: the cash expected in each drawer right now and the total (float plus cash sales, less refunds, paid-outs and drops), cash sales, paid-outs, gift card cash-outs in amber (cash leaving a drawer with no sale behind it), drops to the safe and when the last one happened. The drawer figures are the ones the End of Day will expect — see Where the cash is.
- **Last week by now** under Sales, beside the usual-by-now figure, with the percentage above or below it.
- **Coverage by job now** under Labor: for each job, who is on the clock against who the schedule says should be there at this moment, red when short — the same question the Scheduler’s job bands answer for the week.
- Two more roster chips: **Past Shift End** (still on the clock after the scheduled end — a forgotten clock-out inflates labor) and **Unscheduled** (on the clock with no shift today).
- On a paid holiday the Labor card says so — *Paid Holiday Today · name ×2 · premium included* — and the labor cost, labor percent and projection carry the premium, so they match what payroll will pay rather than the base rates the time clock stores.
- **Oldest open checks** under Service lists up to three (table or number, server, how long, amount) when more than one check is open.
- In Events, a paid-out with no recipient or reason shows its note, so a gift card cash-out reads as one.

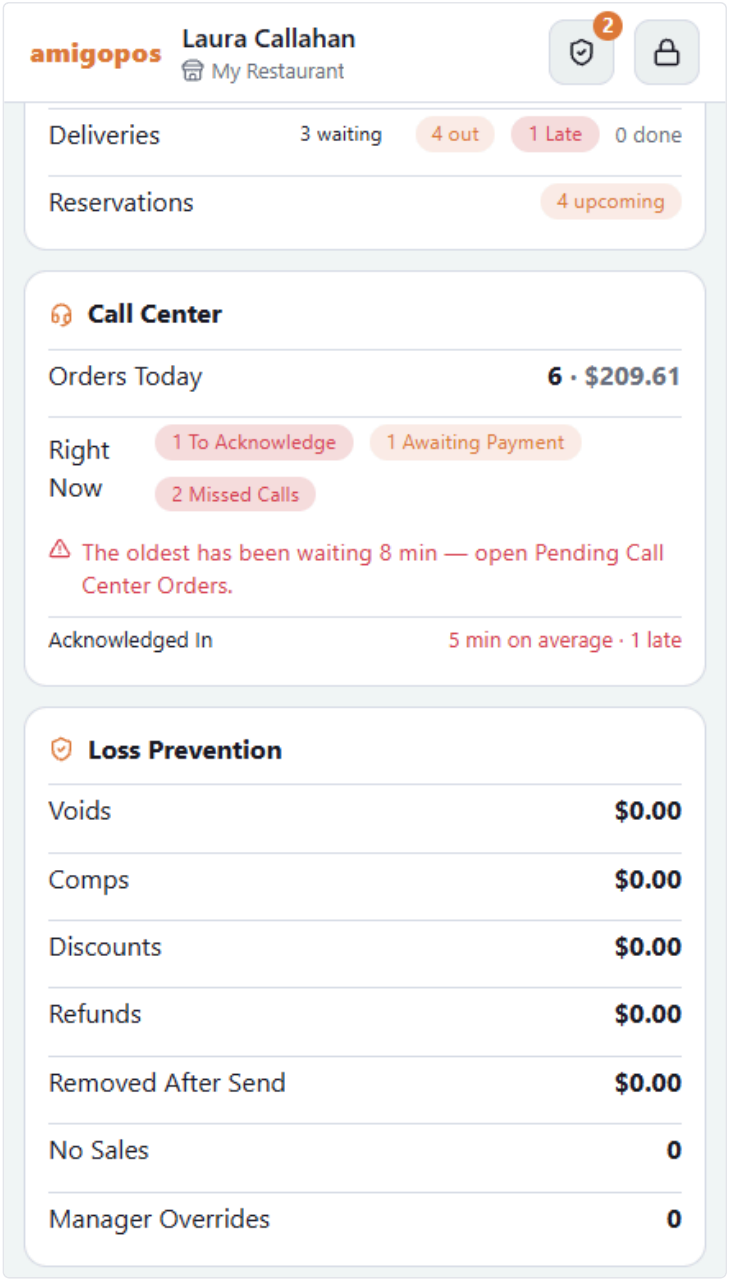

amigopos
Laura Callahan
My Restaurant
1
Today
Saturday 7 Nov · as of 12:54 PM
Friday 6 Nov Was Not Closed. Run End Of Day.
Not Included Below: $1,004.40 Net Sales · 29 Open Checks ($3,404.59)
Sales are $0 so far with no orders, against about $898 usual by this time; the forecast for the day is about $5,518. Two people are on the clock of 15 scheduled, 6 are late and none are no-shows. Labor is $138 so far and at this pace lands at 27.8% against the 25% target. Right now the Bartender, Busser and Cook each have 0 of 1 on the clock and Servers have 1 of 2, and 2 staff are still clocked in from yesterday. The Bud Light keg will run out today, with about 149 fluid ounces needed for the rest of the day.
Sales
$0.00
Net Sales
0
Orders
$0.00
Avg Check
Usual By Now
$898.24
100%
Projected Close
Too early to say
forecast $5,517.65
Last Week By Now
$603.35
100%
Home
Schedule
Team
Deliveries
Tasks
Messages
10



The briefing knows the new figures too and will mention a job running short, someone still on the clock past their shift, a cash-out or a holiday when they matter.

The Call Center card

Between Service and Cash, at stores that take orders from the call center (it appears only when a call-center order reached the store today or a call was missed): orders and sales from the call center today; then what is waiting right now — orders to acknowledge, orders awaiting a pay-link payment, missed calls — or “nothing waiting”; how long the oldest unacknowledged order has waited; and acknowledged-in minutes with the late count. The figures are the ones the call-center alerts use, so the card and the alerts agree.



From Labor to the punches

The **Past Shift End** chip and the warning about someone still clocked in from yesterday open the Team tab showing only who is still on the clock, each with **Clock Out**. The Labor card ends with a **Time Punches** link to the week's punches. See Fixing punches from your phone.

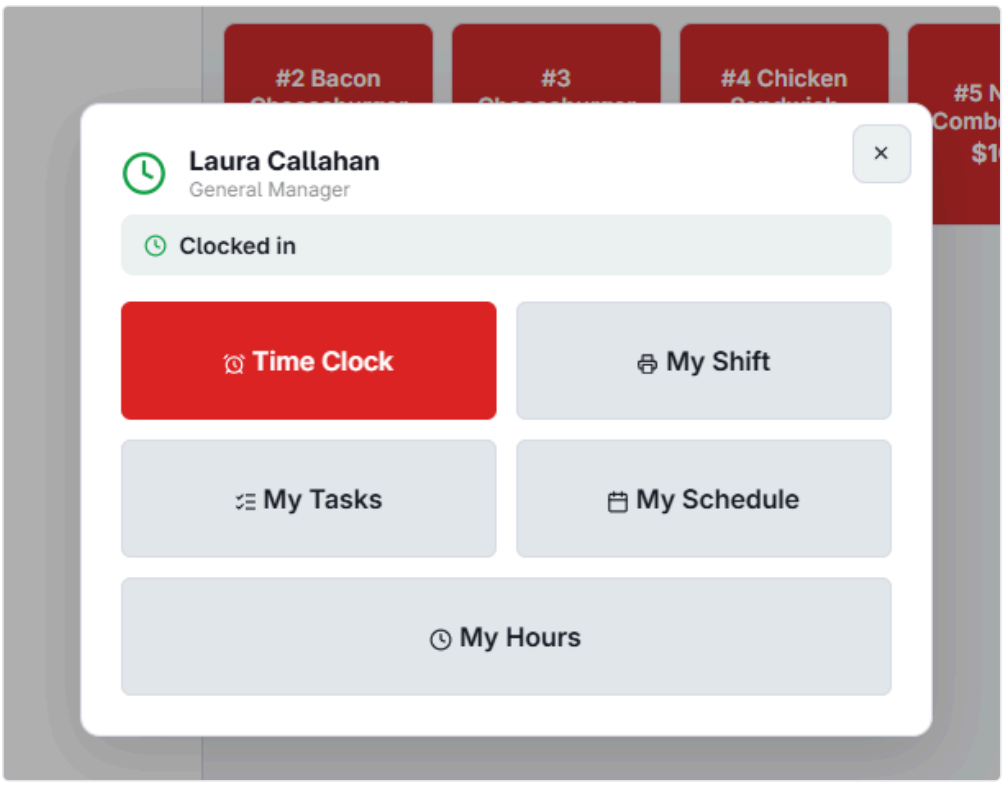
My Hours at the register

Employees › Scheduling & Time Clock

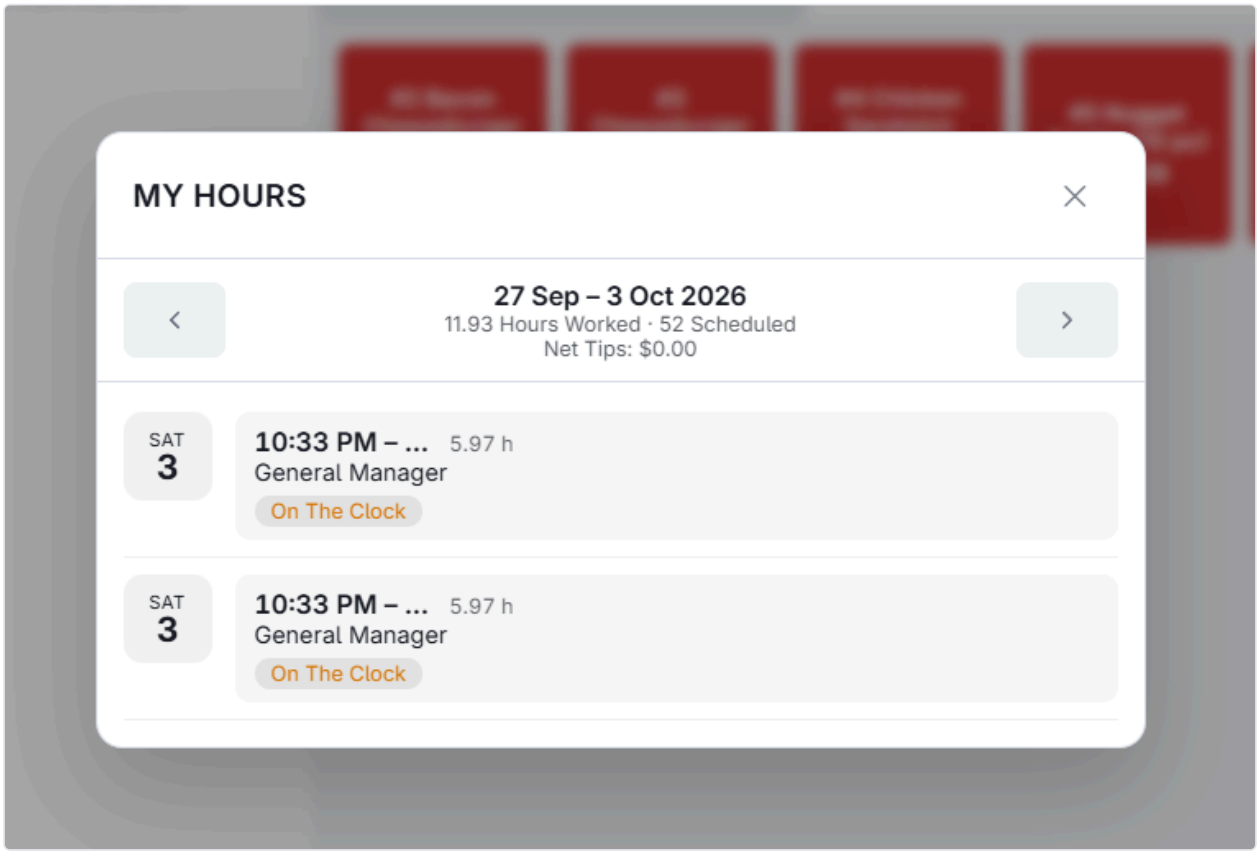
View online ↗

Employees check, approve and dispute their own punches from My Status at the register.

My Hours shows an employee their own punches for a week, right at the register. Tap your name to open **My Status**, then **My Hours**.



The top shows the week, the hours worked against the hours scheduled, and your **Net Tips**. Use the arrows to step back through earlier weeks.



Your punches

Each punch shows the day, the clock-in and clock-out times, the hours, the job, breaks and any tips you declared, and a status:

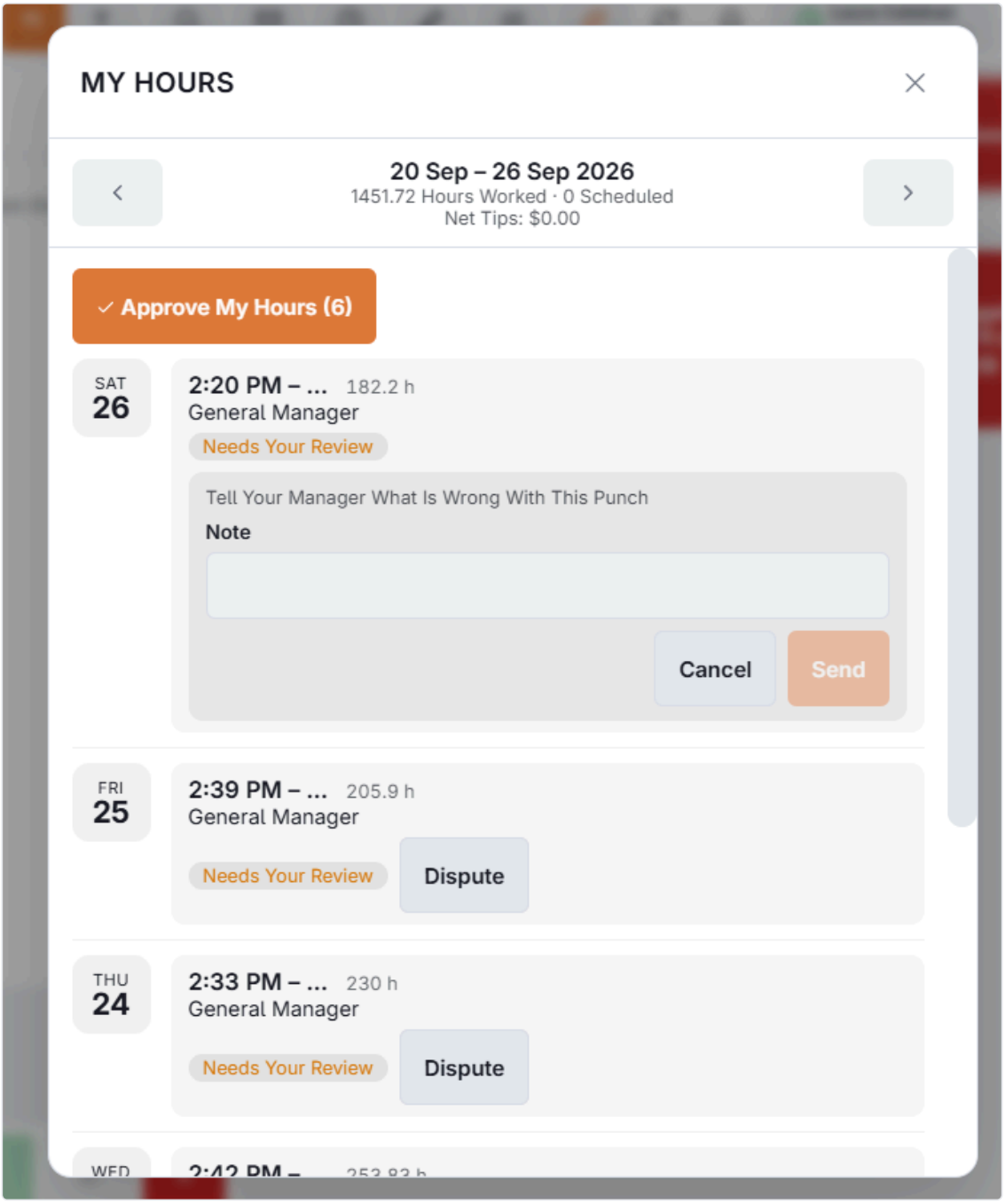
- **On The Clock** — still running.
- **Needs Your Review** — finished, not approved by you yet.
- **Approved By You** / **Approved By Manager**.
- **Disputed — Waiting For A Manager** — you disputed it.

Approving

Approve My Hours confirms every finished punch in the week on screen, except one you disputed.

Disputing a punch

1. Tap **Dispute** on the punch that is wrong.
2. Write what is wrong — *I left at 10:30, not 11:15*.
3. Tap **Send**.



Every manager gets a message, and the punch goes back to review until a manager approves it as it is or corrects it. A shift still running, or one in a closed pay period, can't be disputed — ask a manager.

When tips wait for your manager

If the store hides tips until a manager approves, **Tips Show Once A Manager Approves This Week** appears instead of your net tips until every punch in the week is approved by a manager. The cash tips you declared still show on each punch.

The staff site has the same screen on your phone: My Hours & Tips. Managers handle disputes in Reviewing and approving punches.

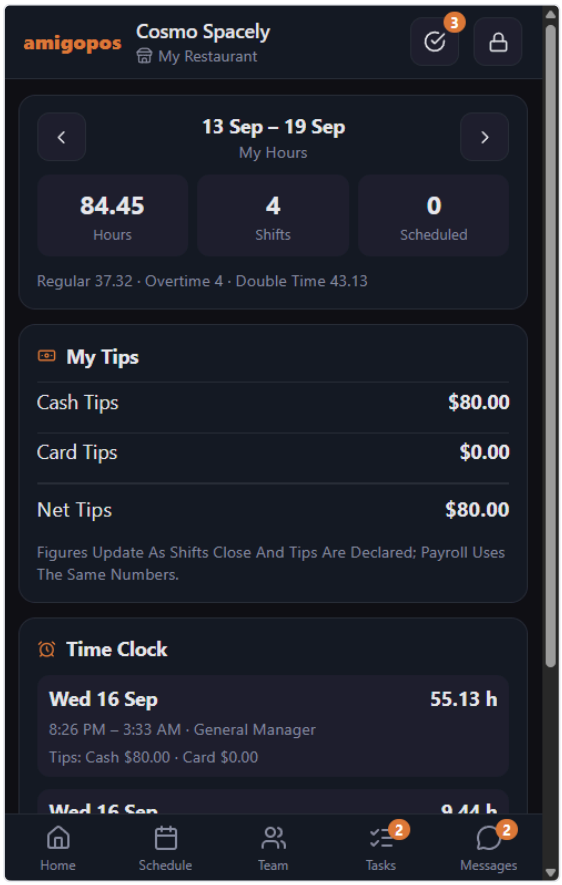
My Hours & Tips (staff view)

Employees › Scheduling & Time Clock

View online ↗

For employees: your hours, overtime and tips for a week, on your phone, with the punches behind them.

My Hours & Tips on the staff site Home screen shows what you worked and what you earned in tips, a week at a time. Use the arrows to step back through finished weeks; the current week updates as you go, and there are no future weeks to look at.



Hours

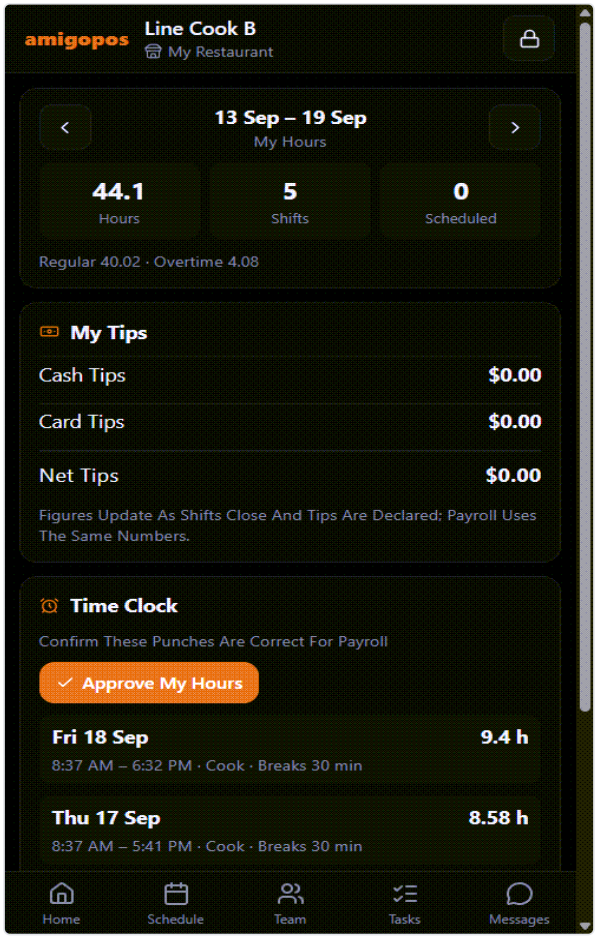
- **Hours** and **Shifts** — what you actually worked, breaks already deducted.
- **Scheduled** — what you were scheduled for, so the difference is visible.
- **Regular**, **Overtime**, **Double Time** — split the way your store's time clock allocates them.
- While you are clocked in, the shift so far is counted and marked as still running.

Tips

- **Cash Tips** — what you declared at clock-out.
- **Card Tips** — gratuities on the checks you closed.
- **Contributed** / **Received** — the tip pool, if your store runs one.
- **Net Tips** — what the tips come to after the pool.
- **Still On Check** — tips you have not taken home in cash, so they come with your pay.

Your punches

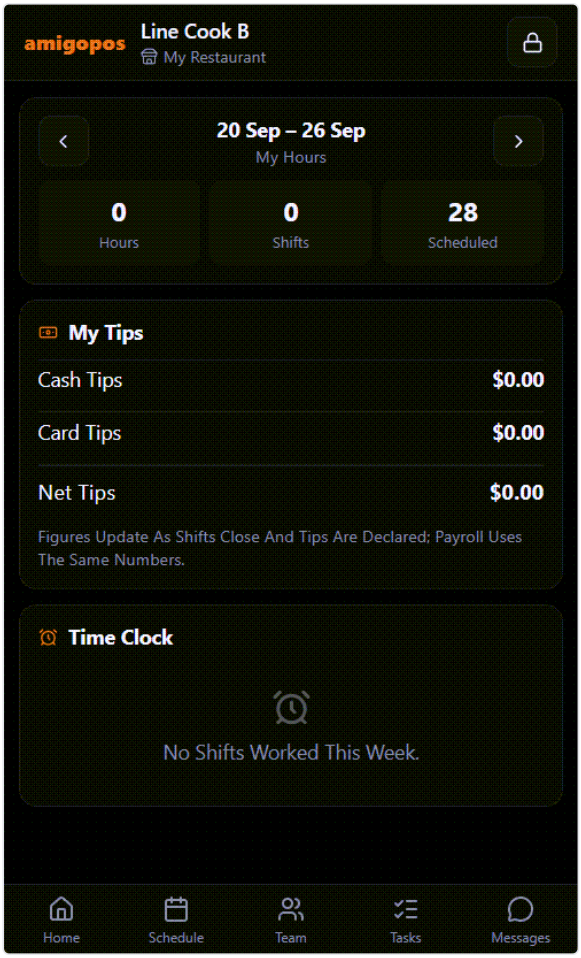
Underneath, each day lists the clock-in and clock-out times, any breaks and the hours that came out of them — the same rows your manager sees in the timesheet. A missing clock-out shows up here first, which is the best reason to look at this screen on the way home rather than on pay day.



> These figures are worked out fresh every time from your punches and checks, so a correction your manager makes shows up the next time you open the screen. A tip-pool change can move a past week's tips too. Nothing here is a payslip — taxes and deductions belong to your payroll service. If a number looks wrong, ask your manager to check the timesheet.

Approving your hours

Above your punches, **Approve My Hours** confirms that every finished punch in the week on screen is right for payroll. Each approved punch then shows **You Approved**, and **Manager Approved** once your manager has approved it too; when everything is approved the button is replaced by **You Approved This Week**.

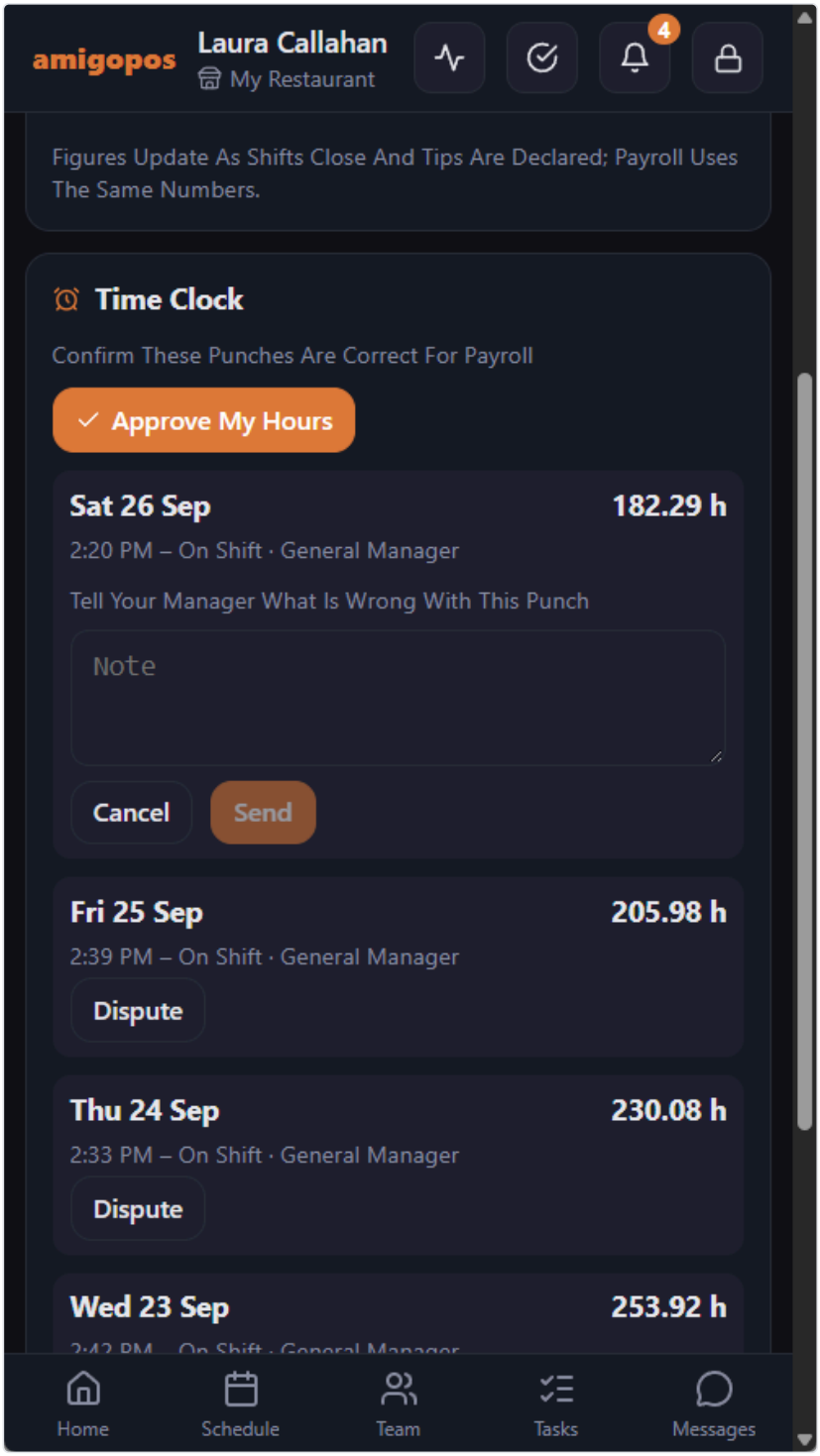


If your manager later corrects one of those punches, your approval on it is cleared and the button comes back, so you can check the corrected times before approving again. A shift you are still clocked in on can't be approved until it ends.

Something wrong? Don't approve it — tell your manager which day, and approve once it is fixed.

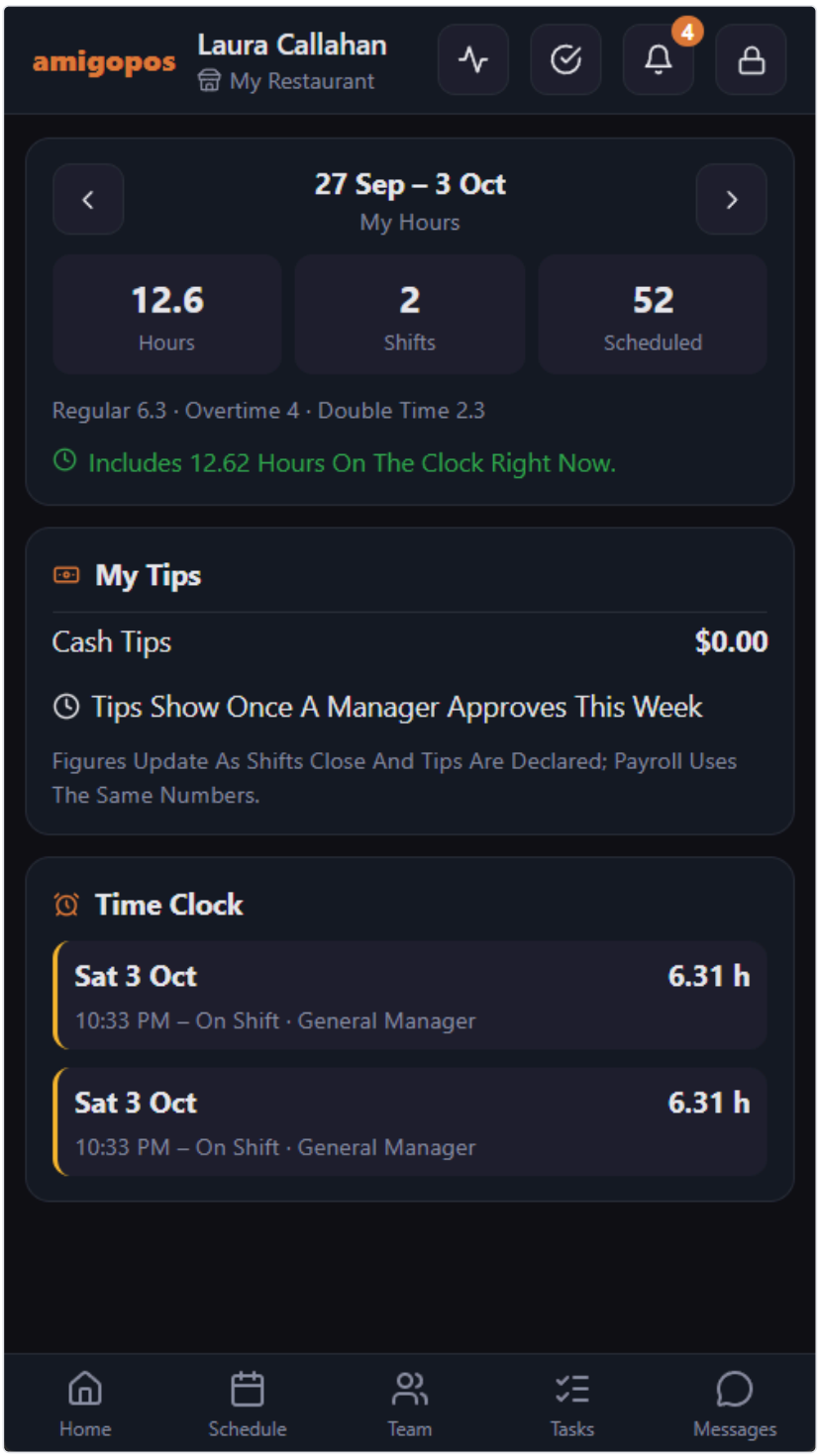
Disputing a punch

If a punch is wrong, tap **Dispute** on it, write what is wrong and tap **Send**. Every manager gets a message, and the punch shows **Disputed — Waiting For A Manager** with your note until a manager approves it as it is or corrects it. **Approve My Hours** leaves a disputed punch alone.



When tips wait for your manager

Some stores show tips only after a manager has approved the week. Then the tips card shows **Tips Show Once A Manager Approves This Week** instead of your card tips, pool and net tips; the cash tips you declared still show.



The same screen is at the register: My Hours at the register.

Phone notifications and schedule alerts

Employees › Scheduling & Time Clock

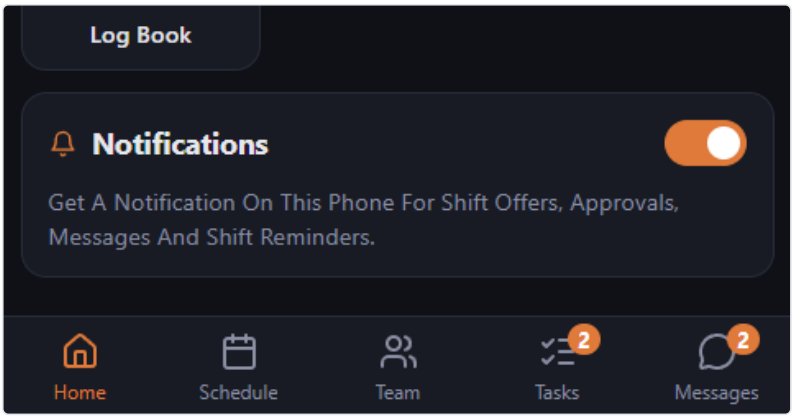
View online ↗

Switching on notifications for a phone, and the three alerts the store sends before and after a shift.

The staff site can raise a notification on a phone even when the site is closed — for a message from a manager, a decision on a request, or a shift about to start.

Turning them on (employee)

1. On the staff site Home screen, find the **Notifications** card and switch it on.
2. The phone asks whether to allow notifications. Allow it.
3. On an iPhone, add the site to the Home Screen first (*Share* › *Add to Home Screen*) and open it from there — Apple only allows notifications for sites added that way.



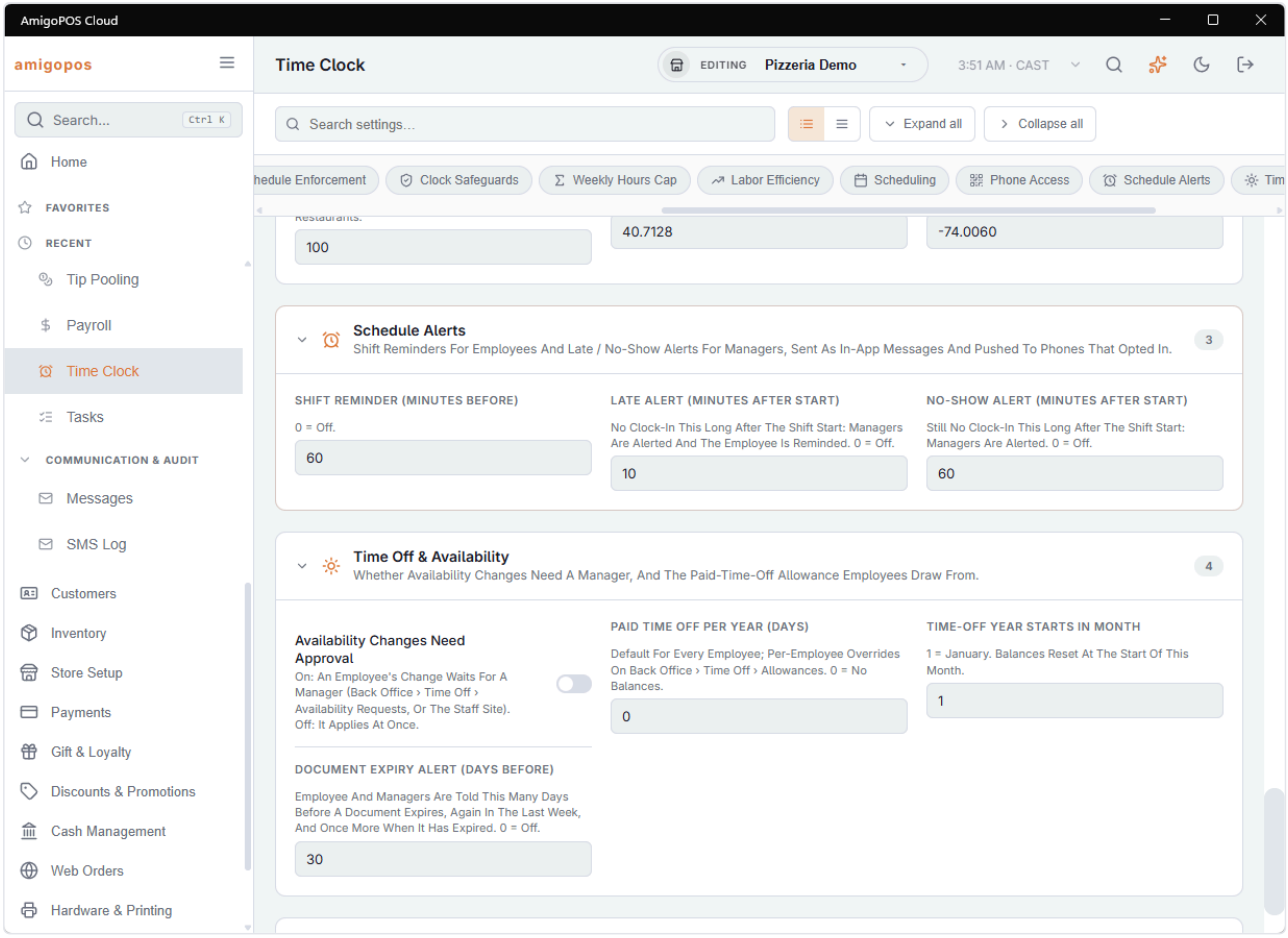
The setting belongs to that phone: switching it on at home does not switch it on for a second phone, and switching it off stops that phone only. If your phone was replaced, or you cleared the browser, switch it on again. The card is hidden on phones that cannot do notifications at all.

What gets sent

- Any message you receive — from a manager, or from the system (a time-off answer, a shift offer).
- **Shift reminder** — a while before your shift starts.
- **Running late** — if the shift has started and you have not clocked in, to you and to the managers.
- **No-show** — to the managers, if nobody has clocked in well past the start.

Setting the alerts (manager)

Back Office › Employees › Scheduling › Time Clock, section *Schedule Alerts*:



- **Shift Reminder (Minutes)** — how long before the start the employee is reminded. 60 by default; 0 turns it off.
- **Late Alert (Minutes)** — how long after the start, with no punch, the employee and the managers are told. 10 by default.
- **No-Show Alert (Minutes)** — how long after the start the managers get a no-show alert. 60 by default.

Each fires once per shift, for published shifts only. The employee gets theirs in the language on their profile; managers get theirs in the store's. The same alerts feed the late and no-show counts in *Attendance history*.

> Notifications need one setup step on the server before any phone can use them; until that is done the Notifications card stays hidden. Messages still arrive in the site's Messages tab either way — a notification is a nudge, not the message.

Manager alerts

Managers also get **manager alerts** through the same notifications — labor over target, overtime ahead, a cash void, an ingredient about to run out. They go to the managers clocked in at the store, outside the store's quiet hours, and each manager can turn kinds of alerts off for themselves. See Manager alerts.

For drivers

- **New delivery run** — the register dispatched orders to you.
- **Order removed** — the store took an order off your run.
- **Order cancelled** — bring it back to the store.
- **Order paid online** — do not collect payment at the door.

They arrive in your own language and open the Deliveries screen.

More that is sent

- **Shift changed**, **New shift**, **Shift removed** — when a manager changes one of your published shifts; see Scheduler.
- **List assigned** — when a manager gives you a list for today or a later day.

- **Overdue** — 10 minutes after a list's due time, if it is not finished: to the person it was given to, or to whoever is on the clock in its jobs, and to the managers on the clock.
- **Out of range** — to every manager, as soon as a temperature or number outside its range is recorded.
- **Clocked out at …** — when a manager closes your punch from their phone; reply to it if the time is wrong.

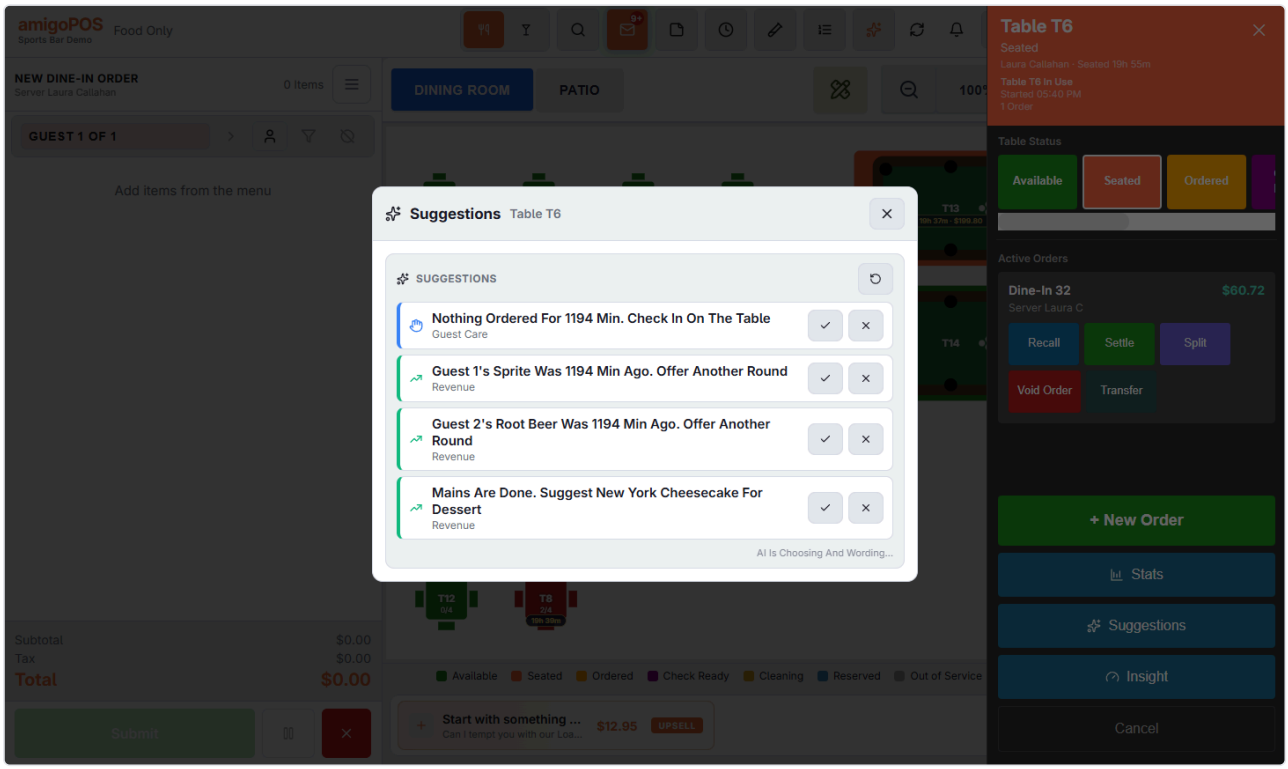
Each one is also a message, so it waits in Messages on the staff site and at the register. The task alerts are explained in Task lists.

Delivery notifications

- **Managers** are notified when a driver reports a problem at the door and when an order is coming back to the store. The notification opens Dispatch.
- **Drivers** are notified when the store resolves the problem they reported (carry on) and when the store wants an order brought back.

Suggestions from the register

With notifications on, the Notifications card also has **Suggestions From The Register**: **All** (late food, a check waiting, a known guest seated and the rest), **Safety Only** (a guest's allergies and blocked customers) or **Off**. The choice belongs to you, not the phone, so it follows you to any phone you sign in on. See Suggestions.



Unlocking with Face ID or fingerprint

Employees › Scheduling & Time Clock

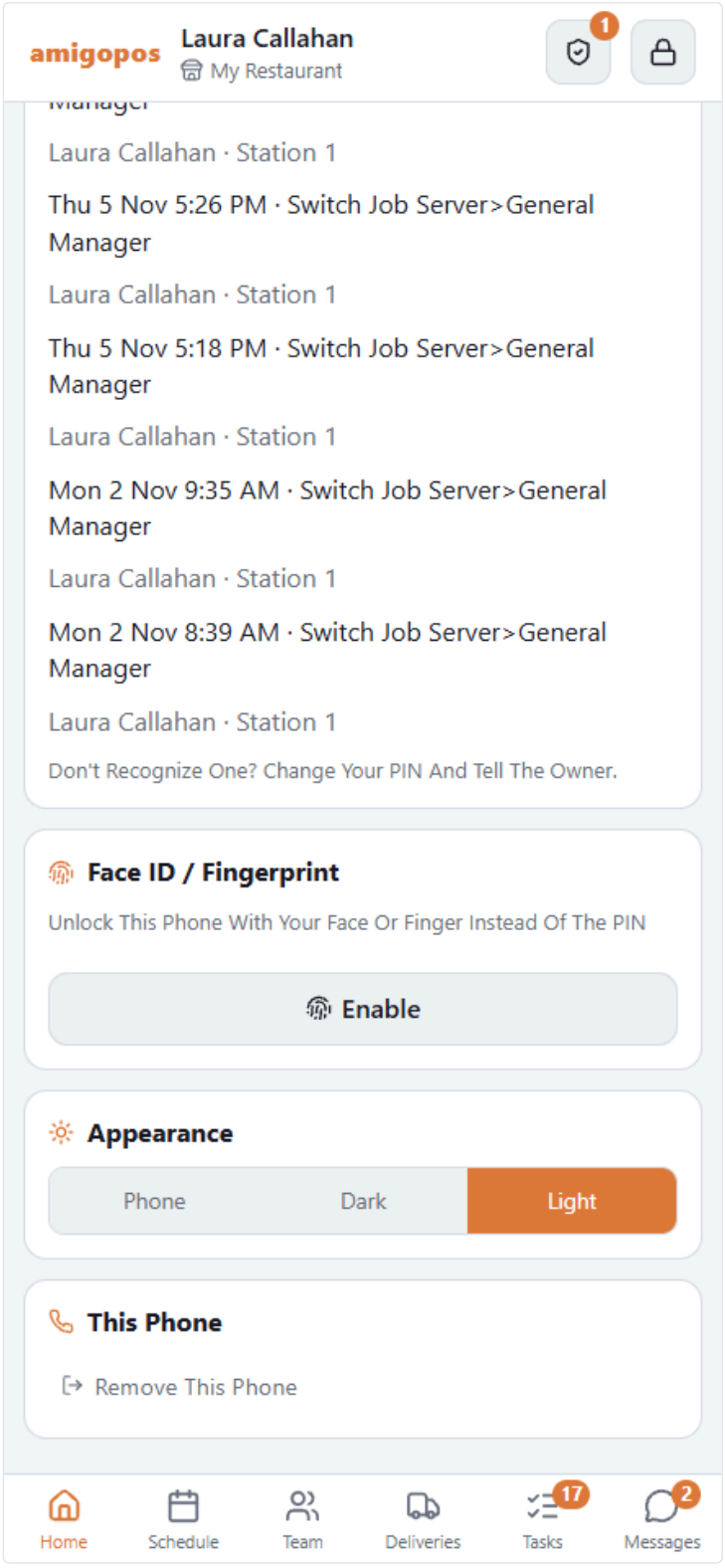
View online ↗

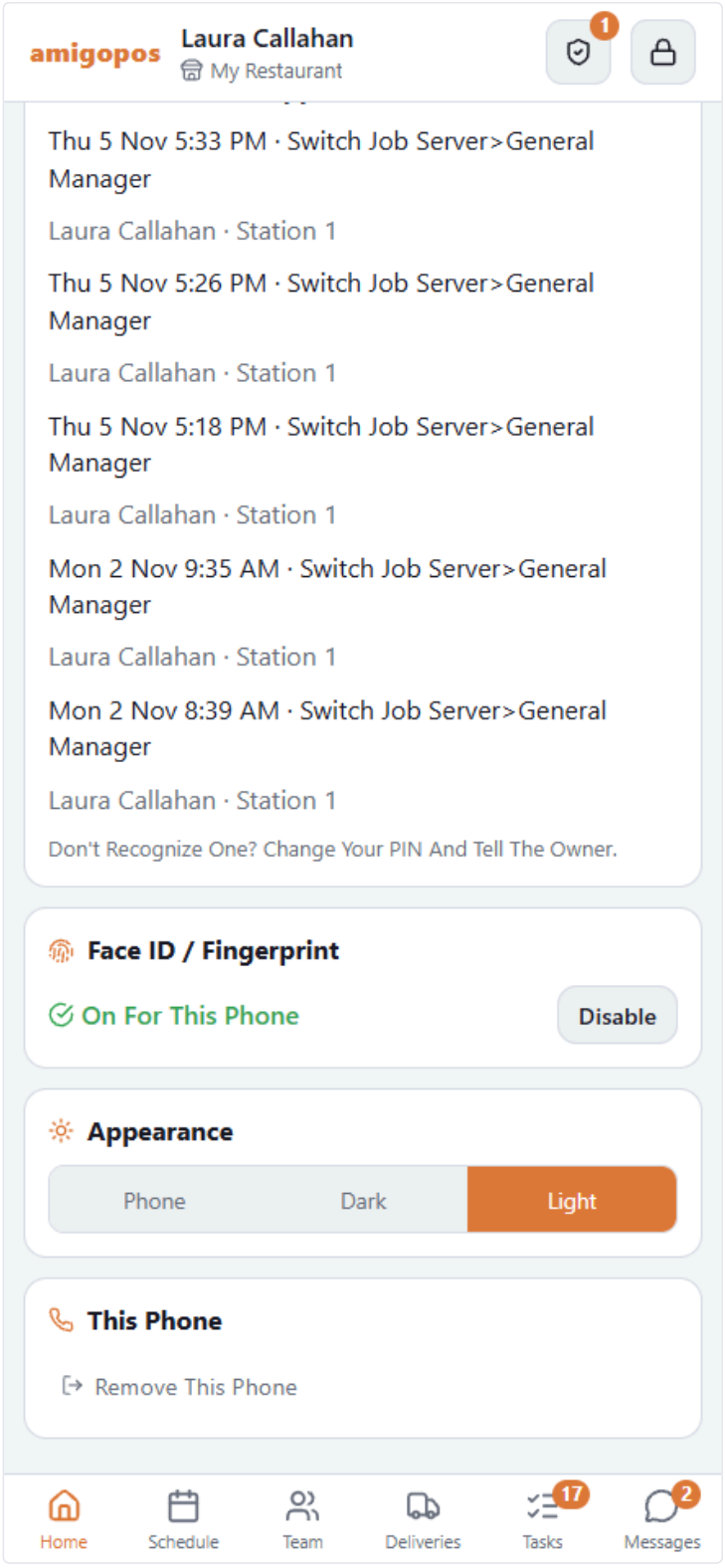
For employees: unlock the staff site with your face or finger instead of typing your PIN.

Instead of typing your PIN, you can unlock the staff site with the Face ID, Touch ID or fingerprint you already use to unlock your phone. Your face or fingerprint never leaves the phone: the phone checks it, and the store only receives the phone's signed answer.

Turning it on

1. Open the staff site and unlock it with your PIN.
2. On the Home screen, find the **Face ID / Fingerprint** card and tap **Enable**.
3. The phone asks for your face, finger or screen lock. When the card says **On For This Phone**, it is done.

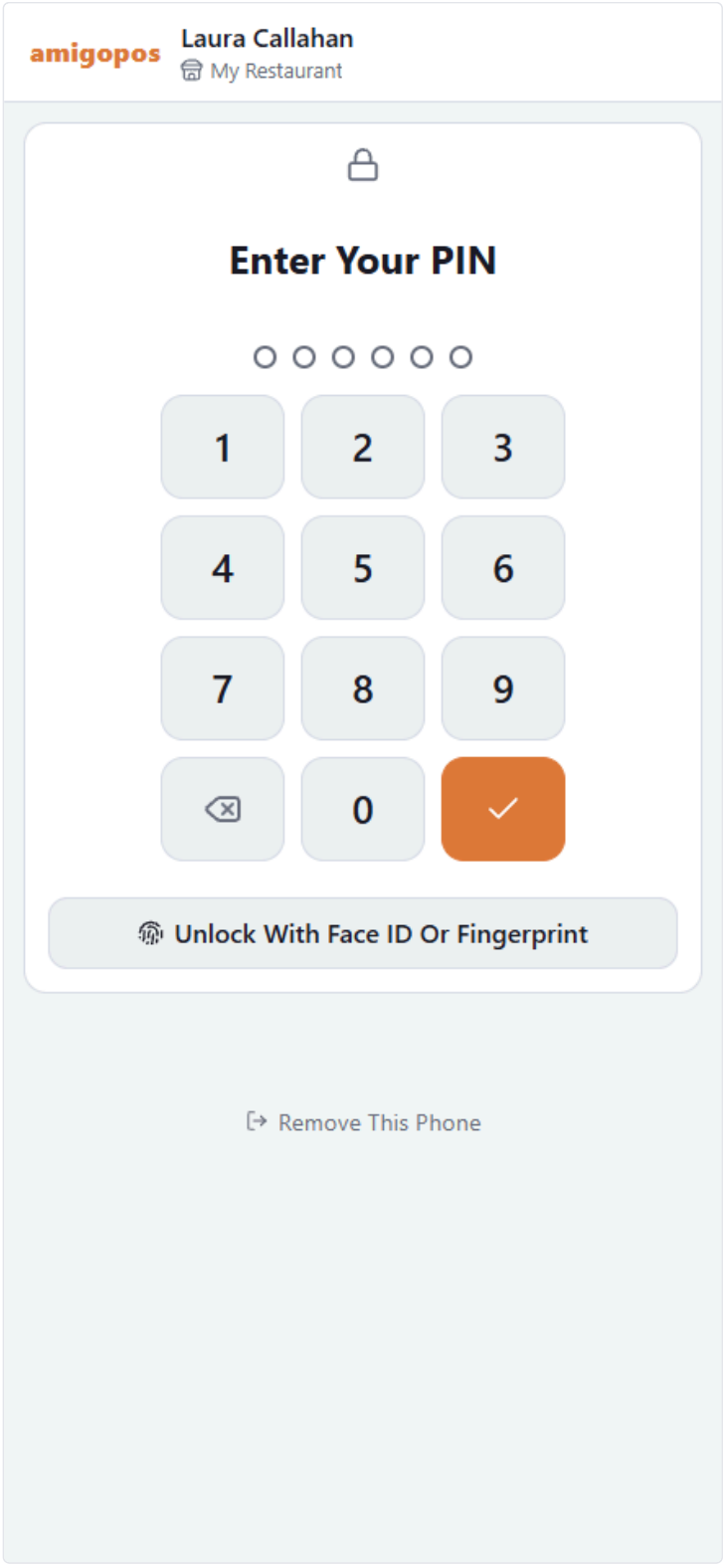

amigopos
Laura Callahan
My Restaurant
1
Laura Callahan · Station 1
Thu 5 Nov 5:26 PM · Switch Job Server>General Manager
Laura Callahan · Station 1
Thu 5 Nov 5:18 PM · Switch Job Server>General Manager
Laura Callahan · Station 1
Mon 2 Nov 9:35 AM · Switch Job Server>General Manager
Laura Callahan · Station 1
Mon 2 Nov 8:39 AM · Switch Job Server>General Manager
Laura Callahan · Station 1
Don't Recognize One? Change Your PIN And Tell The Owner.
Face ID / Fingerprint
Unlock This Phone With Your Face Or Finger Instead Of The PIN
Enable
Appearance
Phone
Dark
Light
This Phone
Remove This Phone
Home
Schedule
Team
Deliveries
Tasks
17
Messages
2



The card only appears on phones that have Face ID, Touch ID, a fingerprint reader or a screen lock, in a browser that supports it. The phone may save it with your passwords as a *passkey* for the staff site; that is what it uses next time.

Unlocking

The PIN pad now shows **Unlock With Face ID Or Fingerprint**. Tap it, then look at the phone or touch the sensor. It unlocks for the same 12 hours as the PIN, and it works even after five wrong PINs have locked the pad. Your PIN still works as before.



It belongs to this phone

- It unlocks only the phone where you turned it on, and only while that phone is set up for you. Your passwords app may show the passkey on your other devices; it opens nothing there.
- It ends with this phone's access: *Remove This Phone*, 90 days without opening the site, a manager revoking phone access, or leaving the job. When the phone is set up again, turn it on again.
- **Disable** on the card turns it off for this phone.

If it does not work

- Cancelling the face or finger prompt shows no message: the PIN pad stays, and the button works again.
- **“Face ID Or Fingerprint Did Not Work — Use Your PIN”** — the phone reported an error, or the store did not accept its answer, for example after the PIN pad had been open for more than two hours. Tap the button again, or use the PIN. If it keeps happening, Disable it and Enable it again.
- **“Face ID Or Fingerprint Could Not Be Turned On”** — the phone reported an error, or the store did not accept the new passkey, for example after the Home screen had been open for more than two hours. Make sure the phone has a screen lock, then tap Enable again.
- **The button is gone from the PIN pad** — it was turned off, or the phone was set up again. Unlock with your PIN and turn it on again.

> Managers: there is nothing to switch on. It is tied to the **Staff Site Address** setting (Time Clock, *Phone Access*): if that address is ever changed, everyone has to turn Face ID or fingerprint on again.

Your shifts in your phone’s calendar

Employees › Scheduling & Time Clock

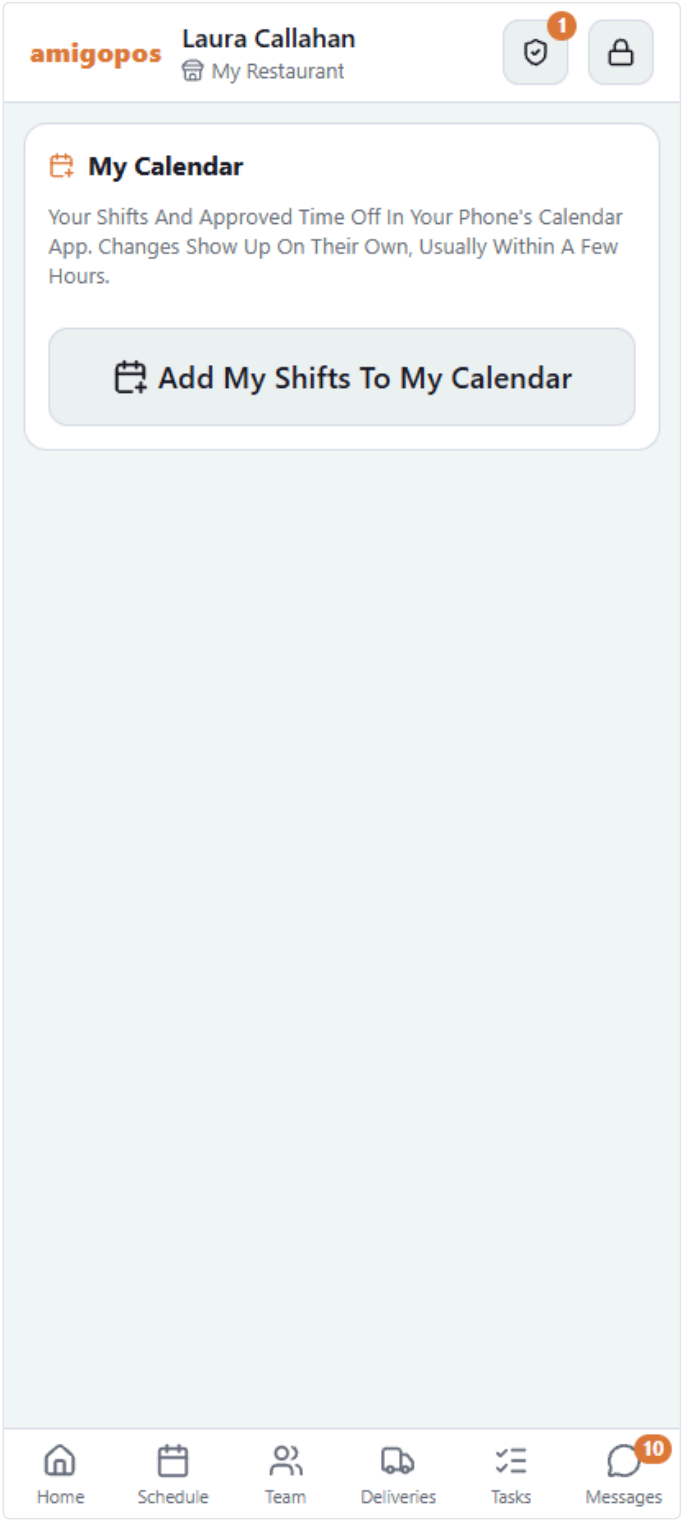
View online ↗

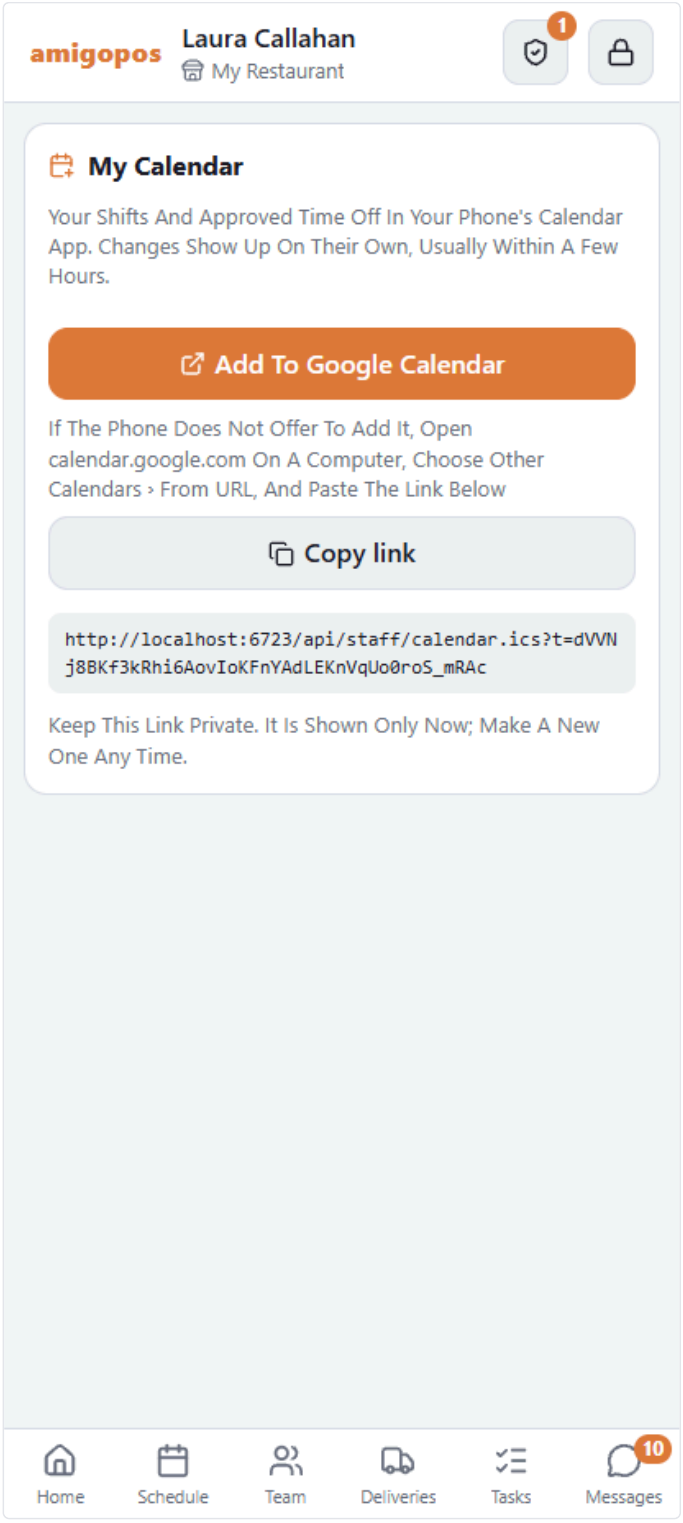
For employees: a private link that puts your published shifts and approved time off in your phone’s calendar app, and keeps them up to date.

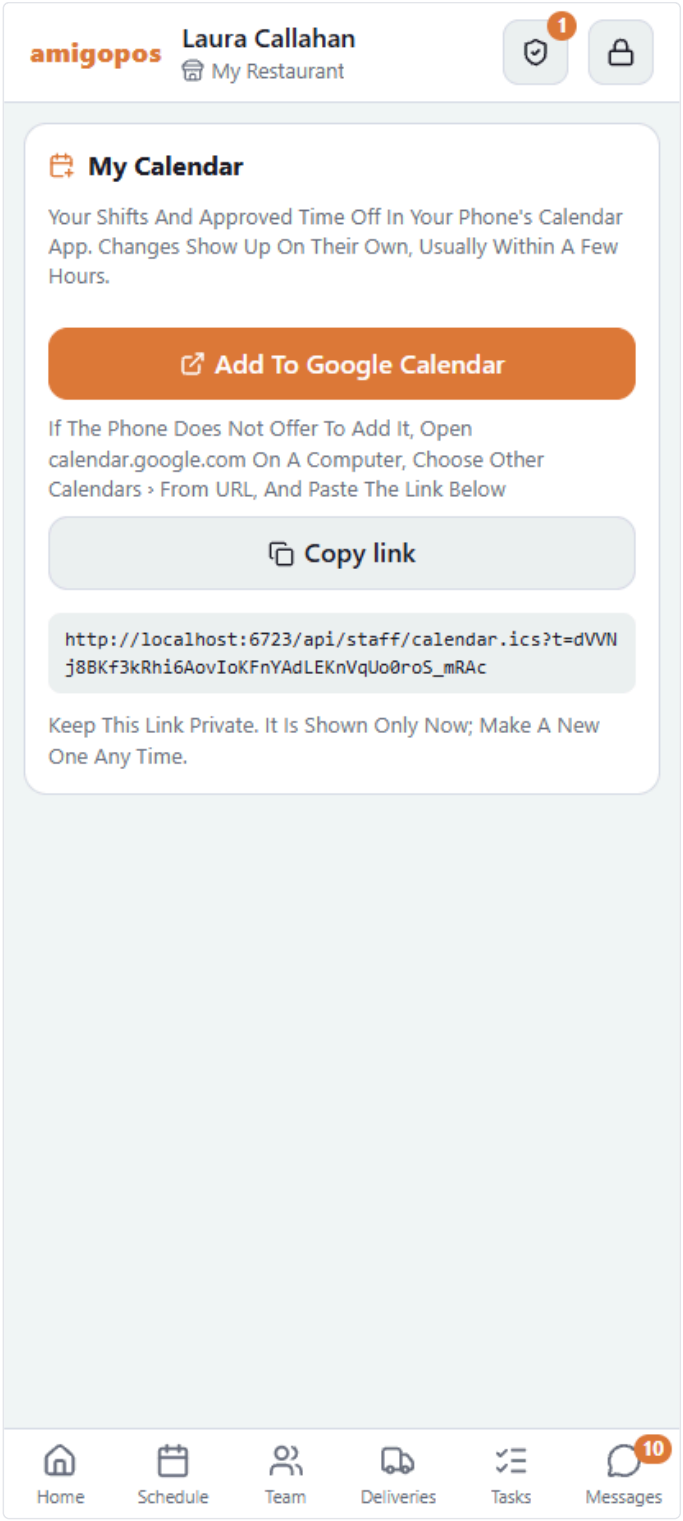
My Calendar puts your published shifts and approved time off in the calendar app on your phone — the iPhone’s Calendar, Google Calendar, Outlook, or any app that can subscribe to a calendar by its address. Once it is set up there is nothing more to do: when your schedule changes, the calendar catches up on its own.

Setting it up

1. On the staff site Home screen, tap the **My Calendar** tile.
2. Tap **Add My Shifts To My Calendar**. A private link is made for this phone.
3. Add it to your calendar app:
    - **iPhone** — tap **Subscribe On This Phone** and confirm in the Calendar app.
    - **Android** — tap **Add To Google Calendar**. If the phone does not offer to add it, tap **Copy Link** and send the link to yourself; then, on a computer, open calendar.google.com, choose *Other calendars › From URL* and paste it.
    - **Another calendar app** — tap **Copy Link** and paste it where the app subscribes to a calendar from a URL.


amigopos
Laura Callahan
My Restaurant
1
My Calendar
Your Shifts And Approved Time Off In Your Phone's Calendar App. Changes Show Up On Their Own, Usually Within A Few Hours.
Add My Shifts To My Calendar
Home
Schedule
Team
Deliveries
Tasks
Messages
10


amigopos
Laura Callahan
My Restaurant
1
My Calendar
Your Shifts And Approved Time Off In Your Phone's Calendar App. Changes Show Up On Their Own, Usually Within A Few Hours.
Add To Google Calendar
If The Phone Does Not Offer To Add It, Open calendar.google.com On A Computer, Choose Other Calendars › From URL, And Paste The Link Below
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Keep This Link Private. It Is Shown Only Now; Make A New One Any Time.
Home
Schedule
Team
Deliveries
Tasks
Messages
10



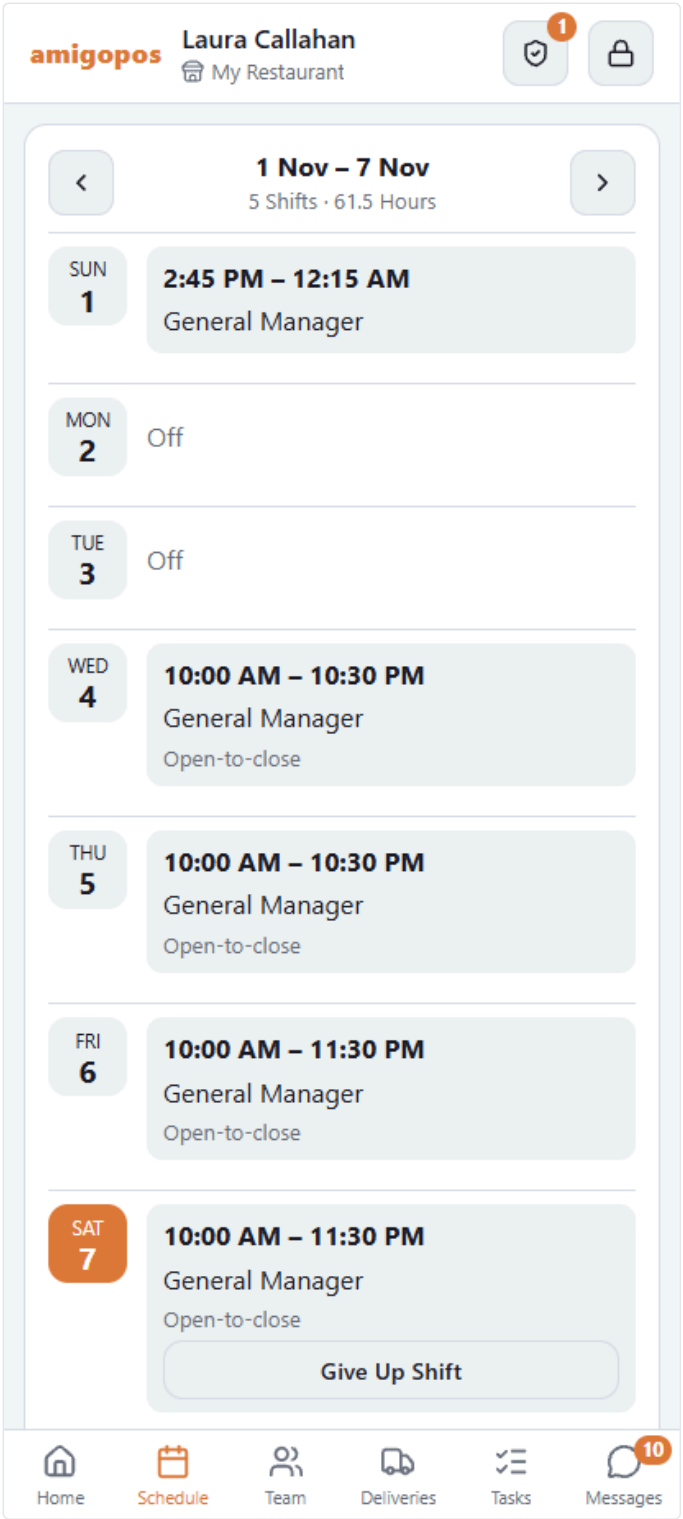
The link is shown only now, right after it is made — the store keeps nothing that could show it again. Keep it private: anyone who has it can see your shifts.

What shows in the calendar

- A calendar named *My Shifts*, with your store's name.
- Each published shift, titled with the job and the store, with the shift's note if it has one — at every store you work at, from 30 days back to 90 days ahead.
- Approved time off, as *Time Off*: all day, or the hours of a part-day request.

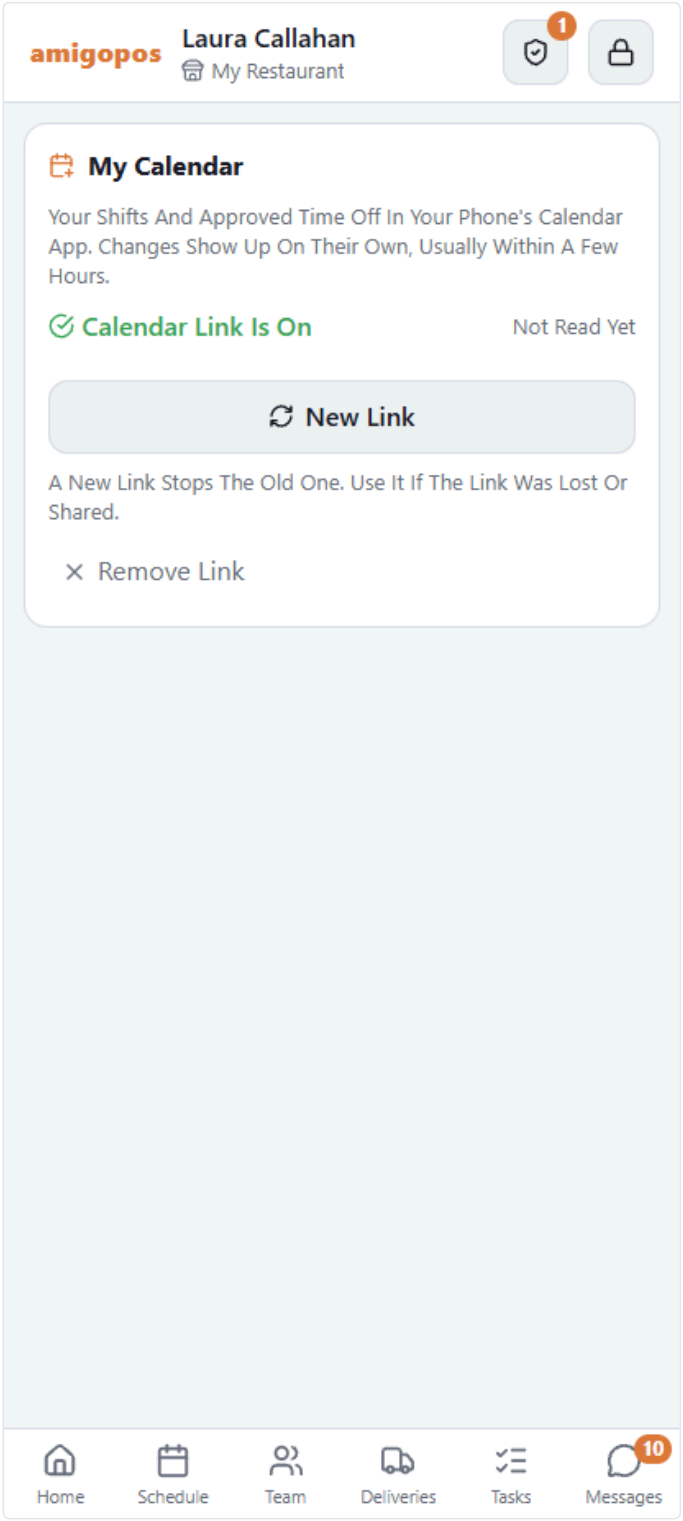
- A shift that runs past midnight ends the next morning. Times show in the phone's own time zone.

Drafts never appear; a shift shows once it is published. Each calendar app decides how often it checks for changes — usually within a few hours, and Google Calendar can take up to a day. The **Schedule** tab on the staff site is always current.



Later

Opening My Calendar again shows **Calendar Link Is On** and when a calendar app last read it; *Not Read Yet* means no calendar app has read it yet.



- **New Link** — makes a new link and stops the old one. Use it if the link was lost or shared; then subscribe with the new link and delete the old calendar from your calendar app.
- **Remove Link** — stops the link. Delete the calendar from your calendar app as well: the app can keep showing what it read last.

When the link stops

The link belongs to this phone's access to the staff site. It stops when the phone is signed out (*Remove This Phone*, or 90 days without opening the site), when a manager revokes phone access, when the store switches phone access off, or when you no longer work there. A calendar app reading the link does not keep the phone signed in. A second phone of yours makes its own link.

If something goes wrong

- **Tapping Subscribe On This Phone does nothing** — copy the link and add it in the iPhone's Settings, under the Calendar accounts: *Add Account › Other › Add Subscribed Calendar*.
- **The calendar shows on the computer but not on the Android phone** — in the Google Calendar app's settings, open the calendar and switch on *Sync*.
- **The calendar stopped changing** — the link was replaced or removed, or this phone's access ended. Open My Calendar, make a link again and subscribe with it; if the phone's access ended, the phone has to be set up again first, with a new invite.

Time off and availability (manager)

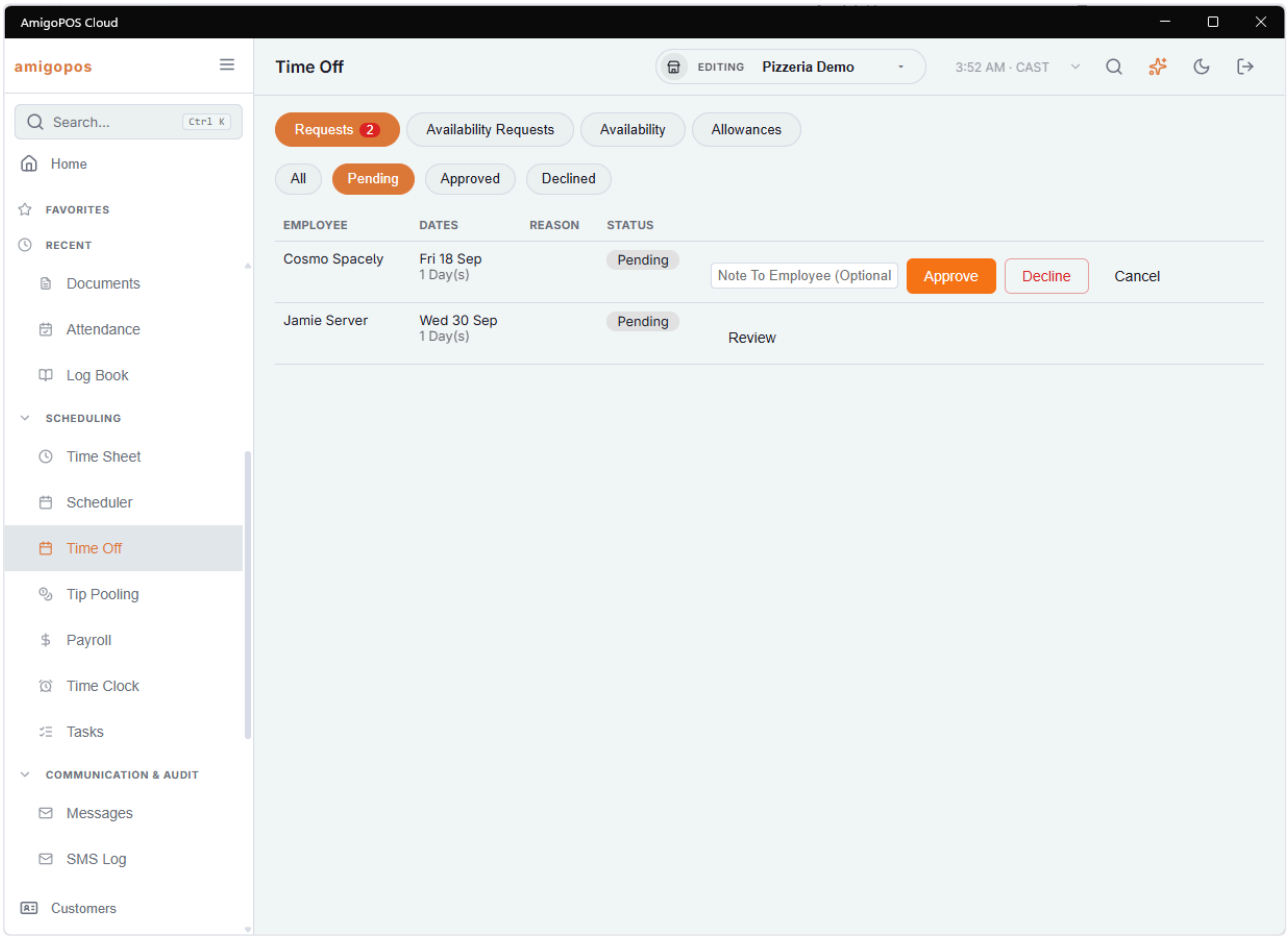
Employees › Scheduling & Time Clock

View online ↗

Approving time-off requests and keeping each employee's weekly availability.

Back Office › Employees › Scheduling › Time Off is the manager's side of what staff set in My Schedule: time-off requests, availability changes, paid-time-off balances and each employee's weekly availability. The page appears for jobs with the **Manager Screen** permission.

It has four tabs: **Requests**, **Availability Requests**, **Allowances** and **Availability**. The first two show a count while something is waiting.



Requests

All, **Pending**, **Approved** and **Declined** filter the list; pending requests sort to the top. Each row shows the employee, the dates — with the number of days, or the times for part of a day, and **Unpaid** when it is unpaid — the reason and the status.

- When balances are on, a pending request shows **Balance After This Request: n Days**, in red when it would go below zero.
- **Review** opens a box for an optional **Note To Employee (Optional)**, with **Approve** and **Decline**. Either way the employee gets a message with the dates and your note.
- A decided request shows who decided it and when, and the note.

Approved days show as **Time Off** on the scheduler grid and pending ones as **Time Off?**, so a conflict is visible while you build the week rather than after.

Part of a day, and unpaid days

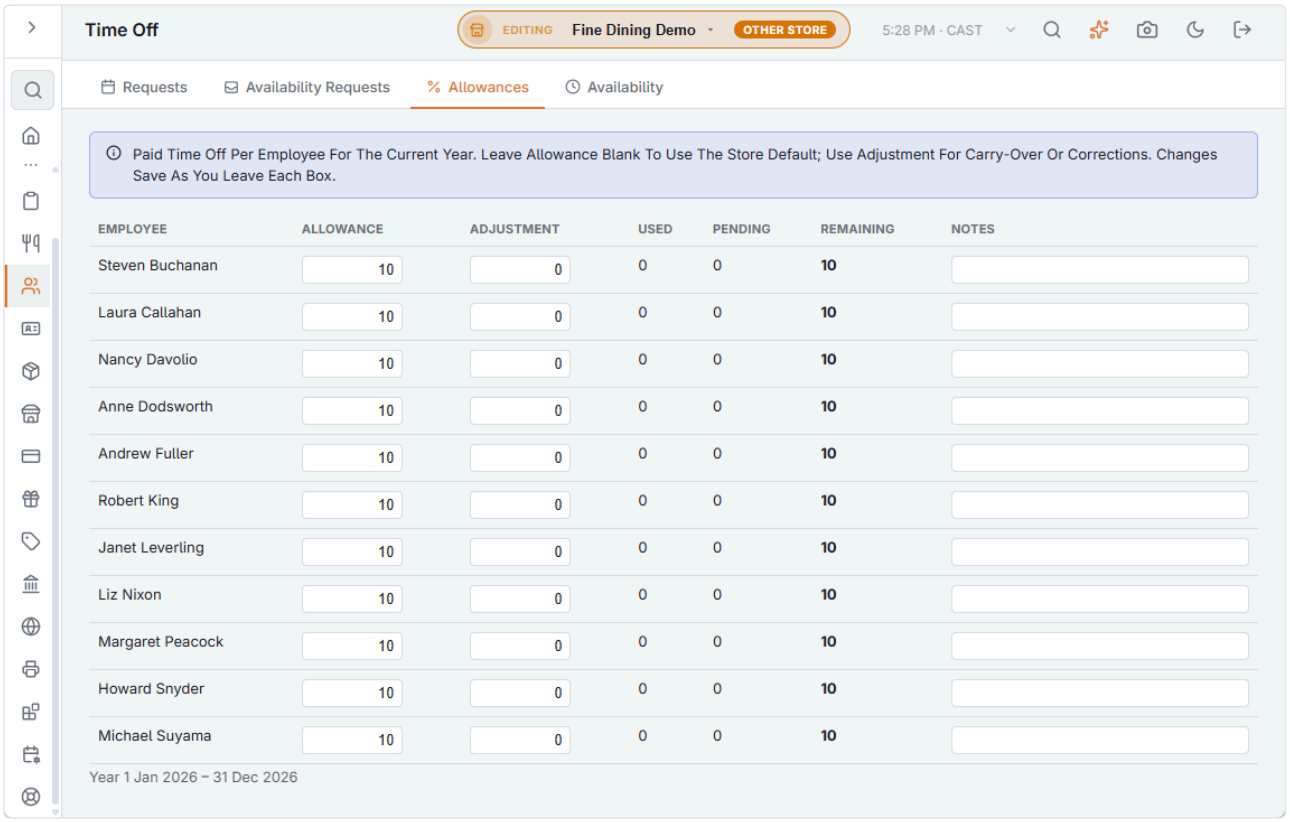
A request can cover one date from a time to a time — the dentist at eleven, not the whole Tuesday — and it can be marked unpaid. Part days are charged against the balance as hours, eight hours to the day.

Availability Requests

With **Availability Changes Need Approval** on (Time Clock settings), an employee saving their weekdays sends a request instead of changing anything. This tab shows their **Current** week above the **Proposed** one, with the changed days marked; **Approve** applies it and **Decline** keeps the current one, each with an optional note to the employee.

Allowances

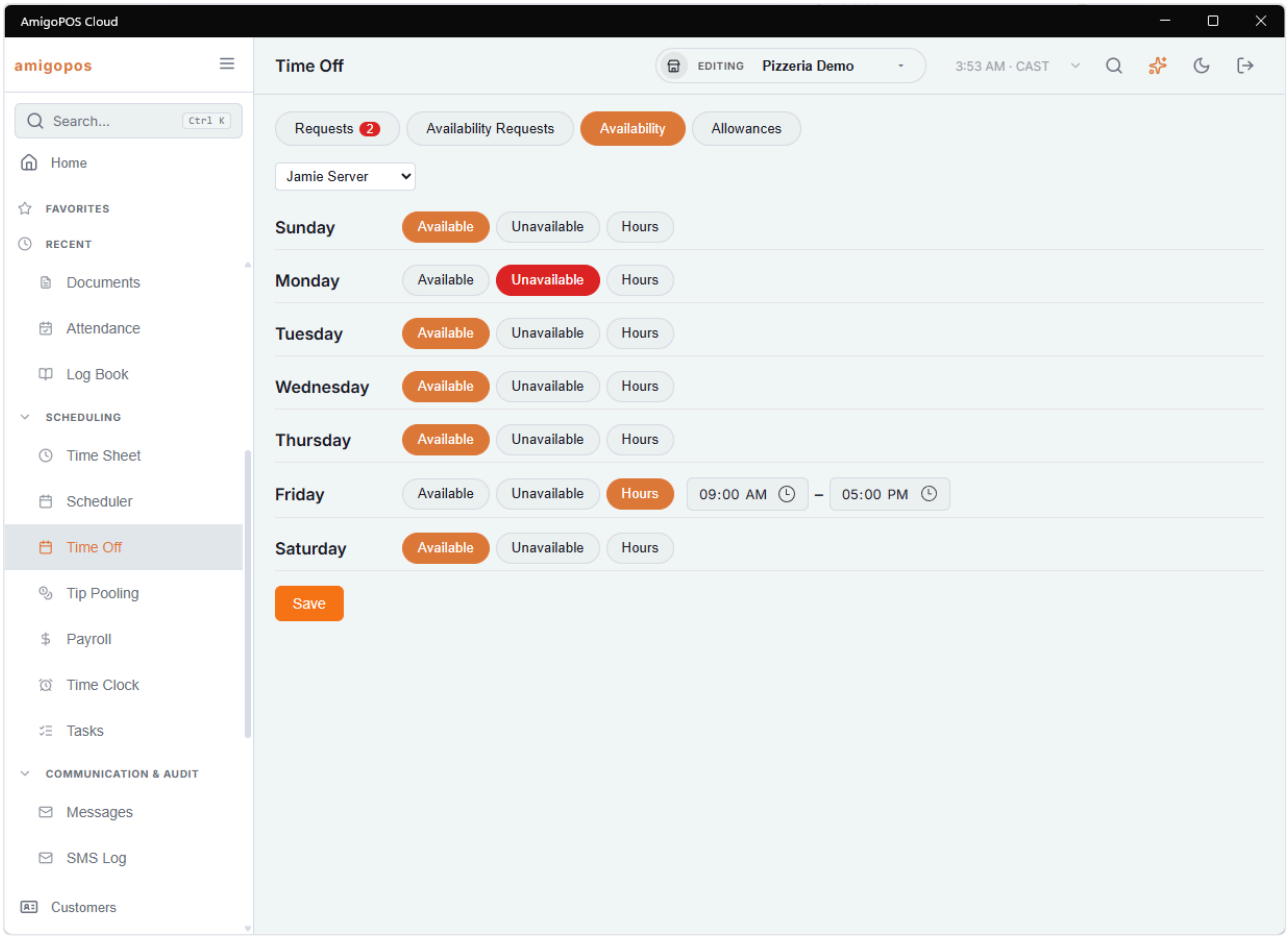
Paid time off per employee for the current time-off year, whose dates are shown under the table. Leave **Allowance** blank to use the store's standard; use **Adjustment** for carry-over or corrections. Changes save as you leave each box. **Used**, **Pending** and **Remaining** follow from them.



When days are earned from hours worked, an **Earned** column appears; point at a figure to see the hours worked behind it.

Availability

Pick an employee in **Select Employee** to edit their weekly availability with the same weekday editor the employee sees — for staff who tell you their availability in person. A manager's change here always applies at once: you are the approval.



> Nothing here blocks scheduling. A shift on an unavailable or approved-off day is flagged, not refused — sometimes you schedule it anyway and ring the person.

Paid time off settings

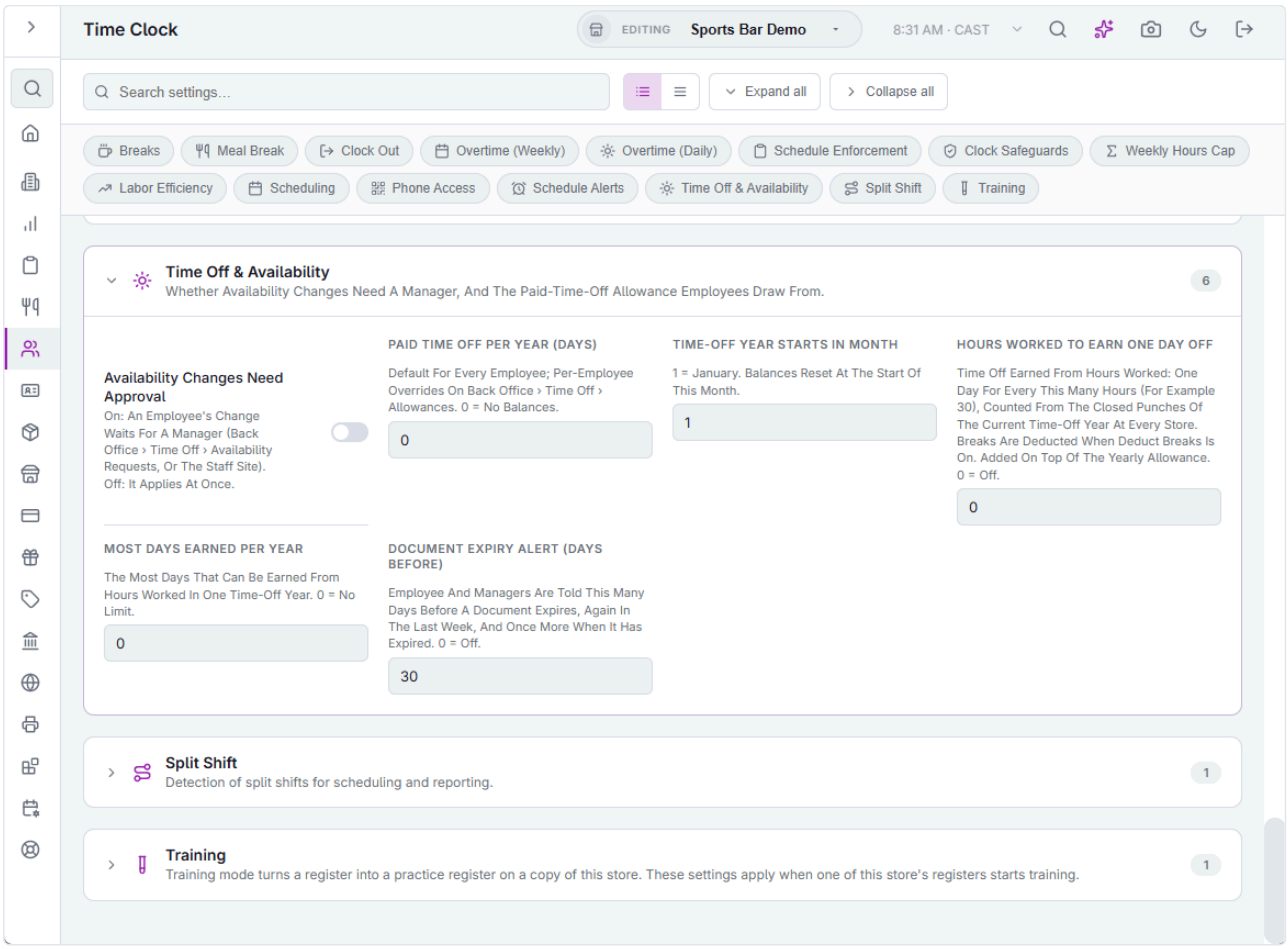
In **Back Office › Employees › Scheduling › Time Clock**, section **Time Off & Availability** (see Time Clock settings):

- **Paid Time Off Per Year (Days)** — the store's standard allowance; 0 leaves balances off. The allowance is available from the start of the year.
- **Time-Off Year Starts In Month** — the month the year rolls over; 1 is January.
- **Availability Changes Need Approval** — see above.

Approvers then see what a request would leave, and the employee sees the balance on their phone.

Days earned from hours worked

Two settings in the same section add days off as employees work:



- **Hours Worked To Earn One Day Off** — 30 means one day for every 30 hours worked. 0 turns it off.
- **Most Days Earned Per Year** — a ceiling on the days earned this way in one time-off year. 0 means no limit.

The hours come from finished punches that started in the current time-off year, at every store, with breaks taken off when **Deduct Breaks** is on. Days are counted in fractions — 45 hours at 30 is 1.5 days — and a punch counts once it is clocked out. The count starts again with each time-off year.

Earned days are added on top of the allowance and any adjustment, so a store can give days for hours alone: switching earning on turns balances on even when the yearly allowance is 0.

- What a request would leave, shown to the approver, includes the earned days.
- On the staff site, the employee's balance says how many days were earned and from how many hours.

Requests from phones

Staff using the staff site send availability and time-off requests from there; they arrive here exactly like requests made at the register, and the decision reaches them in the site's Messages tab.

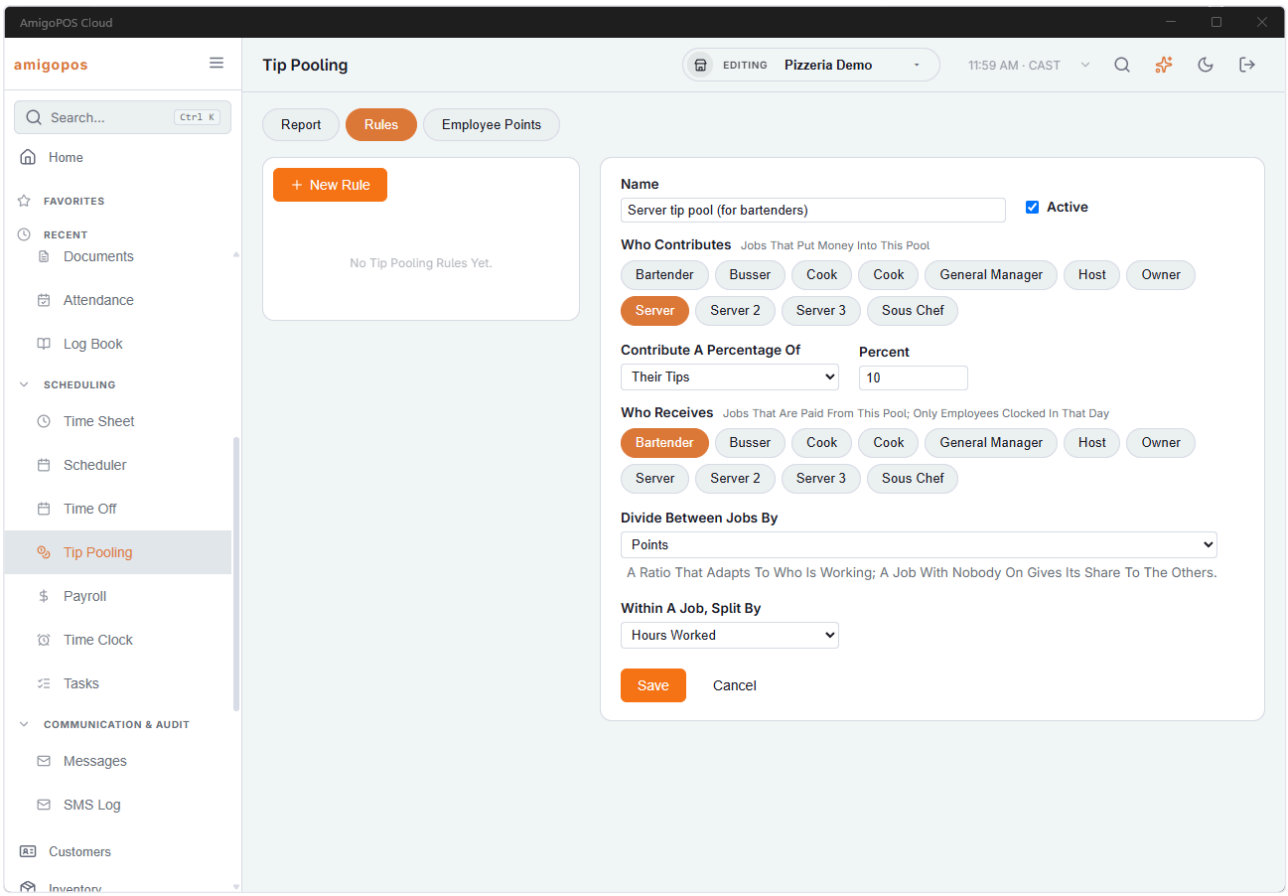
Tip pooling and tip-outs

Employees › Scheduling & Time Clock

View online ↗

Rules that move tips between jobs, and the daily report that feeds payroll.

Back Office › Employees › Scheduling › Tip Pooling turns your house tip policy into rules the system calculates every day: bartenders pooling their tips, servers tipping out runners and bussers, a support-staff pool from food sales.



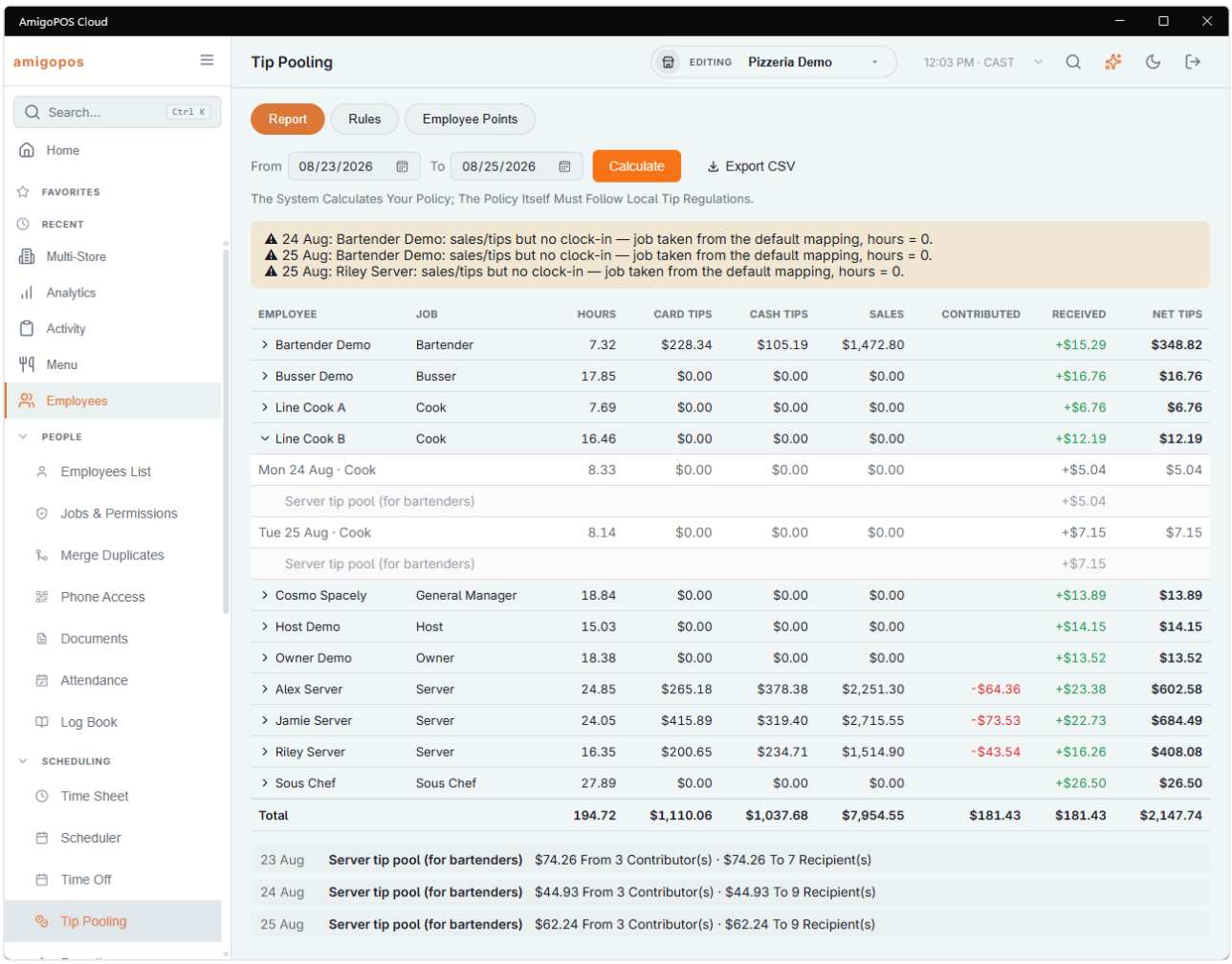
How a rule reads

Every rule is the same sentence: *these jobs contribute this percentage of their tips or their sales, and these jobs receive it, divided this way.*

- **Who contributes** — one or more jobs. Rules are set by job; to weight one person above or below coworkers in the same job, give them employee points (below).
- **Percentage of tips or of sales** — 100% of tips is a pool; 2% of sales is a classic tip-out. Sales can be limited to chosen menu categories, which is how “2% of food sales” is expressed.
- **Who receives** — one or more jobs. The same job on both sides is a pool; different jobs is a tip-out.
- **Divide between jobs by points or percentages** — points are a ratio that adapts to who is working, and a job with nobody clocked in gives its share to the others. Fixed percentages must add to 100, and an empty job returns its share to the contributors.
- **Within a job, split by hours or equally** — hours is the usual choice and the one that survives an argument.

The report

Pick a date range and calculate. Each employee gets one line — hours, card tips, cash tips, sales, contributed, received, net — and expands to show each day and each rule that moved money. The per-pool summary underneath shows what each pool collected and paid out. **Export CSV** hands the whole thing to payroll.



What the figures come from

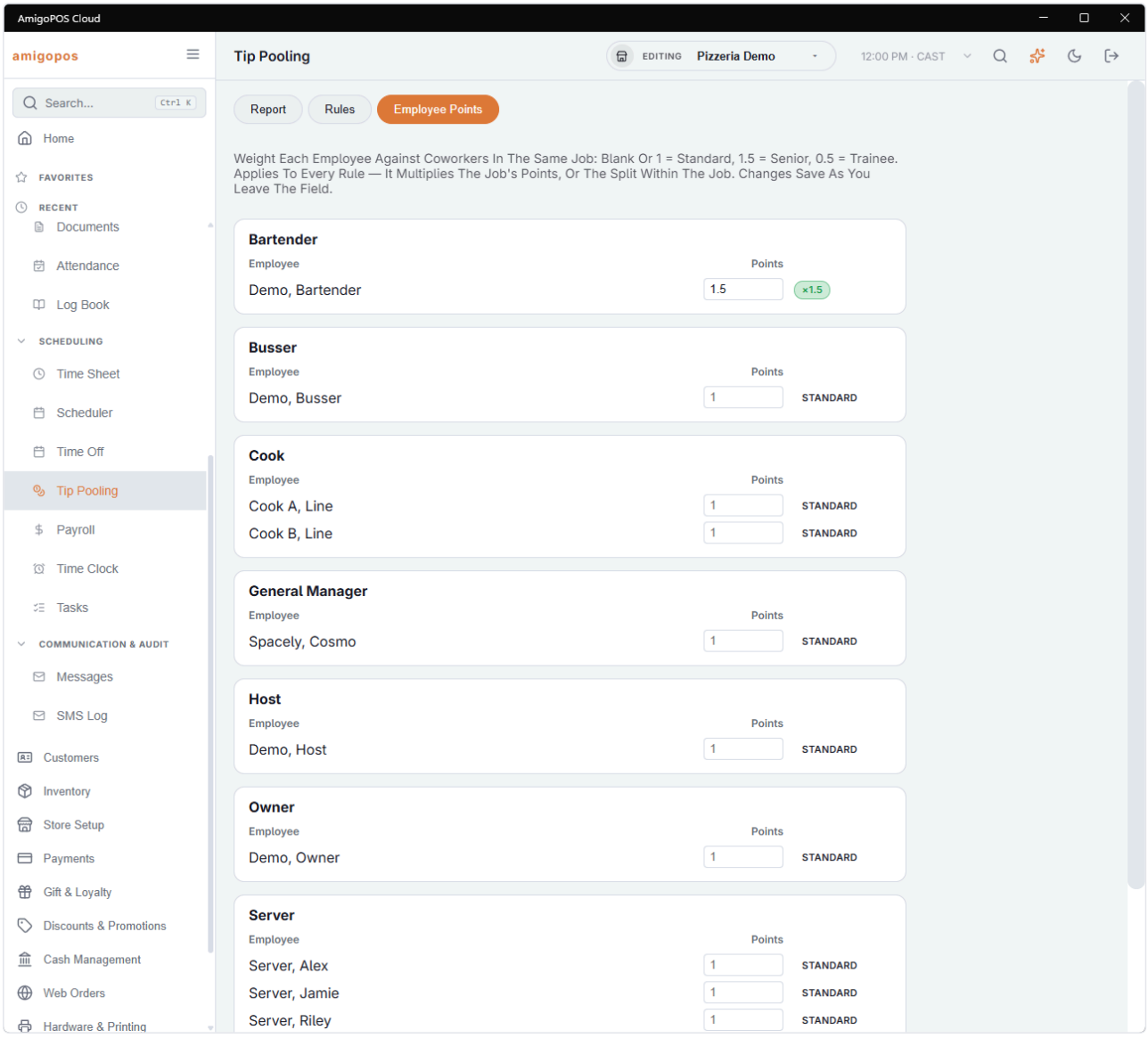
- **Hours** — time clock punches, minus recorded breaks, under the job clocked in.
- **Card tips** — gratuities on the tickets the employee owns.
- **Cash tips** — what the employee declared at clock-out.
- **Sales** — the employee's settled sales for the day, by menu category.

Nothing is stored: the report recalculates from those figures every time it is run, so a corrected timesheet or a fixed tip declaration is reflected immediately — and so is a changed rule, retroactively.

> The system calculates the policy you set; the policy itself must follow your local tip regulations, which differ by country and by state. Check yours before you switch a pool on, and tell the staff how it works — a pool nobody understands breeds more suspicion than no pool at all.

Employee points

The **Employee Points** tab weights individual people against coworkers in the same job — a senior bartender at 1.5, a trainee at 0.5. Employees are grouped under each of their jobs with one box each: blank (or 1) is standard, and a change saves as you leave the box.



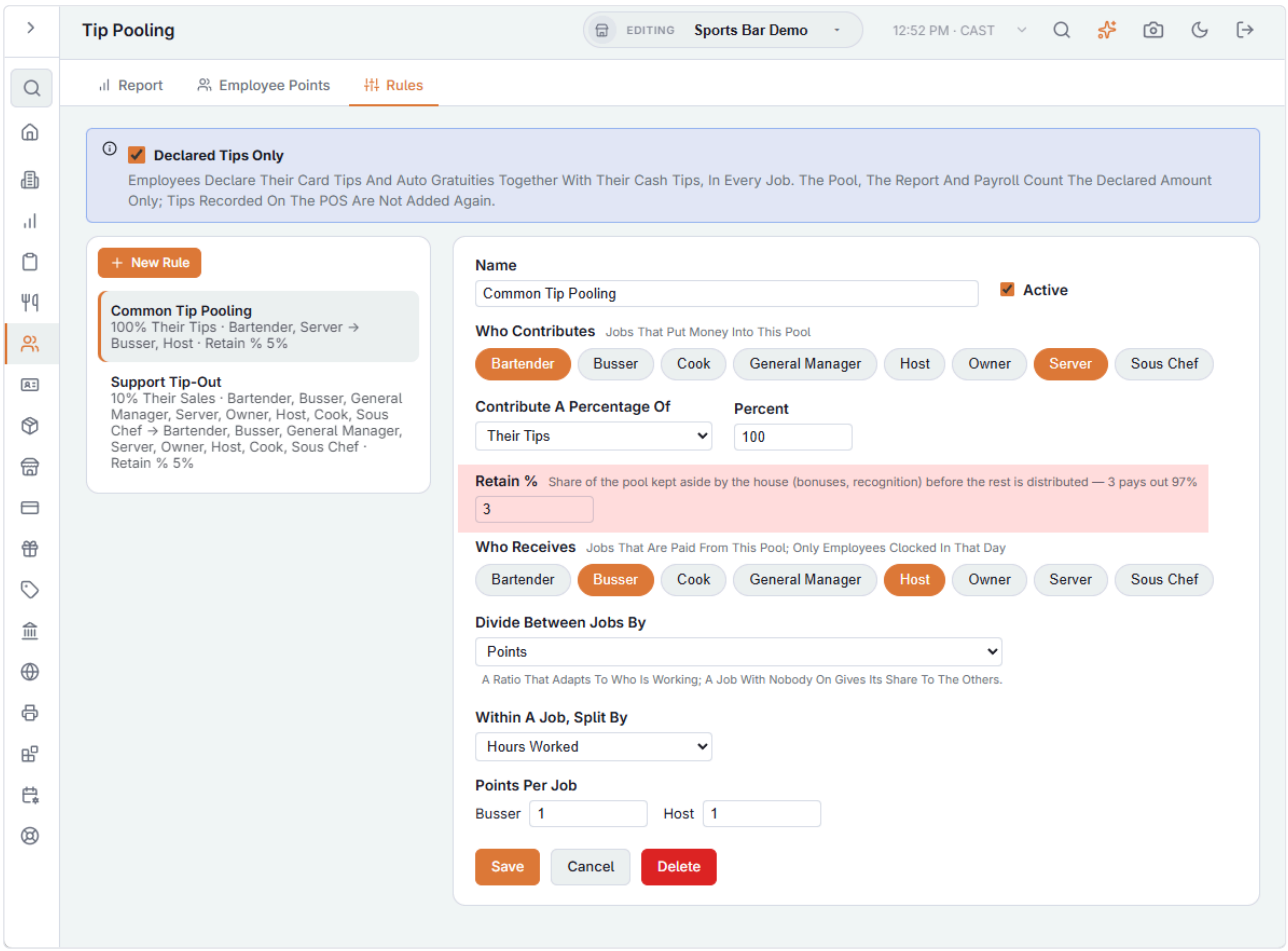
- The weight belongs to the **job assignment**, so the same person can be senior as a bartender and standard as a server.
- It applies to every rule. With *points*, a person's share is job points × employee points × hours (or × 1 when splitting equally). With *percentages*, the job's fixed share is split inside the job by employee points × hours (or × 1).
- In the report, the job column shows *×1.5* next to the job when a weight was applied.

Online order tips

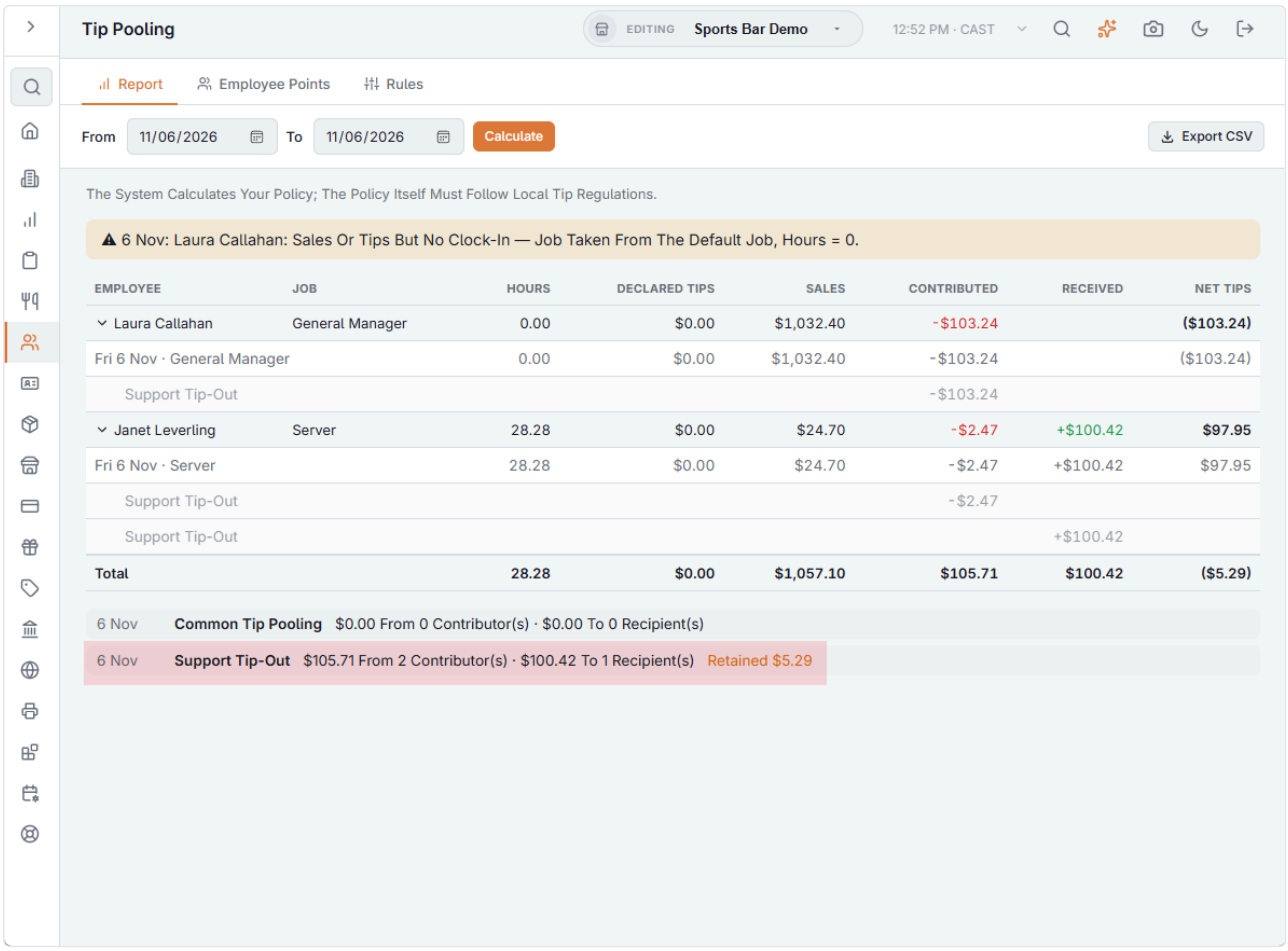
Tips left on web orders and pay links belong to no employee, so on their own they appear in nobody's figures. A rule with source **Online Order Tips** shares them: the store contributes the percentage you set, there are no contributor jobs to choose, and the recipient jobs divide it by points or percentages, by hours or equally, like any other rule. If nobody in a recipient job is clocked in that day, the money stays with the house and the report says so.

House share (Retain %)

A rule can keep part of its pool aside for the house — bonuses, recognition, breakage — before the rest is divided. **Retain %** takes that share off the top: at 3, a $1,000.00 pool keeps $30.00 aside and divides $970.00.

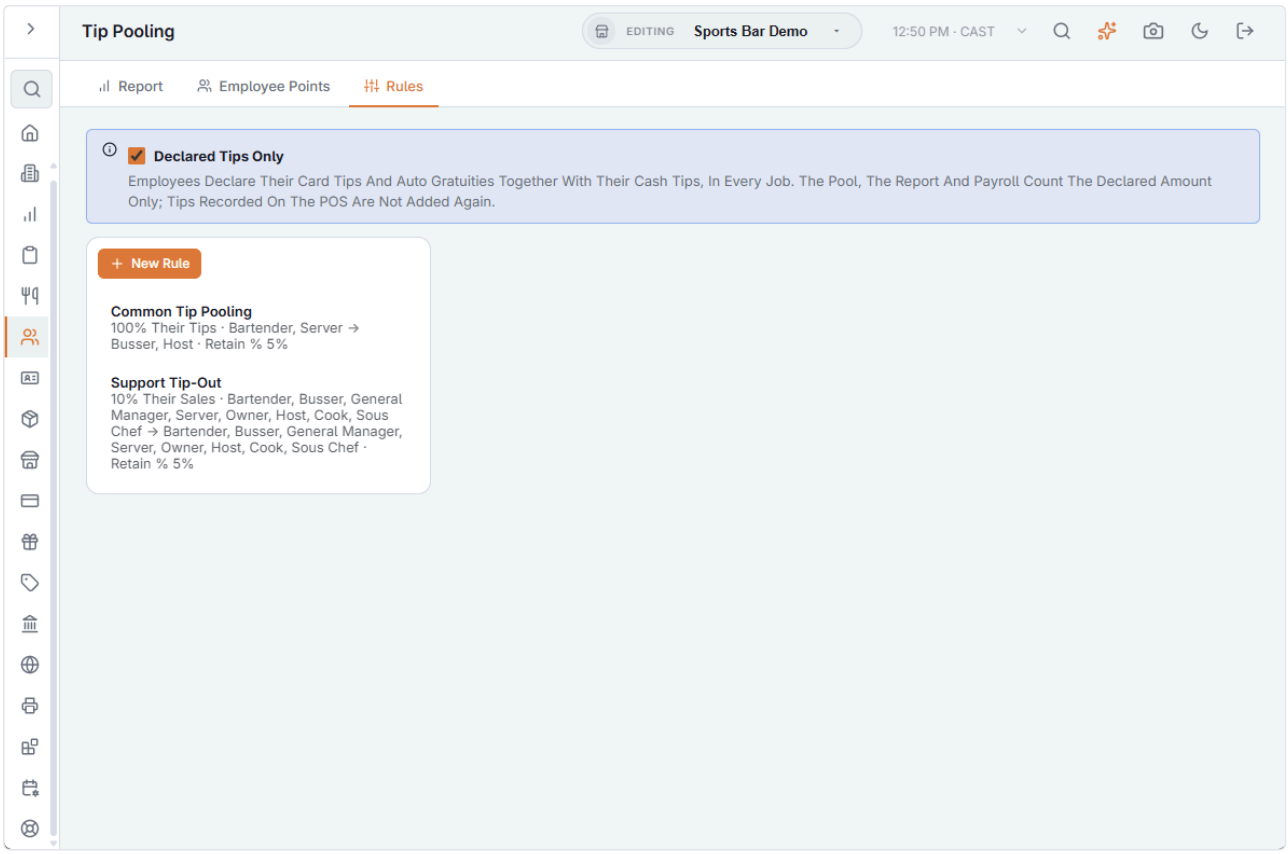


- The report lists it under the table, per day and per rule, as *Retained*. Nobody is paid it, so the **Received** total is the **Contributed** total less what was retained.
- The house share is rounded to the cent for each rule on each day, so over a week it can differ by a few cents from the percentage applied to the week's total.
- When nobody is there to receive and the pool goes back to the contributors, the house share is still kept first.

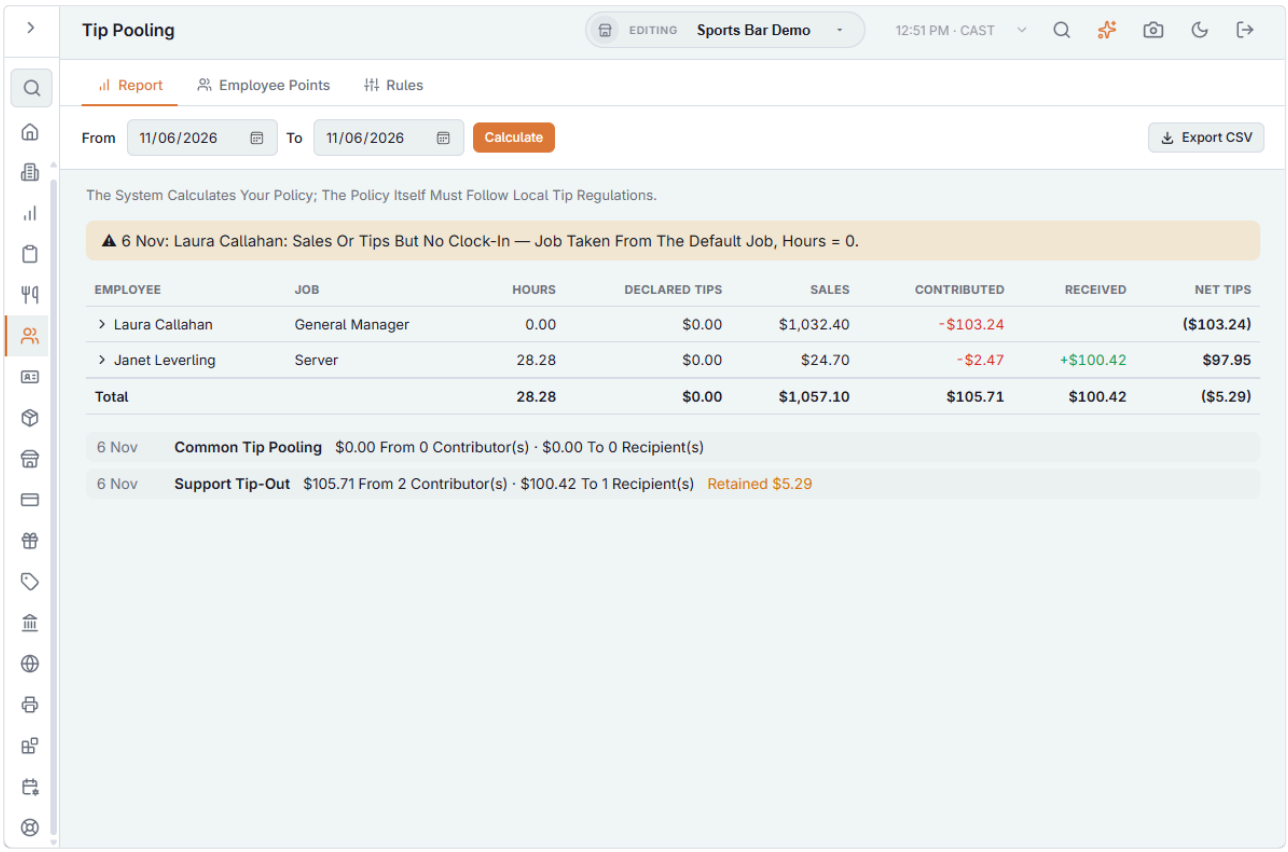


Declared tips only

Some houses have every employee declare everything they made — cash, card tips and auto gratuities — as one amount. Tick **Declared Tips Only** at the top of the **Rules** tab and the declaration becomes the only tips figure:



- Each employee's tips are what they declared. Tips recorded on the POS — auto gratuities and tips entered on card payments — are not added on top, so nothing is counted twice.
- The report shows one **Declared Tips** column in place of Card Tips and Cash Tips, and **Export CSV** does the same.
- Payroll counts the same figure: card tips show as zero and net tips are declared − contributed + received. The declared amount is treated as tips the employee already holds, which is right when card tips are paid out in cash at the end of the shift.
- It applies to every job, and to past dates as soon as it is ticked — calculate a period again to see it.



At clock-out

Tell staff to enter the total — cash, card tips and auto gratuities — where the clock-out (or the end-of-shift declaration on My Shift) asks for cash tips; the screen keeps its label. With blind entry on, the card tips step and the cash tips step are saved together as one declaration, and the minimum declaration, if the store enforces one, applies to the total.

> The report warns when a finished shift declared less than the tips recorded on that employee's own checks — usually the card tips were left out. Someone who declares nothing (a job without the clock-out declaration, or no clock-in at all) has no tips counted in this mode.

Payroll period report and exports

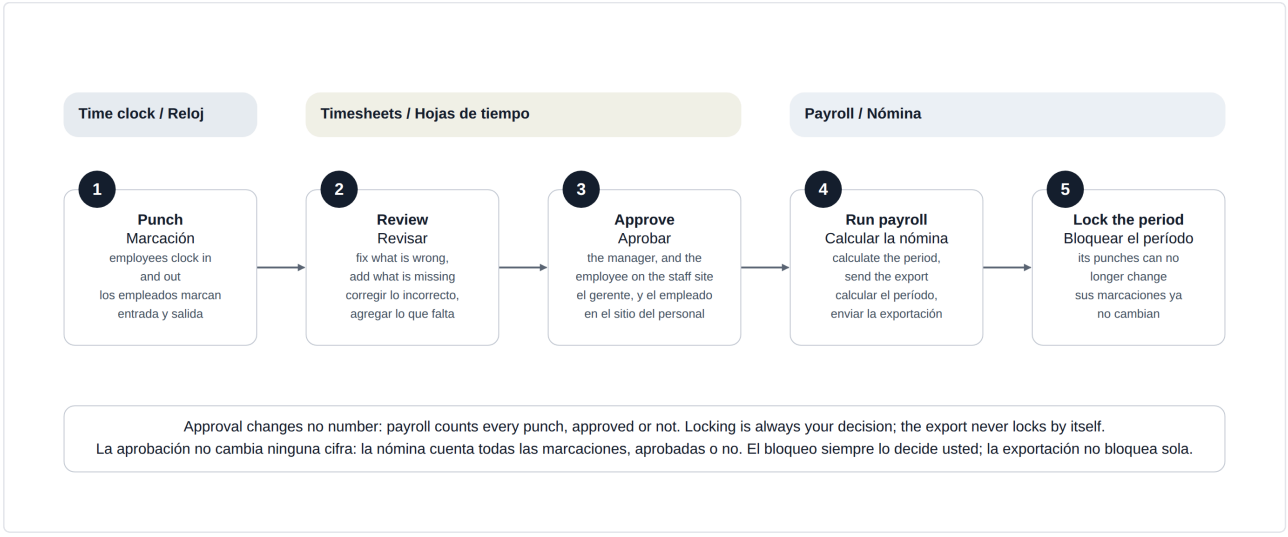
Employees › Scheduling & Time Clock

View online ↗

One line per employee for a pay period — hours, overtime, tips after the pool, what is still owed — and the files payroll services import.

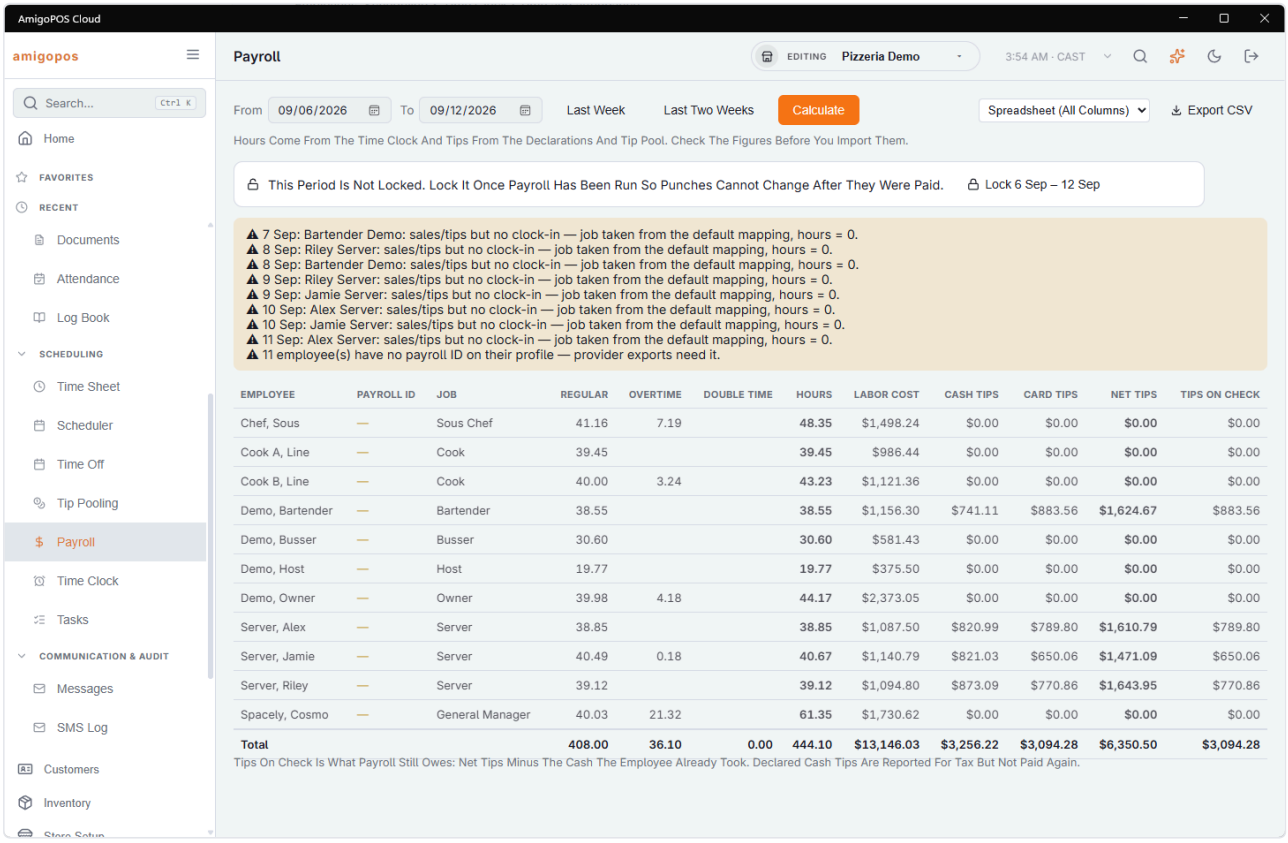
Back Office › Employees › Scheduling › Payroll brings the time clock, tip declarations and the tip pool together for a pay period, and produces the file your payroll service imports. The page appears for jobs with the Back Office **Reports** permission.

In one picture: how a week's punches reach payroll, and when the period is locked.



Running a period

Set **From** and **To**, or use **Last Week** or **Last Two Weeks** (full weeks ending before the current one) or **Last Month** (the previous calendar month), and press **Calculate**. Each employee gets one line:



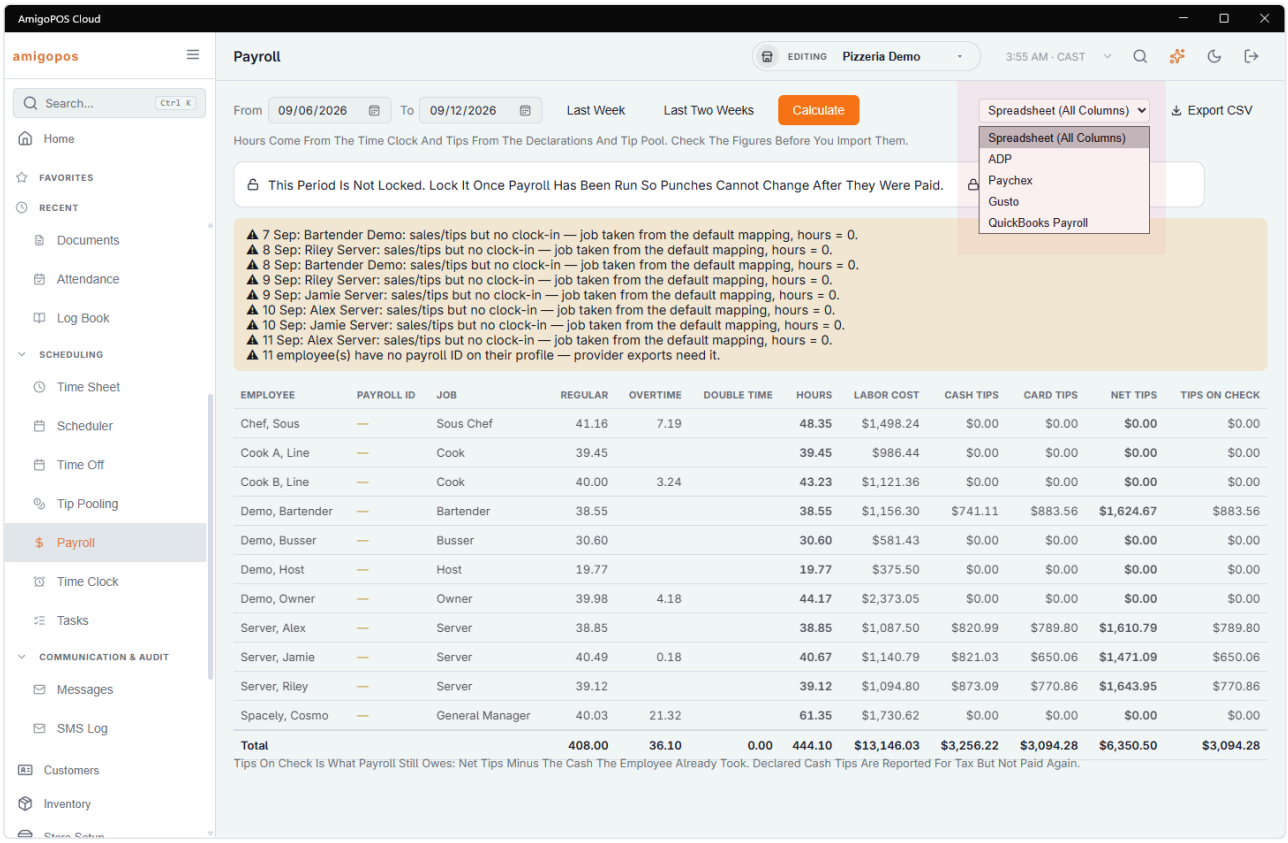
Column	Shows
Employee	Click the name to see the employee's punches for the period on the Time Sheet; its **Payroll** button brings you back here, calculated.
Payroll ID and **Job**	The employee's number in your payroll service, from their profile, and the job they worked most in the period.
Regular, **Overtime**, **Double Time**	From time clock punches, with breaks deducted when the store deducts them, split the way the time clock allocates overtime.

Column	Shows
Holiday	Only when the period contains a paid holiday; see Paid holidays.
Hours	The total. **n Open** beside it counts punches without a clock-out, which are not counted — close them on the Time Sheet.
Registered and **Variance**	Only when an employee has registered hours on their profile; see Registered hours and the hours variance.
Labor Cost	Hours at the pay rates on the punches.
Cash Tips	Declared at clock-out.
Card Tips	Gratuities on the tickets the employee owns.
Net Tips	Tips after the tip pool: collected, minus what they contributed, plus what they received.
Tips On Check	What payroll still owes them in tips: net tips minus the cash tips they already took home. Declared cash tips are reported for tax but not paid again.

A totals row closes the table. Warnings are listed above it — punches still open, punches longer than 12 hours or overlapping another punch of the same employee, tip pool problems, and employees without a payroll ID, who are also highlighted.

Exporting

Choose a format and press **Export CSV**:



- **Spreadsheet (All Columns)** — every column above plus pay rate, holiday premium, contributed, received, sales and shifts, for a spreadsheet or a bookkeeper.
- **ADP**, **Paychex**, **Gusto** — in each service's import layout, matched on the employee's **Payroll ID** (their employee number in that service). Employees without one are left out of the file.
- **QuickBooks Payroll** — matched on the employee's name, so it needs no payroll ID.

> Payroll services let each account rename its earnings codes. Map the codes once inside your payroll service, and check the first file you import against a known pay run before relying on it.

> Nothing is stored. The period recalculates from punches, tickets and the tip-pool rules every time, so a corrected time sheet or a fixed tip declaration shows up the next time you calculate — and so does a changed tip-pool rule, for past days too.

Locking the period

Under the toolbar, a panel shows whether the dates on screen are locked. Once the export has gone to your payroll service, **Lock {from} – {to}** closes the period: its finished punches can no longer be edited or deleted, so the time sheet cannot drift away from what was paid. **Unlock…** asks for a reason and needs the **Edit Employees** permission, and every lock and unlock is kept in **Lock History** under the panel. See Locking a pay period.

Unapproved punches

When finished punches in the dates on screen have not been approved on the Time Sheet, the lock panel says how many. Lock still works — approval changes no figure on this page — but it is the moment to check that the week was reviewed. See Reviewing and approving punches.

Posting the payroll to Xero

When the store's Xero integration is enabled and connected, the lock panel also has **Post Journal To Xero**, available once the period is locked. It posts one journal for the period: wages by job, tips paid through payroll, and the wages payable total. Once it is posted, the row reads **Payroll Journal Posted To Xero** with the date, and **Open This Journal In Xero** opens it in Xero. **Post Again** after a correction replaces the previous journal. See Payroll Journal.

Holidays

Holidays in the toolbar opens the store's paid-holiday calendar. Hours punched on a holiday show in their own **Holiday** column, paid at the holiday multiplier, and reach every export format; see Paid holidays.

Paid holidays

Employees › Scheduling & Time Clock

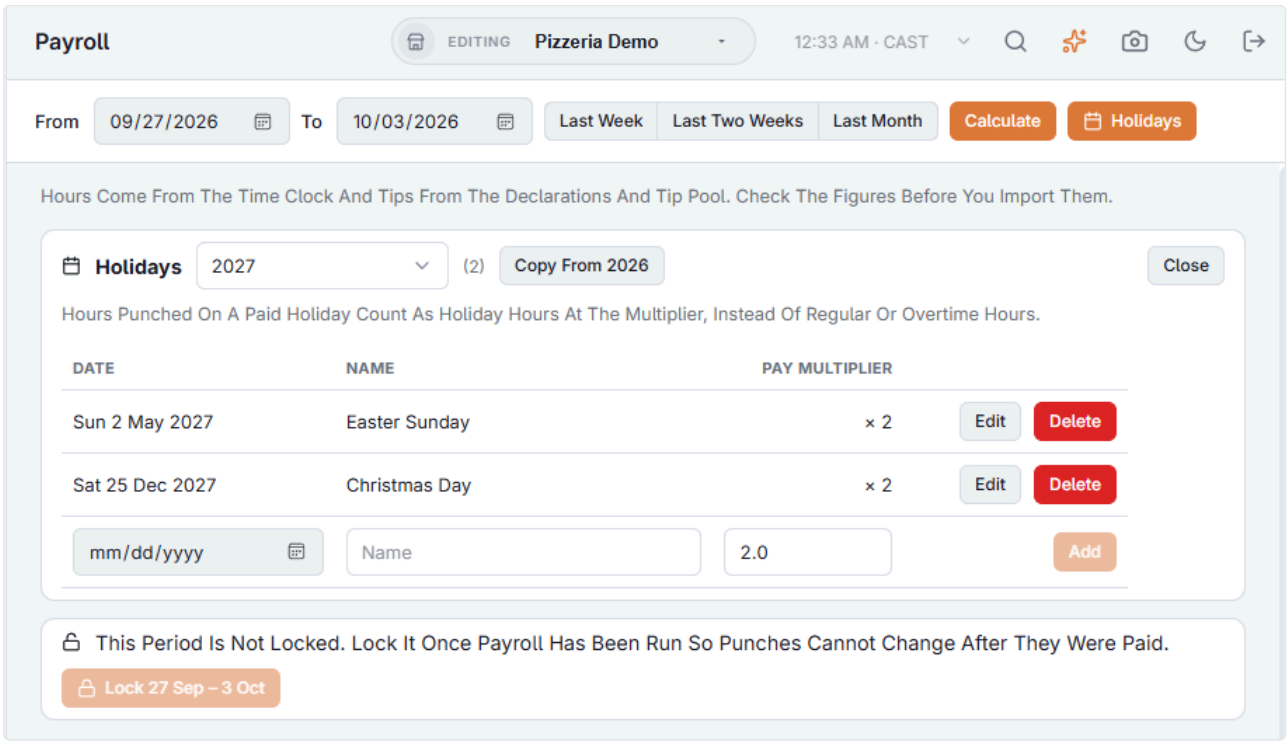
View online ↗

Enter the public holidays once a year and the Payroll page pays the hours punched on them at the multiplier, kept apart from regular and overtime hours.

A **paid holiday** is a store business day on which every hour punched is paid at a premium — double pay on a public holiday is the usual case. Enter the dates once a year at **Back Office › Employees › Scheduling › Payroll › Holidays**, and the Payroll page keeps those hours apart from regular and overtime hours, with the premium already in the labor cost and the export files.

Keeping the calendar

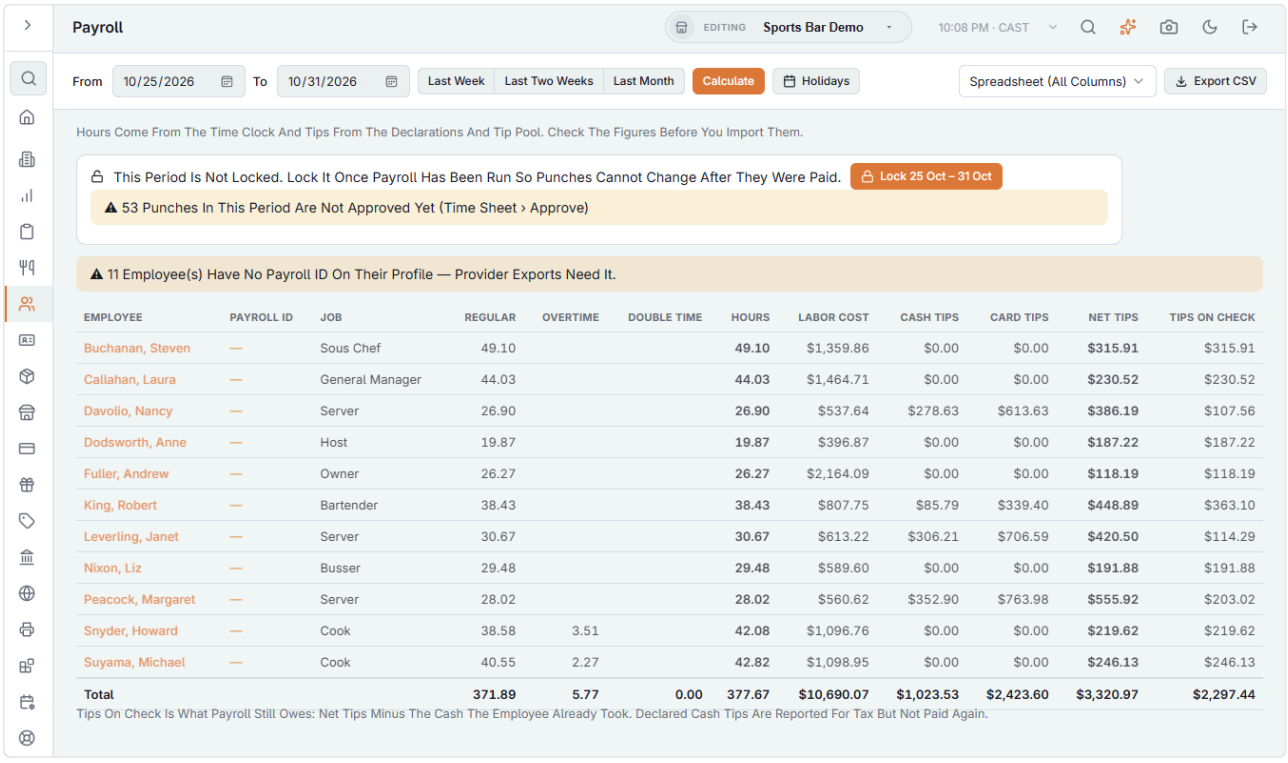
The **Holidays** button in the Payroll toolbar opens the calendar for the year shown in its dropdown. Each line is a date, a name and a **pay multiplier** (2.0 = double pay; 1.5 = time and a half). Pick a date, type the name, adjust the multiplier if it is not 2.0 and press **Add** — Enter in the name box does the same. **Edit** loads a line into the form, **Delete** asks first. A date that is already listed is updated rather than listed twice; the form says so before you save.



Copy From brings last year's holidays into the year on screen on the same month and day, after showing you which ones it will add; dates already in the year are left as they are, and it tells you when there is nothing to copy. Holidays that move each year (Easter, Carnival) are typed in by hand.

What it changes on the Payroll page

Calculate a period that contains a holiday and a **Holiday** column appears next to Regular, Overtime and Double Time, with the holidays in the period named above the table:



- A punch whose business day is a holiday is counted **entirely** as holiday hours — it is not also split into regular and overtime, so nothing is paid twice. The business day follows the store's business-day start time, the same rule the end of day uses, so a closing shift that runs past midnight still belongs to the holiday it started on.
- **Labor Cost** for those hours is hours × the employee's rate × the multiplier. An employee on salary has no hourly rate, so their punches keep their normal cost.
- Hours counts the holiday hours; the totals row sums them.

In the export files

- **Spreadsheet (All Columns)** — *HolidayHours* and *HolidayPremium* columns (the premium is the amount above base pay).
- **ADP** — the holiday hours go out under hours code *H*.
- **Paychex** — a *HOL* earnings row per employee.
- **Gusto** and **QuickBooks Payroll** — a *Holiday Hours* column.

> The time clock itself does not know about holidays: punches on the Time Sheet, the labor percentage on the end-of-day report and the live labor figures stay at base rates. The premium exists on the Payroll page and in its files, where the pay is actually run. The Xero payroll journal posts the labor cost from this page, so it carries the premium.

> Holidays apply to the store they are entered on. A group with several stores enters them per store, which also allows for different public holidays in different countries.

On the manager's Today page

While the holiday is running, the Labor card on the staff site's Today: the manager's day on their phone page shows *Paid Holiday Today* with the name and multiplier, and its labor cost, labor percent and projection already include the premium.

Registered hours and the hours variance

Employees › Scheduling & Time Clock

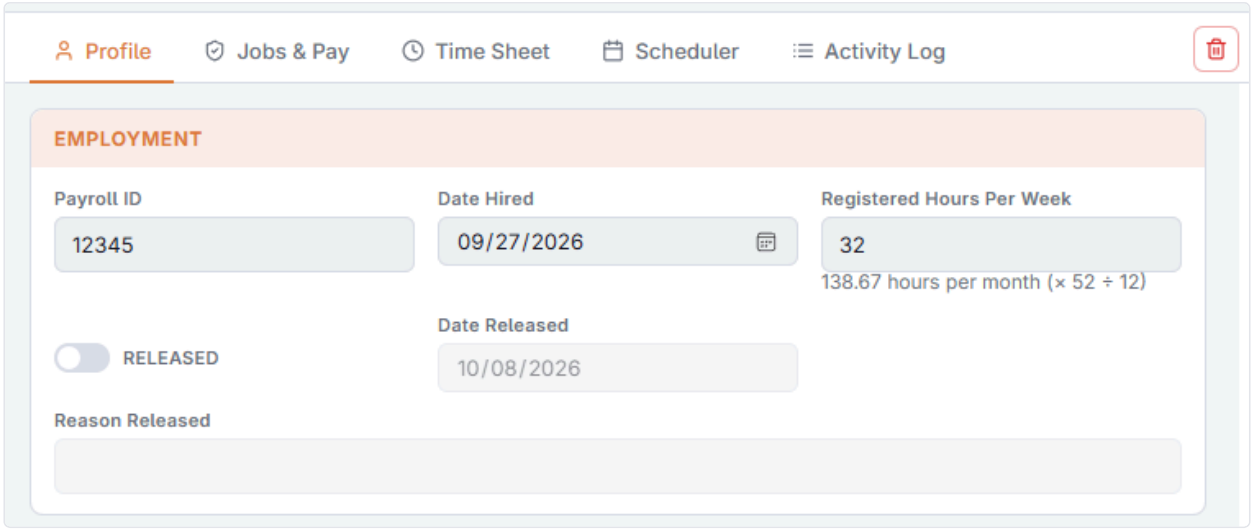
View online ↗

The hours an employee is contracted for, kept on their profile, and the registered hours and variance the Payroll page shows for the period.

Many payroll premiums are calculated over the hours an employee is **registered** for — the hours in their contract — rather than over the hours they happened to work. Someone registered for four days of eight hours is registered for 32 hours a week, which is 32 × 52 ÷ 12 = **138.67 hours a month**: the premium is paid over 138.67 hours, anything worked above it is overtime, anything below it is hours not worked. CloudPos keeps that figure on the employee and does the arithmetic on the Payroll page.

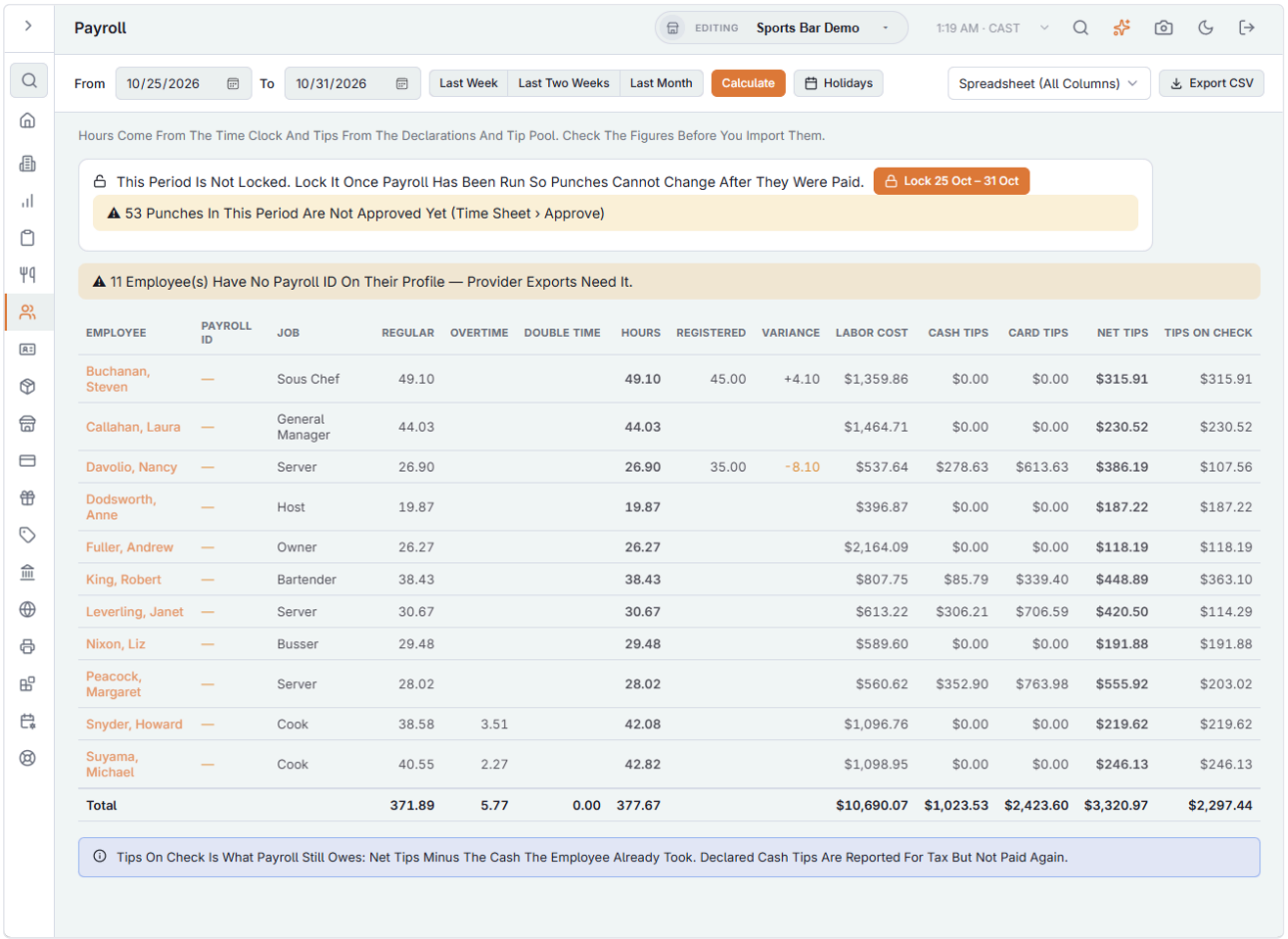
On the employee

Open the employee at **Back Office › Employees › People › Employees List** and, under **Employment**, fill in **Registered Hours Per Week**. The monthly figure (× 52 ÷ 12) is shown underneath as you type, so 32 shows 138.67. Leave it blank for employees without a contracted figure.



On the Payroll page

Calculate a period and two columns appear after Hours for every employee who has a figure — the columns stay hidden while nobody has one:



- **Registered** — the registered hours for the period on screen. A whole calendar month (or several) counts weekly × 52 ÷ 12 per month; any other range counts weekly × days ÷ 7, so a week is simply the weekly figure.
- **Variance** — hours worked minus registered hours. Positive: the extra hours to run as overtime. Negative (shown in amber): hours not worked.

The **Last Month** button in the toolbar selects the previous calendar month, which is the period these figures are meant for. In the **Spreadsheet (All Columns)** export the two values sit right after the employee's name as *RegisteredHours* and *HoursVariance*; the ADP, Paychex, Gusto and QuickBooks files are unchanged, since those services take hours, not contracts.

> Hours worked are the Payroll page's total: regular, overtime, double time and Paid holidays together. An employee with no punch in the period has no line, so a month of leave shows no variance — the absence is yours to record in the payroll service.

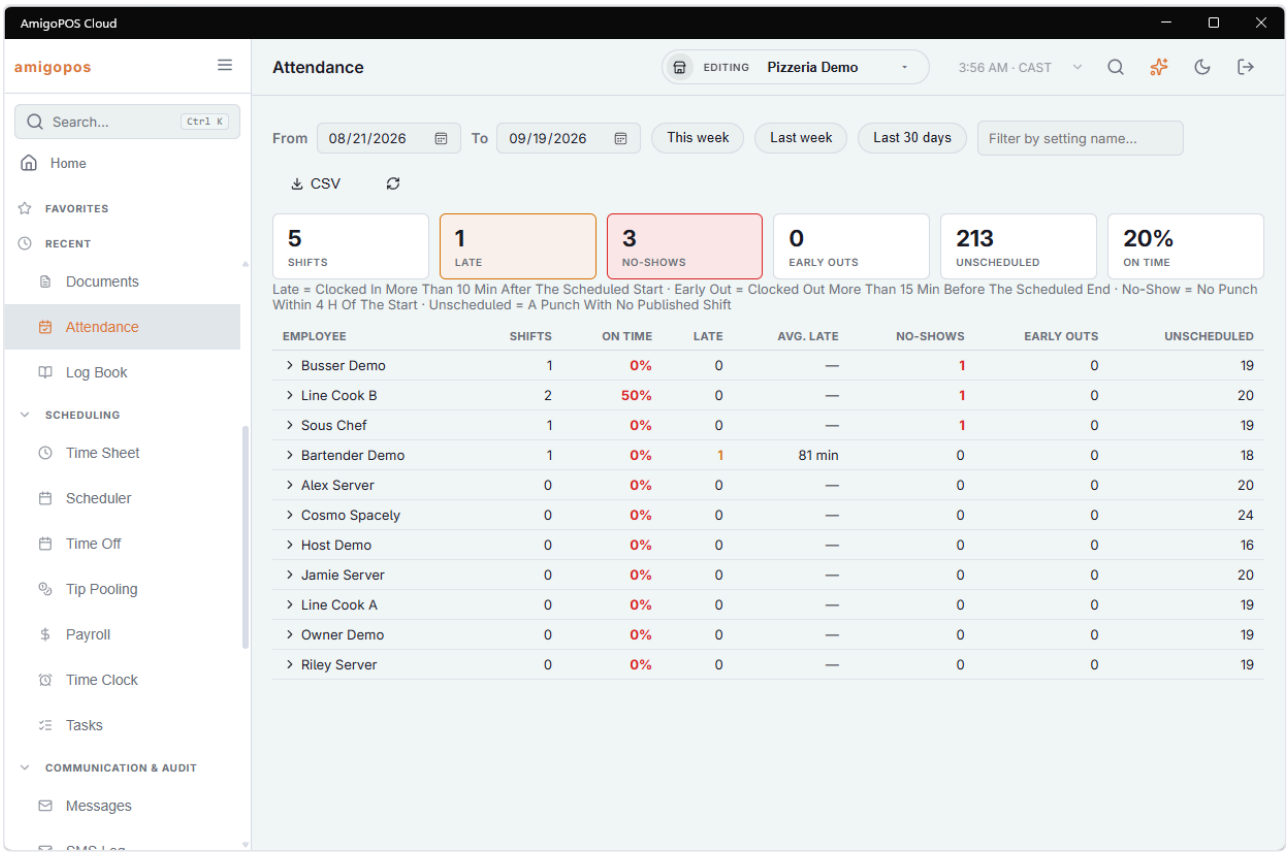
Attendance history (late and no-shows)

Employees › Scheduling & Time Clock

View online ↗

Late arrivals, no-shows, early outs and unscheduled punches per employee over a period, with the shifts behind the numbers.

Back Office › Employees › People › Attendance compares what was scheduled with what was punched, for every employee over a period. It is the answer to "is this person late often, or did I just notice twice?"



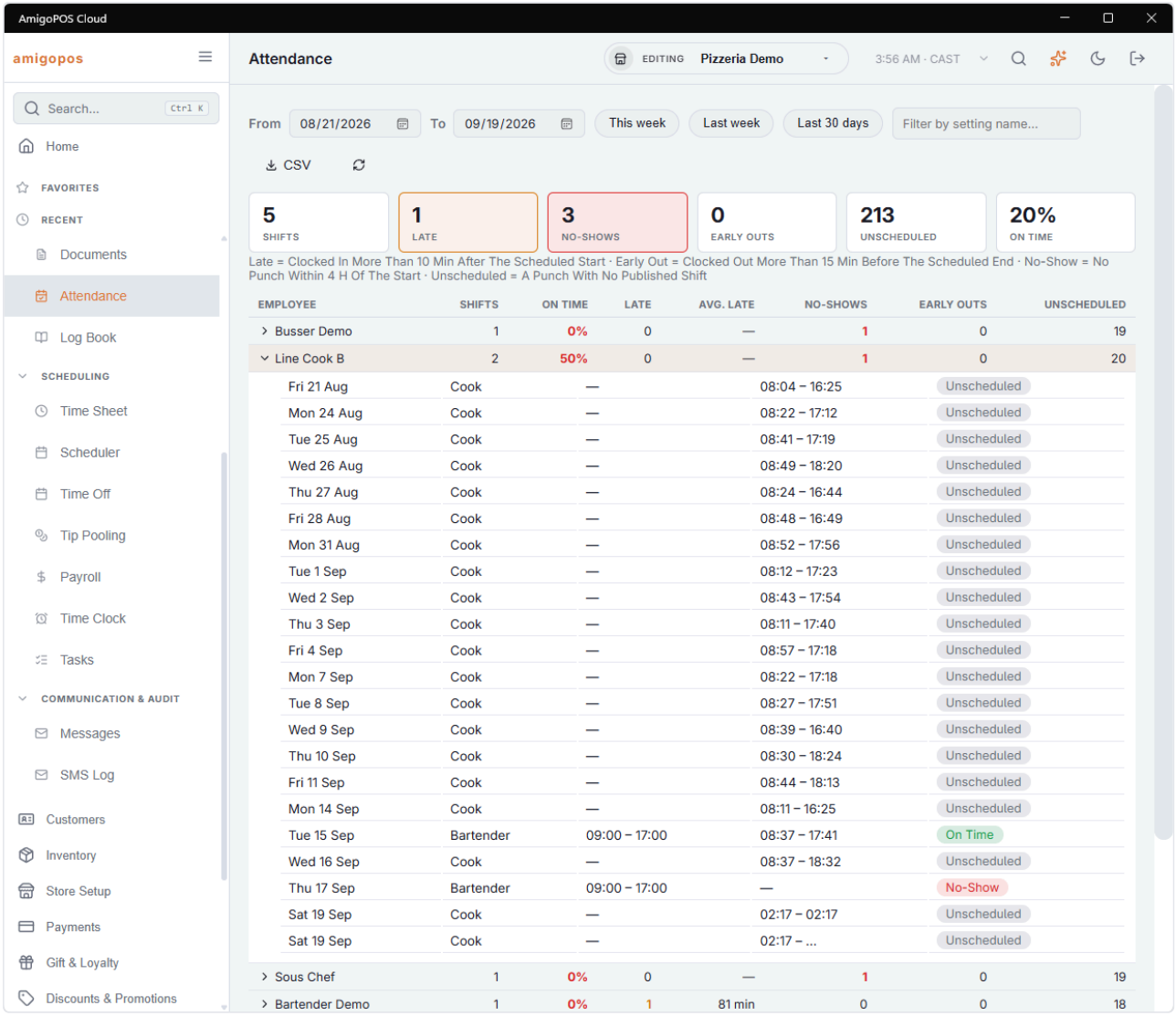
Choosing a period

This Week, **Last Week** or **Last 30 Days**, or set the dates yourself (up to about three months). It opens on last week, because last week is finished. Filter by name to look at one person.

The table

- **Shifts** — published shifts that have ended in the period.
- **On Time** — the share of them started on time.
- **Late** and **Avg. Late** — how many, and by how much on average.
- **No-Shows** — shifts with no punch at all.
- **Early Outs** — clocked out well before the end.
- **Unscheduled** — punches with no shift near them.

Worst first. Click a row to open that person's shifts — date, job, scheduled times, actual times and what each one counted as. **CSV** exports the detail for whoever needs it on paper.



How a shift is judged

- Only **published** shifts whose end time has passed are counted; an open shift nobody took is not somebody's no-show.
- The punch that served a shift is the one taken for it, or the employee's nearest punch starting within four hours of the scheduled start.
- **Late** uses the grace from *Late Alert (Minutes)* (Employees › Scheduling › Time Clock › Schedule Alerts), ten minutes if that is off. **Early out** is more than fifteen minutes before the end.
- An **unscheduled** punch is listed but left out of the on-time share — covering for someone at an hour's notice should not read as a scoreline.

> Fix the timesheet first. A forgotten clock-out or a punch under the wrong job makes this page wrong in the same way it makes payroll wrong — read it after the week has been reviewed, not before.

> One late day is weather. A pattern over a month is a conversation, and this page is where you get the dates for it.

Attendance and the weekly review

Timesheets uses the same matching punch by punch: its Scheduled and Review columns show each punch's difference from its shift, and published shifts with no punch appear there as No Punch rows that can be fixed on the spot. Review and correct the week there first; read this page for the pattern over weeks. See *Reviewing and approving punches*.

Locking a pay period

Employees › Scheduling & Time Clock

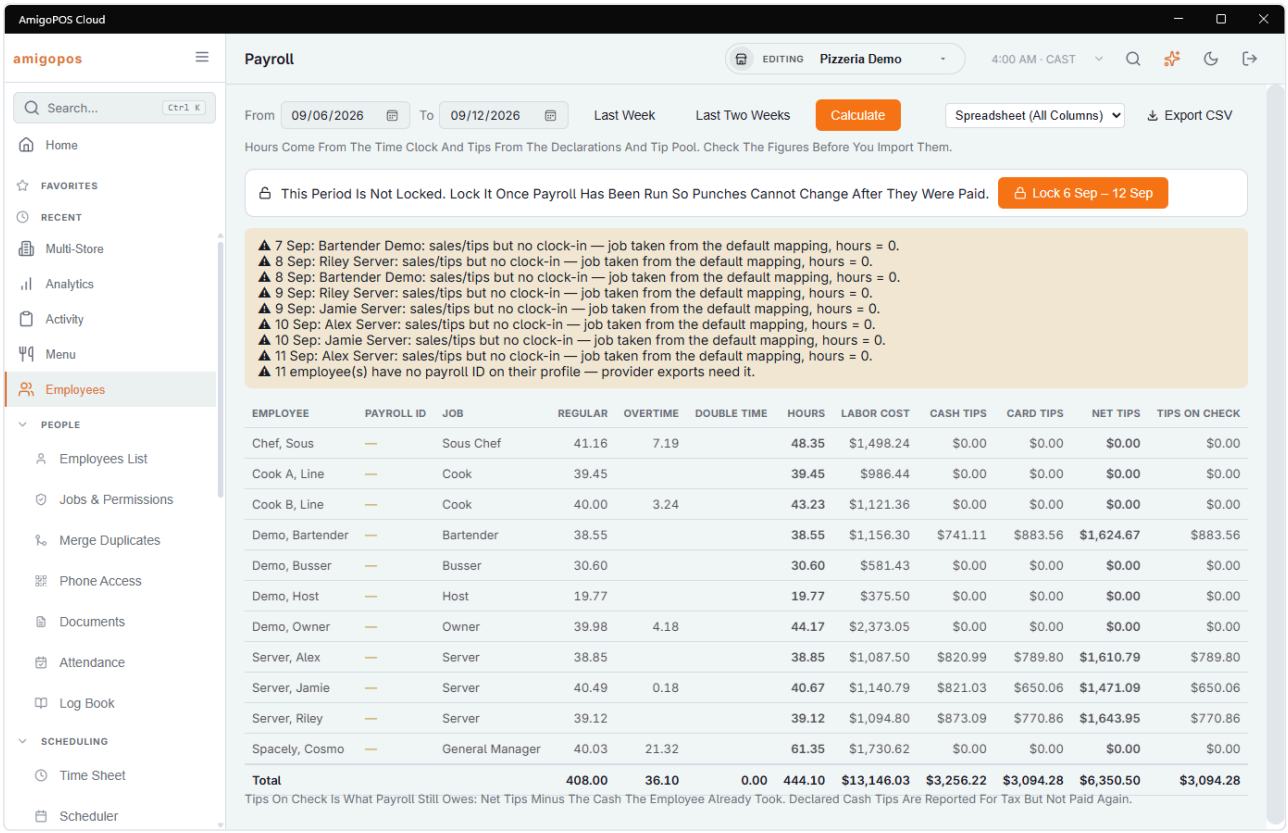
View online ↗

After payroll is run, closing the period so punches cannot change behind the pay that was already sent.

Once a period has been sent to payroll and paid, its punches should stop moving. Otherwise a manager fixing a forgotten clock-out two weeks later quietly makes the timesheet disagree with what was actually paid, and nobody notices until the employee or the accountant does.

Locking

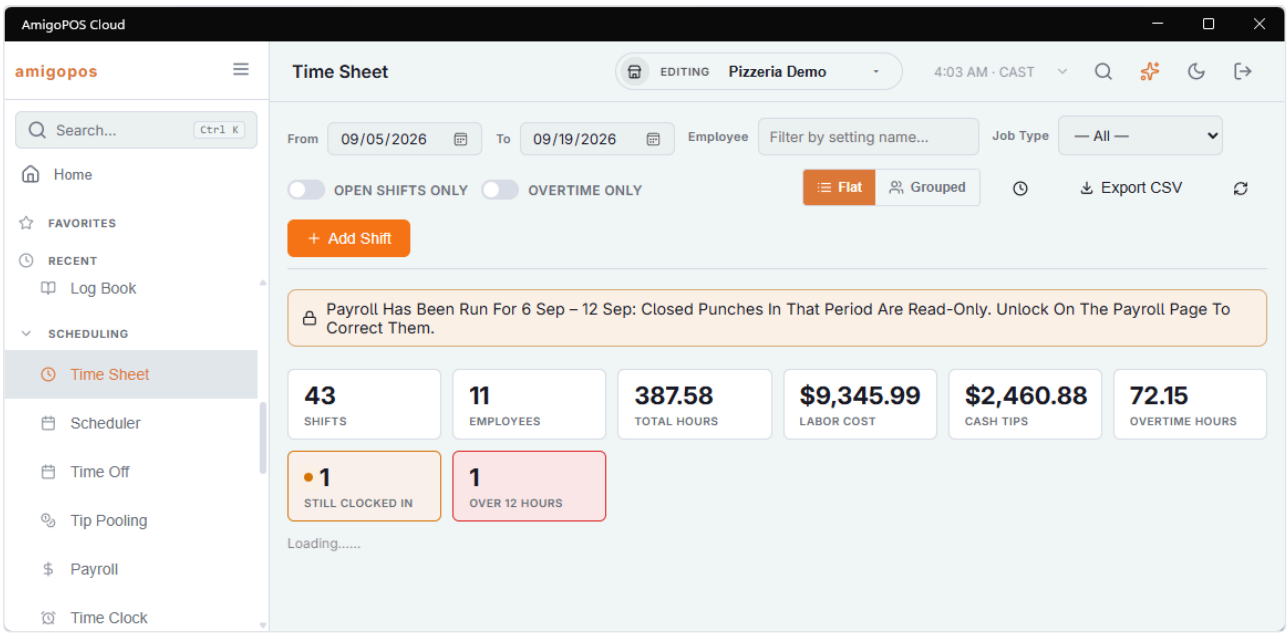
On **Back Office › Employees › Scheduling › Payroll**, calculate the period as usual and send the export. The panel under the toolbar then offers **Lock <from> – <to>**.



Locking is a decision, not a side effect: downloading an export never locks anything by itself. The period has to end before today, and it cannot overlap a period that is already locked.

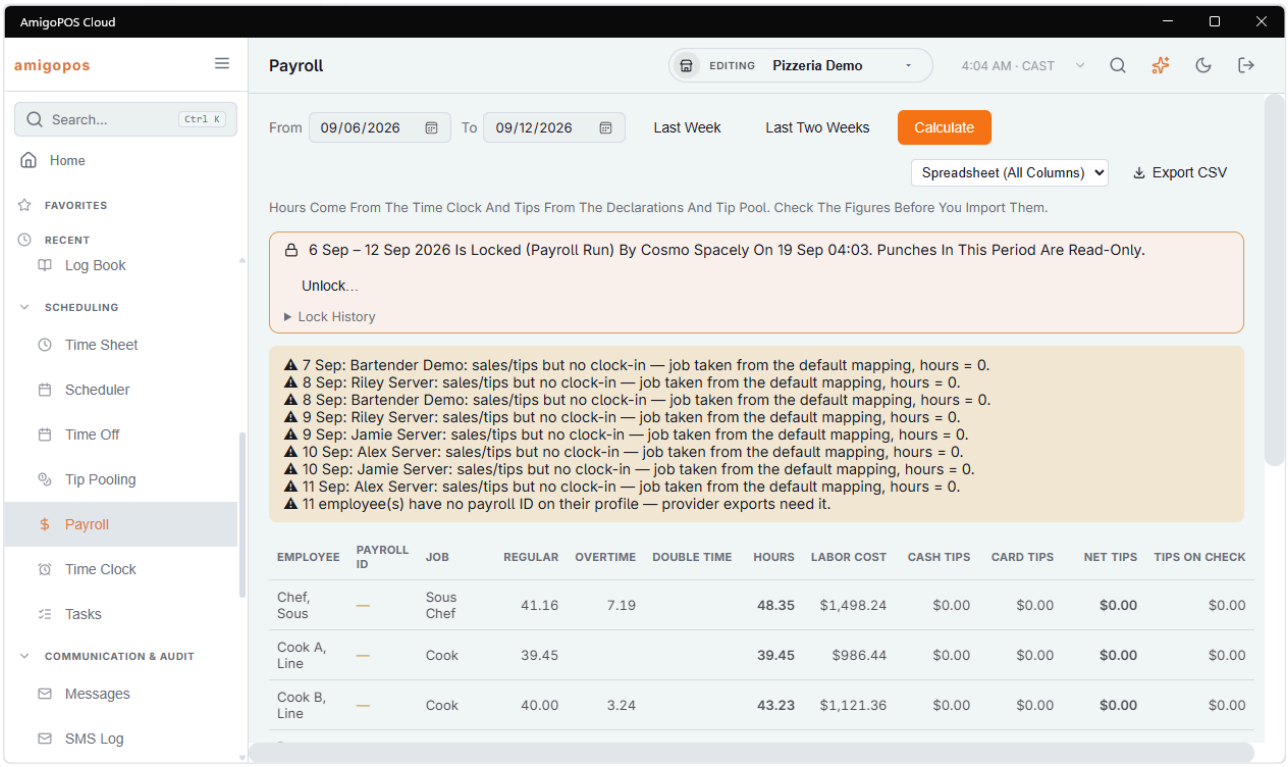
What a lock does

- Finished punches inside the period become read-only: they cannot be edited or deleted, on the Timesheets page or anywhere else.
- The Timesheets page shows a banner while the dates you are looking at touch a locked period, and says so instead of opening the editor when you click one of those punches.
- Punches still running are never blocked, so a shift that crosses into a locked period can still be clocked out. Once closed, it is locked with the rest.
- Nothing else is affected: the clock keeps working, schedules and time-off records are untouched, and the payroll figures still recalculate whenever you press Calculate.



Unlocking for a correction

Unlock… asks for a reason and needs the employee-editor right — not every manager who can run payroll can open a paid period. Make the correction, then lock the period again. The lock history keeps every lock and every unlock with its reason, so a corrected period can be explained later.



A corrected period usually means a second file for the payroll service — recalculate and export again after the fix, and tell them it replaces the first. Locks belong to one store; a group locks each store's period on its own.

Approvals and locked periods

- Before you lock, the panel reports finished punches in the period that no manager has approved yet. It is a reminder, not a block.

- Once a period is locked its approvals are frozen too: Approve on Timesheets skips punches inside it, and an approval there cannot be withdrawn. Unlock first if a punch needs changing.

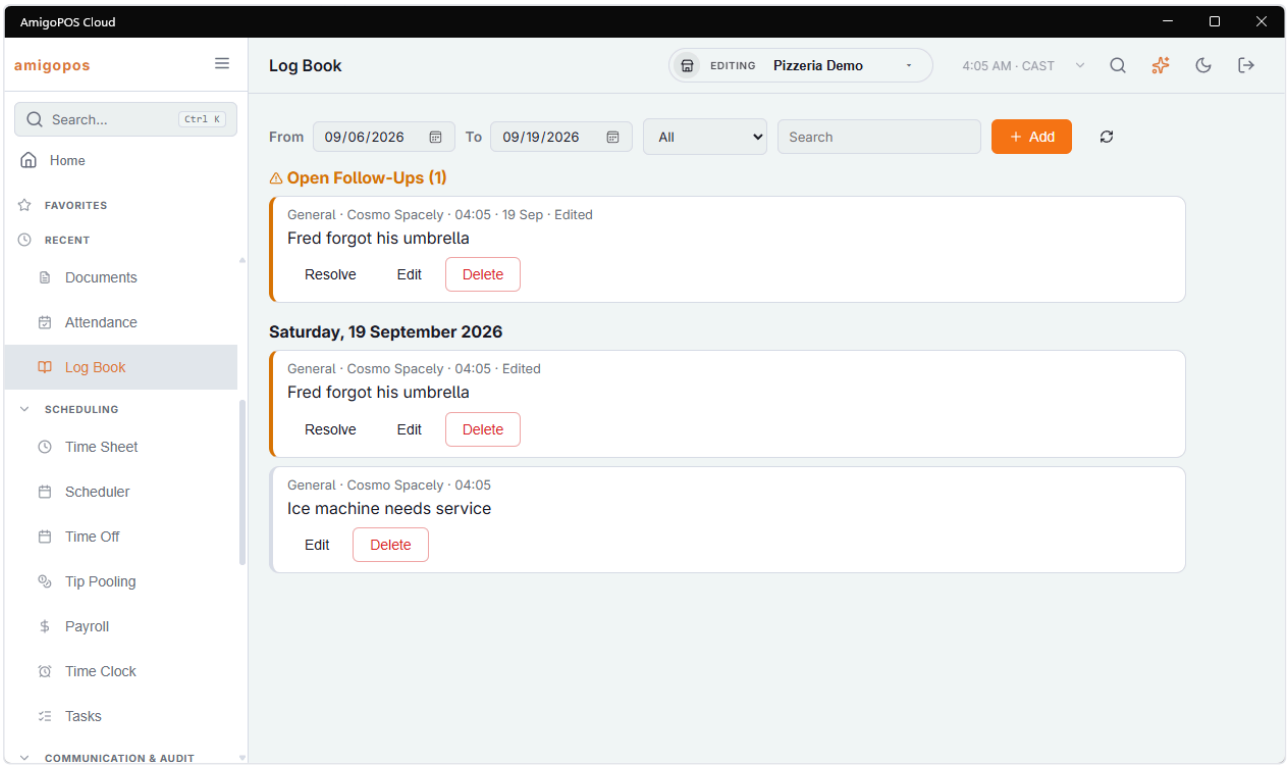
Manager log book

Employees › Scheduling & Time Clock

View online ↗

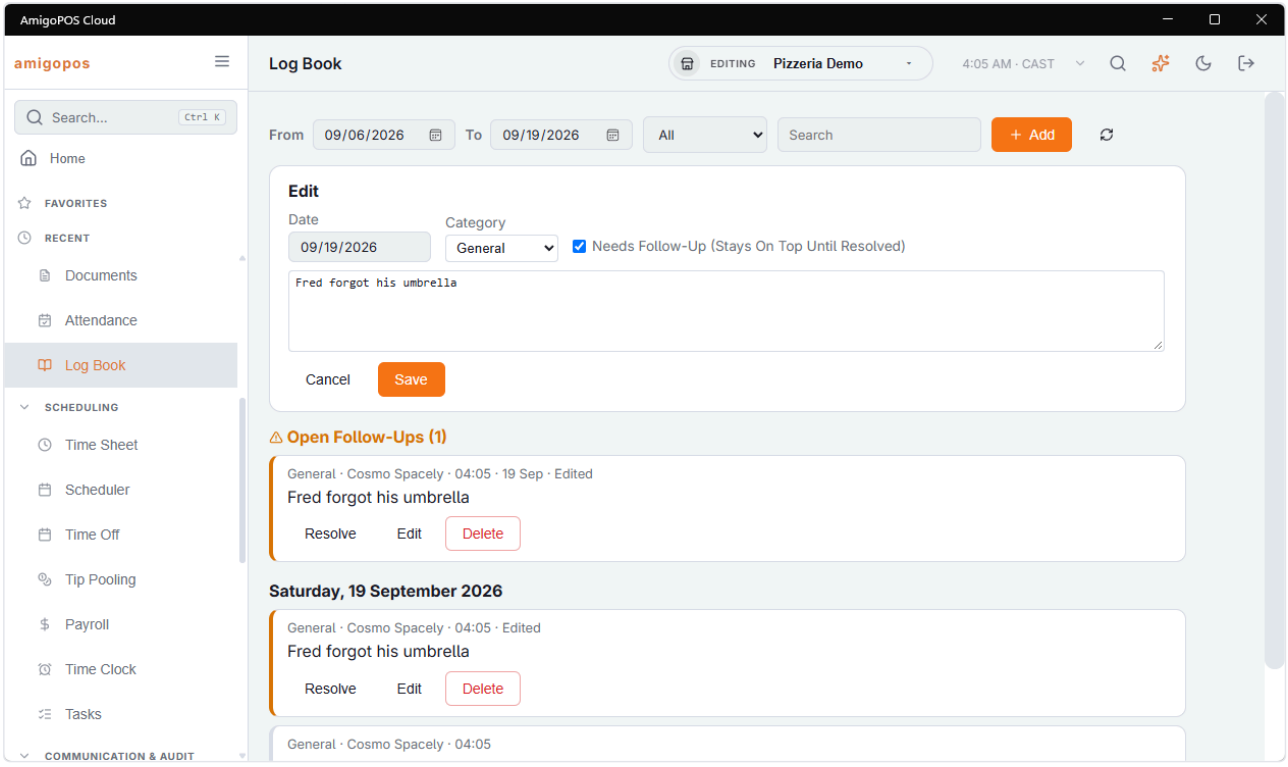
The shift hand-over: what broke, who called in, what the next manager has to pick up.

The log book is what the closing manager tells the opening manager. It lives in two places — **Back Office › Employees › People › Log Book** and the **Log Book** tile on the staff site — and every manager sees the same entries.



Writing an entry

An entry belongs to a business day, has a category and a note, and carries your name and the time automatically. Categories keep a month of entries readable: *General*, *Staffing*, *Guest*, *Incident*, *Maintenance*, *Cash*. Write it while it is fresh — from the phone on the floor, or in Back Office at the end of the night.



Late notes land on the right day: a note written at half past one belongs to the day that is still open, the same way the rest of the night's takings do.

Follow-ups

Tick **Needs follow-up** and the entry stays in an **Open follow-ups** block at the top of the page — on every manager's phone and in Back Office — until somebody taps **Resolve**. The freezer nobody has called about is the reason this exists. Who resolved it and when is kept, and a resolved item can be reopened.

Finding things later

Back Office holds the full book: a date range (the last two weeks to start with), a category filter and a text search across the notes and the authors. "When did that fridge go down the last time?" is a search, not a memory.

Who can do what

- Any job with **manager access** reads and writes.
- On the phone you can delete your own entries. In Back Office a manager with the employee-editor right can edit or delete anyone's; deleted entries are kept out of sight rather than destroyed.
- Employees never see the log book. The one place it goes out is the end-of-day close e-mail, sent to the managers who receive it: it lists the entries for the day that was closed and every follow-up still open (The end-of-day report).

> It is a hand-over record, not an alert and not a personnel file. Anything that has to reach someone tonight belongs in a message; a formal warning belongs in the employee's record, not here.

Communication & Audit

Messages

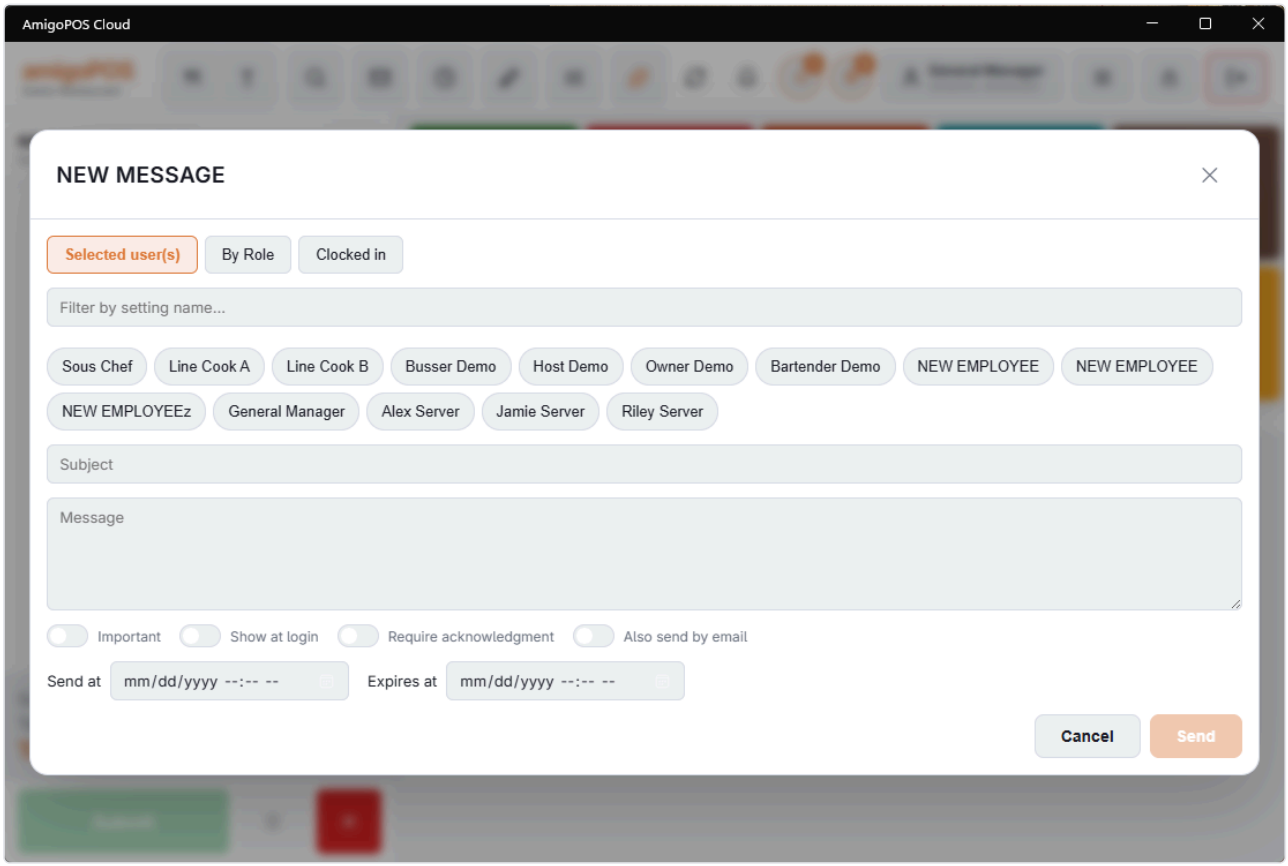
Employees › Communication & Audit

View online ↗

Sending a message to staff, scheduling it, requiring an acknowledgement, and reading who got it.

Back Office › Employees › Communication & Audit › Messages is where managers write to staff and check that a message arrived. Messages appear at the register and on the staff site, rather than on a noticeboard nobody reads. The page appears for jobs with

Compose messages or **Message Log**.



Sent messages

The **Sent messages** tab lists messages between **From** and **To** (the last 30 days when it opens), newest first. The search box looks through subjects, text and senders. The list shows your own messages; with the **Message Log** permission, **All senders** shows everyone's.

Each row shows the subject, its state — **Scheduled**, **Active** or **Expired** —, when it was created, who it went to, how many recipients have read it and, when asked for, acknowledged it, and the number of replies. Important messages stand out.

Writing a message

New Message opens the composer; it needs the **Compose messages** permission.

- **Who** — **Selected user(s)**, everyone in a job (**By Role**), whoever is **Clocked in**, or **All Users**. Messaging everyone needs the **Message All Employees** permission.
- **Subject** and **Message**.
- **Important** — marks it out from routine notices.
- **Show at login** — puts it in front of the recipient when they sign in, rather than waiting for them to look.
- **Require acknowledgment** — they must confirm they have read it, and you can see who has.
- **Also send by email** — also emails it, for something people need off shift.
- **Send at** and **Expires at** — schedule it for later, and have it drop off by itself.

Checking a message

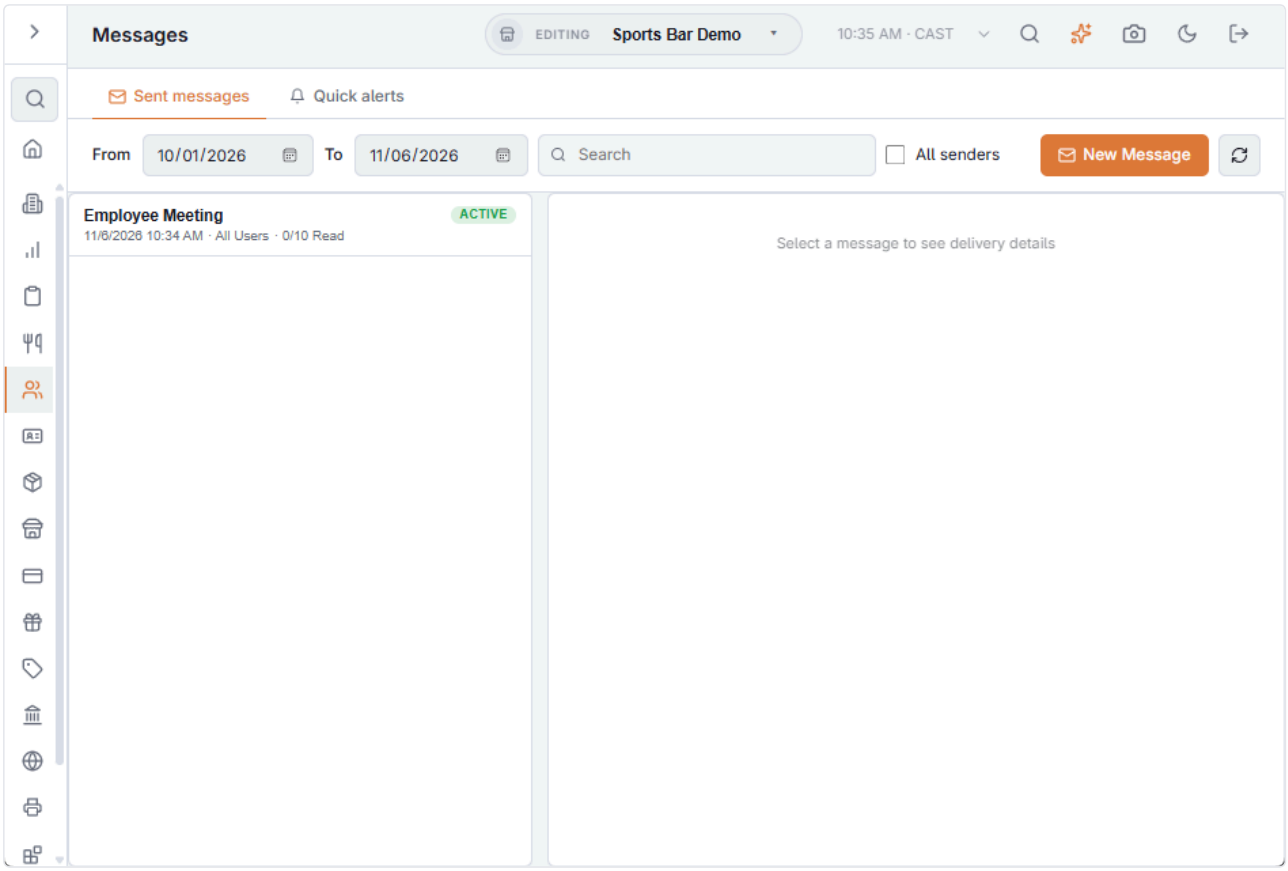
Click a message to open it. The top shows the sender, when it was created, when it is sent and expires, and its options; with email, how many emails went out (✓) and failed (✕). Under the text, **Recipients** lists each person with when it was **Delivered**, **Read** and **Acknowledged**, and its email status, followed by the replies.

- A **Scheduled** message can be changed with **Edit**, or removed with **Delete**, until it goes.
- An **Active** message can be taken out of every inbox at once with **Expire now**. Its entry stays in the log.

To see every message sent in the store with its read and acknowledgement counts, use the Message Log; see Message log.

Quick alerts

The **Quick alerts** tab holds the one-tap messages staff can send to all managers from the POS — a delivery arriving, an item running out. Add one with its **Label**, set its **Sort Order**, switch it **Enabled** or off, or **Delete** it. Changes save as you make them. Sending one needs the **Quick Alerts** permission.



> Sending, messaging everyone and reading everyone's messages are separate permissions. A supervisor can message their own team without seeing everybody else's.

Notices the system sends

Some messages are sent automatically and land in the same inbox as yours: time-off decisions, a published schedule, shift offers and pick-ups, and manager-approval requests for shift changes. They show the person who triggered them as the sender.

Staff using the staff site on their phones read the same inbox in its **Messages** tab; reading a message there marks it read at the register too.

Sticky notes (shift notes board)

Employees › Communication & Audit

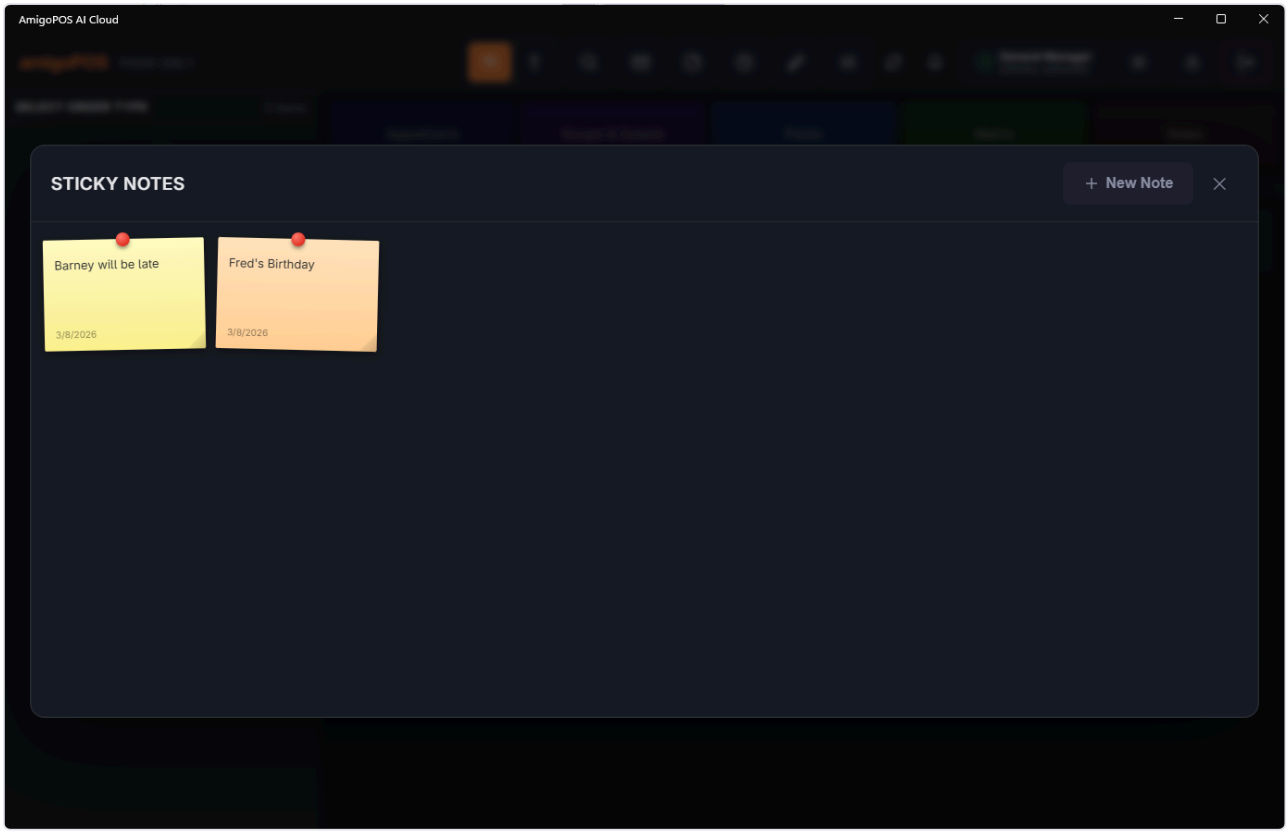
View online ↗

A shared post-it board on every register — shift notes, reminders, and announcements, with private notes and login-screen pinning.

Sticky notes are the store's shared post-it board: "86 the salmon", "health inspector due Thursday", "new hire shadowing tonight". Notes sync live to every register, so a note written at the bar appears on the host stand immediately.

Using the board

1. Open **More › Sticky notes**. Notes appear as a grid of colored cards.
2. Tap **New note**, type up to 500 characters, and pick one of the five colors.
3. Tap **Save**. To edit or delete later, tap the note — the same editor opens with a Delete button.



Who can do what

- **Anyone can create** a note.
- **Editing and deleting** a note is limited to its author — and managers, who can edit or remove any note.

Public, private, and login notes

- **Public** (default) — visible to everyone on the board.
- **Private** — turn the Public toggle off; the note shows only to you, marked with a lock. Good for personal reminders.
- **Show on login** — available on public notes. The note also appears on the **PIN login screen**, before anyone signs in — the strongest placement for must-see shift information, since every employee reads it at clock-in. Use it sparingly so it keeps its impact.

Good habits

- Delete notes when they expire — a board full of stale notes trains people to ignore it.
- Use colors consistently (for example red for urgent, yellow for kitchen, blue for FOH).
- For a dated announcement to specific people, use **Messages** instead — sticky notes are ambient, messages are directed.

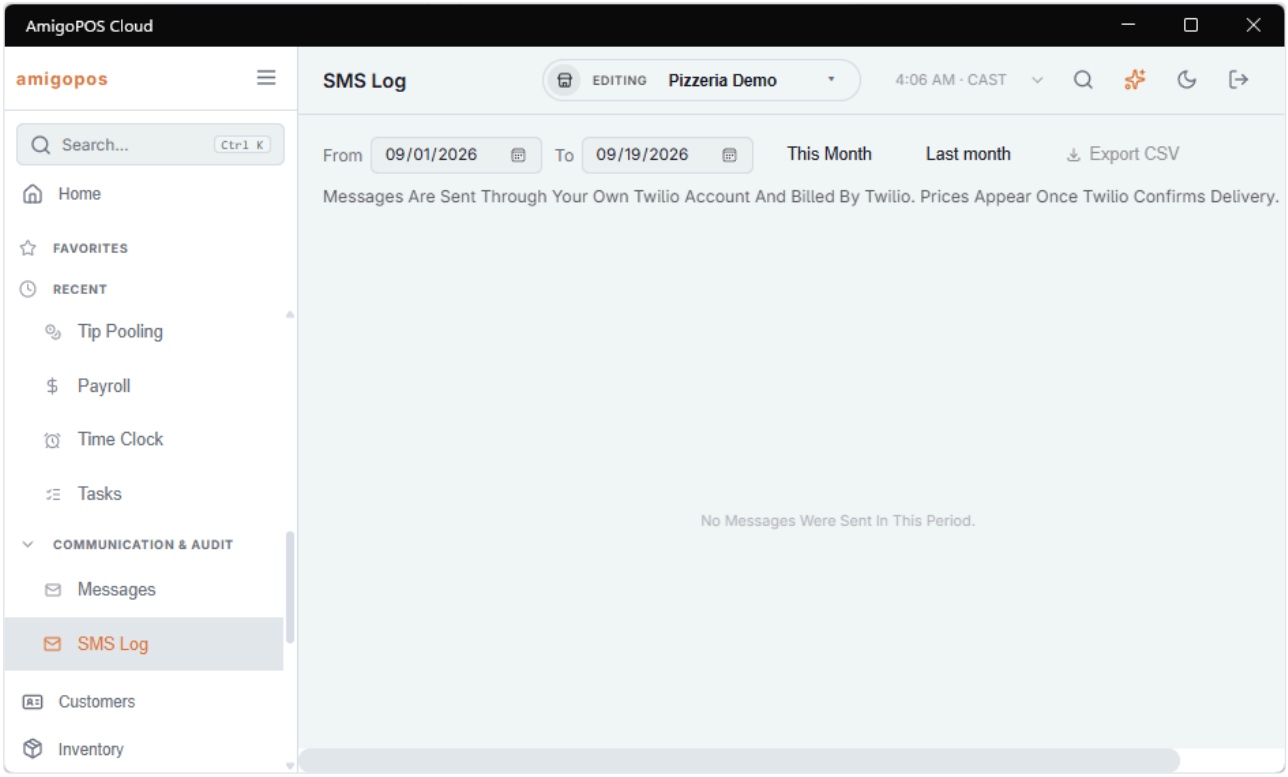
SMS log and message costs

Employees › Communication & Audit

View online ↗

Every text and WhatsApp message the POS sent, what texts cost, and how they are billed.

Back Office › Employees › Communication & Audit › SMS Log lists every text message and WhatsApp message the store sent, with what each one cost. It is where you check that a customer got a message, and what the month's texts will be billed. The page appears for jobs with the Back Office **Reports** permission.

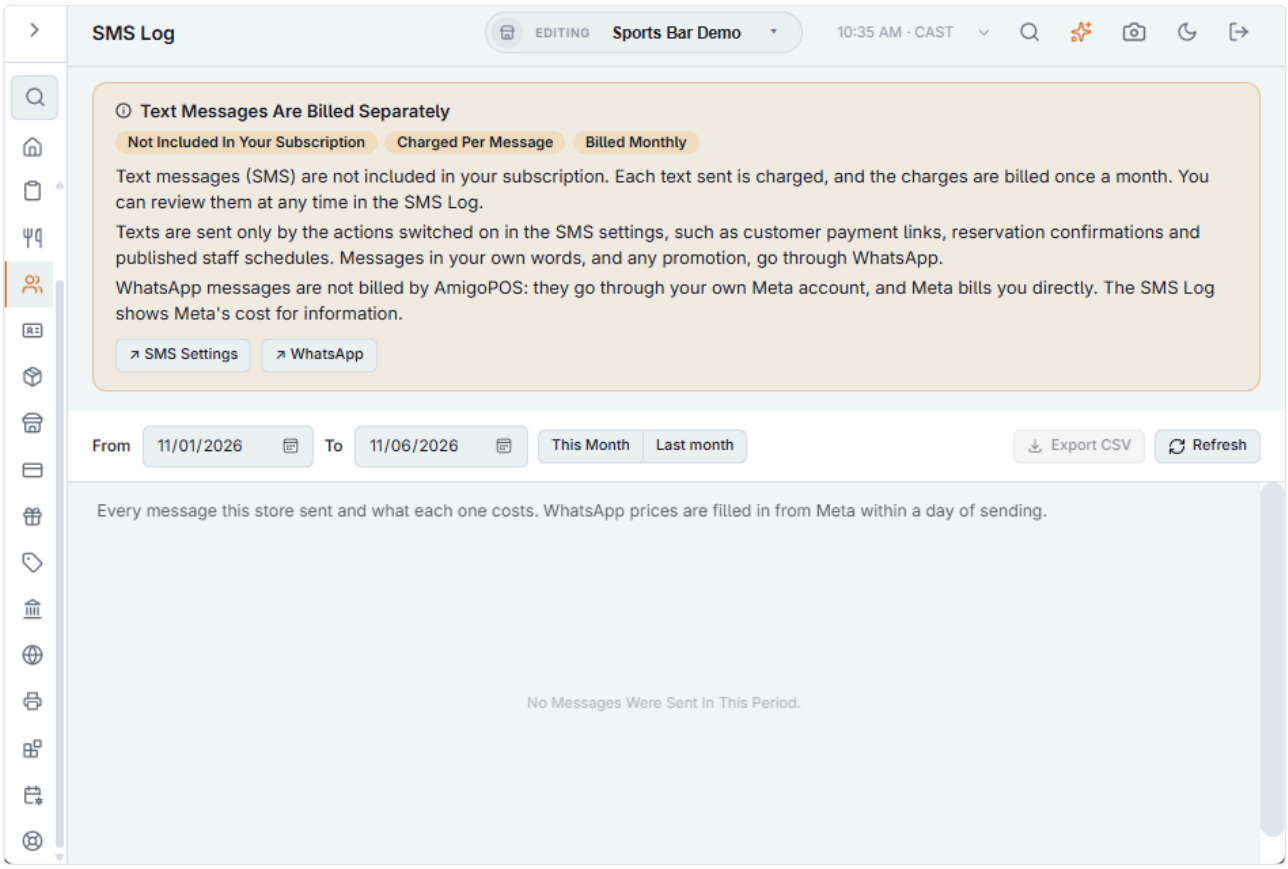


Choosing the period

From and **To** are store days; the page opens on the current month. **This Month** and **Last month** set them in one tap. **Refresh** reloads, and **Export CSV** downloads every row with its provider, sender number, pricing details and error, for month-end reconciliation. The file keeps the channel, purpose and status codes as stored, not the words shown on the page.

The totals

Above the list, cards count the **Messages**, **Segments** and **Failed** messages in the period, the **Cost** in each currency, and how many texts are **Awaiting Price**. A table under them splits the messages, segments and cost by **Purpose** and **Channel**.



What is listed

Every attempt — delivered, failed or blocked — with the **Date**, the **Channel** (**SMS** or **WhatsApp**), the **Purpose** (what sent it: a pay link, a payment or reservation confirmation, a reminder, table ready, an online order, a published schedule, a staff invitation, a gift card, a test; a purpose the page does not know is shown as its code), the number it went **To** and its **Country**, the **Reference** — the order or reservation it relates to —, the **Segments**, the **Status** and the **Price**. Point at a row to see its text, or the error for a message that failed.

Texts

- Texts are sent by AmigoPOS's text service. They are **not included in the subscription**: each one is charged, and the month's texts are billed once a month. The amount shown on a text is what you are billed for it.
- A text is charged per **segment**: 160 plain characters, or 70 when the message contains an accent or an emoji, so a long message can cost several.
- The final price comes from the carrier shortly after sending; until then the text counts as **Awaiting Price**.
- Only the actions switched on at **Back Office › Integrations › SMS** can send texts, always in the system's own wording. See SMS settings.

WhatsApp

WhatsApp messages go through the store's own WhatsApp account, and **Meta bills the store directly**. Their rows show Meta's cost for information — it fills in within a day, and replies inside a conversation the customer started cost nothing — but it is never part of what AmigoPOS bills, and it is left out of the **Cost** cards.

Reading the statuses

- **Sending** and **Sent** — on its way; no delivery report has come back yet.
- **Delivered** (and, for WhatsApp, **Read**) — it reached the phone.
- **Not Delivered** — the message failed or was blocked; a ⚠ after it means there is an error to read when you point at the row. A failure is worth a look. A cluster of failures to one country usually means numbers are being typed without the right country code, or the number is not a mobile. A failed WhatsApp message carries WhatsApp's error code; see WhatsApp troubleshooting.

- A blocked message also reads **Not Delivered**. It was not sent: the customer replied STOP to the store's WhatsApp, or the only template for that message is held as marketing.

> If a customer says they never got a message, find it here first: the status usually answers the question before anyone calls the carrier.

CHAPTER 16

Customers, Gift & Loyalty

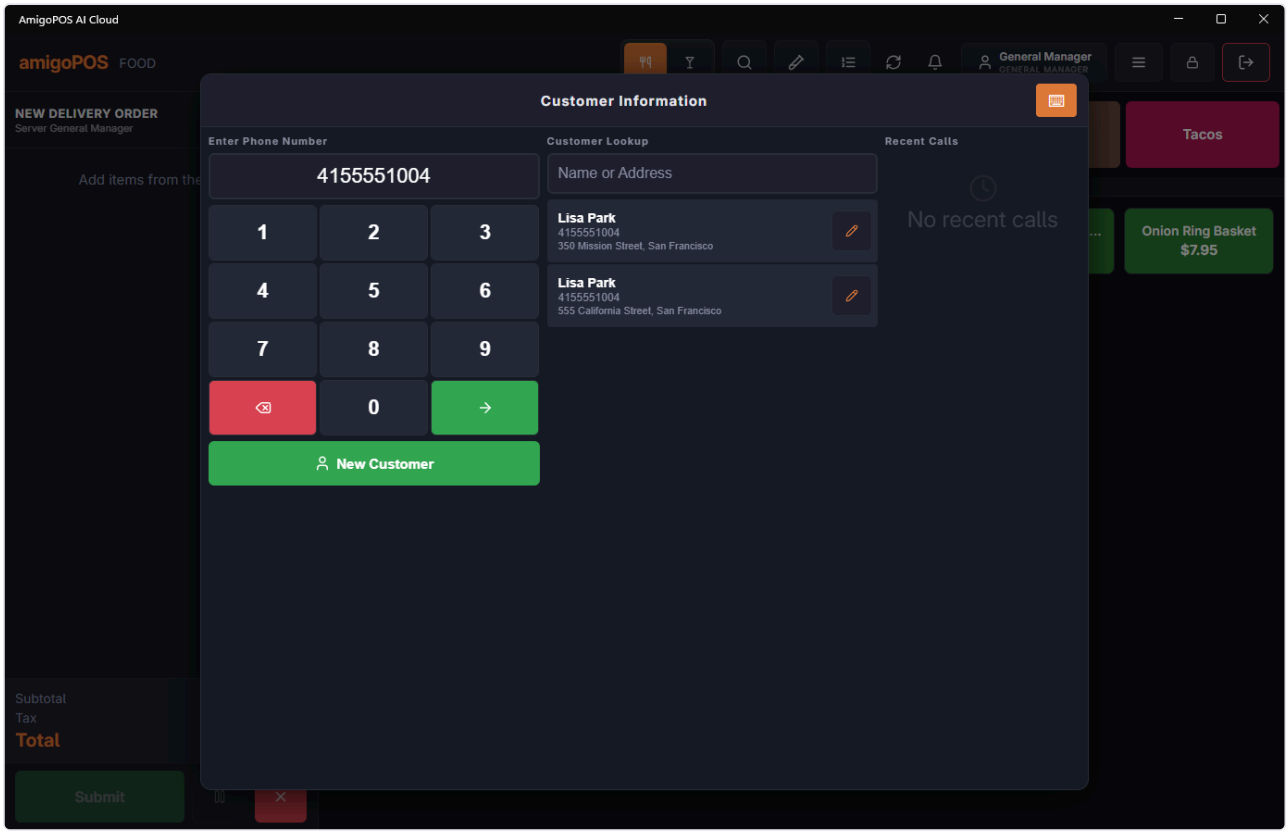
Customers

Customer lookup at the register

View online ↗

Finding an existing customer by phone or name mid-order, or creating one on the spot.

Phone, delivery, and call-center order types open with the **customer lookup** — find the caller, or create them, in seconds.



Looking up

- **By phone** — the primary path: digits go in (a minimum count before search fires), matches appear as you type. With caller-ID integration, **recent calls** are listed to tap instead of type.
- **By name or address** — the fallback when the phone number is new but the customer isn't.

Selecting a match loads the customer onto the order — name, addresses, notes — and their **order history** is one tap away ("the usual" is a reorder, see *Customer order history*). A blocked customer flags immediately, before the order is taken. **Unblock** on the customer screen needs the **Unblock Customer** permission; without it, a manager approves.

New customers

New customer opens the entry form with the phone number already filled. Which fields appear and which are required is configured per store — see *Customer-information screen*; require only what the order genuinely needs, because this form is on the critical path of every phone order.

> Whether lookup appears at all — and where in the order flow — is part of the order type's action pipeline (*Order types and workflow*). Walk-in counter orders skip it entirely; delivery can't proceed without an address.

Calls from the phone system

With caller ID connected, **Take Call** on the incoming-call banner opens this screen with the caller's number already searched. The **Recent Calls** column on the right lists the latest calls, newest first: tap one to search that number. Calls already taken are dimmed, and an unknown number shows the name sent by the phone company when there is one. See **Taking a call at the register**.

For a regular, Customer Info shows their usual order with a one-tap button — see The usual: one-tap reorder for regulars.

During an outage

Lookup needs the server. While the register is offline, the customer screen is replaced by a small prompt for a name and phone, which print on the receipt. No customer record is created or matched. See Working offline.

Delivery address: one Continue

For a delivery order type the address is routed as soon as the customer comes on screen: the zone, the delivery fee and the estimated time appear by themselves, so a known address needs one Continue. An address you type or change is routed on the first Continue (the banner shows what was found) and committed on the second. Picking another saved address routes that one.

Order type, on a call-center station

Until the order starts, a strip across the top of the customer screen shows the order types the call center may use, with the current one lit. Tap another to change it; a delivery address is routed again. Once the order has started, the type is changed from More › Change Order Type, as on any register, with the **Change Order Type** permission or a manager's approval.

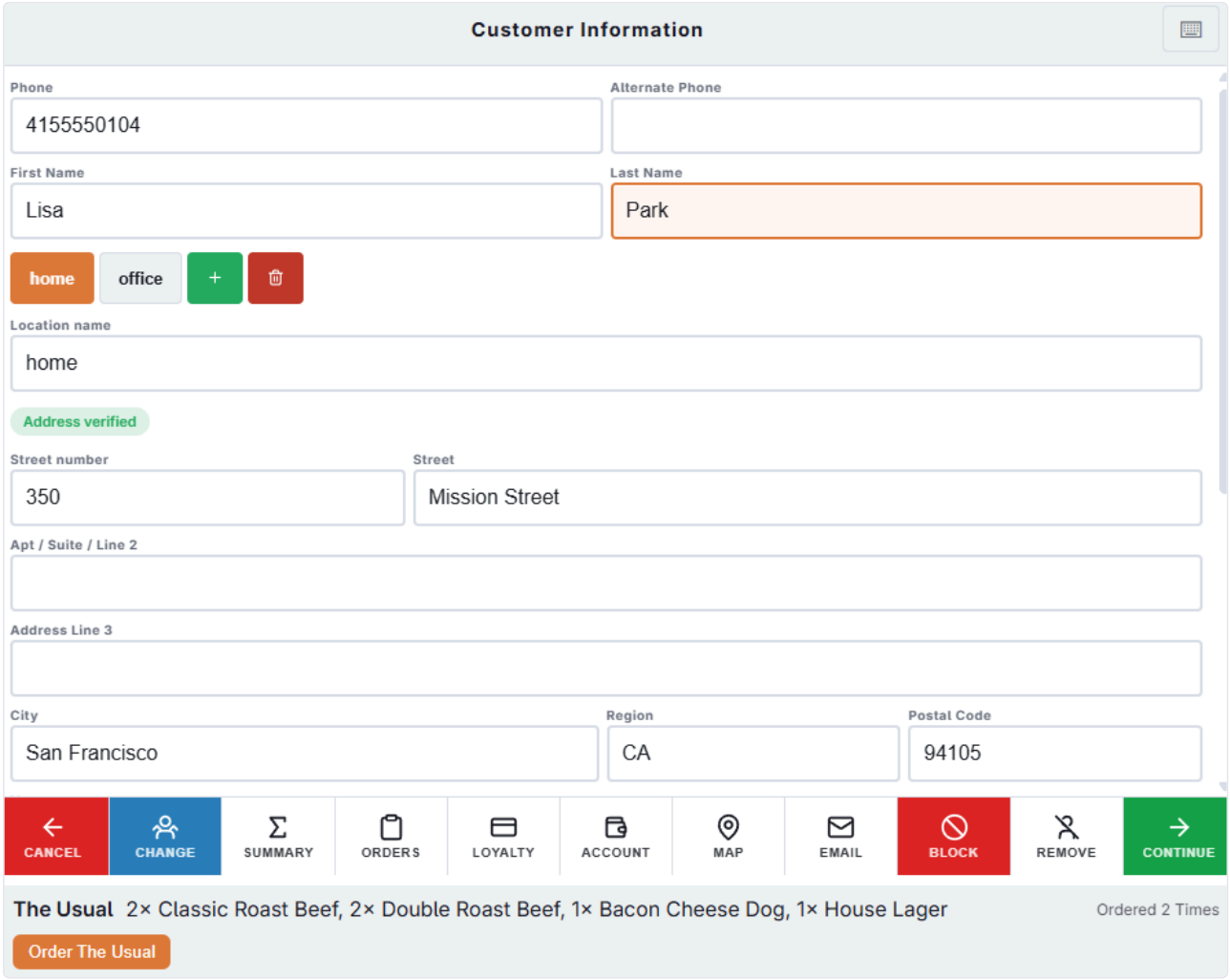
The usual: one-tap reorder for regulars

Customers, Gift & Loyalty › Customers

View online ↗

Customer Info and the caller ID banner show a regular's usual order, ready to reorder.

When Customer Info opens on a customer who orders the same thing again and again, a strip above the info panels shows their **usual** — for example *2× Chicken Tacos, 1× Lemonade · Ordered 5 Times* — with an **Order The Usual** button.



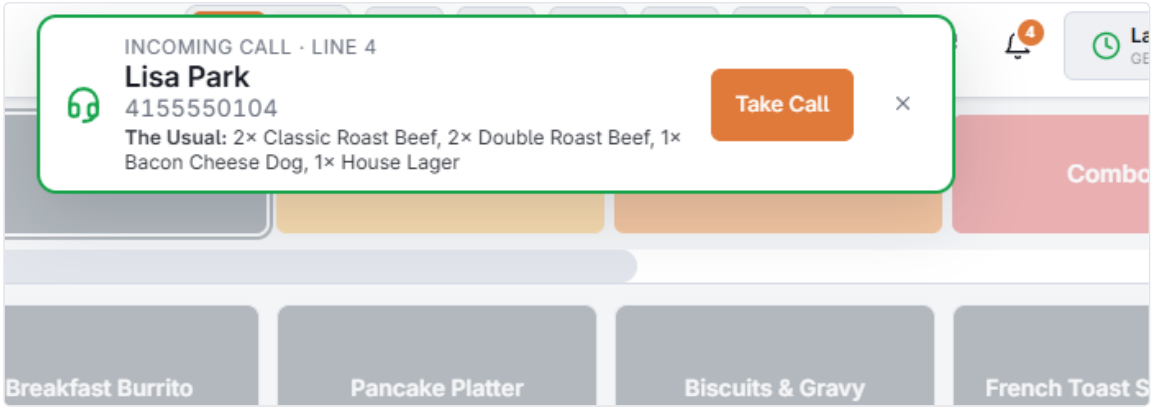
How the usual is chosen

- It looks at the customer's last 20 paid orders at this store.
- The usual is the set of items (with quantities) that appears most often, as long as it appears at least twice. Modifiers are not compared.
- **Order The Usual** reorders the most recent of those orders, the same way as **Reorder** in the customer's order history, so its modifiers come along.

The strip appears when the **Reorder** button is turned on for Customer Info. A customer with no repeated order simply has no strip.

On the caller ID banner

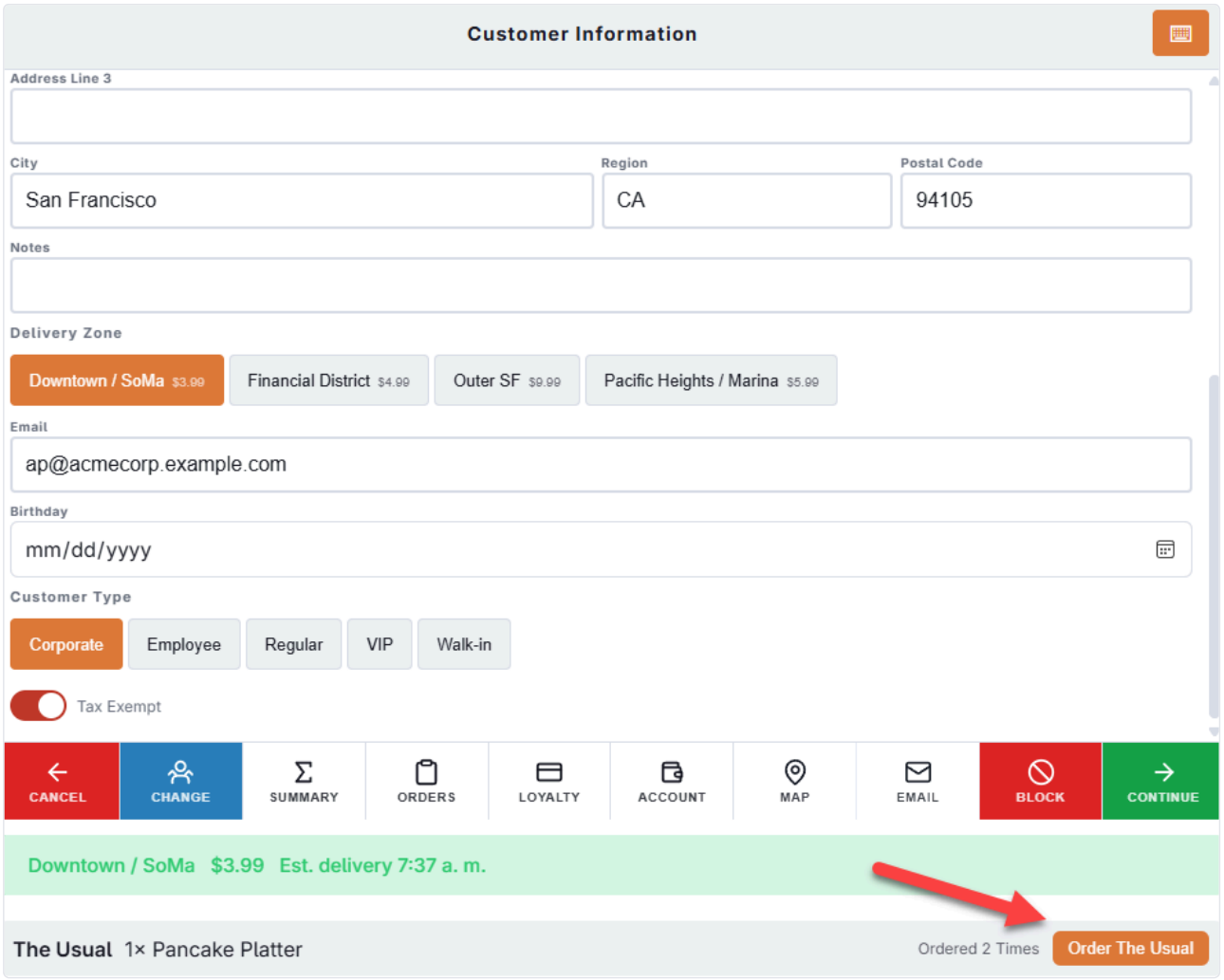
When an incoming call matches a customer with a usual order, the banner shows it under the caller's number, so you know what they will probably ask for before you pick up. **Take Call** then opens Customer Info with the button ready — see Taking a call at the register.

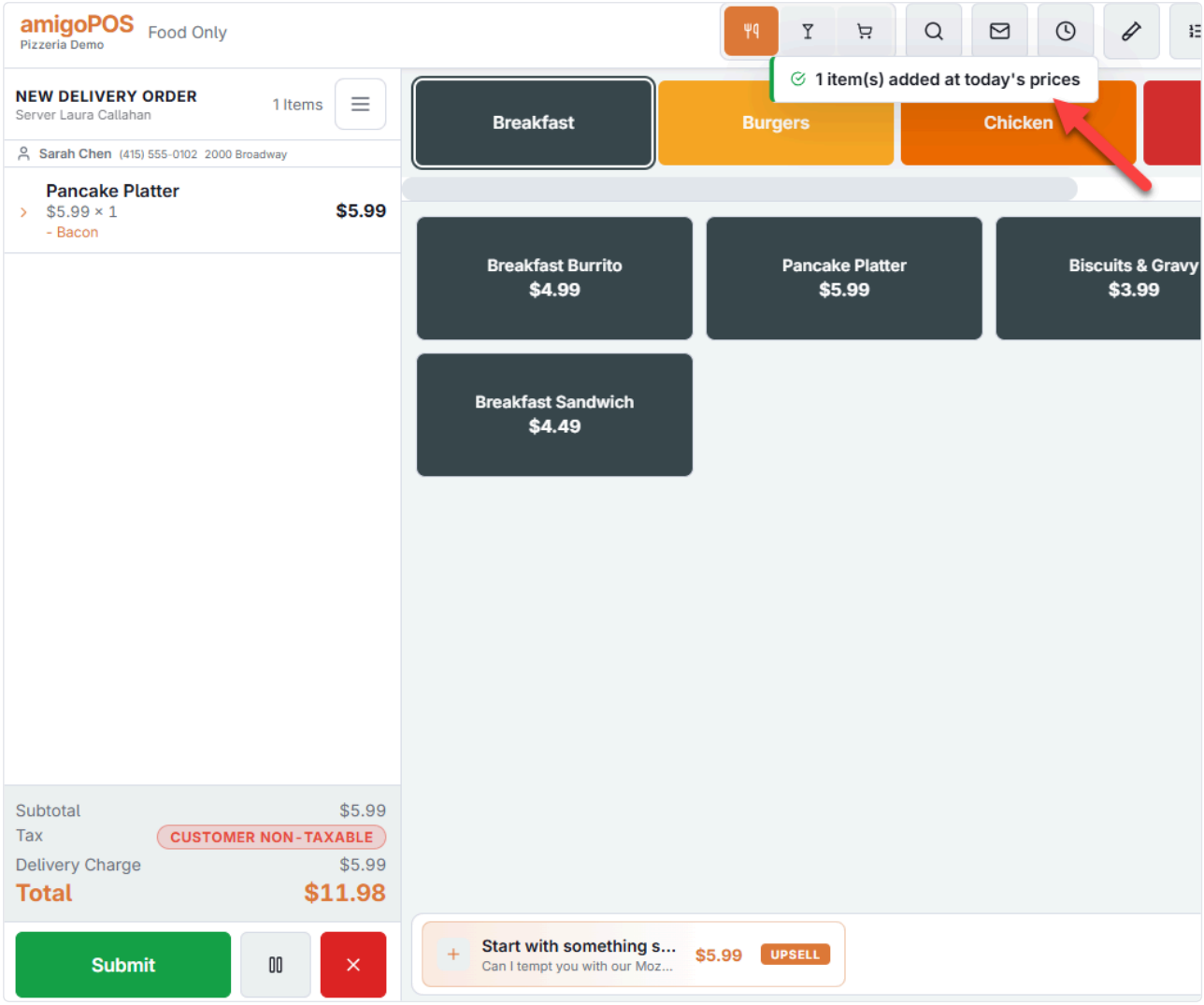


Today's prices, and what is left out

Order The Usual and Reorder bring the items over with their modifiers and item notes, priced from today's menu: each item at its current menu price with whatever rule applies now (happy hour, the customer's type, a quantity band), its modifiers at the prices they had. However long ago the order was placed, the caller pays what the menu says today.

What cannot be rung again is left out and named in the message, so you can tell the customer: an item that is no longer on the menu or not offered at this time of day, one the menu item counters say is sold out, a line that was removed from the old order, and weighed or timed lines, gift cards and cover charges. On a call-center station, the order can be rung for a different store than the one that made it: the items are checked against the store you are ordering from.





For a delivery, the usual goes through the same address check as Continue: the zone, the fee and the distance are those of the address as it is now, and an address that cannot be delivered stops with the banner showing.

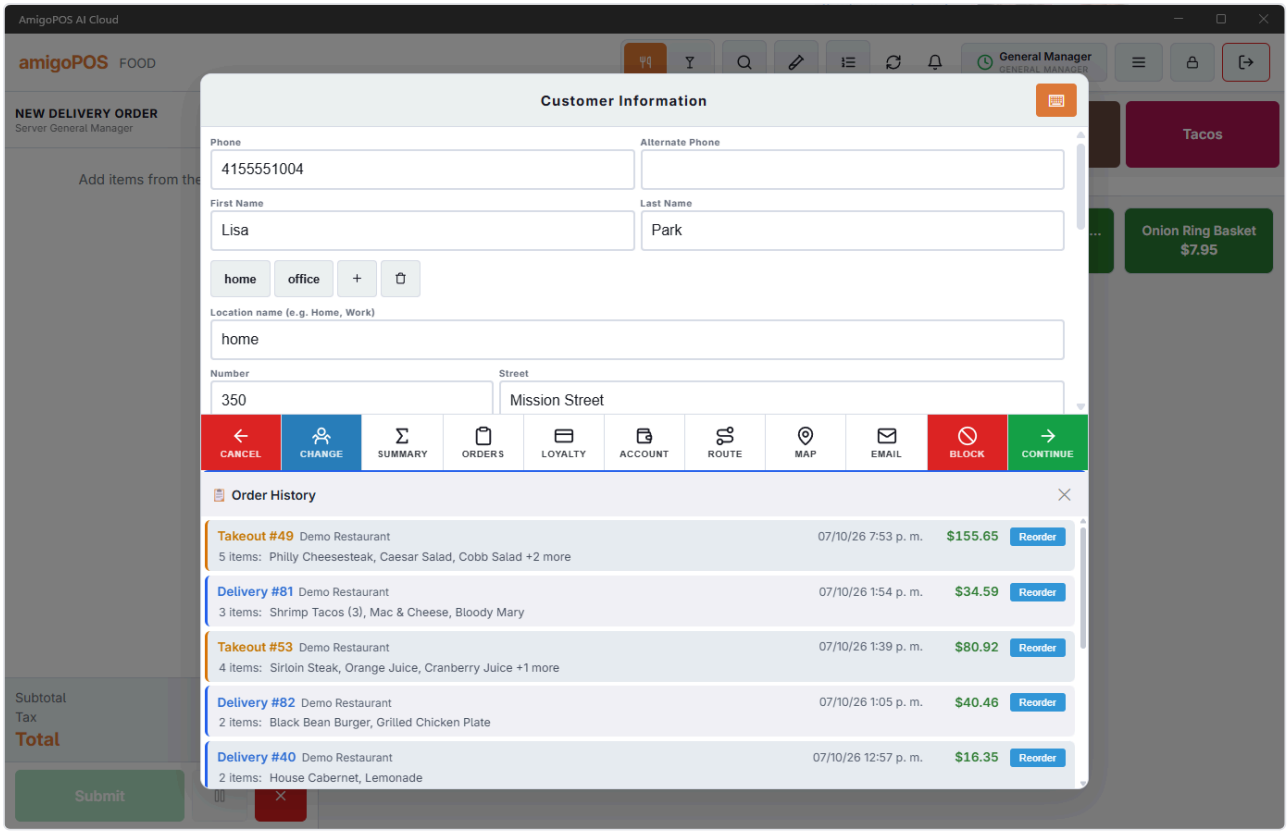
Customer order history

Customers, Gift & Loyalty › Customers

View online ↗

What a customer has ordered before, what they spend, and reordering it in one step.

A customer's past orders are on the **Orders** tab of their record in **Back Office › Customers › Customers**, and in the **Order History** panel of the register's customer screen, where an order can be rung again.



In Back Office

Open the customer and choose **Orders**. The tab shows the number of orders on the customer, and lists the last 50, newest first, from every store of your business:

- **Date** (in the store's time), **Order** number, **Store**, **Order Type** and **Total**.
- Voided and refunded orders are marked in the list.
- The eye button (**Preview**) opens the order.

To find your best customers, sort the customer list by **Sort: Total Spent** or **Sort: Order Count** (see Customers list, types, and merge).

At the register

With the customer open on the customer screen, **Order History** lists their recent orders with the order type and number, store, date (in the store's time), total, the items and the delivery address. When the Reorder button is turned on for the customer screen, each order that was not voided has **Reorder**, which puts its items on a new order at today's prices. See The usual: one-tap reorder for regulars for what is brought over and what is left out.

The guest timeline

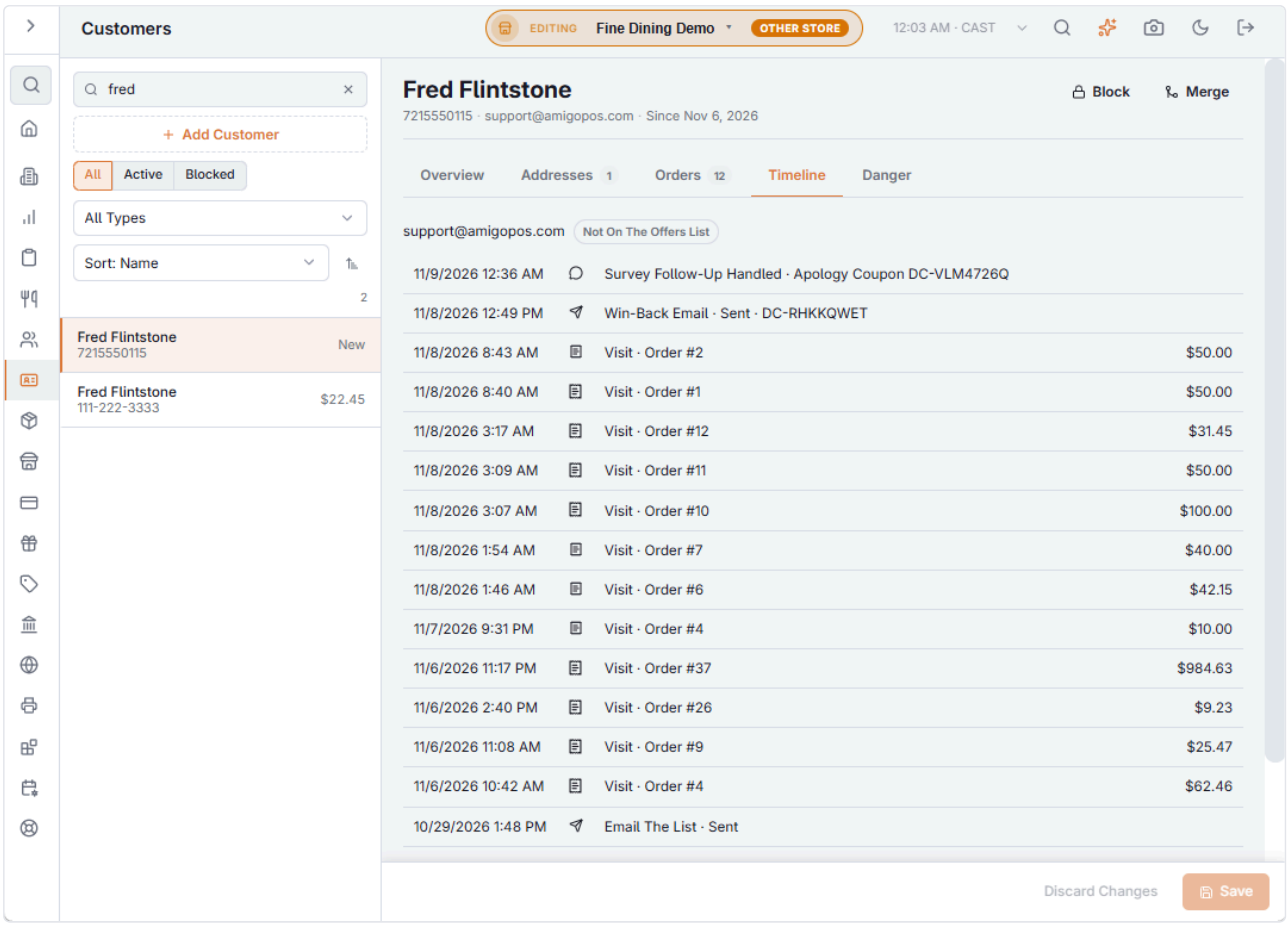
Customers, Gift & Loyalty › Customers

View online ↗

One guest's history in Back Office › Customers: visits, the offers list, every offer email, coupons used, survey contacts and calls, newest first.

When a guest calls about a coupon or a complaint, the **Timeline** tab of the customer shows everything at a glance.

Open **Back Office › Customers › Customers**, pick the customer and open **Timeline**. The guest's email and whether they are on the offers list show at the top; below, newest first:



- Their last 30 visits, with the order number and total.
- Offers list changes: joined (and where), left, paused, birthday only, back to all offers.
- Every offer email: which one, sent, not delivered or held out, with its coupon code.
- Coupons used, with the order and the check.
- Survey contact requests and how they were handled, with the apology coupon.
- Regulars We Miss calls, personal offers and dismissals.
- Birthdays and anniversaries recorded from reservations.

> The tab can be hidden with **Show The Guest Timeline** in **Discounts & Promotions › Guest Offers › Settings › At The Host Stand And Table**.

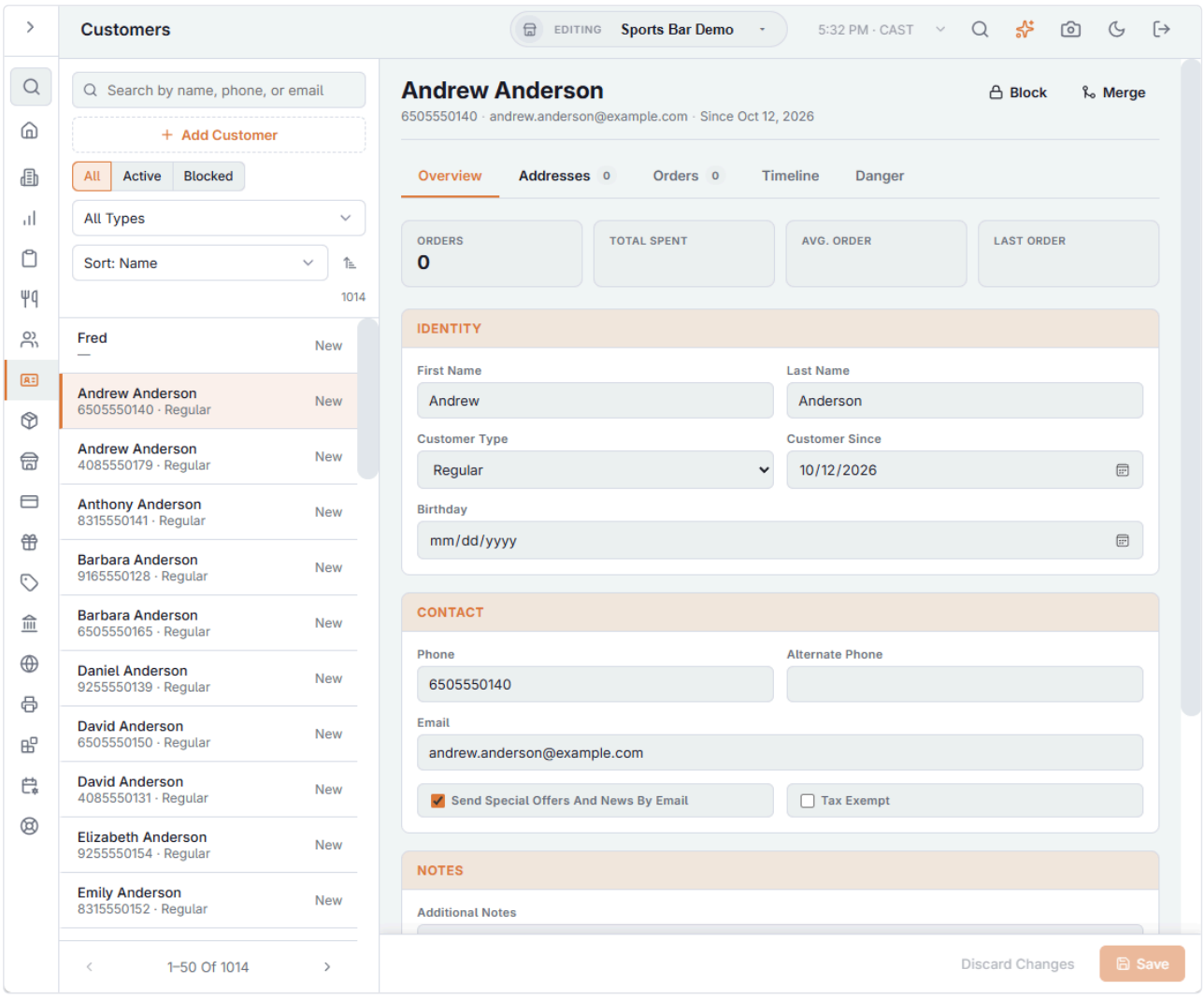
Customers list, types, and merge

Customers, Gift & Loyalty › Customers

View online ↗

Managing customer records in the back office, including merging duplicates.

Back Office › Customers › Customers is the customer list shared by all the stores of your business. Find a customer, edit their details and delivery addresses, see their orders, and block, merge or delete a record.



The list

- **Search by name, phone, or email** — the list updates as you type; Enter searches at once.
- **All**, **Active** and **Blocked** — which customers are listed.
- **All Types** or one customer type — shown under them when your business has customer types; lists only the customers of that type.
- **Sort: Name**, **Sort: Last Order**, **Sort: Total Spent**, **Sort: Order Count** or **Sort: Customer Since**. The arrow button next to it switches between ascending and descending.

Each row shows the name, the phone, the customer type and the total spent, or **New** for a customer with no orders yet. Hover a row to see the number of orders. Blocked customers carry a **Blocked** badge. The list shows 50 customers at a time; use the arrows under it to move between pages.

Adding a customer

Press **Add Customer** (+). An empty record opens with only the **Overview** tab; nothing is saved until you press **Save**. A new customer gets the first customer type in the list, so check **Customer Type** before saving.

The customer record

The header shows the name, phone, email and the date the customer was added, with the **Block** (or **Unblock**) and **Merge** buttons.

Overview

- **Orders**, **Total Spent**, **Avg. Order** and **Last Order** — the customer's figures.
- **Identity** — First Name, Last Name, Customer Type, Customer Since and Birthday. The loyalty birthday reward and birthday offer emails use the Birthday.

- **Contact** — Phone, Alternate Phone and Email.
- **Send Special Offers And News By Email** — tick it when the guest asks for your offers by email; it puts them on your offers list (Guest offers: building your email list). Each change is kept in the guest's offers consent record as made by staff.
- **Tax Exempt** — the customer's orders are tax exempt when the customer is added to the order at the register.
- **Notes** — Additional Notes (up to 255 characters) and Custom Field 1, 2 and 3.

Overview changes are kept until you press **Save** or discard them. If you pick another customer first, **Unsaved Changes** asks whether to **Keep Editing** or **Discard Changes**.

Addresses

The customer's delivery addresses. **Add Address** adds one straight away, named *New Address* and set to the default delivery zone. Each address has Name, Street number, Street, Apt / Suite / Line 2, City, Region, Postal Code, Delivery Zone and Notes; each field saves on its own when you leave it, and a tick confirms it. The bin icon deletes the address after you confirm.

Orders

The customer's last 50 orders, newest first: date, order number, store, order type and total. Voided and refunded orders are marked. The eye button opens the order. See Customer order history.

Timeline

Everything that happened between your business and this guest: visits, offer emails, coupons used and more. See The guest timeline.

Danger

Delete Customer removes the customer and all their addresses after you confirm. Their orders stay in your history but are no longer linked to anyone.

A customer can't be deleted while they have a customer account or a gift or loyalty card linked; a message says which. Delete the account in Customer Accounts first, or block the customer, or merge them into another customer.

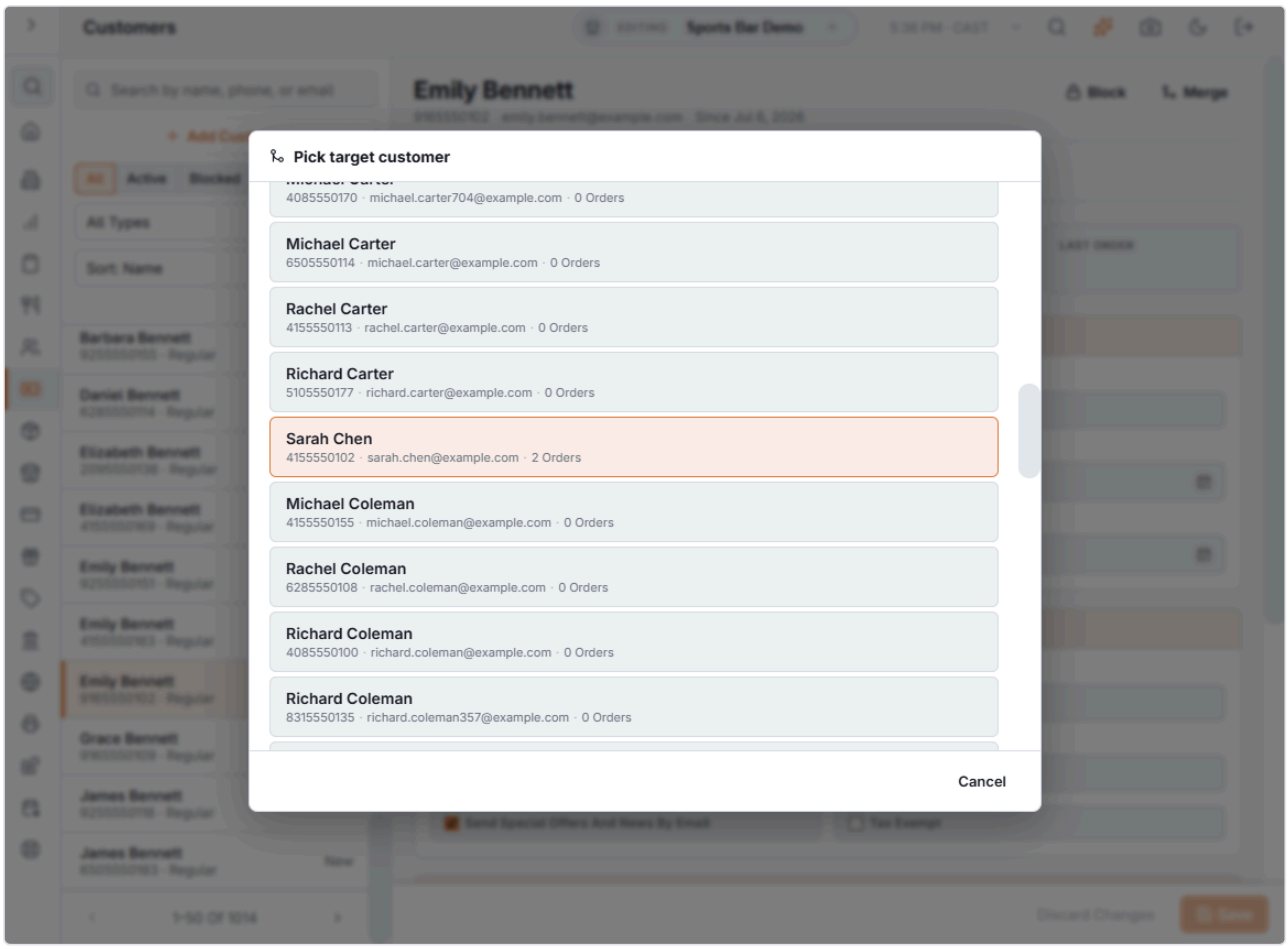
Blocking a customer

Block asks for a reason; the customer is then listed as blocked, with the reason. At the register, a blocked customer shows in red in the phone lookup, and choosing them opens their record with a **Blocked** banner and the reason instead of adding them straight to the order. Blocked customers are not sent guest survey emails and are left out of Regulars We Miss. **Unblock** clears the block at once. It needs the **Unblock Customer** permission; without it, **Permission Denied** shows and the customer stays blocked. At the register, Unblock on the customer screen asks for a manager instead.

Merging duplicates

The same person sometimes ends up with two records, for example under two phone numbers. To combine them:

1. Open the **duplicate** — the record you want to get rid of.
2. Press **Merge**. **Pick target customer** opens with a search box that searches all your customers as you type and shows the first 50 matches by name; the duplicate itself is not in the list.
3. Choose the record to **keep**. Each row shows the name, phone, email and order count.
4. Confirm in **Merge Customers**. The kept record is selected when it is done.



The duplicate's addresses — and the orders placed with them —, its customer accounts with their transactions, and its loyalty cards move to the kept record, and the duplicate is deleted. Its own contact details and notes are not copied, so add anything worth keeping to the kept record first.

> Merging and deleting are permanent. Check both records first.

Customer types

The **Customer Type** list comes from the Customer Types page, where each type can also carry daily limits for the price rules restricted to it. See Customer types and daily limits and Price rules.

> Looking a customer up while taking an order is covered in Customer lookup at the register.

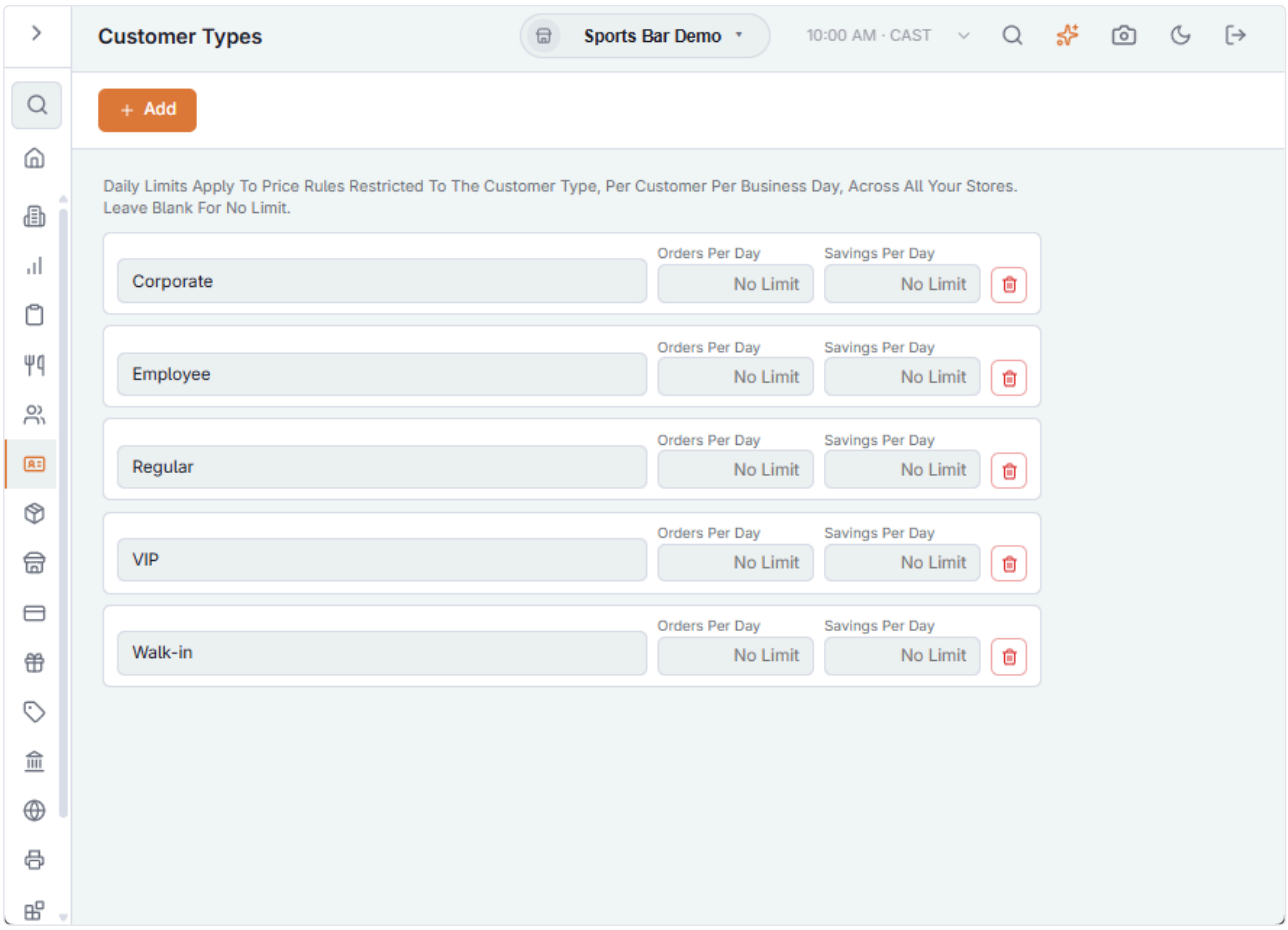
Customer types and daily limits

Customers, Gift & Loyalty › Customers

View online ↗

Customer groups, and daily order and savings limits for their price rules.

Back Office › Customers › Customer Types is the list of groups you sort customers into, such as Staff, Wholesale or Senior. A customer has one type, chosen on their record. Price rules can be restricted to a type, and each type can limit how often its customers get those prices each day. The list is shared by all your stores.



Managing the types

- **Add** — adds a type called *New Type* at once. Type over the name to rename it.
- Each change saves when you leave the box; a tick confirms it, a cross means it was not saved.
- The bin icon deletes a type after you confirm. Customers and price rules that used it lose the type.

The types appear in the **Customer Type** list of each customer record in Customers list, types, and merge. A new customer gets the first type in the list.

Daily limits

The two boxes on each row limit the Price rules restricted to that type. They count per customer, per business day, across all your stores. Leave a box blank (it shows **No Limit**) for no limit.

Box	What it limits
Orders Per Day	How many orders a day the customer can get the type's prices on.
Savings Per Day	How much the customer can save in a day with those prices: the regular price less the rule price, times the quantity, added up over the day's orders.

The register checks the limits when the customer is added to an order or an order of theirs is recalled. Orders already saved that day count, except voided ones. Once a limit is reached, items ring at their regular prices and the register says so, for example *Staff: Daily Order Limit Reached. Regular Prices Apply.* Before that, it can show what is left, such as *Staff: $12.00 Left Of Today's Savings Limit*.

> A staff meal rule with **Orders Per Day** set to 1 gives each employee one discounted meal a day, whichever store they eat at.

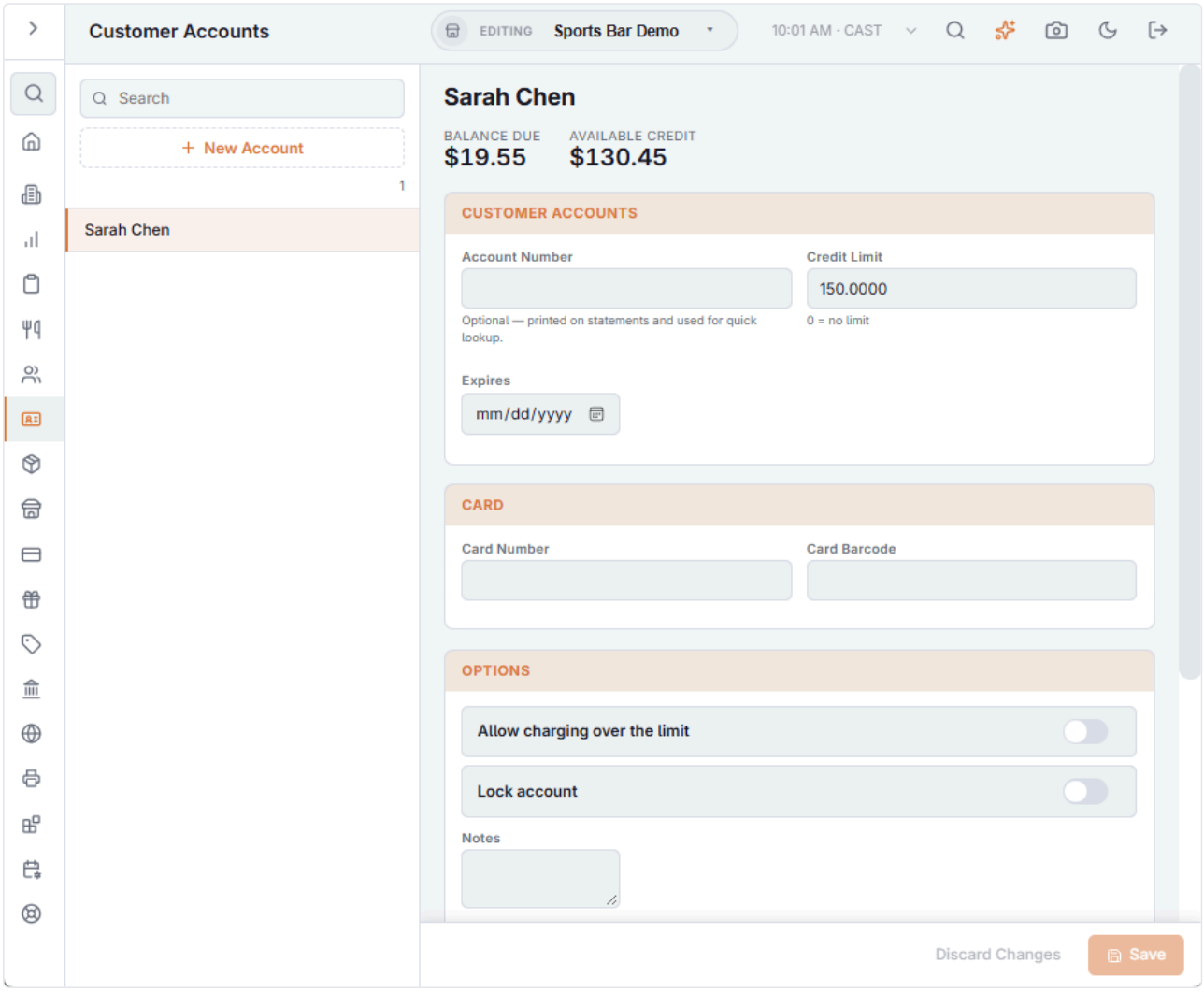
Customer accounts

Customers, Gift & Loyalty › Customers

View online ↗

House accounts let trusted customers charge orders now and settle later. Create accounts, set credit limits, and control how they're used.

Back Office › Customers › Customer Accounts holds the house accounts: customers you let charge orders now and pay the balance later, such as regulars, staff or a company. Each account belongs to one customer and has its own credit limit, card and history.



Finding an account

Type in the search box: the list updates as you type, and Enter searches at once. It finds accounts by account number, card number or barcode, and customer name. The list shows 50 accounts a page, each with the customer's name and the account number, and the arrows under it move between pages; the count shows how many accounts match. Locked accounts are greyed out. A new search starts again at page 1.

Opening an account

1. Press **New Account** (+). **Select Customer** opens.
2. Search for the customer by name or phone and pick them. The account is created at once and opens; if the customer already has one, it opens instead.
3. Fill in the fields below and press **Save**.

The account

The top of the account shows the **Balance Due** and the **Available Credit** (∞ when there is no limit), with an **Account Locked** or **Account Expired** badge when it applies.

Field	What it does
Account Number	Optional. Printed on statements and used to find the account.
Credit Limit	The most the customer can owe; 0 means no limit.
Expires	Optional date. After it, the account can't be charged.
Card Number and **Card Barcode**	A card for the account, so staff can find it by scanning or typing the card.
Allow charging over the limit	Lets a charge go through even when it is more than the available credit.
Lock account	Stops new charges and keeps the balance and history. A **Reason** box appears for why.
Notes	Free text for staff, for example "bills monthly".

Changes are kept until you press **Save** or **Discard Changes**. **Delete** is offered only while the account has no transactions. If the delete fails, **The Entry Could Not Be Deleted** is shown.

The balance

The balance due is always the charges less the payments, leaving out voided lines. It is worked out each time the account is opened, so it never drifts from the history. The **Transactions** list and the **Statement** are described in Account transactions, voids, and statements.

> At the register, a charge is refused when the account is locked or expired, or when it is more than the available credit and **Allow charging over the limit** is off. Payments on the account are always taken, so a locked account can still be paid off. See Charging orders and account payments at the POS.

Charging orders and account payments at the POS

Customers, Gift & Loyalty › Customers

View online ↗

Charge an order to a customer's account, or take a payment against an outstanding balance — both from the register.

At the register you can charge an order to a customer's house account, or take a payment against an outstanding balance. Both happen without leaving the POS.

Charging an order to an account

1. Ring up the order as usual and tap **Pay**.
2. Choose **Customer Account** as the payment method.
3. Find the account by **name**, **account number**, or **card**, then confirm.

The order total posts to the account as a charge, and the order is settled.

> **Note:** A charge is refused if the account is **locked**, or if it would exceed the **credit limit** — unless **Allow charging over the limit** is turned on for that account.

Taking a payment on an account

1. Open the **More** menu and choose **Account Payment**.
2. Search for the account. Only accounts with a balance owing appear here.
3. Enter an amount, or tap **Full balance** to pay it off.
4. Choose how the customer is paying — **cash**, **card**, and so on — to record it.

The payment reduces the account balance and is recorded as a tender, so it reconciles in the cash drawer and end-of-day totals like any other payment.

> **Cash payments need an active cash drawer** on the device. If none is assigned, assign one in Settings before taking cash. You also can't settle an account *with* the account itself — the Customer Account option is disabled on this screen.

Account transactions, voids, and statements

View online ↗

Review an account's history, reverse mistakes, and print or email a statement.

Every house account in **Back Office › Customers › Customer Accounts** keeps its own history. Open an account to see its **Transactions**, correct a line, or give the customer a **Statement**.

Transactions

The list shows the account's latest 50 lines, newest first, with the date and time in store time, the type and the amount. Charges add to the balance and show as positive amounts; payments take it down and show as negative amounts. Voided lines stay in the list, marked, and count as nothing.

- **Charge** — an order paid with the customer account at the register.
- **Payment** — money taken against the balance with **Account Payment** at the register.

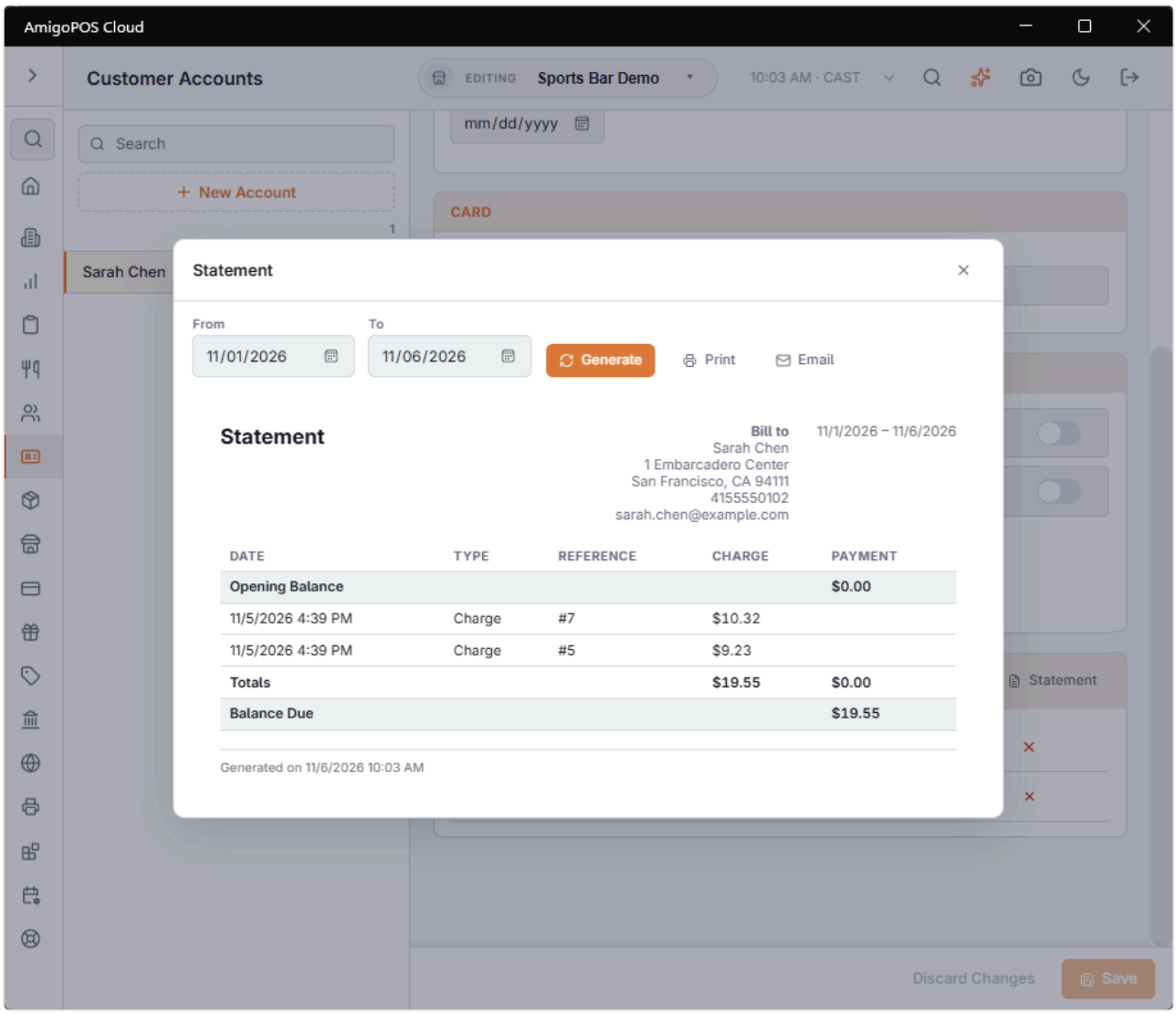
Voiding a line

Press the **×** on a line and confirm. What happens depends on the line:

Voiding a…	Result
Charge	The order it paid is reopened and its balance restored, so it can be paid another way.
Payment	The account balance goes back up and the payment is reversed in the cash drawer.

> A void can't be undone. The confirmation says which reversal will happen; read it before you confirm.

Statements



1. Open the account and press **Statement**.
2. Set **From** and **To**. The statement opens on the current month and is redrawn when you change a date; **Generate** draws it again.
3. Press **Print** for a paper copy, or **Email** to send it to the customer's email address.

The statement shows your store's name, address, phone and email; **Bill to** with the customer's name, address, phone and email; the account number and the period; the **Opening Balance**; each charge and payment in the period with its date, type and reference (usually the order number); the **Totals**; and the **Balance Due** at the end of the period. Dates and times are in the store's time.

The emailed statement and its subject are written in the language you are using Back Office in (English, Spanish or Arabic).

> **Email** goes to the email on the customer's record. When the customer has none, a message says so; add the email in Customers list, types, and merge and send again.

Regulars and VIPs at the host stand and table

Customers, Gift & Loyalty › Customers

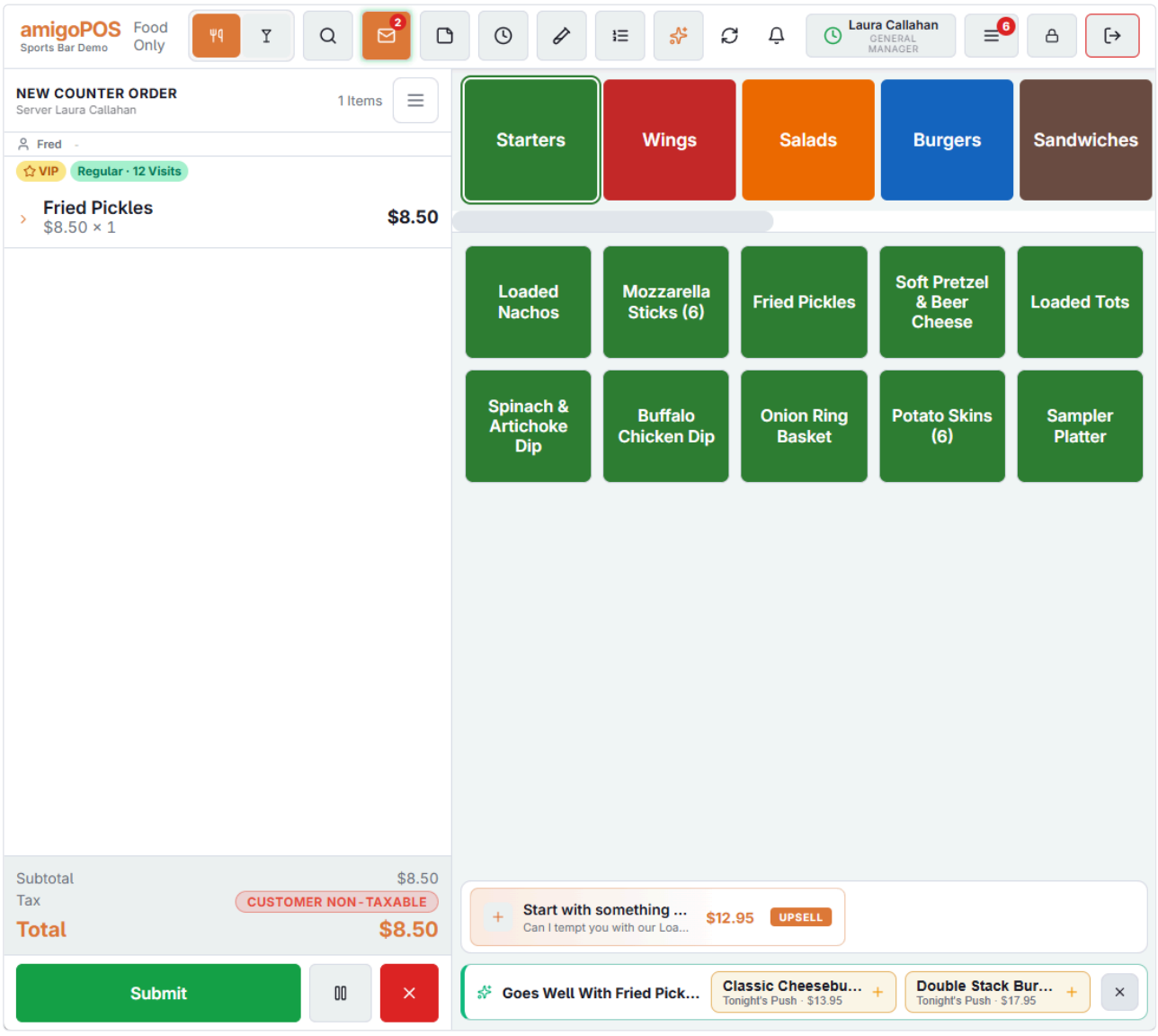
View online ↗

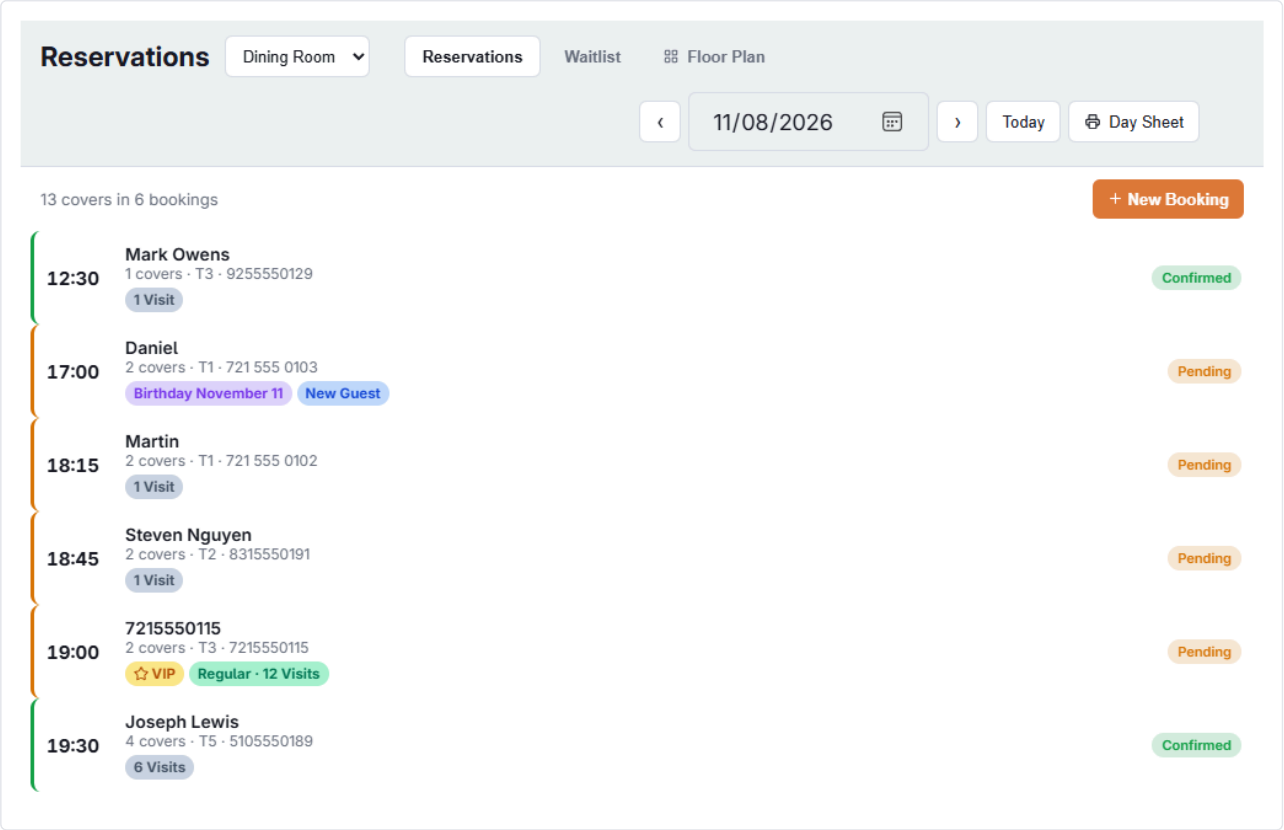
Chips on the order and the reservation book tell staff who is a VIP, a regular, new, celebrating a birthday or has allergies; tap them for the last visit, average check and usual order.

Greeting a regular by name, remembering their usual or a birthday makes a visit. The register now shows what your staff should know about a known guest, where they need it.

Where it shows

- **The order** — under the customer line of the order panel, when a customer is on the order.
- **The reservation book** — under the name of each booking and each waitlist entry. Bookings without a customer and the waitlist are matched by phone number.

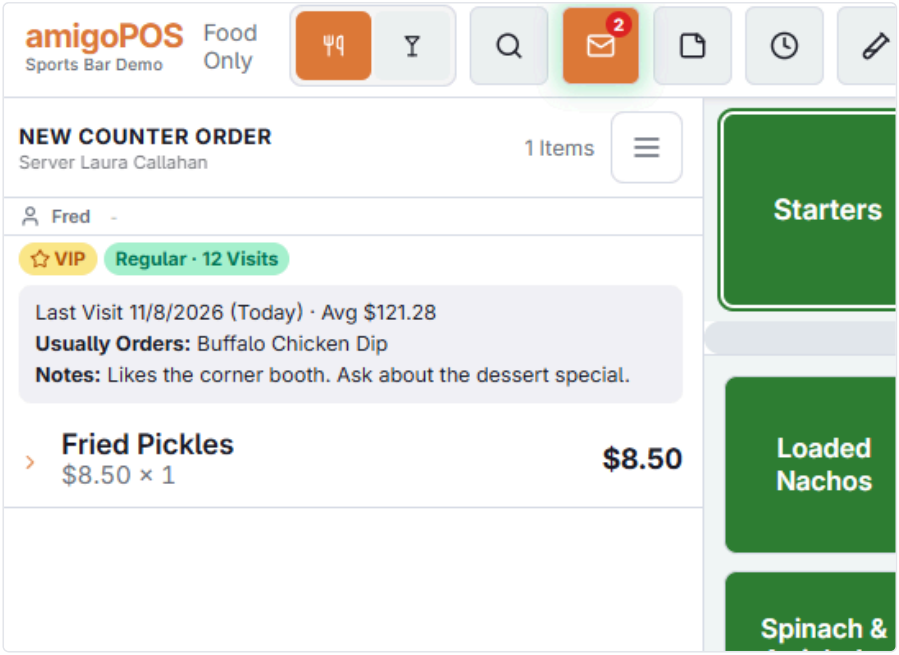




The chips

- ★ **VIP** — the customer is marked VIP.
- **Flagged** — the customer carries the Problem flag.
- ⚠ **Allergies** — the customer record lists allergies (tap to read them).
- **Birthday** — a birthday between yesterday and a week from today.
- **Regular · N Visits** — at least 4 paid visits in the last 90 days (setting); otherwise **N Visits**, or **New Guest** for a known customer with no paid visit yet.

Tap the chips for the details:



- **Last Visit** — date and how long ago, and the average check.
- **Usually Orders** — up to three items ordered on more than one visit in the last year.
- **Allergies** and **Notes** from the customer record.

Visits count paid checks at every store of your business. VIP, Problem, allergies and notes are set in the customer editor.

Settings

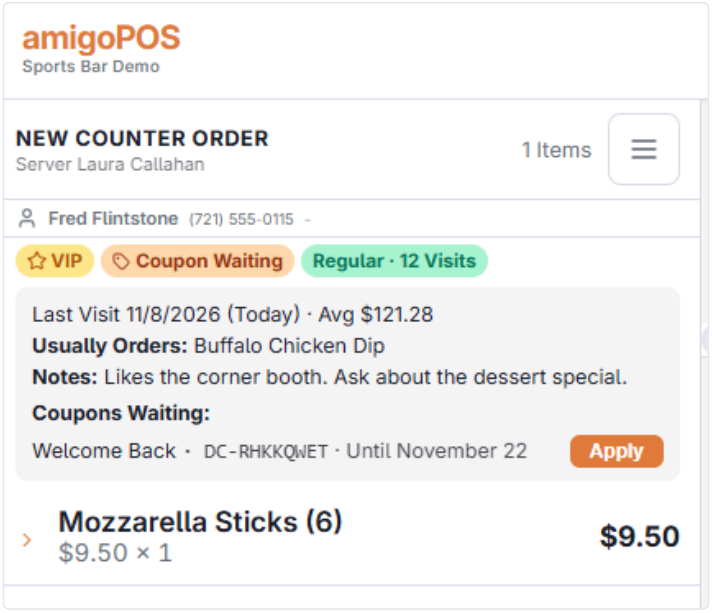
In **Back Office › Discounts & Promotions › Guest Offers › Settings › At The Host Stand And Table**:

- **Show Regulars And VIPs** — on by default.
- **Regular After (Visits In 90 Days)** — 4 by default.

> Nothing shows while the register is offline, for guests who aren't customers yet, or for shared walk-in customers (such as the delivery app or table guest customer). The register remembers each guest for 10 minutes, so a change in the customer record can take that long to show.

Coupons waiting

When a known guest has unused coupons made for them at this store (from the offer emails, an invite, an apology or a coupon printed for them), an orange **Coupon Waiting** chip shows next to the others. Tap the chips to see each coupon with its code and last day; on the order, **Apply** adds it to the order just like typing the code. Up to 5 show, soonest to expire first. Guest survey rewards are anonymous, so they never show here.



Regulars who stopped coming

Regulars and VIPs who haven't been in for a while are listed for managers to call or send a personal offer (Regulars we miss), and each customer's full history is on their Timeline tab (The guest timeline).

Gift cards

How gift cards work

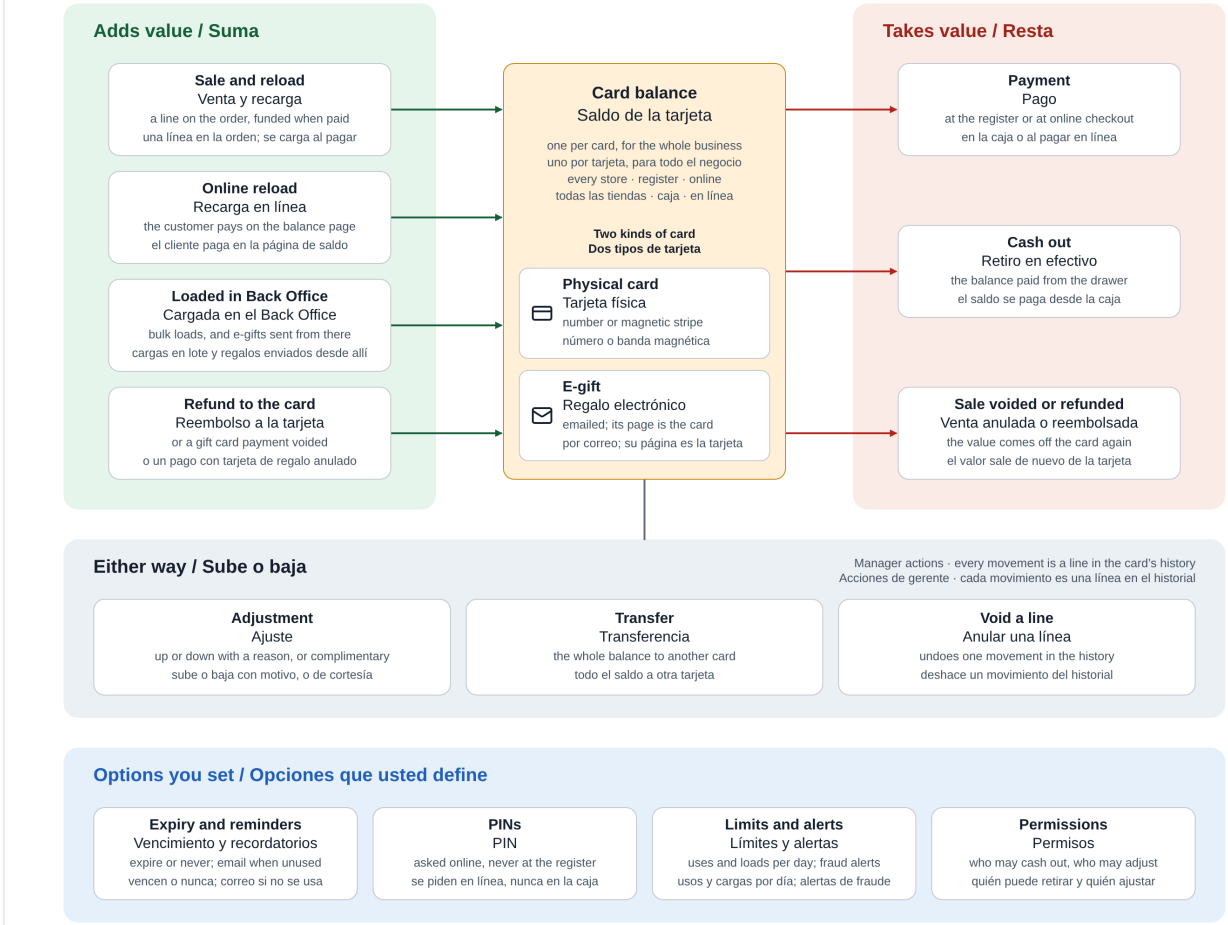
Customers, Gift & Loyalty › Gift cards

View online ↗

Physical cards and e-gifts, where the balance lives, and where every movement is recorded.

A gift card is stored value your business owes the holder until it is spent. AmigoPOS keeps one balance per card for the whole business: a card sold in one store can be spent in any of your stores, at the register or online.

In one picture: what adds value to a card, what takes it off, what can go either way, and the options you set.



Two kinds of card

- **Physical cards** — plastic cards with a number or magnetic stripe. Sell them at the register; you can also load a whole box of numbers in advance (Adding cards in bulk).
- **E-gifts** — a digital card sent by email. The recipient opens a link to activate it, and that page then works as the card itself (The e-gift page as the card).

What moves the balance

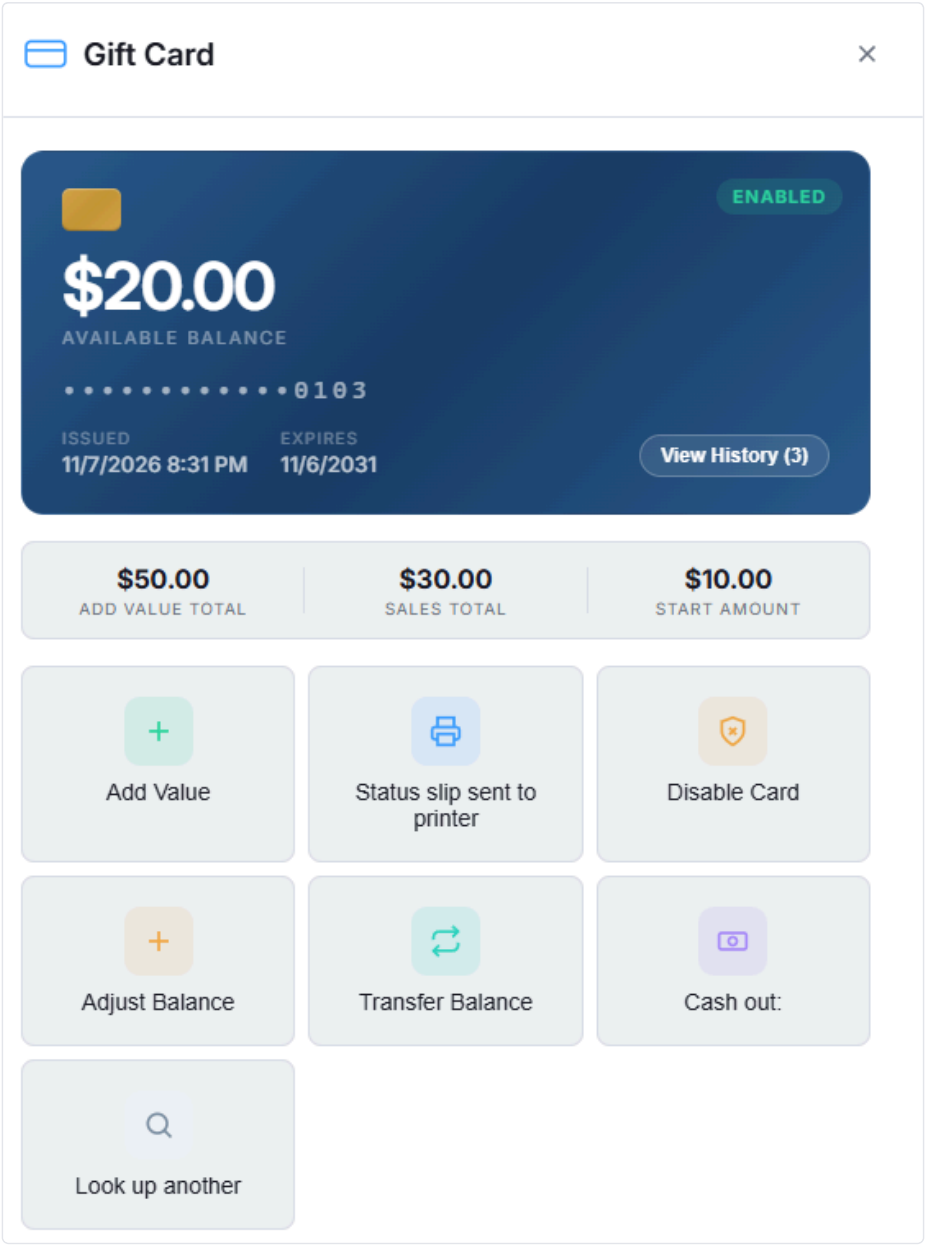
Movement	Where
Sale and reload	A gift card item on an order; the card is funded when the order is paid (Selling and reloading)
Payment	The gift card payment method at settle (Paying with a gift card)
Refund	Refunding an order back to a gift card credits the card
Cash out	Paying the balance out in cash (Cashing out)
Adjustment, complimentary value, transfer	Manager actions on the Gift Card screen (Adjusting and transferring)
Bulk load	The same amount loaded onto many cards from Back Office
Online reload	The customer adds value on the balance page
Online purchase	A guest buys an e-gift in the online store (Selling gift cards in your online store)

Every movement is a line in the card's history with its source, the employee and a reason where one is required. Nothing is edited in place: a mistake is corrected by voiding the line or by an adjustment, so the history always explains the balance.

Where to look

- **At the register** — the Gift Card screen (look up a card, see its balance and history, and the manager actions).
- **Back Office › Gift & Loyalty › Cards › All Cards** — every card, searchable, with its detail window (All Cards).
- **End of day** — the gift card section lists every movement of the day, including cash outs, e-gifts issued from Back Office and online reloads.
- **Gift Card Liability** — what you owe on all cards on a given date (Gift card liability).

> Gift card sales are not revenue and never earn loyalty points; the money becomes a sale when the card is spent.



Cards shared between restaurants

Restaurants under different owners can share one gift card through a **shared card program**: a layer above the businesses with its own card numbers, one set of rules and one shared ledger, settled between the owners from a periodic statement. Your own cards are unaffected. See What the shared card program is.

Digital gift cards

Customers, Gift & Loyalty › Gift cards

View online ↗

What digital (e-gift) cards are and how they move from purchase to redemption

A digital gift card, or e-gift, is a gift card with no plastic. It is sent to the recipient by email or text message with a card number and an **Activate** link, and is then used like any printed card: at the register, and online on its gift page, where the balance can be checked and topped up.

How it works

The card is created and funded when the gift is issued; a gift scheduled for later only holds back the email or text. Digital and physical gift cards share the same balances, history and reports — a card is a card, however it was issued.

Where gifts are issued

- **At the register** — sold to a guest as a line on their order and sent by email when the order is paid (Send a digital gift card at the register).
- **In Back Office** — **Back Office › Gift & Loyalty › Digital Gifts** issues gifts given by the business, by email or text, and lists every gift sent or scheduled (Manage digital gifts in the back office).
- **In the online store** — guests buy a gift for someone else and pay by card; it is sent like any other e-gift and listed in Digital Gifts (Selling gift cards in your online store).

Before the first gift, check the sending address and the gift page: Set up digital gift cards.

Selling and reloading gift cards

Customers, Gift & Loyalty › Gift cards

View online ↗

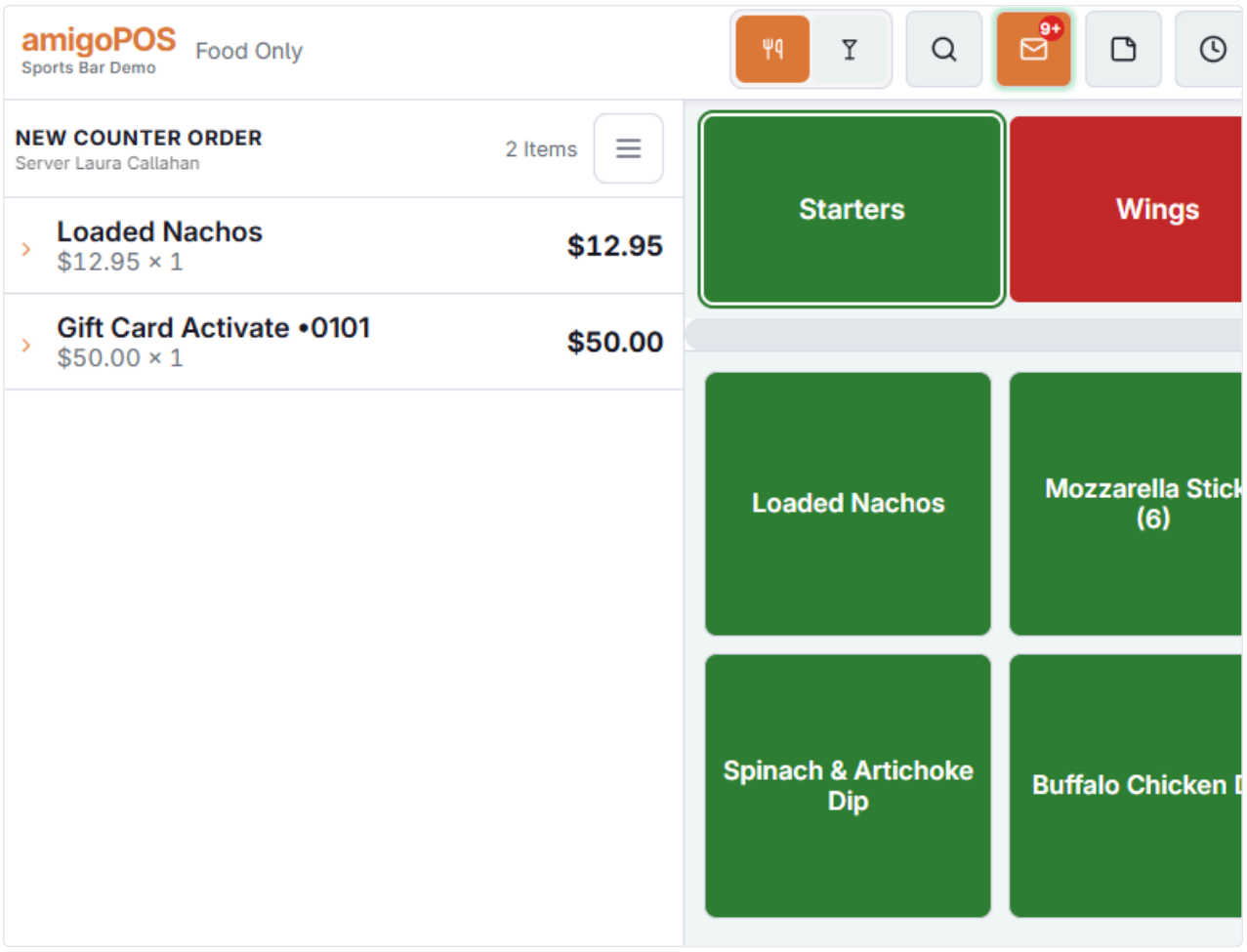
Selling a new card or adding value to one at the register, and when the money reaches the card.

Selling or reloading a card is part of a normal order, so it is paid, receipted and reported like everything else.

1. Open the **Gift Card** screen at the register and swipe, scan or type the card number.
2. Choose **Activate** for a new card or **Add Value** for one already in use, and enter the amount.
3. The amount goes on the order as a gift card line. Take payment as usual.

Opening the screen needs the **Gift Cards** permission, and **Add Value** needs **Add Gift Card Value**. Without one, a manager approves before the card goes on the order.

The card is funded when the order is paid — not when the line is added. Until then it waits as a *pending card operation*, so an order that is never paid never puts money on a card. If the order is later voided, or the gift card line refunded, the value comes off the card again.



Good to know

- A physical card loaded in Back Office in advance starts inactive; its first sale activates it.
- Gift card lines never earn loyalty points and are left out of discounts calculated on the order.
- A store can limit how much value one card can take in 24 hours (Daily limits and fraud alerts).
- To send a card by email instead, see Send a digital gift card at the register.

Paying with a gift card

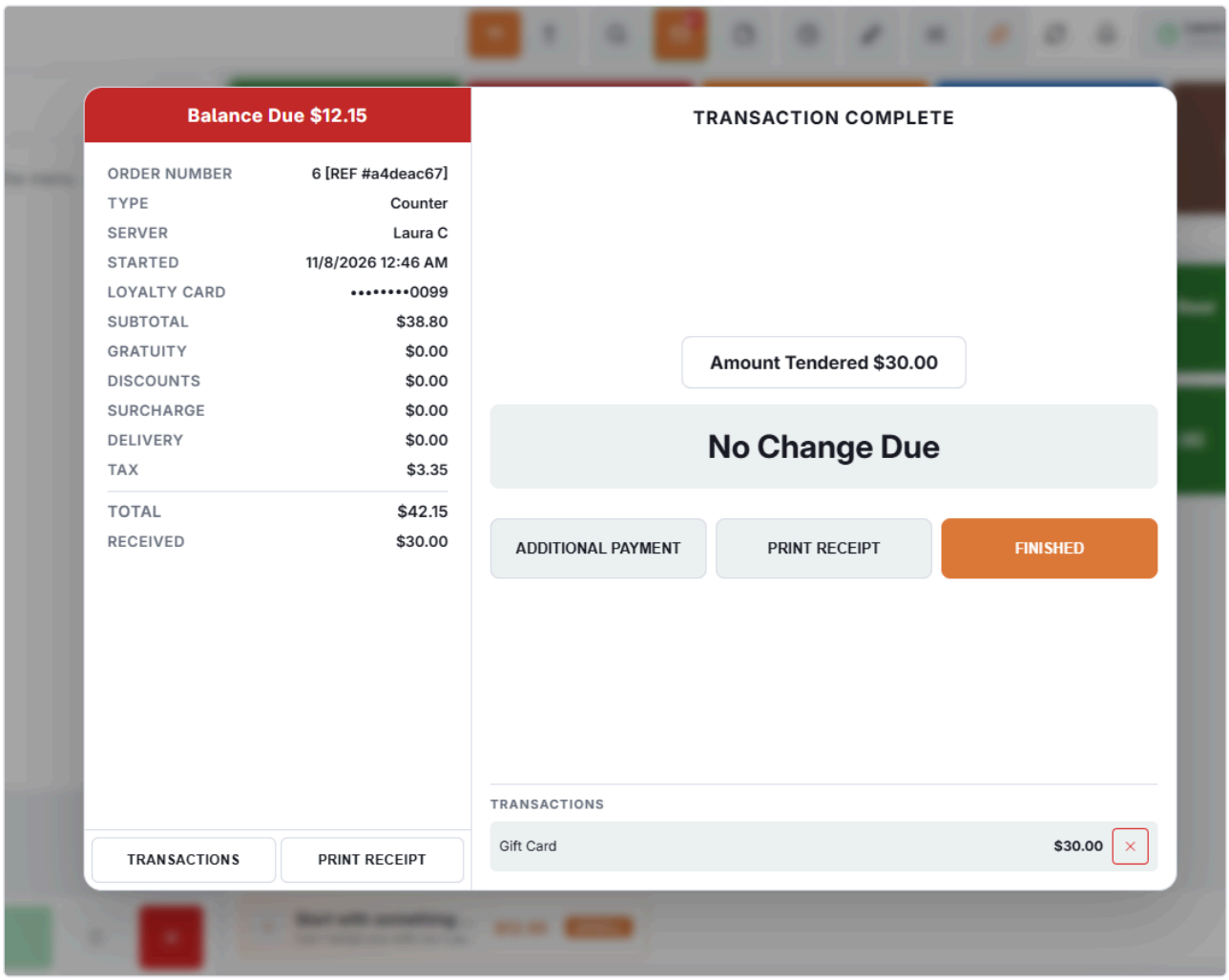
Customers, Gift & Loyalty › Gift cards

View online ↗

Taking a gift card as payment, partial payments, voids and refunds, and what the receipt shows.

At payment choose the **gift card** payment method and swipe, scan or type the card. The payment is taken from the card in the same step the payment is recorded, so two stations can never spend the same balance twice.

- **Not enough on the card** — take what the card has and settle the rest with another method.
- **E-gifts** — scan the barcode on the guest's phone or type the number printed under it.
- **Deactivated or expired** cards are refused with the reason.



Voids and refunds

- **Voiding the payment** puts the amount back on the card.
- **Refunding to a gift card** credits the card you choose.
- A payment still standing on an order can't be reversed from the card's history — void the payment on the order instead.

On the receipt

The customer receipt lists each gift card that paid, the amount taken and what is left on it (Gift card and loyalty lines on receipts).

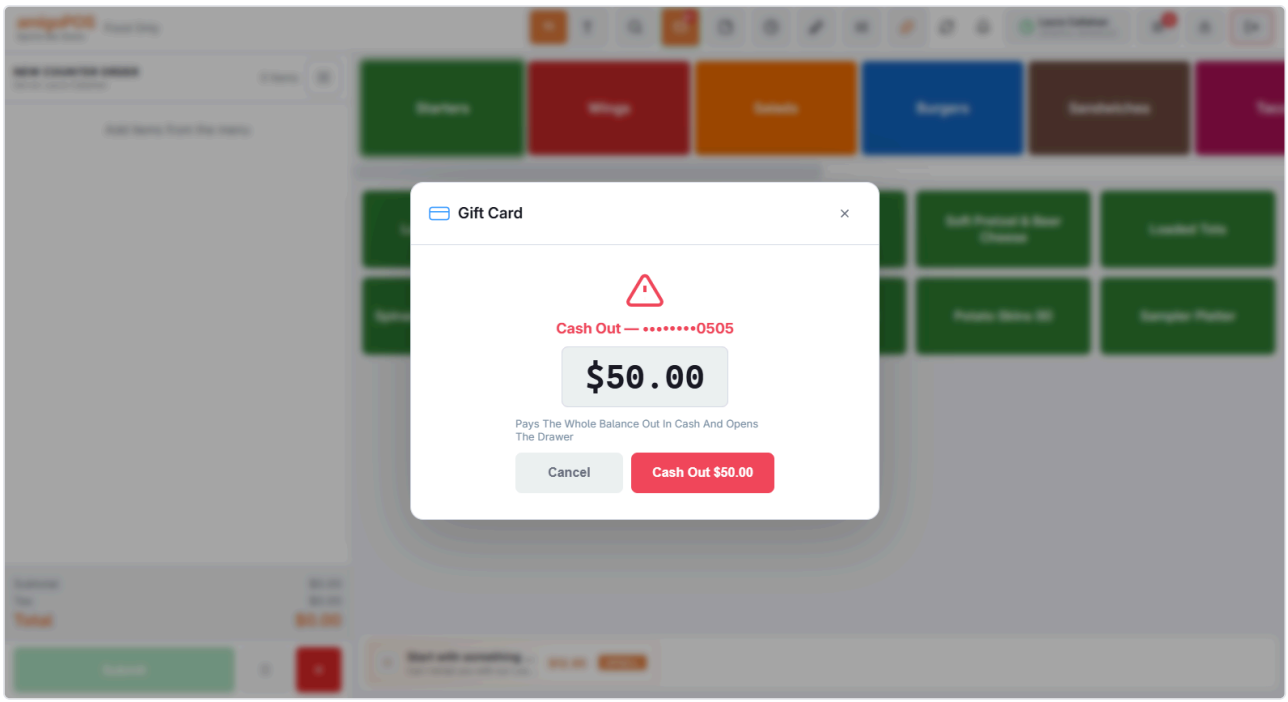
Cashing out a gift card

Customers, Gift & Loyalty › Gift cards

View online ↗

Paying a gift card balance out in cash: who can do it, the limit, and how it shows in the drawer and reports.

Some places require a small leftover balance to be paid out on request. **Cash Out** on the Gift Card screen does it in one step: the balance comes off the card, a cash payout is recorded and the drawer opens.



Controls

- **Permission** — only roles with *Allow Gift Card Cash Out* see the button. It is on by default: review your roles and turn it off where it doesn't belong.
- **Ceiling** — the store setting `GiftCardCashOutMaxBalance` refuses a cash out when the balance is above it (0 = no limit).
- **Alert** — every cash out raises a fraud alert unless `GiftCardAlertOnCashOut` is off (Daily limits and fraud alerts).

In the drawer and the reports

The payout counts against the drawer like any cash payout and appears in the end-of-day gift card section with the employee's name. Voiding the cash out on the card's history restores the balance and voids the payout together, which puts the cash back into the drawer's expected cash. The drawer reset report lists the cash out under **Cash Payouts (-)**, with its note (*Gift Card Cash Out* • and the card's last four digits) in place of a reason.

Where it shows

On the end-of-day report a cash out is a **paid-out** (*Gift Card Cash Out* • and the card's last four digits, with the employee's name) and a *Cashed out* line in the gift-card ledger and on the receipt slip's Gift cards block. It is never counted as *Gift cards redeemed* — the guest took cash, not goods. Paying a check with the card is a different action: the **Gift Card** tender on the payment screen, which shows under tenders and redemptions instead.

Adjusting and transferring a balance

Customers, Gift & Loyalty › Gift cards

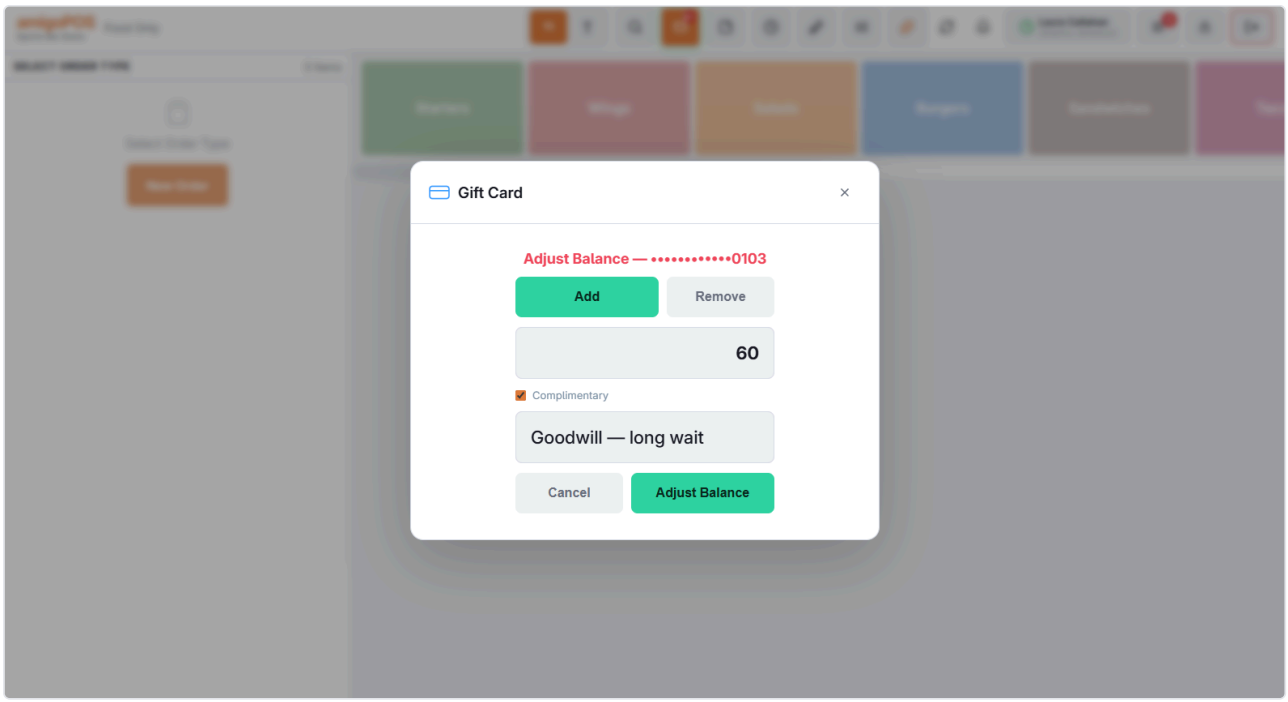
View online ↗

Manager corrections, complimentary value, moving a balance to a replacement card, and voiding a line.

These actions sit on the Gift Card screen at the register and need the *Allow Gift Card Adjust* permission, which is off for every role until you grant it.

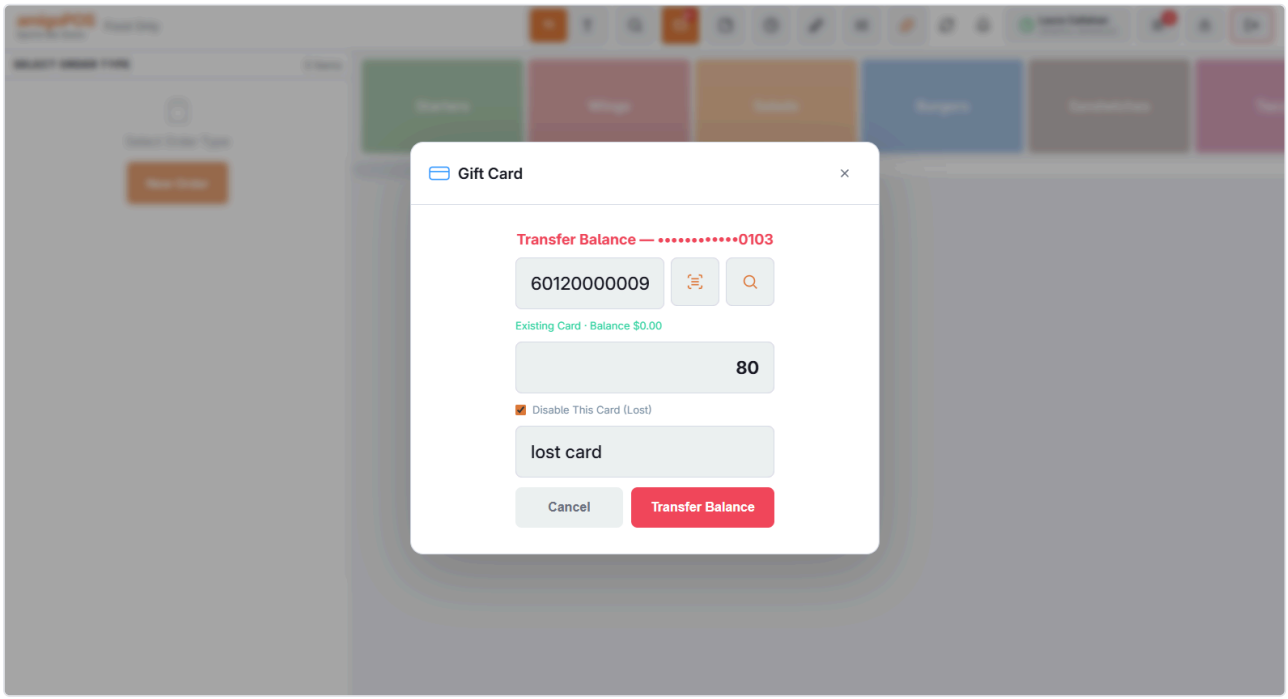
Adjust

Adds or removes value with a required reason — for example to correct a mistake. Mark it **Complimentary** to give value away (a goodwill gesture or a prize) so it reports apart from corrections. Store setting `GiftCardAdjustmentsEnabled` turns adjustments off entirely; a large adjustment raises a fraud alert (Daily limits and fraud alerts).



Transfer

Moves the whole balance to another card — the answer to “I lost my card”: look up the old card, choose **Transfer**, scan the new card and optionally deactivate the old one in the same step. A transfer can’t be voided; transfer back if needed. Store setting `GiftCardTransfersEnabled` turns it off.



Voiding a line

A line in the card’s history can be voided with a reason (same permission). The balance is recalculated from the history, and a payment still standing on an order has to be voided on the order instead.

> E-gift not opened yet? A manager can activate it from the same screen so the guest can use it right away.

Send a digital gift card at the register

View online ↗

Selling an e-gift for someone who is not there, scheduling delivery, and when the money actually moves.

A digital gift card is sold at the register and emailed to whoever it is for — useful when a guest wants to buy a gift for someone who is not in the room.

Selling one

1. Open the gift card screen and choose **send digital gift**.
2. Enter the **amount** and the **recipient's email**.
3. Optionally add the recipient's name, a *from* name and a short message. All three appear in the email exactly as typed.
4. Confirm. The gift is added to the order as a line.

When the money moves

The gift is **rung as a line on the check and issued when the order settles**, not at the moment you enter it. That is what you want: the card is funded by the payment the guest actually makes.

It also means a gift line **voided before the order settles simply never happens** — no card is created and nothing is emailed. If a guest changes their mind, remove the line; there is nothing to unwind.

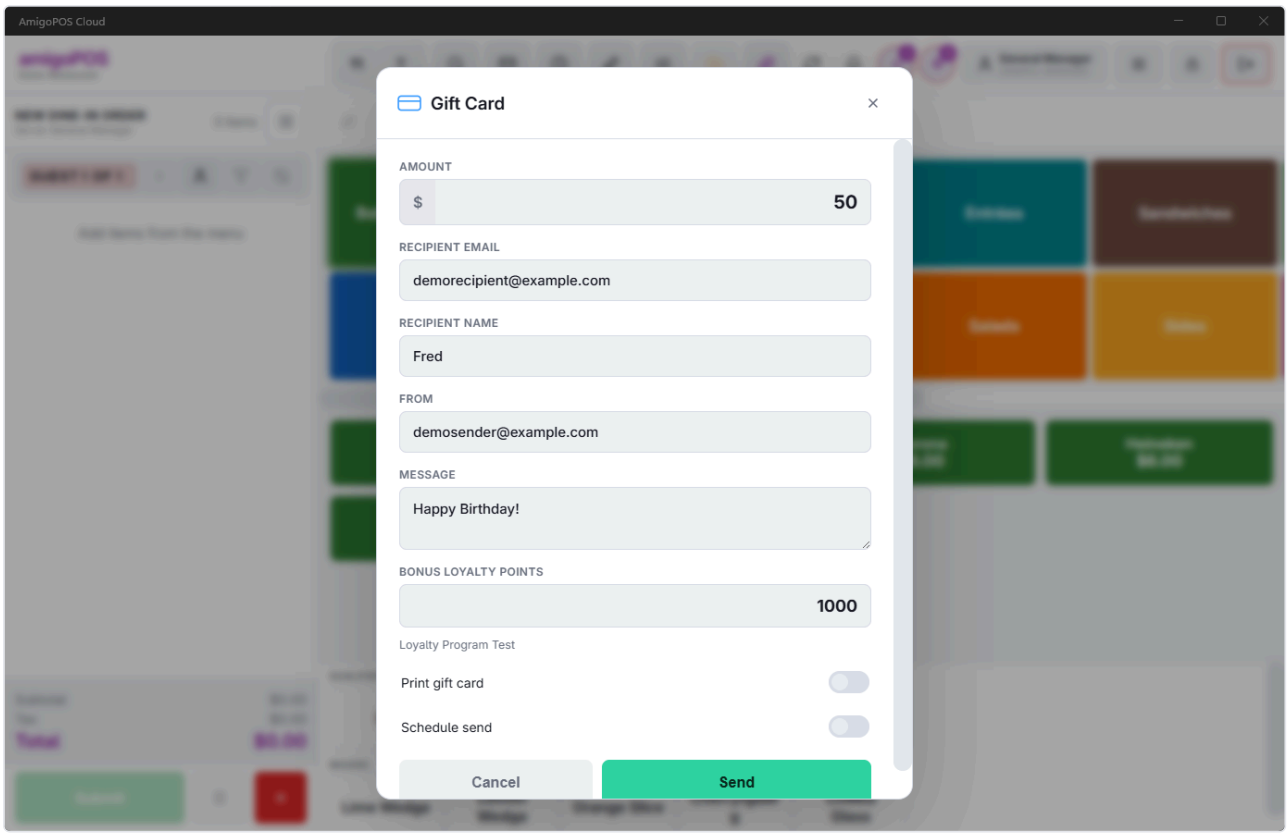
> The corollary matters just as much: an order left unsettled has issued no card. If a recipient says nothing arrived, check that the sale was completed before looking anywhere else.

Sending it later

For a birthday or an anniversary, set a **scheduled send** date and time. The card is still created and funded when the order settles; only the email is held until the moment you chose.

> Read the email address back to the guest before you settle. It is the only route the gift has, it is typed under time pressure, and a wrong address is not something the recipient can report — they never knew a gift was coming.

> A printed gift slip can be requested with the sale for a guest who wants something physical to hand over. It prints after the order settles, for the same reason the card is issued then.



E-gifts under a shared program

When the store is an Active member of a shared card program that allows e-gifts, the form shows an **Issue Under** picker: *Our Own E-Gift*, or the program. A program e-gift can be spent at any member restaurant and counts as a sale by yours. See Program cards at the register.

Manage digital gifts in the back office

Customers, Gift & Loyalty › Gift cards

View online ↗

Issue e-gifts and review, filter, or cancel scheduled and recent deliveries

Back Office › Gift & Loyalty › Digital Gifts issues digital gift cards (e-gifts) by email or text message and lists the gifts sent and waiting to go out. A gift issued here is given by the business: no payment is taken, so it needs the **Adjust And Transfer Gift Card Balances** permission; without it, pressing **Send** shows a message saying so and nothing is issued. To sell an e-gift to a paying guest, use the register (Send a digital gift card at the register).

Sending a gift

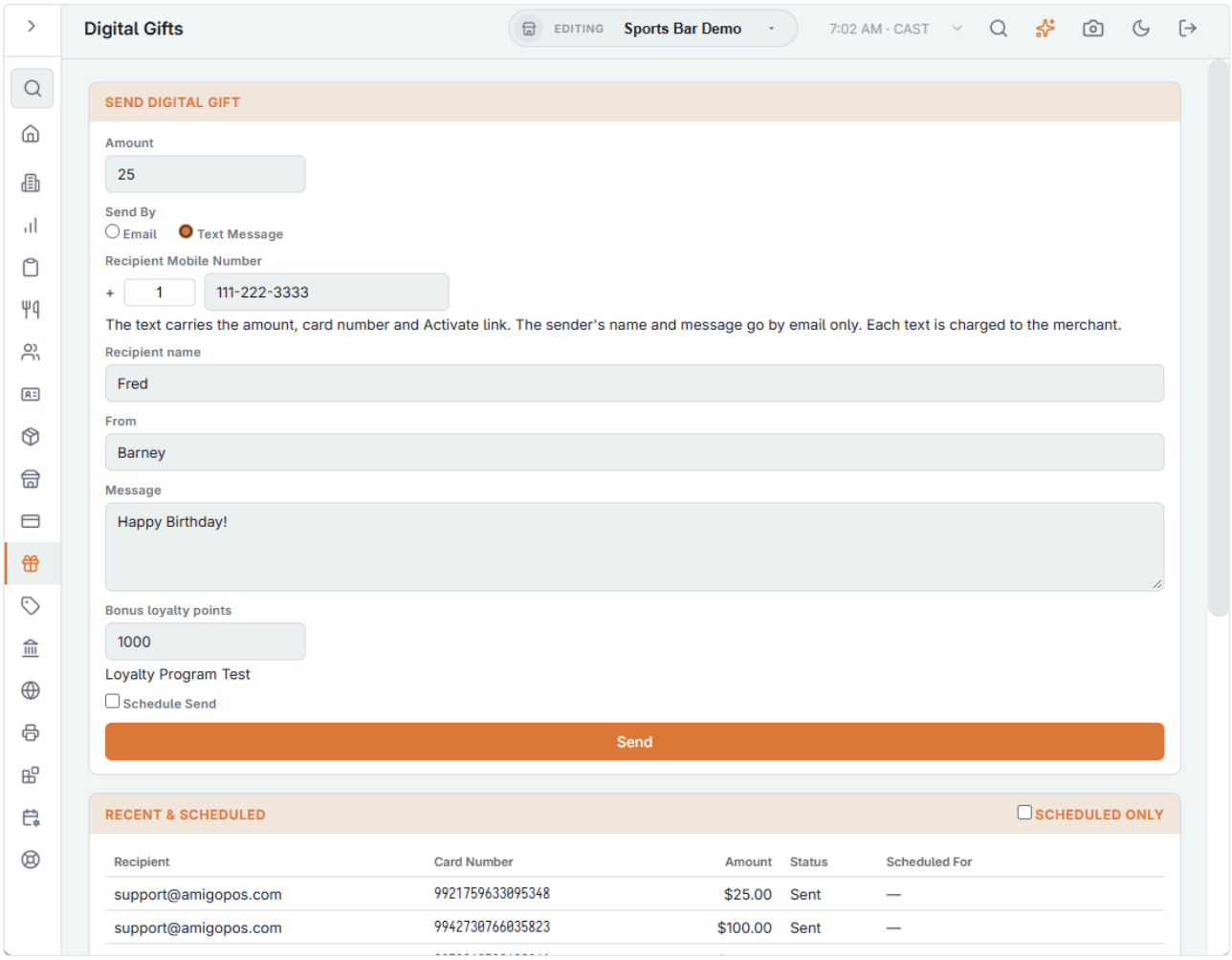
Fill in **Send digital gift**:

- **Amount** — the gift card value.
- **Send By** — **Email** or **Text Message**, then the **Recipient email** or the **Recipient Mobile Number** (see below).
- **Recipient name**, **From** and **Message** — optional; they appear in the email as typed.
- **Bonus loyalty points** (points programs) or **Bonus** (bonus programs) — optional loyalty value put on the same card. The program's name shows under the box; with no active loyalty program the box is disabled. A gift can carry only points, with no gift value.
- **Schedule Send** — tick it and choose a date and time in store time to deliver later, for a birthday for example.

Press **Send** (or **Schedule**). The card is issued and funded straight away; *Gift card sent* or *Gift card scheduled* confirms it. If the email or text could not go out, a message gives the card number and the reason: the card exists either way, so fix the cause and re-send it from the list, or read the number to the guest.

Sending a gift by text

- Choose **Send By › Text Message** and enter the **Recipient Mobile Number**: the country code box is filled with the store's default; type a number starting with + to give the full international number instead.
- The text carries the amount, the business name, the card number and the **Activate** link. The sender's name and message go by email only.
- **Schedule Send** works the same as for email.
- Each text is charged to the store and listed in the SMS log. It needs **Send Text Messages** and **Digital Gift Cards** on in SMS settings.



Recent & scheduled

The list shows the latest 100 gifts: the recipient's email or phone, the card number, the amount, the status and **Scheduled For**, the time it is set to go out. Tick **Scheduled only** to see only gifts set for a later time.

- **Pending** — not sent yet: going out now, or waiting for its time.
- **Sent** — accepted for delivery. For a text, whether it reached the phone is in the SMS log and message costs.
- **Failed** — the send didn't go through and is not retried by itself. Hover the ⓘ for the reason.
- **Canceled** — a scheduled send that was stopped.

Canceling a scheduled gift

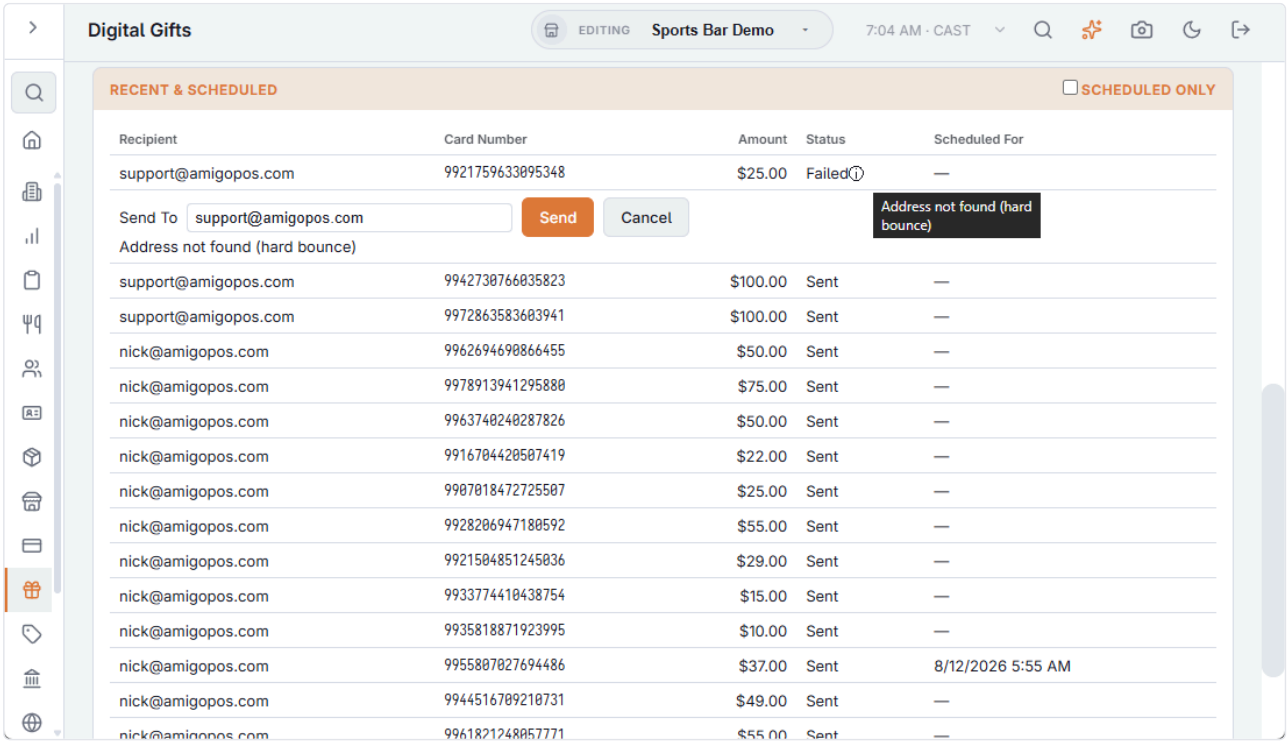
A scheduled gift that hasn't been sent has **Cancel**, which stops the email or text from going out.

> **Important:** canceling stops the *delivery* only. The card was funded when it was issued and stays valid.

Sending a failed gift again

1. Press **Re-Send** on the failed row. A row opens under it with **Send To** filled in with the email address or phone number the gift went to, and the reason it failed.
2. Correct the address if that was the problem. For a text, a number typed without + gets the store's country code, as when issuing.
3. Press **Send**.

The same card number and activation link go out again; no new card is issued. *Gift card sent* confirms it and the row turns **Sent**. If it fails again, the reason is shown and the row stays **Failed**. A corrected address replaces the old one on the delivery.



All cards in one place

Every card, physical or digital, gift or loyalty, is also listed under **Gift & Loyalty › Cards › All Cards**, with its full history (Finding a card: All Cards).

Issuing under a shared program

Members of a shared card program see an **Issue Under** selector on the issue form: *Our Own E-Gift*, or the program. The program e-gift carries the program's card prefix and is spent at any member. See Program cards at the register.

Gifts bought online

Gifts that guests buy in the online store are in the same list, with the buyer as the sender, and are re-sent or cancelled the same way. Turning the online sale on is in Selling gift cards in your online store.

The gift card email

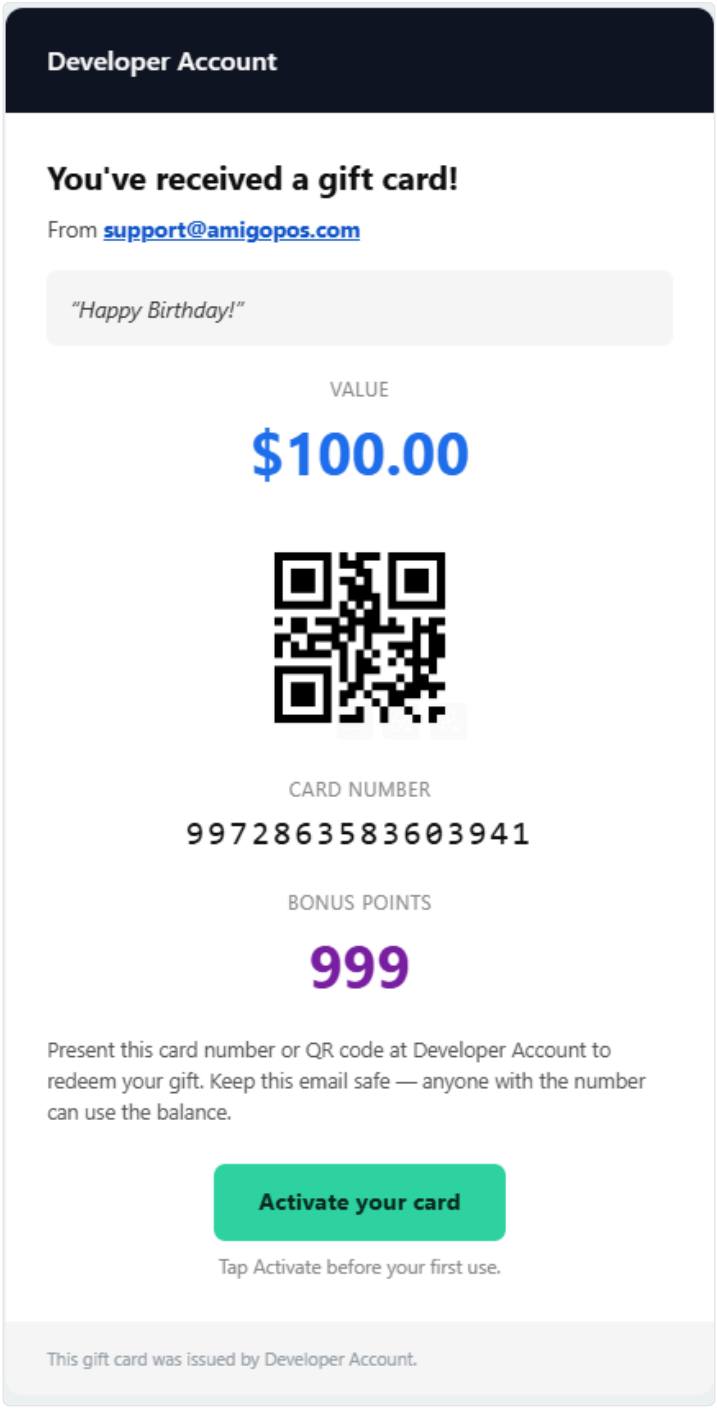
Customers, Gift & Loyalty › Gift cards

View online ↗

What the recipient receives, and how they spend it.

A digital gift arrives as an email from your business carrying everything the recipient needs. It comes from your gift sender address, set on the **Gift Card Defaults** tab of **Back Office › Gift & Loyalty › Cards** (Set up digital gift cards).

- The **value** of the gift, and any bonus loyalty points or bonus put on the card.
- The sender's **name and message**, when they were written.
- The **card number** and a QR code to show at the register.
- An **Activate** button, to press before the first use.



The recipient spends it in person by showing the card number or the QR code, exactly like a printed card. Nothing has to be printed and no app is needed.

The gift email and its subject are in the store's language (English, Spanish or Arabic). The activation confirmation email and the email sent when the card is used are in English.

> If a guest says the email never arrived, check spam first, then that the address was typed correctly, then the gift's status in Manage digital gifts in the back office. A failed send is not retried by itself: fix the cause and press **Re-Send** on it there.

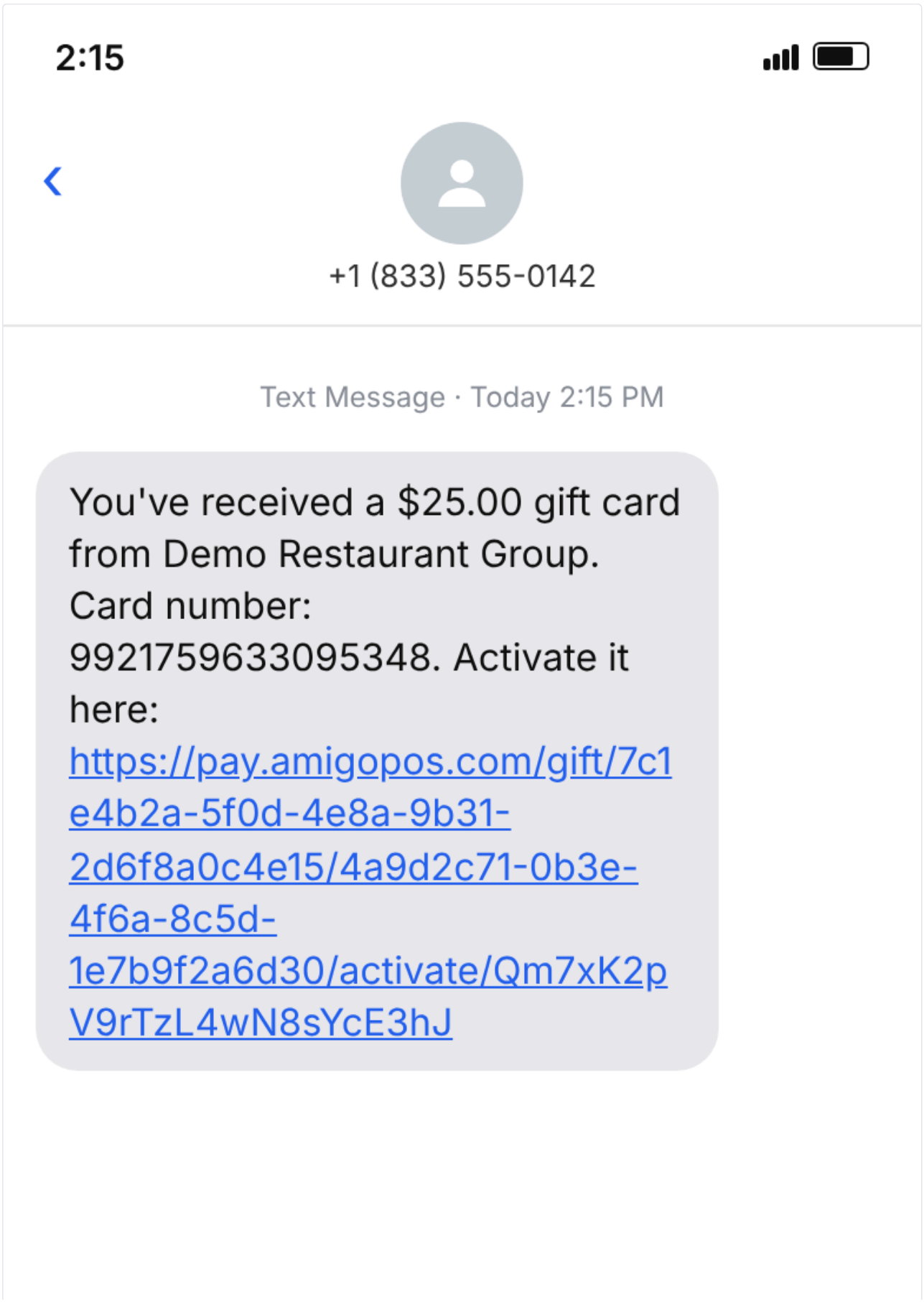
> Until your own sender address is verified with Amazon SES, gift emails come from the platform's standard sender address (Verify your gift email sender address).

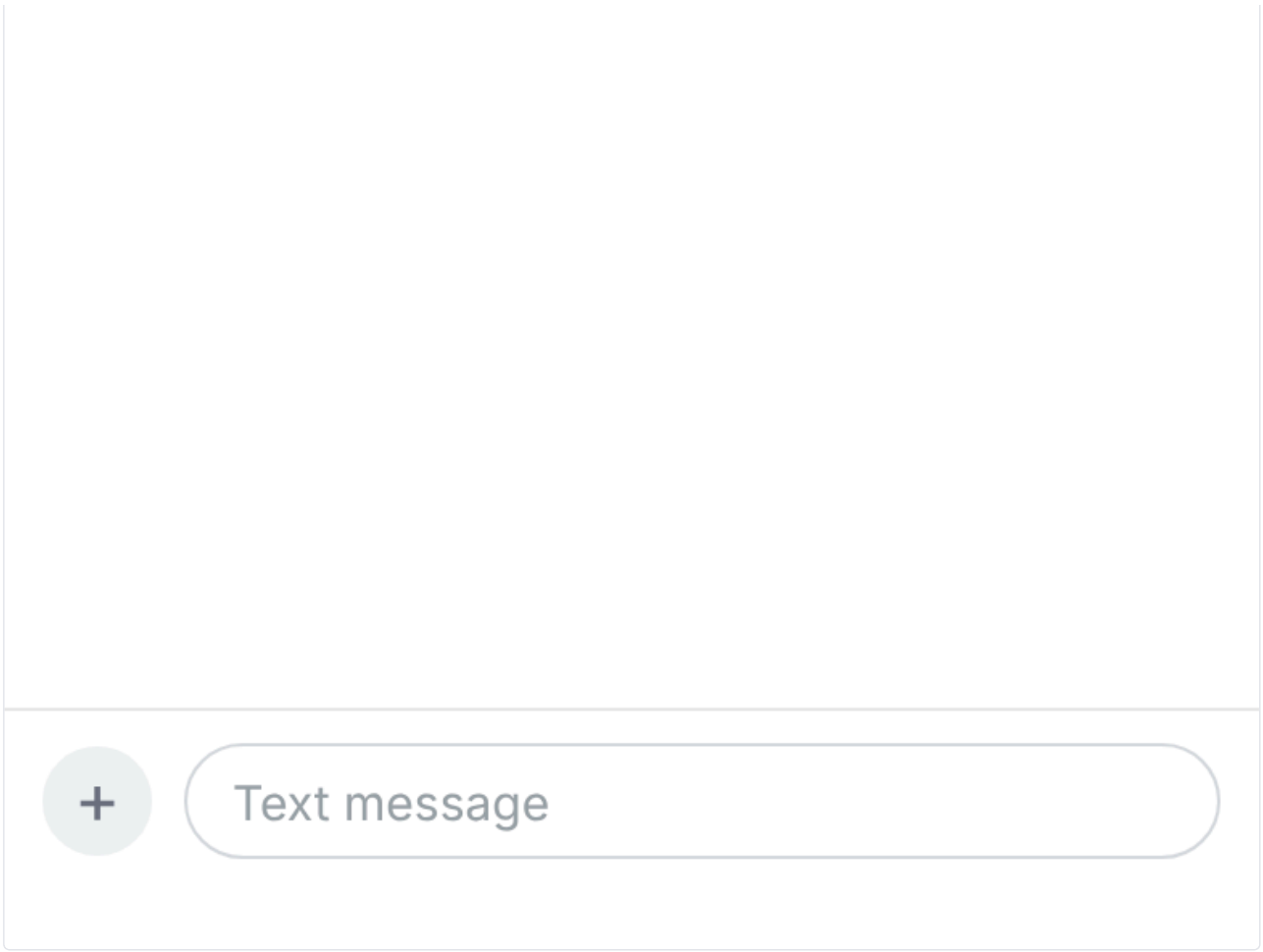
After the email

Once activated, the link opens the card itself, with a barcode to show at the register (The e-gift page as the card). If the card goes unused, balance reminder emails can follow (Expiry and balance reminders).

The gift card text

A gift sent by text message arrives as one text: *You've received a $25.00 gift card from (your business). Card number: … Activate it here: (link)*, in Spanish when the store's language is Spanish. It has no sender name or message, and the recipient gets no confirmation email when activating, since there is no address to send it to. The page the link opens is in the store's language too, and tells the recipient the card number is in the email or text message they received.


2:15
+1 (833) 555-0142
Text Message · Today 2:15 PM
You've received a $25.00 gift card from Demo Restaurant Group. Card number: 9921759633095348. Activate it here: https://pay.amigopos.com/gift/7c1e4b2a-5f0d-4e8a-9b31-2d6f8a0c4e15/4a9d2c71-0b3e-4f6a-8c5d-1e7b9f2a6d30/activate/Qm7xK2pV9rTzL4wN8sYcE3hJ



If a text never arrives, see Digital gift cards: troubleshooting.

Checking a gift card balance online

Customers, Gift & Loyalty › Gift cards

View online ↗

The public page where a customer looks up what is left, without an account.

Customers can check what is left on a gift card from a public page. There is no account and no login — the card number is the key.

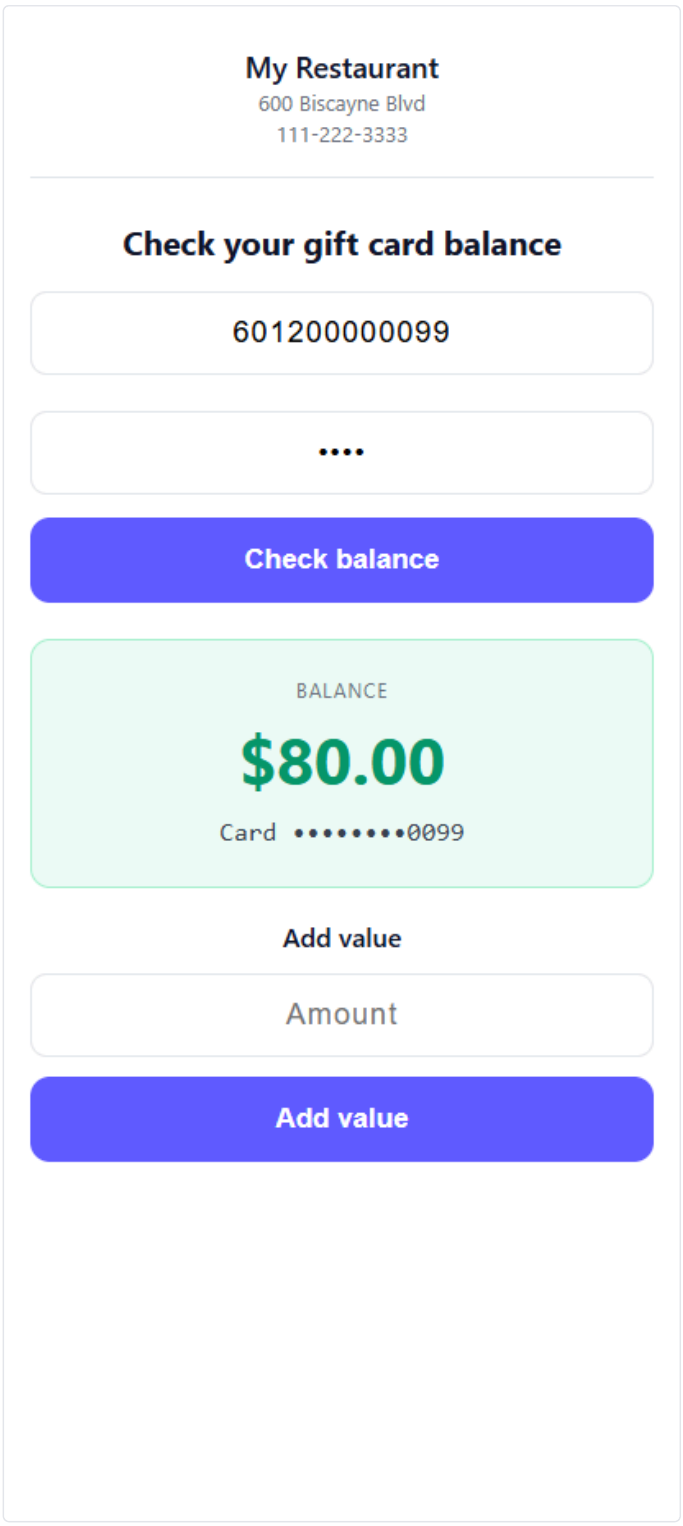
1. Open the balance page, from the **Check balance** link in the gift email or a link you share.
2. Enter the gift card number.
3. The page shows the remaining amount, the last digits of the card, and an expiry date where there is one.

Only the last few digits of the number are ever displayed, so a customer can check a balance on a screen somebody else can see.

When a card will not check

The page says why: not found, expired, or not a card that can be looked up. "Not found" is most often a mistyped number — a long number read off a printed card is easy to get wrong.

> The page has to be published and its address configured before the **Check balance** button appears in gift emails. See **Set up digital gift cards**.



PIN and the e-gift page

A card that has a PIN needs it on this page too (Card PINs). An e-gift opened from its email link shows the card number as a barcode to scan at the register (The e-gift page as the card).

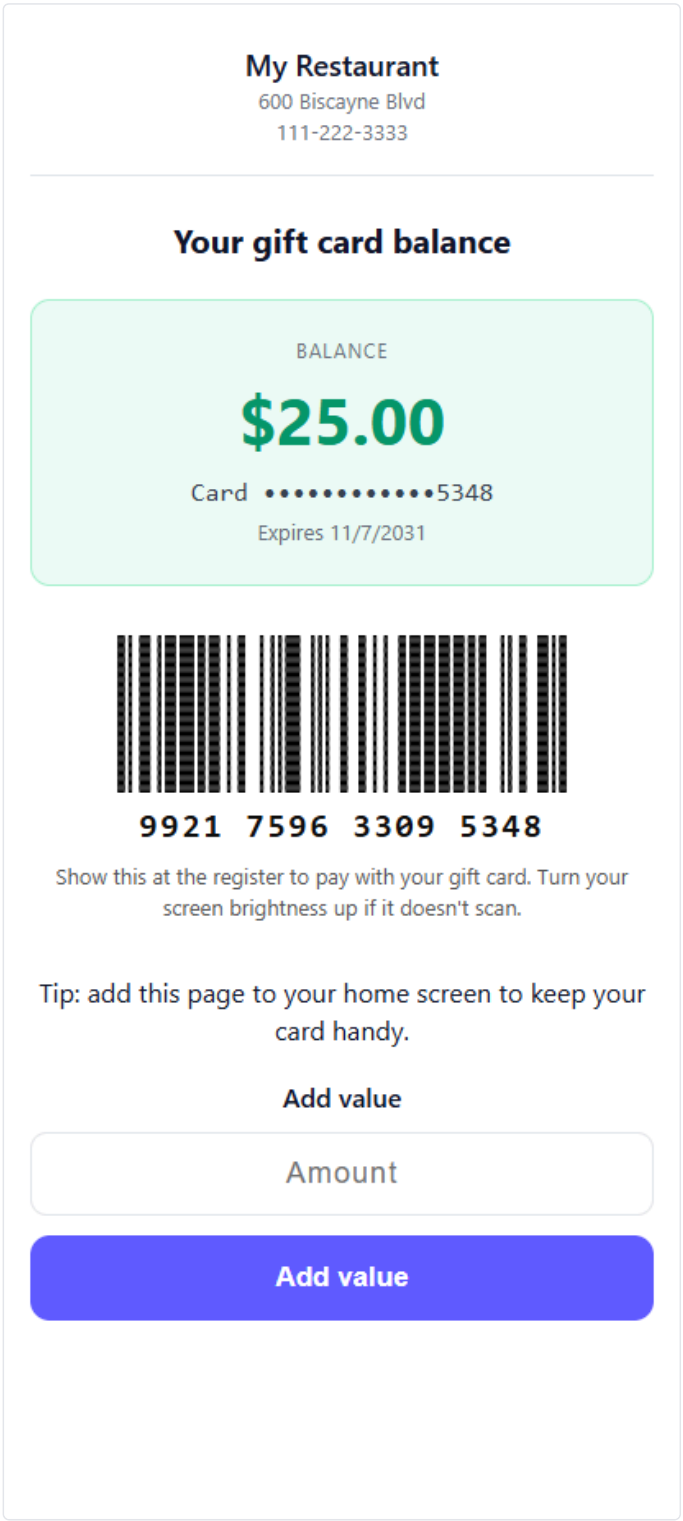
The e-gift page as the card

Customers, Gift & Loyalty › Gift cards

View online ↗

The link in the gift email shows the balance and a barcode to scan at the register, and can be saved to the phone.

Once an e-gift is activated, the link in its email opens a page with the live balance, the card number as a barcode and the number printed under it in groups of four. That page is the card: the guest shows it at the register and the cashier scans it like a physical card.



- **Scanning** needs an imager scanner — laser scanners can’t read phone screens. Otherwise type the printed number.

- **Keeping it handy** — the page can be added to the phone's home screen (Android and iPhone) and says so.
- **Privacy** — the page is never cached and doesn't pass its address on to other sites.
- Store setting `GiftCardWebShowBarcode` hides the number and barcode if you prefer the page to show the balance only.

Checking a physical card by number on the balance page never shows a barcode (Checking a gift card balance online).

Adding value to a gift card online

Customers, Gift & Loyalty › Gift cards

View online ↗

Topping up a card from the balance page, and why the new balance appears a moment later.

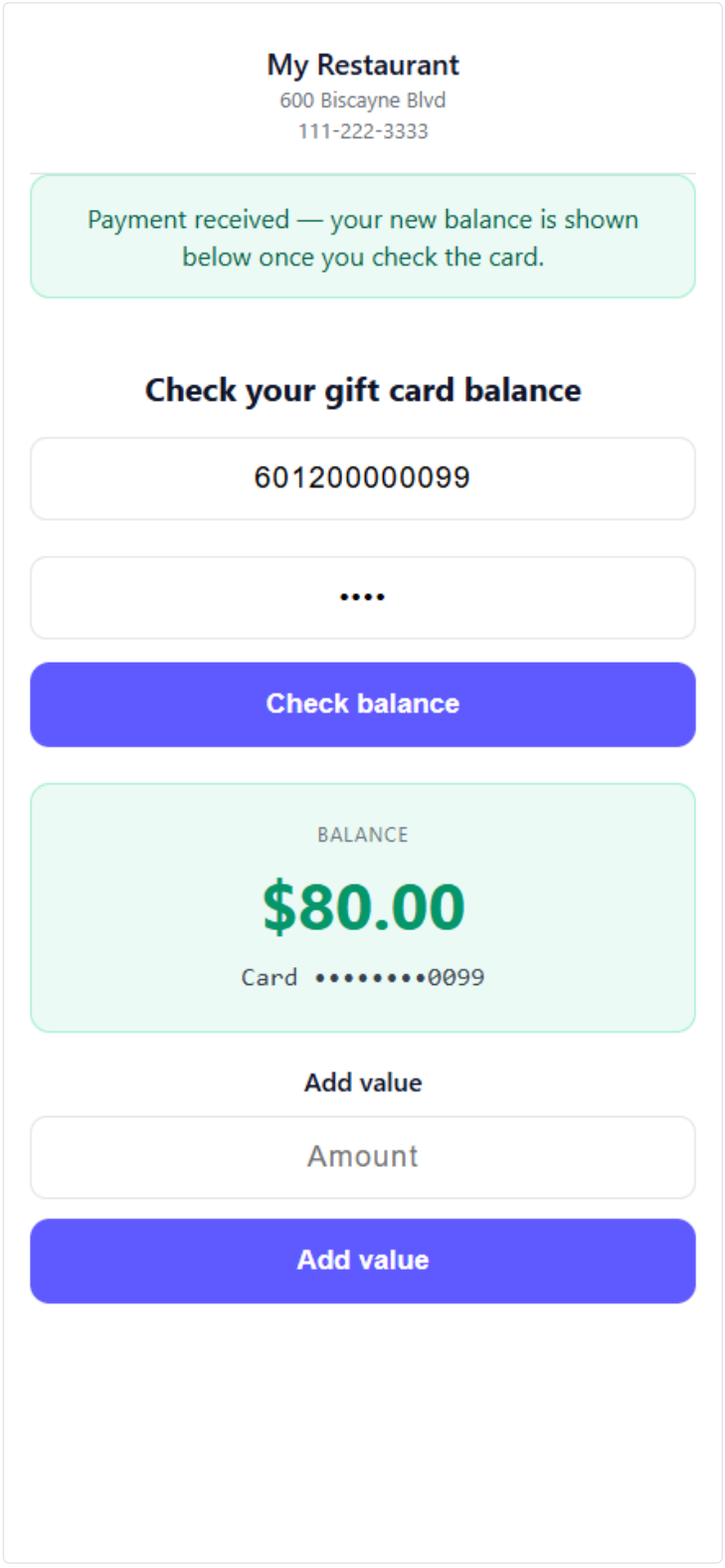
A customer can top up a card from the same balance page, paying by card.

1. Check the balance first — that confirms the card is active and reloadable.
2. Enter the amount in **Add value**.
3. Complete the payment on the secure checkout page that opens.
4. Confirmation appears on return.

> The value lands on the card once the payment is confirmed, not at the moment the customer submits the form. Checking the balance again shows the new amount. A customer who looks immediately and sees the old figure has not lost anything.

If reload is not offered

Online reload needs the storefront payment setup behind it. Where that is not configured the balance page still checks balances and simply does not offer to add value — see **What online reload needs**.



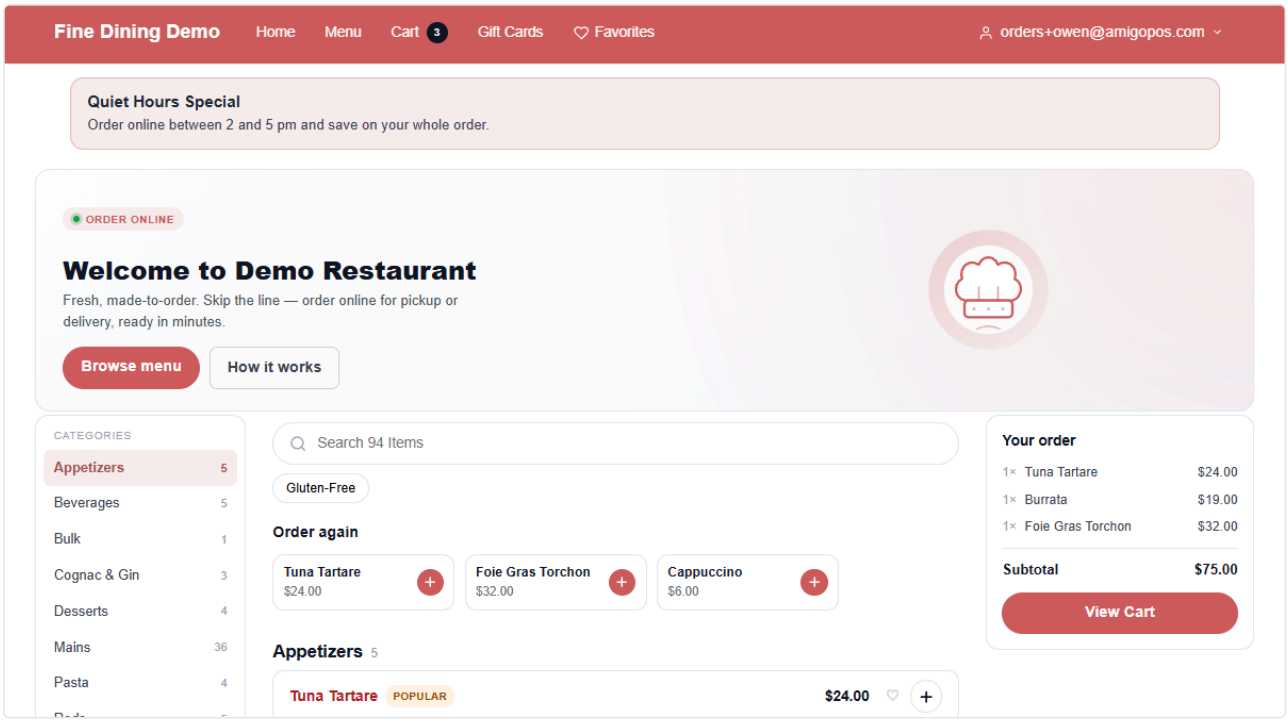
Selling gift cards in your online store

Customers, Gift & Loyalty › Gift cards

View online ↗

Let guests buy an e-gift on your web ordering site: switching it on, the amounts, what the buyer and the recipient see, and where the sale shows up.

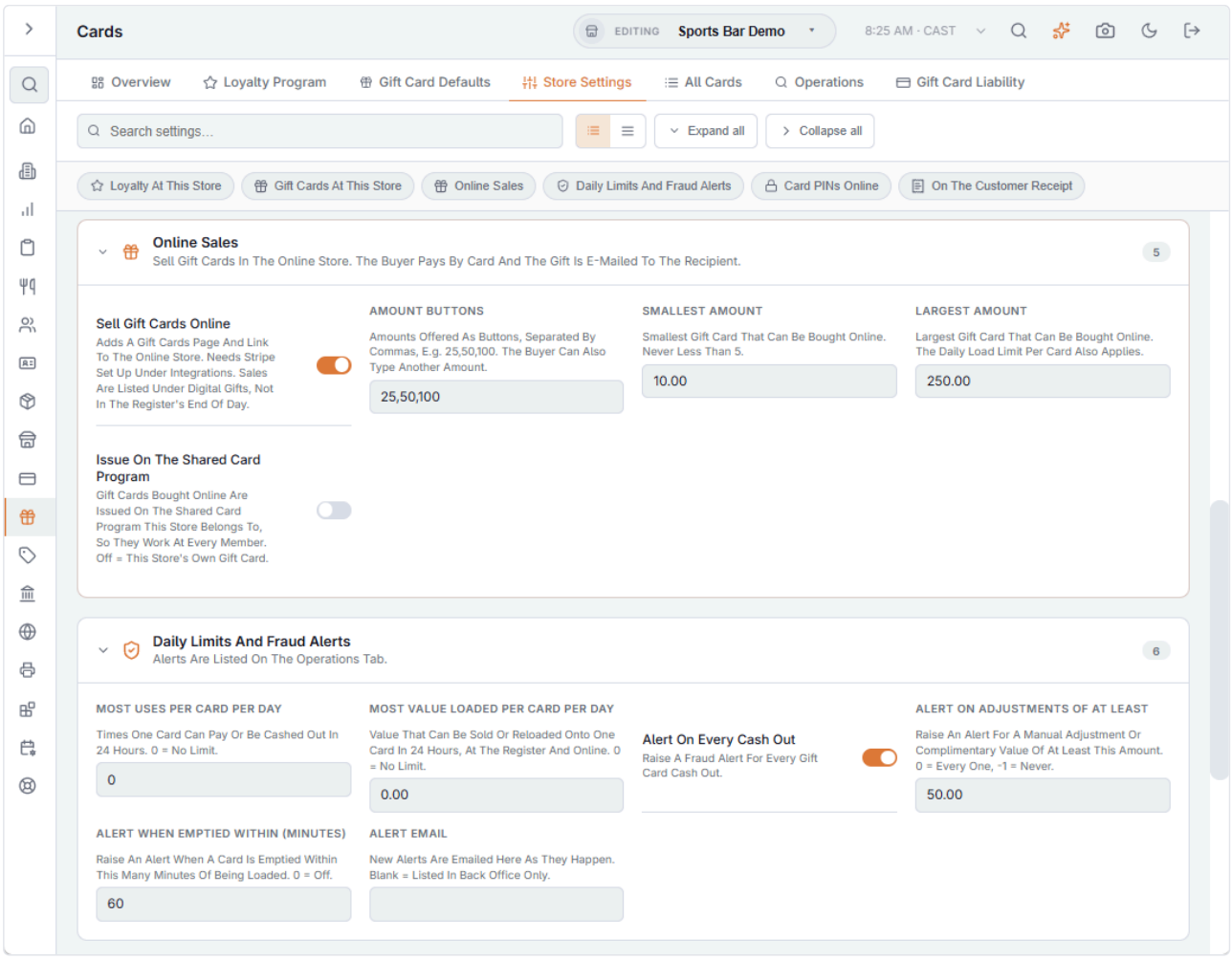
Your web ordering site can sell gift cards. A guest picks an amount, says who it is for and pays by card; the gift is then e-mailed to the recipient exactly like an e-gift sent from **Back Office › Gift & Loyalty › Digital Gifts**, and spent the same way, at the register or online.



Switching it on

Open **Back Office › Gift & Loyalty › Cards**, the **Store Settings** tab, section **Online Sales**. Each setting saves as soon as you change it and belongs to the store you are editing, so a business with several stores switches it on for each one.

- **Sell Gift Cards Online** — off to start with. On, the store's site gets a **Gift Cards** link in its menu bar and the gift card page.
- **Amount Buttons** — the amounts offered as buttons, separated by commas: *25,50,100* to start with. Up to six are shown, and any outside the smallest and largest amount are left out. The guest can always type another amount.
- **Smallest Amount** — 10 to start with, never less than 5.
- **Largest Amount** — 250 to start with. When the store's **Gift Card Max Load Per Day** is lower, that is the largest instead.
- **Issue On The Shared Card Program** — off to start with; see *Shared card program* below.

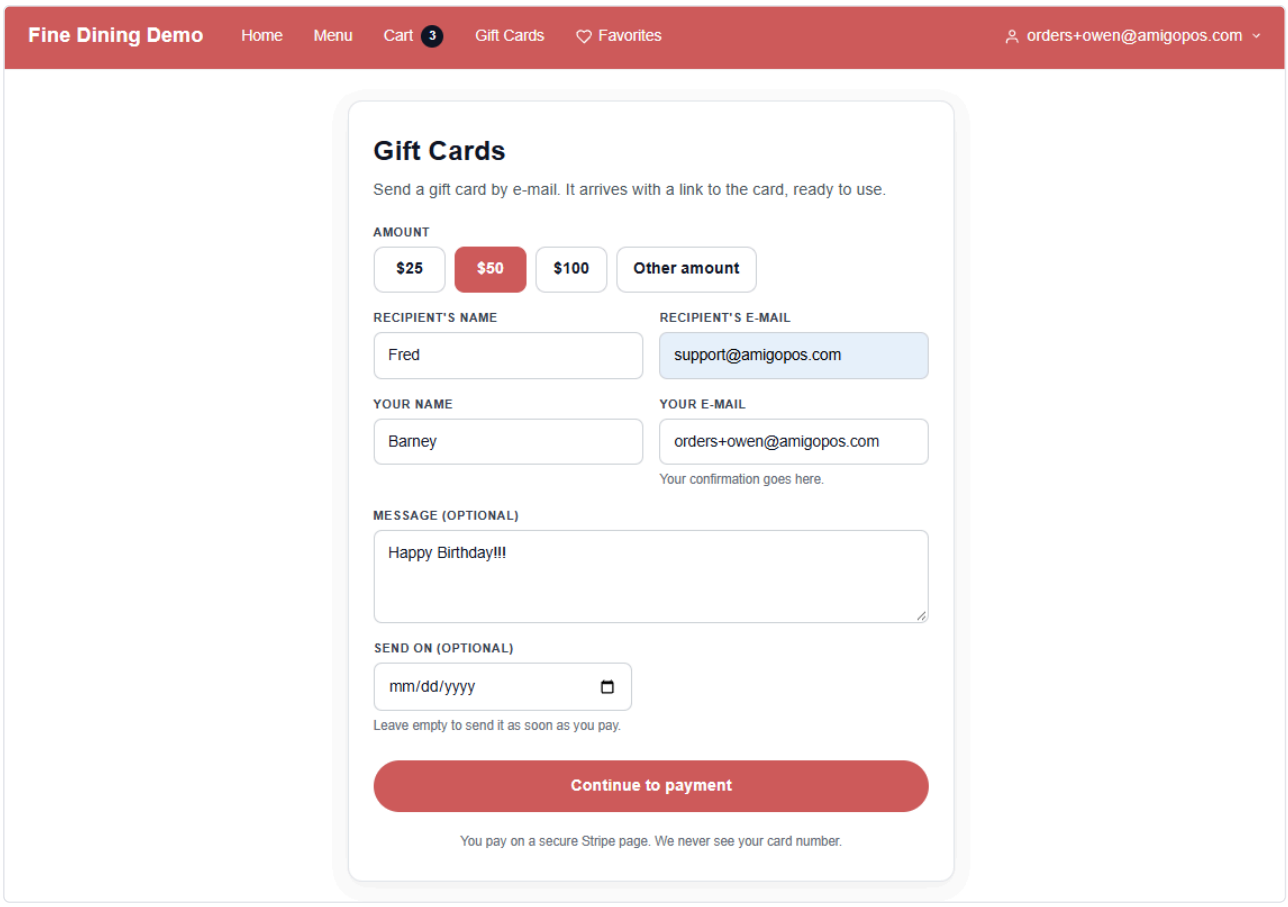


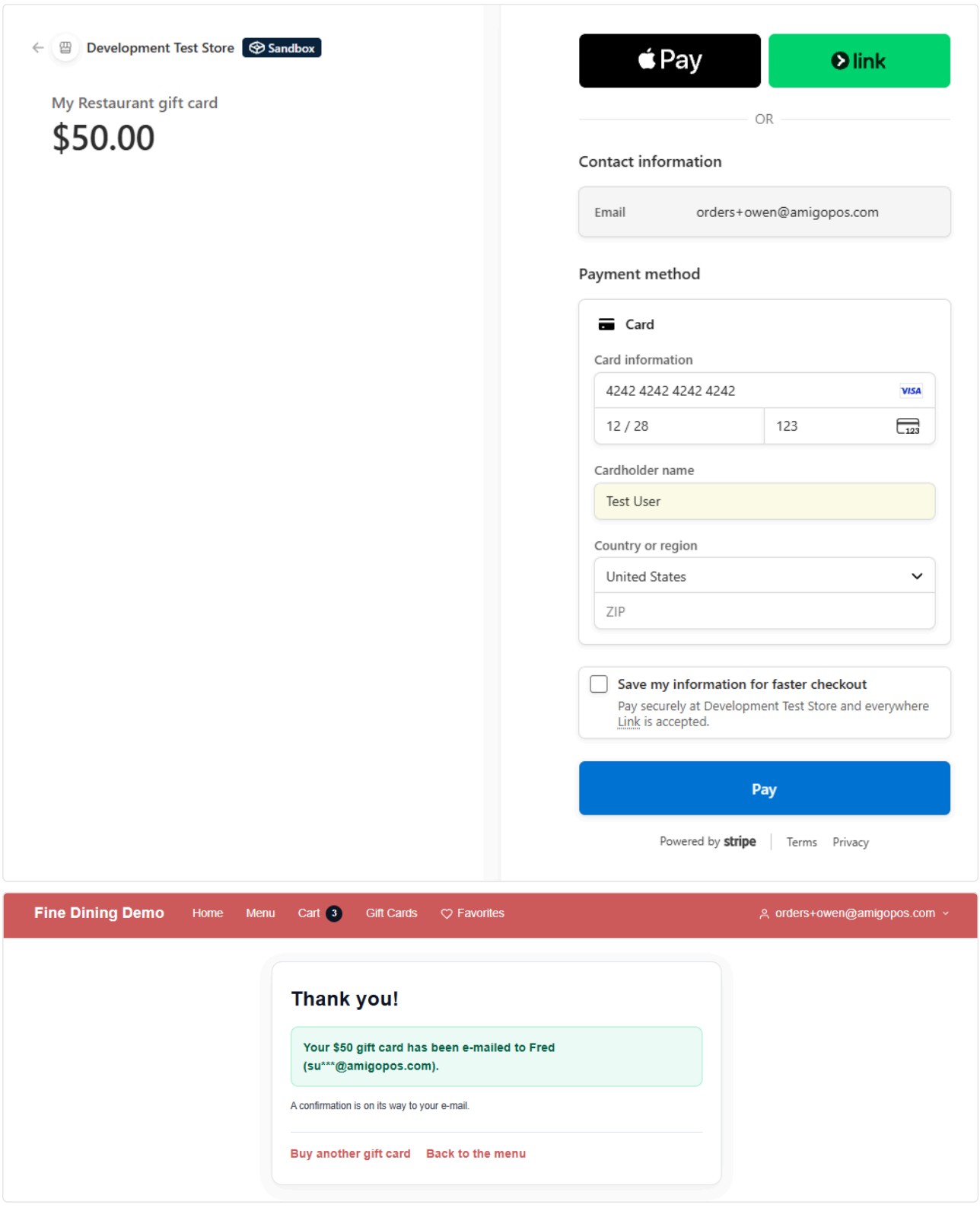
The page takes payments through the store's Stripe setup, the same one web checkout and pay at the table use (Stripe setup for pay at the table). With the setting on but no Stripe secret key for the store's current mode, Test or Live, the link and the page stay hidden.

The site looks at the setting again every couple of minutes, so the link can take up to two minutes to appear or to go.

What the guest does

1. Taps **Gift Cards** in the site's menu bar.
2. Picks an amount, or **Other amount** and types one.
3. Fills in the recipient's name and e-mail, their own name and e-mail, and a message if they want one. A signed-in guest finds their own e-mail filled in.
4. Optionally picks a **Send on** date, for a birthday for example. The gift then goes out at 9:00 in the morning, store time, on that day. Left empty, it goes as soon as the payment is in.
5. Presses **Continue to payment** and pays on Stripe's own page — by card, or with Apple Pay or Google Pay where the store's Stripe account offers them. Your site never sees the card number.
6. Comes back to a thank-you page that says the gift has been e-mailed to the recipient, with the address partly hidden, or the day it will be sent.


Fine Dining Demo
Home
Menu
Cart 3
Gift Cards
Favorites
orders+owen@amigopos.com
Gift Cards
Send a gift card by e-mail. It arrives with a link to the card, ready to use.
AMOUNT
$25
$50
$100
Other amount
RECIPIENT'S NAME
Fred
RECIPIENT'S E-MAIL
support@amigopos.com
YOUR NAME
Barney
YOUR E-MAIL
orders+owen@amigopos.com
Your confirmation goes here.
MESSAGE (OPTIONAL)
Happy Birthday!!!
SEND ON (OPTIONAL)
mm/dd/yyyy
Leave empty to send it as soon as you pay.
Continue to payment
You pay on a secure Stripe page. We never see your card number.

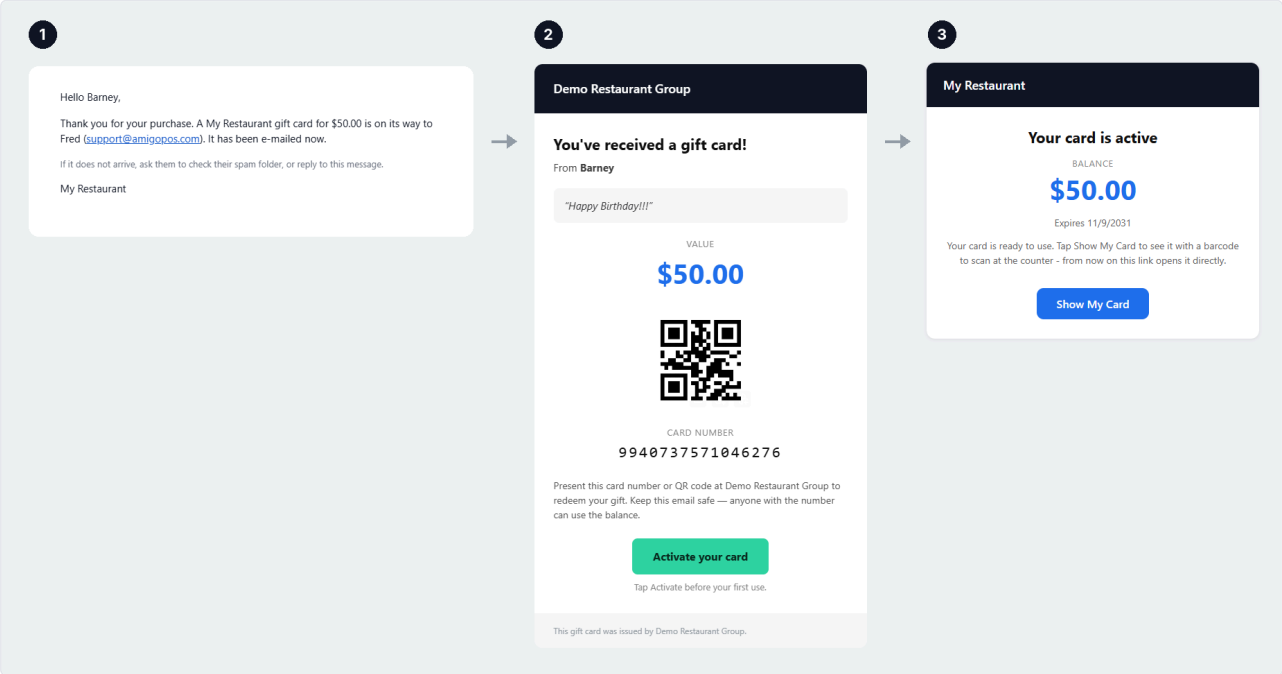


A guest ordering at a table by QR code does not see the link: the table page keeps to the order.

What happens next

- When Stripe confirms the payment, the card is issued and the gift e-mail goes to the recipient with the card number and the **Activate** button (The gift card email).

- The buyer gets a short confirmation: the amount, who it is for, when it goes out and the message. It is in Spanish when they used the site in Spanish, otherwise in English.
- The gift is listed in **Digital Gifts** like any other, so a failed e-mail can be sent again and a scheduled one cancelled there (Manage digital gifts in the back office).
- The card is in **All Cards** and counts in the gift card liability from the moment it is issued (Finding a card: All Cards).



A guest who closes the page straight after paying loses nothing: the card is issued as soon as Stripe's confirmation arrives, and a check every quarter of an hour finishes any paid purchase whose confirmation never came. Allow about twenty minutes before looking into a missing gift.

Money and reports

- The guest pays into the store's Stripe account; the money arrives with the Stripe payout.
- The purchase is not an order. It is not in the day's sales or payments and not in any drawer. The end-of-day gift card section counts it with the cards loaded outside orders, like an online reload (The end-of-day report).

Shared card program

A store that is an active member of a shared card program can issue the cards it sells online on the program, so they are spent at every member: switch on **Issue On The Shared Card Program**. The program has to allow e-gifts, and its largest load also caps the amount. Off, an online card is the store's own card. Agree it with the other members first: a program card can be spent anywhere in the program and is settled on the program's statement (What the shared card program is).

When something is not right

- **No Gift Cards link** — the setting is on for another store (it is set per store: check which store Back Office is editing), the store has no Stripe secret key for its current mode, or the site has not looked again yet.
- **The guest paid, the recipient has no e-mail** — find the gift in Digital Gifts. Pending: it is scheduled, or going out now. Failed: correct the address and press **Re-Send**. Not in the list twenty minutes after the payment: contact support with the time of the purchase and the buyer's e-mail.
- **Choose an amount between …** — the amount typed is outside the smallest and largest amount.

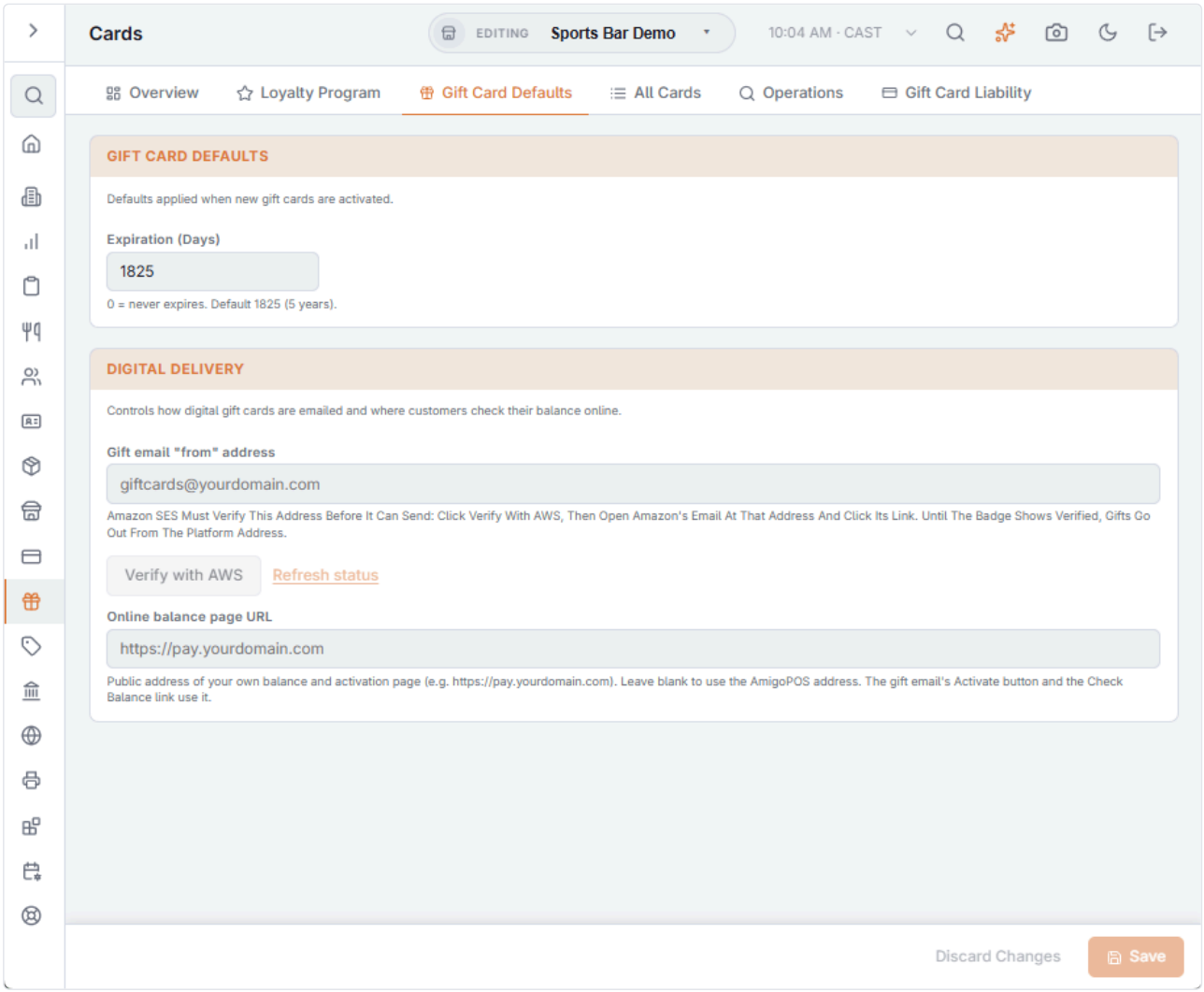
Set up digital gift cards

Customers, Gift & Loyalty › Gift cards

View online ↗

Administrator settings for e-gift email delivery and online reload

Digital gift cards need two things: an address to email them from, and the public gift page the recipient opens to activate the card, check the balance and add value. Both are set on the **Gift Card Defaults** tab of **Back Office › Gift & Loyalty › Cards**, under **Digital delivery**; press **Save** after changing them.



1. The sending address

Gift email "from" address is the address gift emails come from, for example *giftcards@yourdomain.com*. Gift emails are sent through Amazon SES, which must verify the address before it can send from it: press **Verify with AWS** and click the link in Amazon's email (Verify your gift email sender address).

Until the address shows **Verified**, or when the box is blank, gifts go out from the platform's standard sender address, so e-gifts work from the first day.

2. The gift page

Online balance page URL is the public web address of your gift page, for example *https://pay.yourdomain.com*. Leave it blank to use the platform's own public address. The gift email's **Activate** button, the activation confirmation and the balance reminders all link to this page. On it, the recipient activates the card, sees the balance, and can add value.

The gift email and its subject are written in the store's language (English, Spanish or Arabic). The activation confirmation and the email sent when the card is used are in English.

The page header shows the store's business name, address and telephone, and amounts use its base currency, all from General settings.

3. Adding value online (optional)

Adding value on the gift page is a card payment, so it uses the store's Stripe setup. If pay-at-table already works for the store, adding value works too. See What online reload needs.

4. Text messages (optional)

To send gifts by text message, turn on **Send Text Messages** and **Digital Gift Cards** in SMS settings.

5. Selling gift cards online (optional)

To let guests buy e-gifts in your online store, switch on **Sell Gift Cards Online** in **Back Office › Gift & Loyalty › Cards**, **Store Settings** tab, **Online Sales**. It needs the store's Stripe setup. See Selling gift cards in your online store.

Next: Digital gift cards: first-time setup checklist.

Digital gift cards: first-time setup checklist

Customers, Gift & Loyalty › Gift cards

View online ↗

A short ordered checklist to get the feature working and tested end to end

Use this checklist the first time you turn on digital gift cards, and to confirm they work end to end. Each step builds on the one before. The settings are on the **Gift Card Defaults** tab of **Back Office › Gift & Loyalty › Cards** (Set up digital gift cards).

Step 1 — The sender

1. Under **Digital delivery**, enter your **Gift email "from" address** and press **Save**.
2. Press **Verify with AWS**, open that inbox and click the link in Amazon's email.
3. Press **Refresh status** and check that the badge reads **Verified**.

Until then, gifts come from the platform's standard sender address, so you can test the rest meanwhile.

Step 2 — The gift page

1. Leave **Online balance page URL** blank to use the platform's address, or enter your own and press **Save**.

Step 3 — Send yourself a gift

1. In **Back Office › Gift & Loyalty › Digital Gifts**, send a small gift to your own email (Manage digital gifts in the back office), or sell one at the register.
2. Check the email arrives with the amount, the card number and the **Activate** button.
3. Press **Activate**: the gift page opens with the card and its balance.

Step 4 — Use the card

1. At the register, look the card number up on the gift card screen; it shows the balance you sent.
2. Pay part of a test order with it and check the balance goes down.

Step 5 — Add value online (optional)

1. Check Stripe is set up for the store (What online reload needs).
2. On the gift page, add value with a test card payment.
3. Check the balance again after a moment: it updates once Stripe confirms the payment.

Step 6 — Scheduling

1. Send a gift with **Schedule Send** set a few minutes ahead.
2. On **Digital Gifts**, check it shows as **Pending** with its time under **Scheduled For**.
3. Scheduled gifts are sent every few minutes; soon after the time, the status turns **Sent** and the email arrives.

If something doesn't behave, see Digital gift cards: troubleshooting.

Expiry and balance reminders

Customers, Gift & Loyalty › Gift cards

View online ↗

When gift cards expire, the never-expire option, and the emails that remind holders of an unused balance.

How long gift cards last is set on the **Gift Card Defaults** tab of **Back Office › Gift & Loyalty › Cards**, and cards with money left on them can trigger reminder emails to their holders.

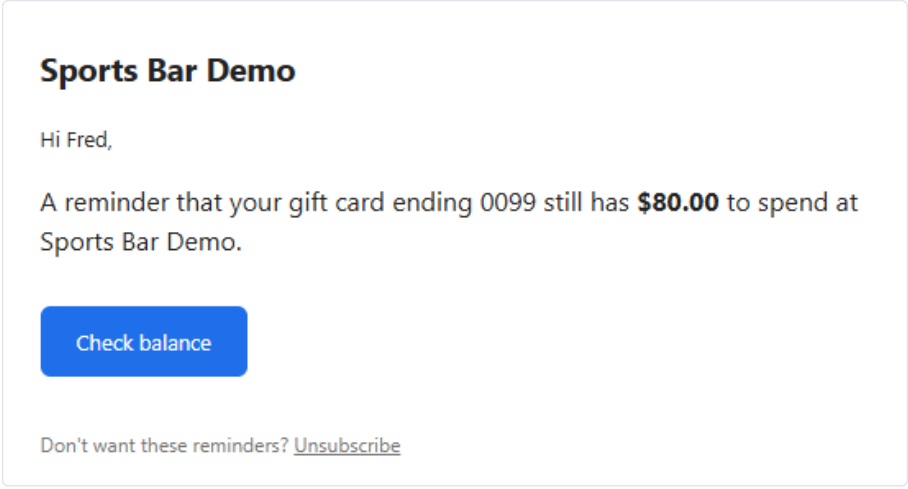
Expiry

A gift card gets its expiry date when it is activated, from **Expiration (Days)**: 1825 days (5 years) by default, 0 for no expiry. Changing it affects cards activated afterwards.

Where the law says gift cards must not expire, turn on **Gift Cards Never Expire** in All program settings (search): new cards then get no expiry date, and the date on older cards is ignored at the register and online.

Balance reminders

Set **Gift Card Balance Reminder (Days)** in **Back Office › Discounts & Promotions › Guest Offers › Settings › Extras In Your Emails** (for example 90). Once a day, AmigoPOS emails the holder of any card this store issued that still has a balance and hasn't been used for that many days — to the email on the card or the e-gift recipient. Another reminder goes out only after another quiet period. 0 (the default) turns reminders off.



Reminders are written in the store's language, come from your gift sender address once it is verified (from the platform's standard sender address until then) and carry an unsubscribe link that also stops loyalty expiry warnings. Their link opens your gift page (Set up digital gift cards).

What online reload needs

Customers, Gift & Loyalty › Gift cards

View online ↗

The Stripe and address settings required for customers to add value online

Online reload lets a customer pay by card to top up a gift card. It reuses the store's existing card-payment (Stripe) setup, so there are no separate gift-specific payment keys.

Required for reload

- **Stripe configured for the store** — secret key and mode (Test or Live), the same settings pay-at-table uses.
- **Stripe webhook** — your existing Stripe webhook must be active. Reload confirmations arrive on the same webhook as pay-at-table; no new endpoint is needed.
- **A public base URL** — the store's pay-at-table base address is used for the payment's return links.

How a reload is confirmed

When the customer pays, the value is **not** added immediately. The card is credited only after the payment provider confirms the charge through the webhook. This is deliberate: a canceled or failed payment adds nothing, and no charge is kept.

> If pay-at-table already works for a store, reload will work for that store with no extra steps.

> **Important:** If a store has no Stripe configuration, the **Add value** button can't start a payment. Balance checking still works regardless of Stripe.

Digital gift cards: troubleshooting

Customers, Gift & Loyalty › Gift cards

View online ↗

Common issues with sending, scheduling, balance checks, and reloads — and how to fix them

If a digital gift card isn't behaving, find the symptom below. Most answers start in **Back Office › Gift & Loyalty › Digital Gifts**, where every gift shows its status (Manage digital gifts in the back office).

The gift email never arrived

- **Check the status in the list. Failed** means the send was rejected; hover the ⓘ for the reason, fix it and press **Re-Send**. A failed gift is not sent again by itself. **Pending** on a gift that was not scheduled points to a problem with the email service.
- **Check the address.** It is used exactly as typed. With **Re-Send** you can correct it.
- **Ask the recipient to check spam. Sent** means Amazon SES accepted the email.

The card exists and is funded whatever happened to the email, so you can also read the card number to the guest.

The Activate button opens the wrong site

The button links to the address in **Online balance page URL** on the **Gift Card Defaults** tab, or to the platform's address when the box is blank. Correct the address and press **Save**; gifts sent afterwards use it.

A scheduled gift didn't send at its time

- Scheduled gifts are sent every few minutes, so allow a short delay past the exact time.
- Check the gift wasn't **Canceled** in the list.
- The time you schedule is store time.

The gift page says the card can't be found

- Check the card number for typing mistakes.
- Make sure the page is your store's gift page; a card belongs to one business.
- After many quick lookups from the same connection, lookups are refused for a short while; wait a minute and try again.

Adding value won't start a payment

- The store needs Stripe set up (What online reload needs).
- The card must be active and not expired.

A guest paid to add value but the balance didn't change

- The balance updates only after Stripe confirms the payment; have them check again after a moment.
- If it never updates, check that the store's Stripe webhook is working — the same one that confirms pay-at-table payments.

> Canceling a scheduled gift stops the email or text only. The card was funded when it was issued and stays valid.

The gift text never arrived

- In SMS settings, both **Send Text Messages** and **Digital Gift Cards** must be on. A gift sent while either was off shows **Failed** with that reason.
- Check the number and its country code: a number typed without the right code goes to the wrong country, or is refused as not a usable mobile number.
- Find the text in the SMS log and message costs: its status says whether it reached the phone.

- Once the cause is fixed, use **Re-Send** on the gift; you can correct the number there.

Verify your gift email sender address

Customers, Gift & Loyalty › Gift cards

View online ↗

Verify the "from" address with AWS so gift card emails can be sent

Gift emails go out through Amazon SES (Amazon's email service), which sends from an address only after its owner has confirmed it. You do this once per address, from the **Gift Card Defaults** tab of **Back Office › Gift & Loyalty › Cards**.

Verifying an address

1. Under **Digital delivery**, type the address in **Gift email "from" address** and press **Save**. If it is not verified yet, a message says so.
2. Press **Verify with AWS**. Amazon sends a verification email to that address.
3. Open that inbox and click the link in Amazon's message.
4. Back on the tab, press **Refresh status**. The badge changes to **Verified**.

What the badge means

- **Verified** — gift emails come from this address.
- **Pending — check inbox** — the link has been sent but not clicked yet.
- **Not verified** — Amazon hasn't seen this address; press **Verify with AWS**.
- **Verification failed** — the attempt didn't complete; check the address and try again.

The status is checked each time the tab opens. Until the address is verified, gift emails still go out, from the platform's standard sender address.

> The verification email can take a minute to arrive and may land in spam. Press **Verify with AWS** again to send another one.

> An address stays verified once confirmed; you only do this again when you change the address.

Loyalty

How loyalty works

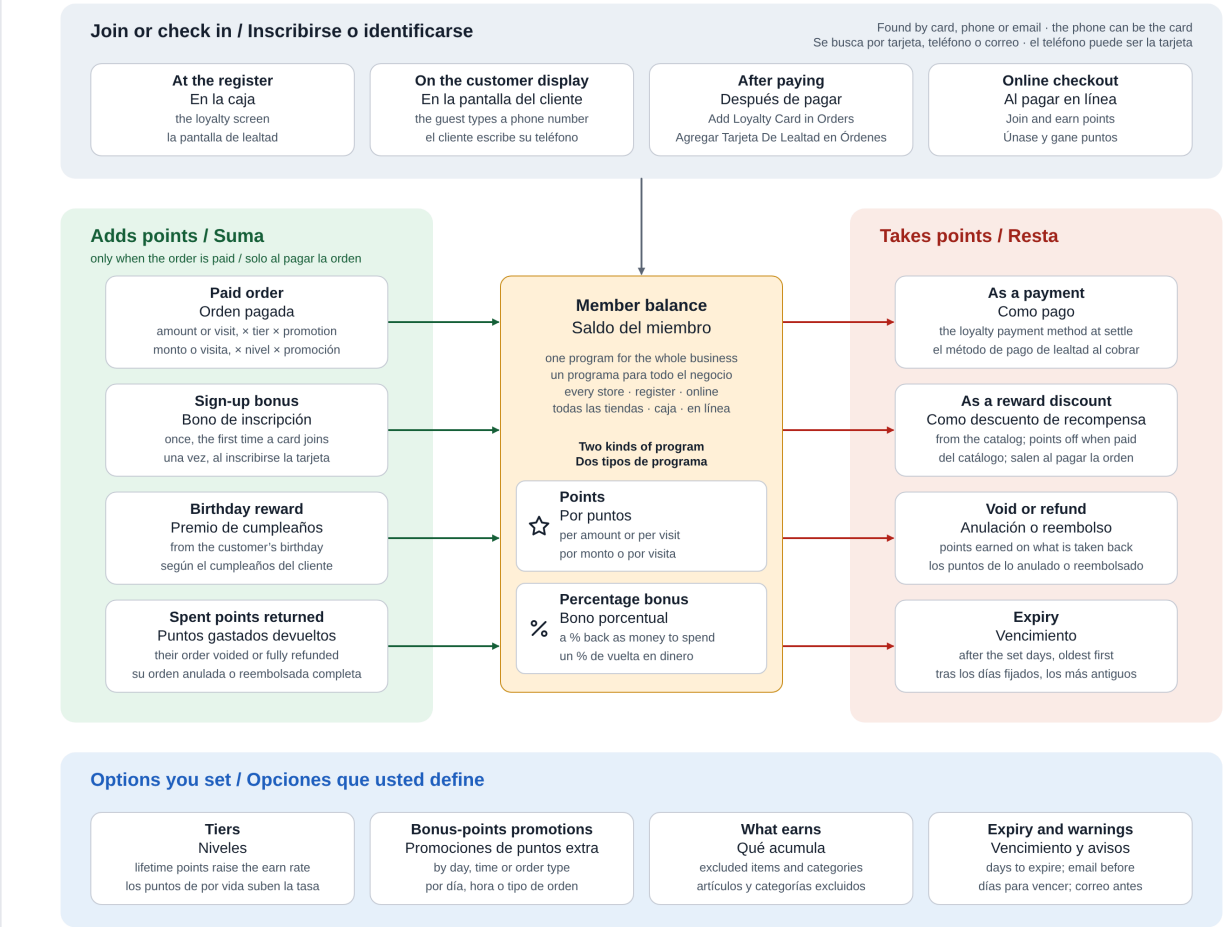
Customers, Gift & Loyalty › Loyalty

View online ↗

Points and bonus programs, when points are earned and spent, and what happens on voids, refunds and splits.

One loyalty program covers the whole business: a member earns and spends in any of your stores, at the register and online. Members are found by card number, phone or email — a phone number alone can be the card.

In one picture: how a guest joins, what adds and takes points, and the options you set.



Two kinds of program

- **Points-based** — spending (or each visit) earns points; points are spent at payment or on rewards from a catalog.
- **Percentage bonus** — spending earns a money bonus the member spends like a gift balance.

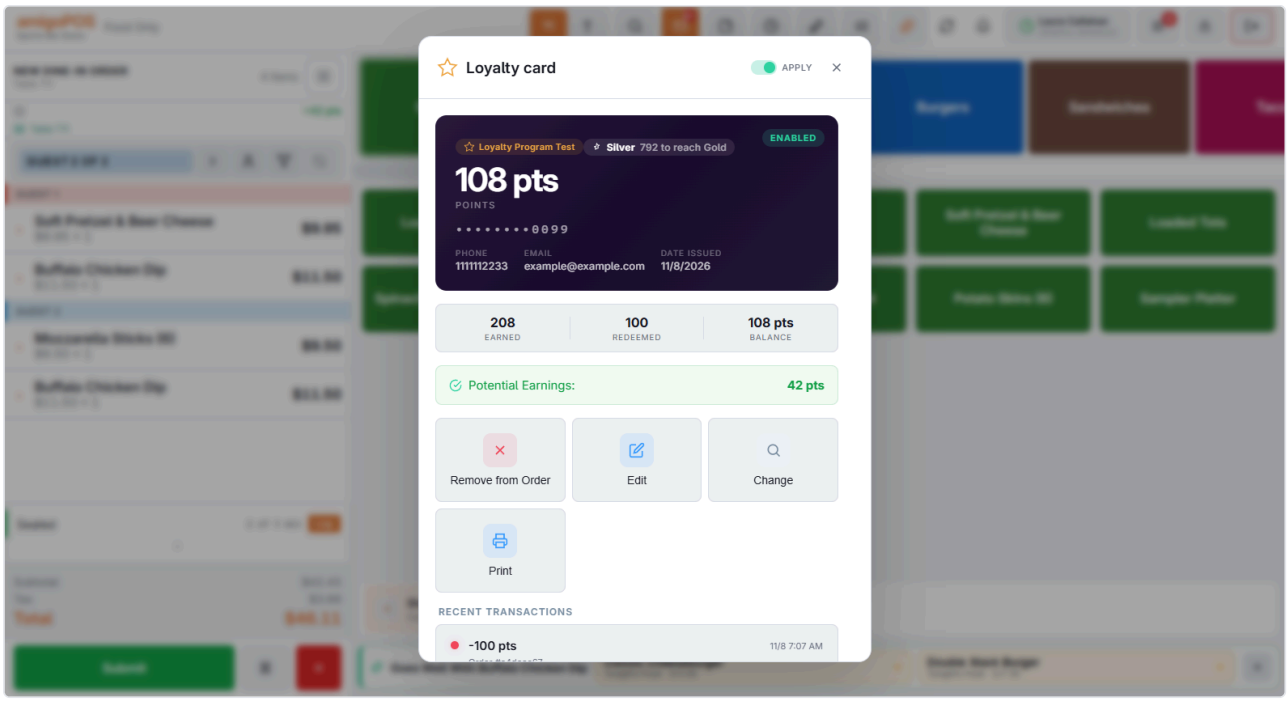
When points are earned

Points are earned when the order is **paid**, never when it is sent to the kitchen, so a voided order or a walkout earns nothing. A refund takes back the points for what was refunded, and voiding the order takes them all back. Changing the card on an order moves the earnings to the new card.

What counts is set by the program (What earns points), multiplied by the member's tier and by any bonus-points promotion running (Promotions and bonuses).

Spending

- **As a payment** — the loyalty payment method at settle (Earning and redeeming points).
- **As a reward discount** — a reward from your catalog taken in the Discounts screen; the points come off when the order is paid (Rewards as discounts).



> Everything a member did is in their card's history: open the card from **Back Office › Gift & Loyalty › Cards › All Cards** (The card detail window).

One card across several restaurants

In a shared card program the guest carries one program card, and each restaurant keeps its own points on it under its own rules; the register shows what the guest holds at the other members, and points can be turned into gift balance spendable at any member. See Loyalty on a program card.

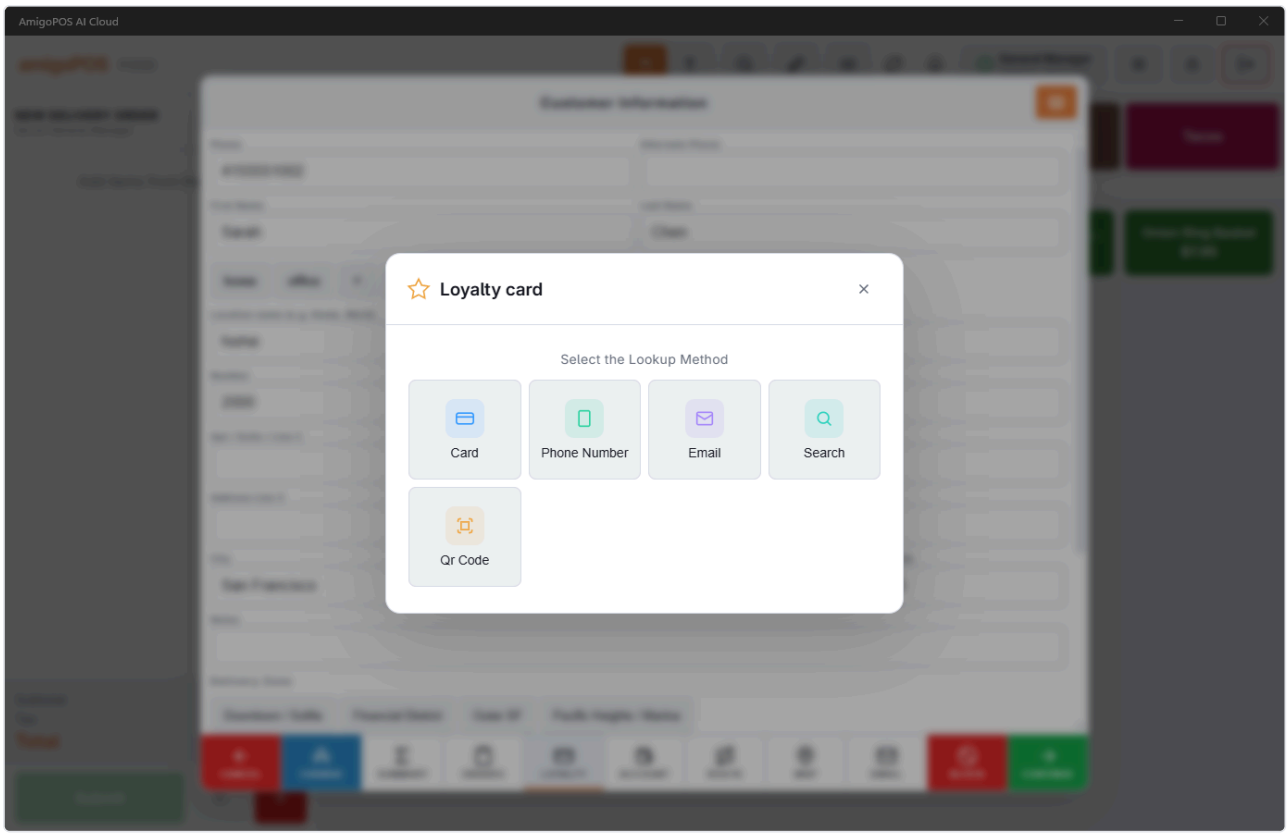
Enrolling a customer or loyalty card

Customers, Gift & Loyalty › Loyalty

View online ↗

Signing a guest up for loyalty at the register, or attaching an existing card.

Enrollment happens at the register, mid-order, in under a minute — the **Loyalty** function (More › Loyalty, or the loyalty prompt in the order flow).



Enrolling

1. Open the loyalty overlay and choose **Register new card**.
2. Enter the customer's **phone number** (the everyday lookup key) and optionally **email**; attach a **physical card** by scanning it if the program allows cards — or skip the card entirely and the phone number *is* the card.
3. Save. The card is issued, attached to the customer, and can start earning on this very order.

Finding an existing member

The overlay's **lookup** searches by card number, phone, or email (partial search after a few characters). Selecting the member attaches their card to the order — balance, recent transactions, and tier progress show right there. Details can be edited (new phone, replacement card) from the same overlay; deactivated or expired cards report their status instead of silently failing.

> The moment to enroll is at settle, with the earnings visible: "this order would earn you 45 points" converts better than any signup pitch. The potential-earnings figure on the overlay exists for exactly that sentence.

Other ways to join

Guests can also join on the customer display at payment, after paying from the Orders list, and during online checkout (Ways a guest can join).

Asking for the card as the order starts

Add **Prompt for loyalty card** to an order type's workflow (Workflow steps, stage by stage) and the loyalty card screen opens as each order of that type starts, so the card is on the order before anything is rung. Close it to carry on without a card. It is skipped offline, in training mode and when a card is already on the order.

Ways a guest can join

Customers, Gift & Loyalty › Loyalty

View online ↗

Signing guests up at the register, on the customer display, after they paid, and during online checkout.

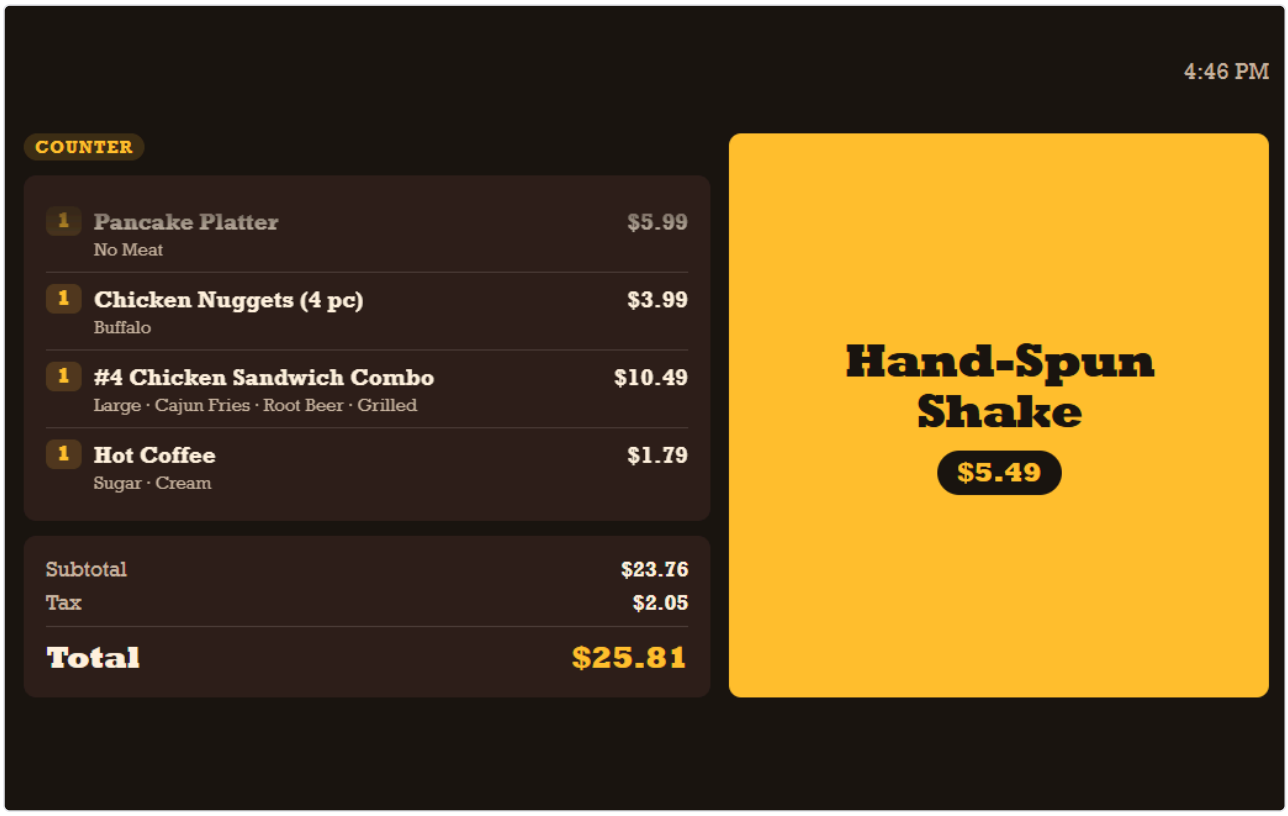
Every way of joining creates the same member — a phone number that is already registered simply finds the existing member.

At the register

The loyalty screen registers a new member or finds one (Enrolling a customer or loyalty card).

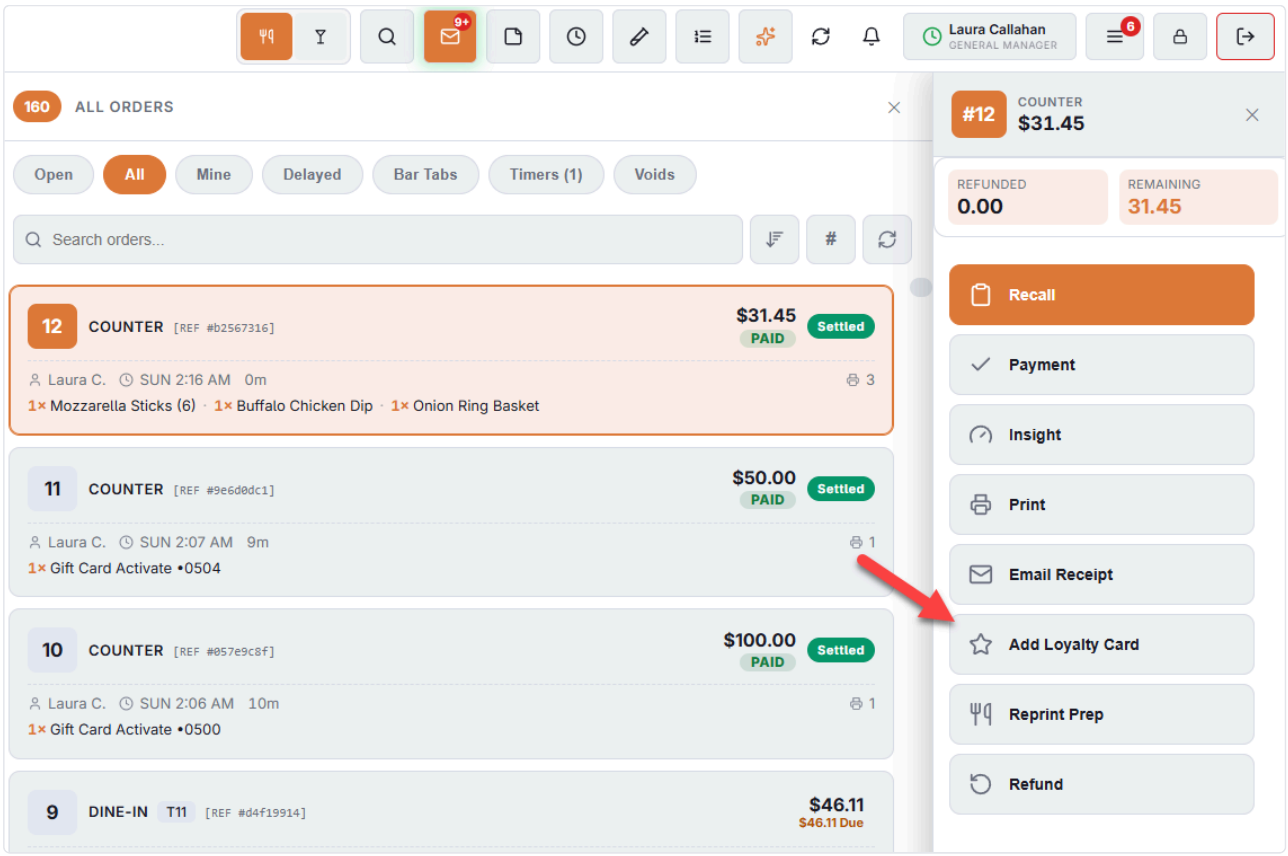
On the customer display

With `LoyaltyPromptOnCustomerDisplay` on and the customer display open, starting payment on an order without a card shows **Earn Rewards** with a phone keypad. The guest types their number and taps **Join / Check In**, or **No Thanks**. The card goes on the order at once, so this visit earns. If the cashier reaches card payment first, the tip prompt takes over the screen.



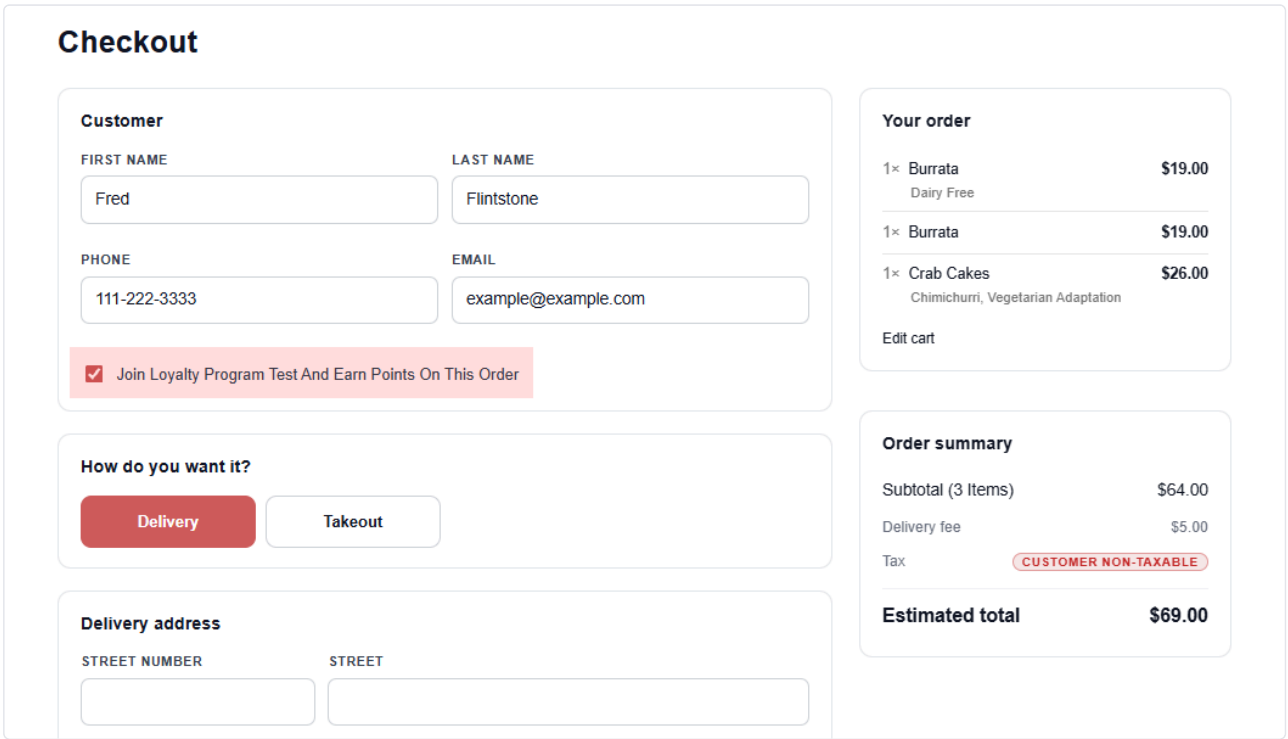
After paying

With `LoyaltyClosedCheckSignup` on (the default), a paid order in the Orders list has **Add Loyalty Card**. It opens the usual loyalty screen; the card chosen goes on that order and earns its points straight away. An order that already has a different card is refused.



Online

When gift and loyalty cards are enabled for the web store and the program is active, checkout offers **Join and earn points on this order** under the email field. Ticked, the customer is signed up by phone (or email) and the order earns. It isn't offered on table QR orders.



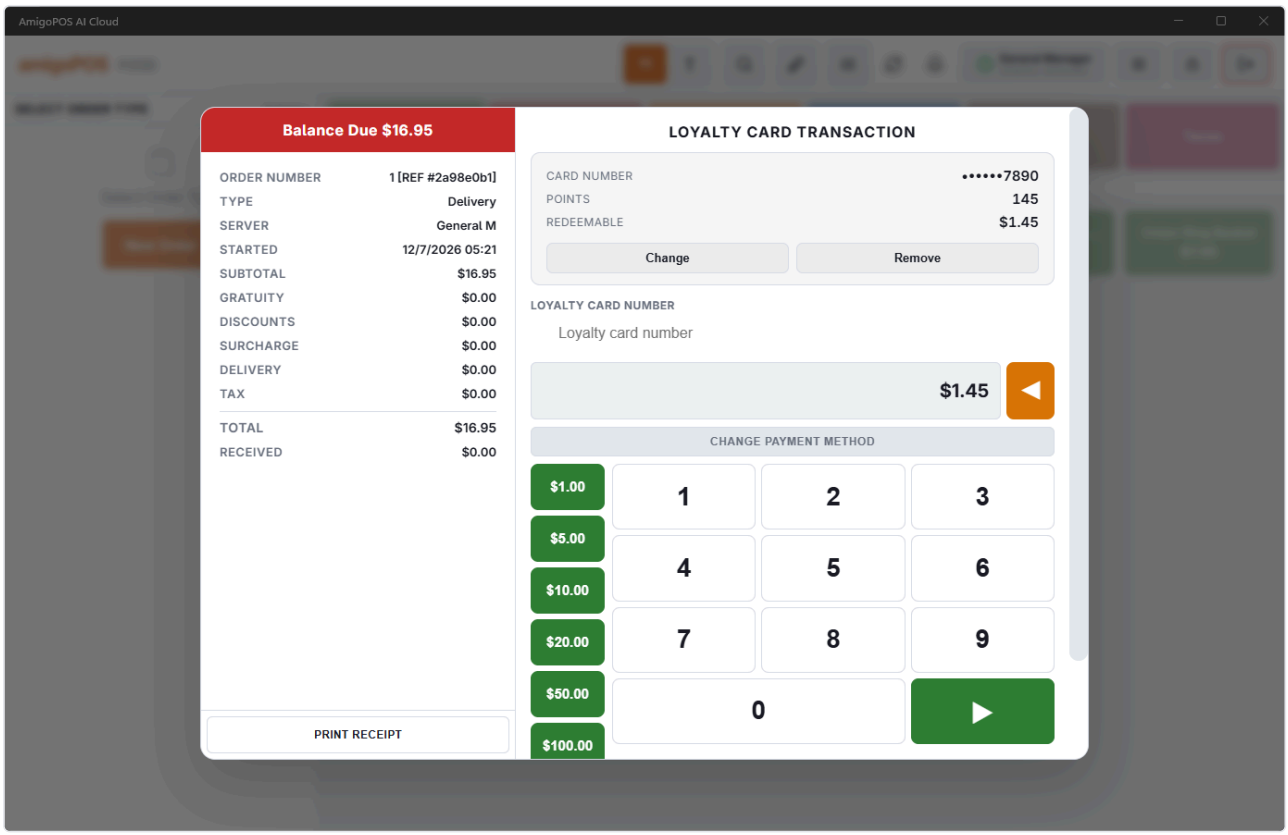
A sign-up bonus, if you set one, is given the first time a card joins, however it joins (Promotions and bonuses).

Earning and redeeming points

View online ↗

How loyalty points accrue on an order and how a guest spends them.

With a loyalty card attached to the order, earning is automatic and redeeming is one prompt.



Earning

Attach the member (scan, phone lookup, or via the attached customer) any time before settle. On settlement the order's eligible amount — as defined by the program's accrual rules — converts to points at the program rate, times any tier bonus. The overlay shows **potential earnings** live while the order builds, and the member's balance and recent earn/redeem transactions are always visible on their card view.

Redeeming

At payment, a member with a redeemable balance can apply points to the order — subject to the program's **minimum points** and **minimum amount**. The redemption posts as a credit on the check, the balance updates immediately, and the receipt shows it. Remove the card from the order before settle and nothing earns or redeems.

Common questions

- **Points look lower than the total suggests** — the program excludes tax/gratuity/delivery, deducts discounts, or the order held *exclude-from-loyalty* items. The accrual rules in *Loyalty program setup* are the answer key.
- **Can't redeem** — under the minimum-points or minimum-order threshold, or the card is expired/deactivated (the overlay says which).
- **Forgot to attach the card** — attach before settle next time; policy on retroactive credit is the store's call, not automatic.

When points count

Points are earned when the order is paid, not when it is sent, so voided orders and walkouts earn nothing; a refund takes back the points for what was refunded. Besides paying with points, a points program can offer a reward catalog taken as a discount (Rewards as discounts). The full picture is in How loyalty works.

What earns points

Customers, Gift & Loyalty › Loyalty

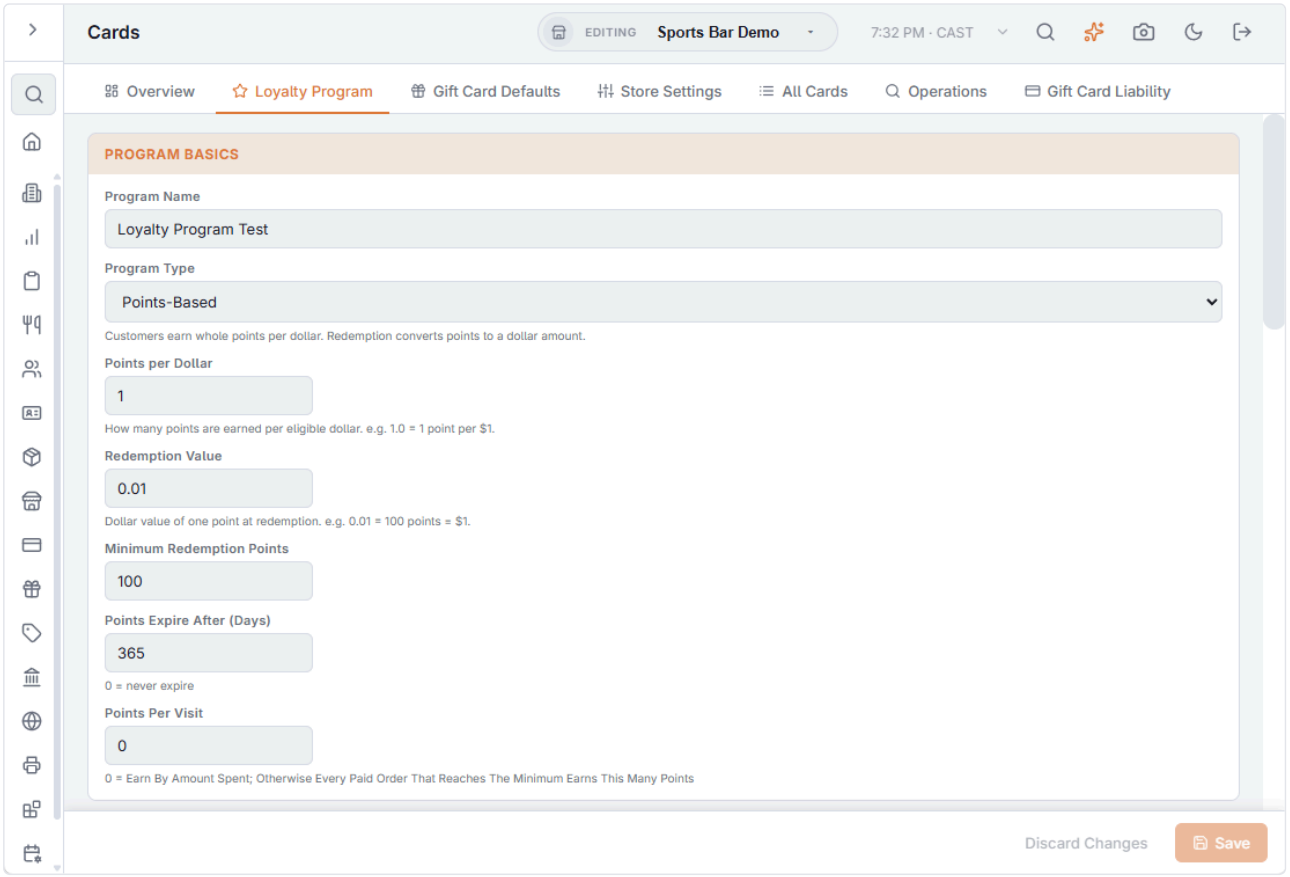
View online ↗

Earning by amount or by visit, what is counted, items and categories left out, and tiers.

All of this lives in **Back Office › Gift & Loyalty › Cards › Loyalty Program**.

By amount or by visit

- **By amount** — the accrual rate (points per dollar, or the bonus percentage) applied to the eligible amount.
- **By visit** (points programs) — set **Points Per Visit** and every paid order that reaches **Minimum Spend For A Visit** earns that many points. Leave Points Per Visit at 0 to earn by amount.



What counts

The eligible amount starts from the subtotal; the program's switches add tax, gratuity, surcharge or delivery and can deduct discounts. Then these are left out:

- Items marked **Exclude from loyalty** in the menu item editor.
- Every item in a category marked **Exclude from loyalty** in the category editor — the quick way to leave out alcohol, tobacco or gift cards.
- Modifiers follow their item, and the matching share of tax is left out with the item.
- Gift card sales never earn.

Tiers

With tiers enabled, each tier has a name, the lifetime points that reach it and an earn multiplier (Gold earning 1.25×, for example). The multiplier applies to both kinds of earning, and bonus-points promotions multiply on top.

> "Why so few points?" is almost always an excluded item or category, a discount deducted, or a visit under the minimum spend.

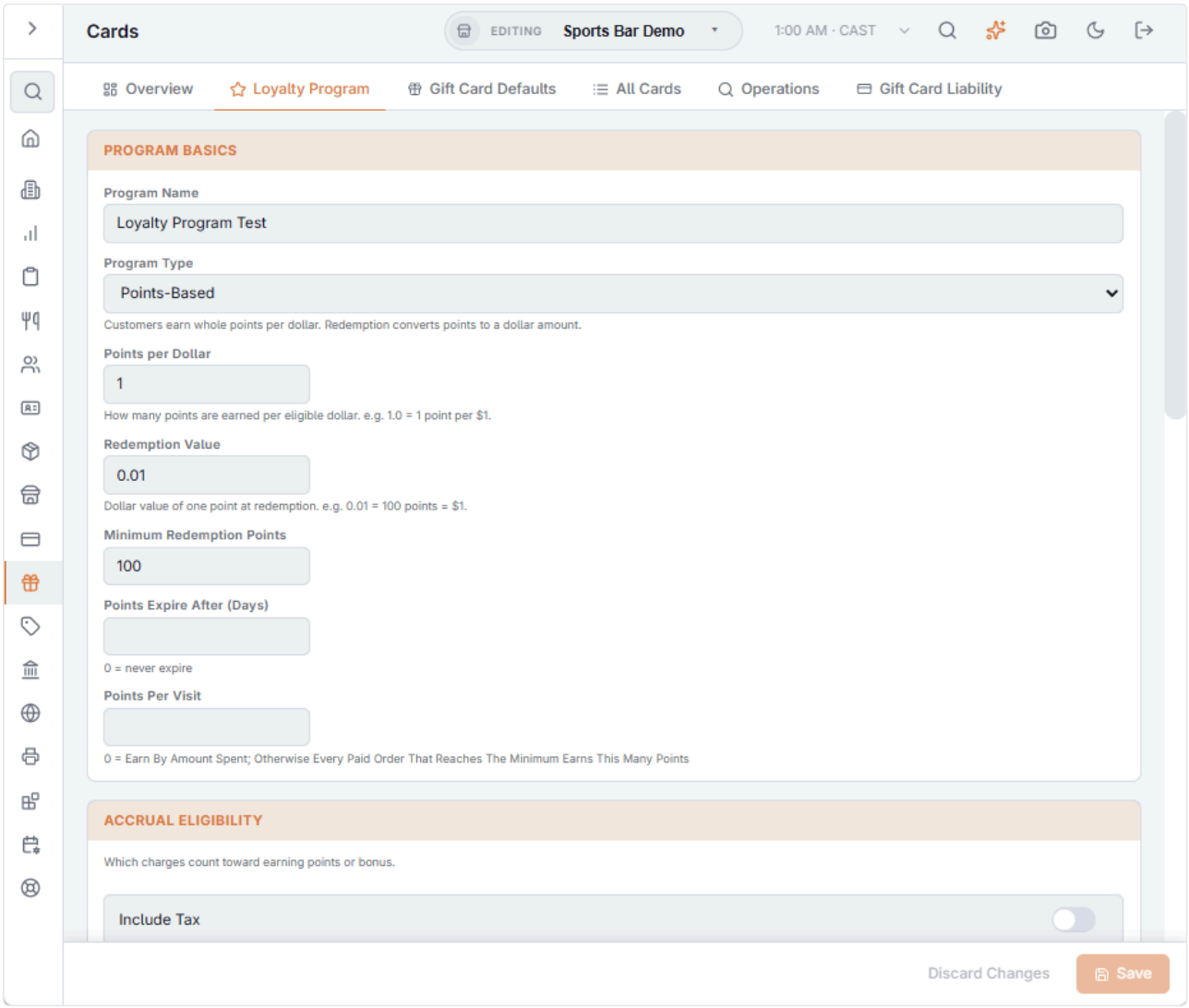
Loyalty program setup

Customers, Gift & Loyalty › Loyalty

View online ↗

Earn rates, bonuses, expiry and the rules behind the loyalty program.

The **Loyalty Program** tab of **Back Office › Gift & Loyalty › Cards** sets how members earn and spend rewards. There is one program for the whole business, used by every store, at the register and online. Changes are kept until you press **Save**, or **Discard Changes**, which also puts back the tiers, rewards and promotions as last saved.



Program Basics

- **Program Name** — the name shown to staff and members, for example *House Rewards*.
- **Program Type** — **Points-Based**: members earn whole points and spend them at a set value. **Percentage Bonus**: members earn a percentage of what they spend as a money bonus to spend later.
- **Points per Dollar** (points) or **Bonus Rate** (bonus) — the earning rate on the eligible amount. A bonus rate of 0.05 is 5%.
- **Redemption Value** (points) — what one point is worth when spent; 0.01 means 100 points = 1.00.
- **Minimum Redemption Points** (points) or **Minimum Redemption Amount** (bonus) — the least a member can spend at a time.
- **Points Expire After (Days)** (points) — 0 means points never expire. See Points expiry and warnings.
- **Points Per Visit** and **Minimum Spend For A Visit** (points) — earn a set number of points per paid order instead of per amount. See What earns points.

Accrual Eligibility

What the earning rate is applied to. It starts from the order subtotal; **Include Tax**, **Include Gratuity**, **Include Surcharge** and **Include Delivery Charge** add those amounts, and **Deduct Discount** takes the order's discounts off, so members earn on what they actually paid. Items and categories marked to be left out of loyalty never earn.

Loyalty Tiers

Points programs only. Turn on **Enable tiers** and add rows with **Add tier**: a **Tier name**, the **Min lifetime points** that reach it and an **Earn multiplier** (1.25 means 25% more points). A member earns at the multiplier of the highest tier their lifetime points reach. The bin icon removes a tier.

Sign-Up Bonus

Points On Sign-Up (points) or **Bonus On Sign-Up** (bonus) is given once, when a card first joins the program; 0 means none. See Bonus-points promotions and sign-up bonus.

Loyalty Rewards

Points programs only: the reward catalog members can take as a discount. See Rewards as discounts.

Bonus Points Promotions

Multipliers for chosen days, hours or order types, such as double points on Tuesdays. See Bonus-points promotions and sign-up bonus.

Birthday Reward

Turn on **Enable birthday reward** and set **Birthday points** (points) or **Birthday bonus** (bonus). Each day, members whose customer record has that day as their **Birthday** get the reward on their loyalty card, once a year. The birthday is entered on the customer's **Overview** tab (Customers list, types, and merge).

Program Status

- **Allow same-order redemption** — members can spend what an order earns on that same order. Off, what an order earns can only be spent on a later visit.
- **Program Active** — off pauses earning on every card. Balances are kept, and the program's settings, tiers, rewards and promotions stay here and can still be changed and saved while it is off.

> Work out what the program costs before you fill in the fields: points per dollar × redemption value is the share of sales you give back. 1 point per dollar with 100 points worth 1.00 is a 1% program; 100 points worth 5.00 is 5%.

Bonus-points promotions and sign-up bonus

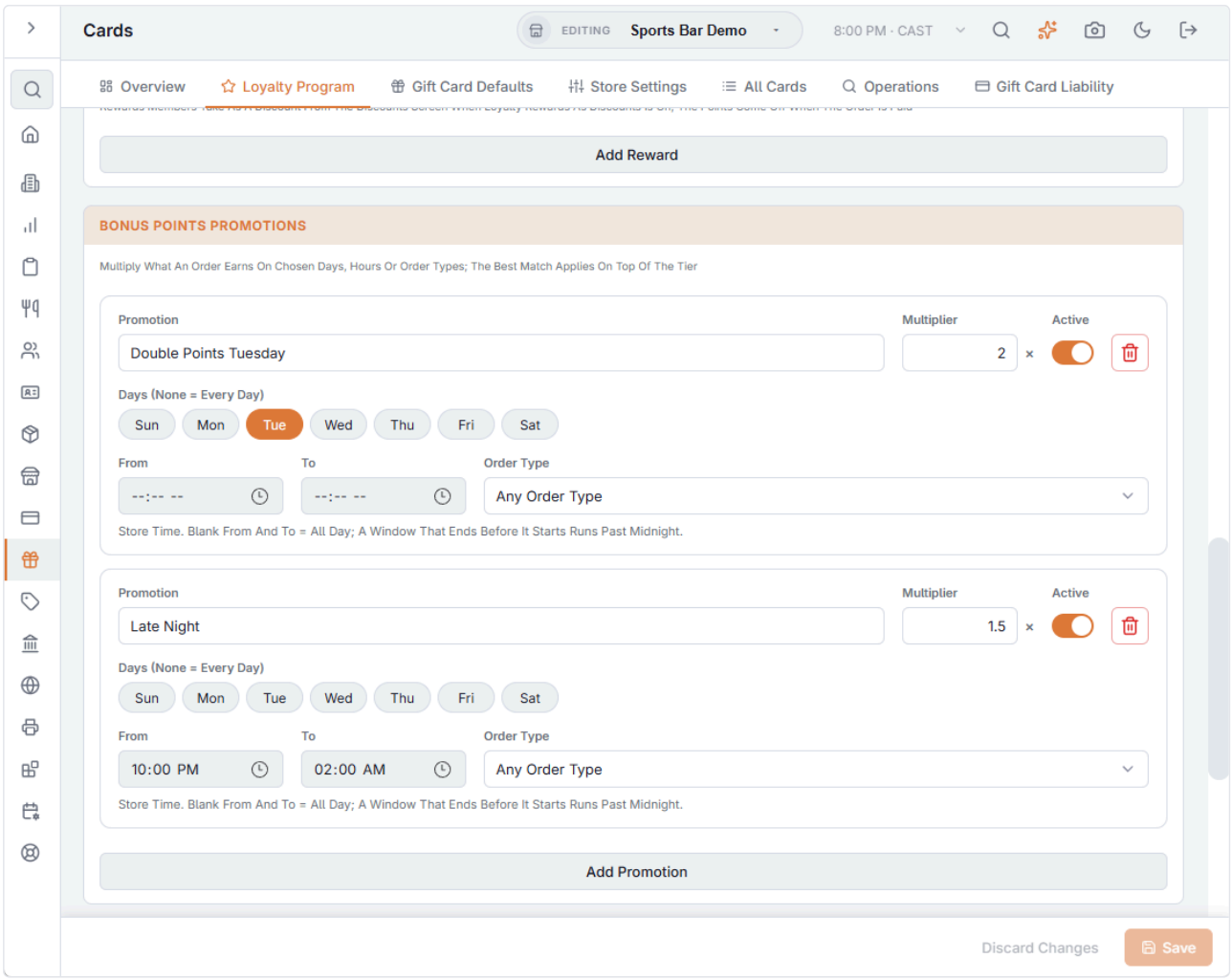
Customers, Gift & Loyalty › Loyalty

View online ↗

Double-points days and hours, order-type promotions, the sign-up bonus and the birthday reward.

Bonus Points Promotions

In the Loyalty Program editor, each promotion row has a name, a **multiplier**, the **days** it runs (none ticked = every day), an optional **from / to** time in store time and an optional **order type** (blank = any). A window that ends before it starts runs past midnight: 22:00 to 02:00 is a late-night promotion.



When a paid order matches, the best matching multiplier applies, on top of the member's tier: a Gold member (1.25×) on double-points Tuesday earns 2.5×. The order's start time and its order type decide the match. Untick **Active** or remove the row to stop a promotion.

Sign-Up Bonus

Points (points programs) or value (bonus programs) given once, the first time a card joins the program — at the register, on the customer display, after paying or online. It expires like any other points. 0 means none.

Birthday reward

Set in the same editor; see Loyalty program setup.

Rewards as discounts

Customers, Gift & Loyalty › Loyalty

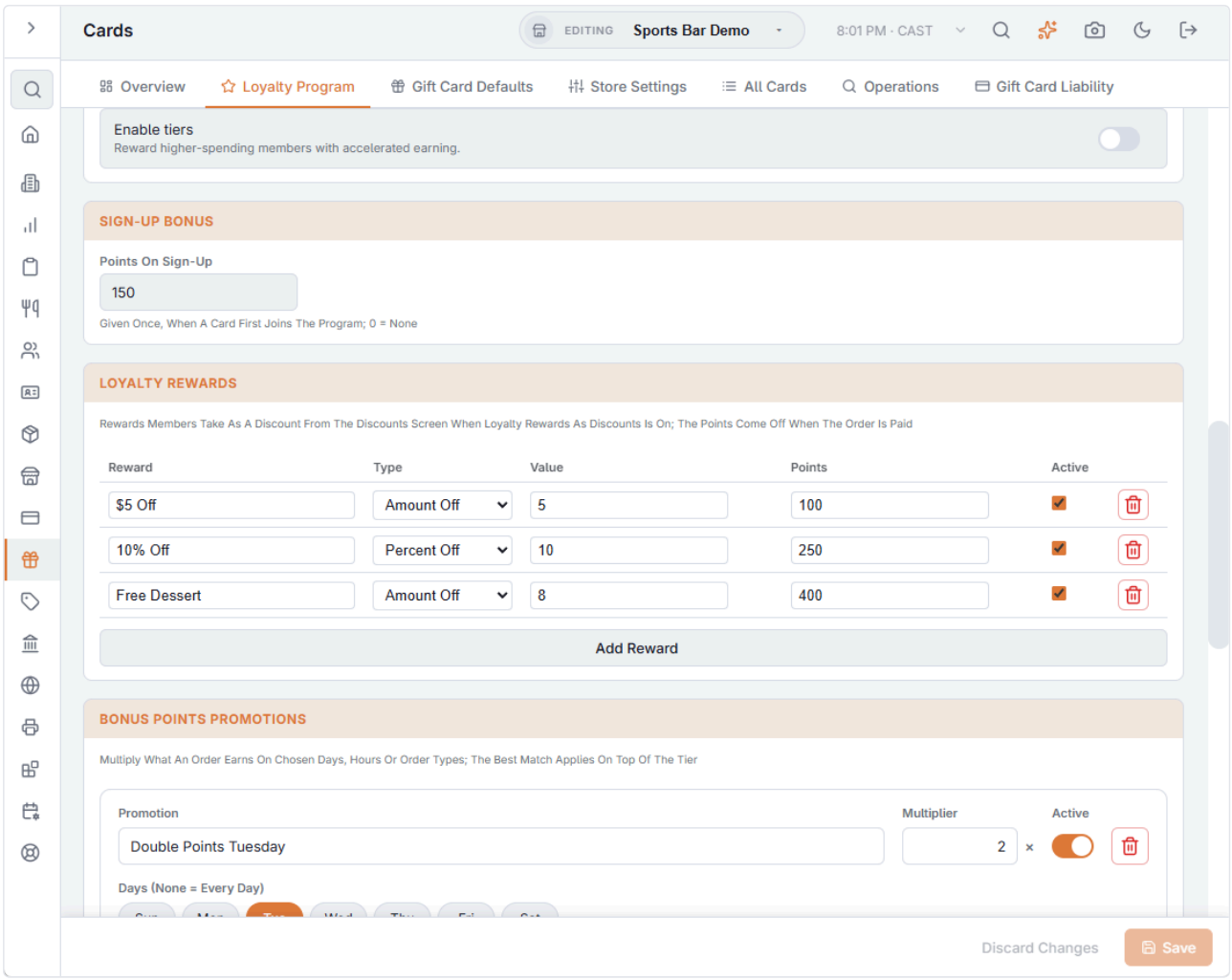
View online ↗

A reward catalog members spend points on from the Discounts screen, how tax is handled, and voids, refunds and splits.

A points program can offer rewards such as 5.00 off for 100 points, or 10% off for 250 points, taken as a discount instead of a payment. The catalog is the **Loyalty Rewards** section of the **Loyalty Program** tab in **Back Office › Gift & Loyalty › Cards**. A discount lowers the sale, so reports show the reward as a discount rather than money collected.

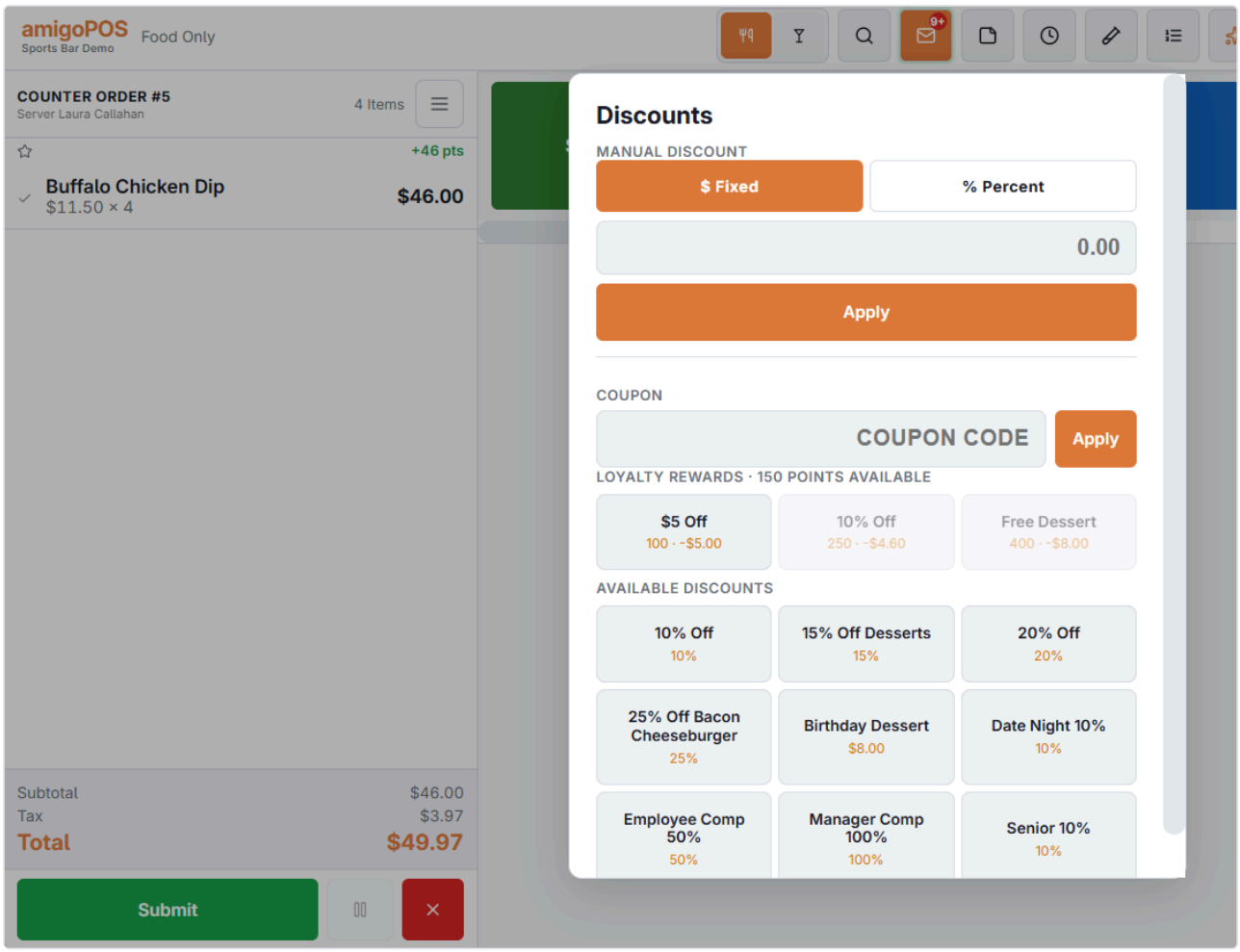
Setting up

1. In **Loyalty Rewards**, press **Add Reward** for each reward and fill in the row: **Reward** (the name), **Type** (**Amount Off** or **Percent Off**), **Value**, **Points** (what it costs) and **Active**. The bin icon removes a reward.
2. Press **Save**.
3. In All program settings (search), turn on **Loyalty Rewards As Discounts**. It is off by default.



At the register

With a loyalty card on the order, the **Discounts** screen lists the rewards with the points left; rewards the member can’t afford are greyed out. Tap one to apply it — a percentage is worked out on the subtotal at that moment.



When points come off

- Nothing is deducted while the order is open; removing the reward costs nothing.
- The points come off when the order is paid.
- Voiding the order, or refunding it in full, gives them back.
- Splitting the check gives each part its share of the discount; only one part takes the points.

Tax

With **Loyalty Rewards Pre Tax** on (the default, in All Program Settings), the reward is spread over the items like a store coupon, so tax is charged on the discounted amount; off, it comes off the total after tax. If the items already carry another pre-tax discount, what doesn't fit comes off the total.

> The loyalty payment method keeps working alongside rewards; disable it in Payment methods if you only want the catalog.

Points expiry and warnings

Customers, Gift & Loyalty › Loyalty

View online ↗

Use-it-or-lose-it points, the daily expiry run, and the email warning members before points expire.

Points programs can let points expire. Set **Points Expire After (Days)** on the **Loyalty Program** tab of **Back Office › Gift & Loyalty › Cards**; 0 means points never expire. Bonus programs don't expire.

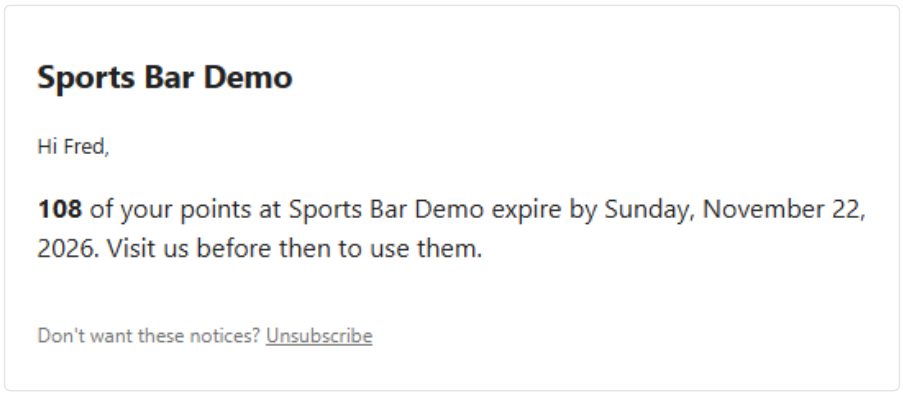
How points expire

Points expire that many days after they were earned, oldest first; points already spent are never expired. A daily run posts the expiries to each member's history, where they show as expirations in the card detail window. The sign-up bonus and promotion points expire like

any others.

Warning members

In All program settings (search), set **Loyalty Expiry Warning Days** (for example 14). Members whose points will expire within that many days get one email per window, in the store's language, saying how many points and by when. It goes to the email on the card, for cards the store issued, and has the same unsubscribe link as gift card reminders. 0 (the default) turns warnings off.



Managing cards

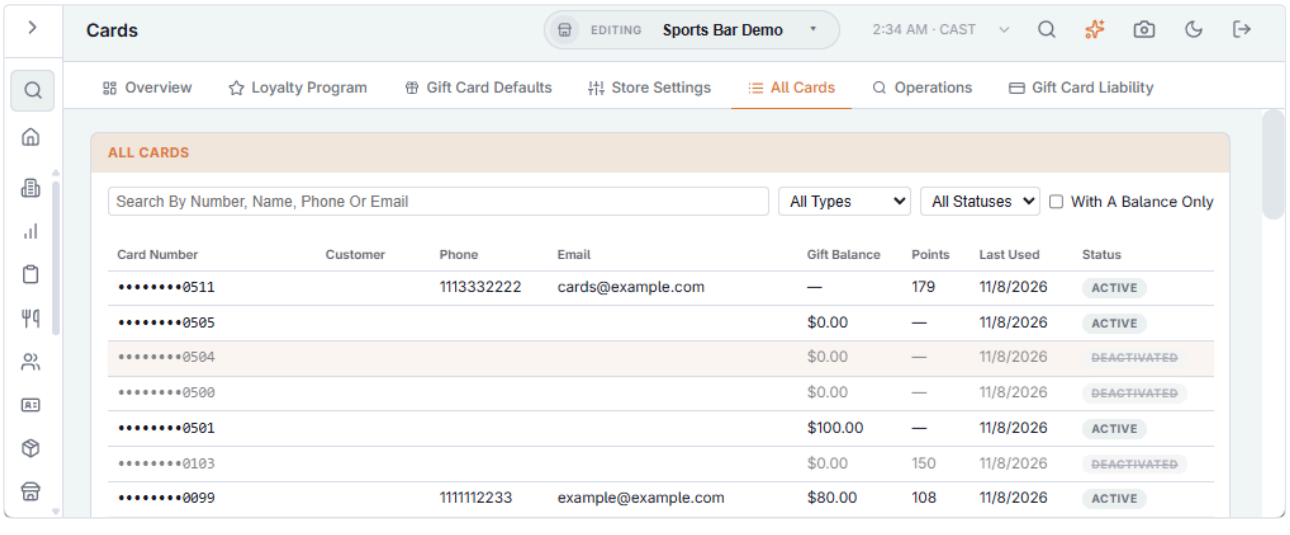
Finding a card: All Cards

Customers, Gift & Loyalty › Managing cards

View online ↗

Every gift and loyalty card of the business in one list, with search and filters.

Back Office › Gift & Loyalty › Cards › All Cards lists every card of the business, most recently used first, 50 a page.



Filters

- **Search** — part of the number, name, phone or email; it searches as you type.
- **Type** — gift cards (have gift activity), loyalty cards (have a loyalty balance), or *not used yet*, such as cards loaded in bulk and never sold.
- **Status** — active or deactivated.
- **With a balance only** — cards with gift value, points or bonus left.

Columns: the number (masked, with an *E-Gift* label on e-gifts), customer, phone, email, gift balance, points or bonus, last used and status. Click a row to open the card (The card detail window).

> The **Operations** tab next to it holds the bulk upload, pending card operations and gift card alerts.

Program cards in the list

Cards your stores sold under a shared card program appear with a **Program Card** badge. Their balance and history belong to the program ledger, so the detail window shows every member's lines with an **At** column. See Program cards at the register.

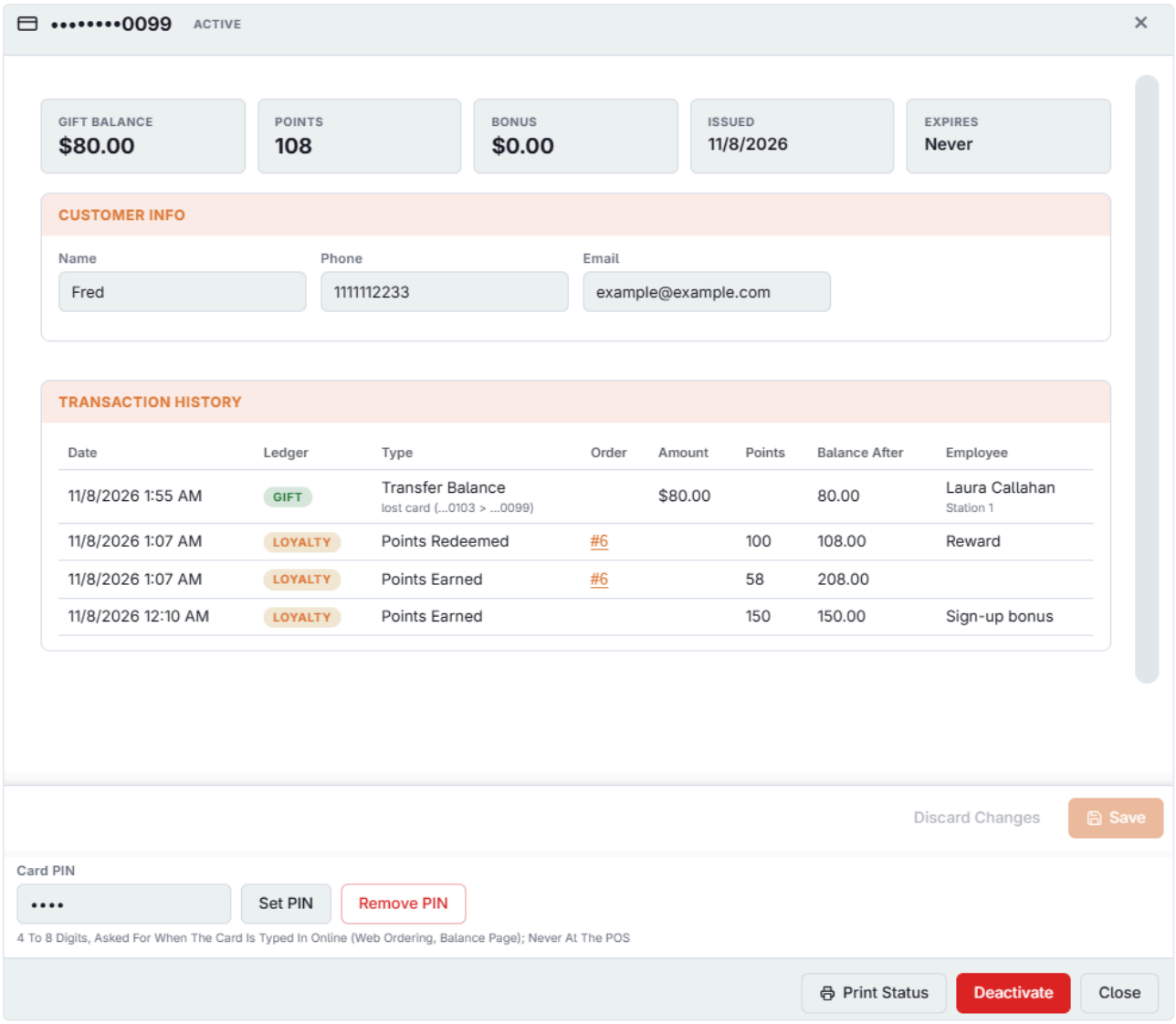
The card detail window

Customers, Gift & Loyalty › Managing cards

View online ↗

Balances, customer details, the full history, printing a status slip, PIN and deactivating a card.

Opening a card from All Cards shows everything about it in one window.



- **Tiles** — gift balance, points, bonus, issue date and expiry.
- **Customer Info** — name, phone and email; edit them and **Save**. Reminder emails go to this email.
- **Card PIN** — set or remove the PIN asked for online (Card PINs).
- **Transaction history** — gift and loyalty lines together, newest first: date, ledger, type, amount, points, balance after and employee.

Footer buttons

- **Print Status** — prints the gift slip, the loyalty slip, or both, on this station's receipt printer.
- **Deactivate / Activate** — a deactivated card is refused everywhere until activated again; its balance is kept. It asks you to confirm, and it needs the **Deactivate Gift Card** permission.

Money actions — adjust, transfer, cash out, void — are done on the Gift Card screen at the register (Adjusting and transferring a balance).

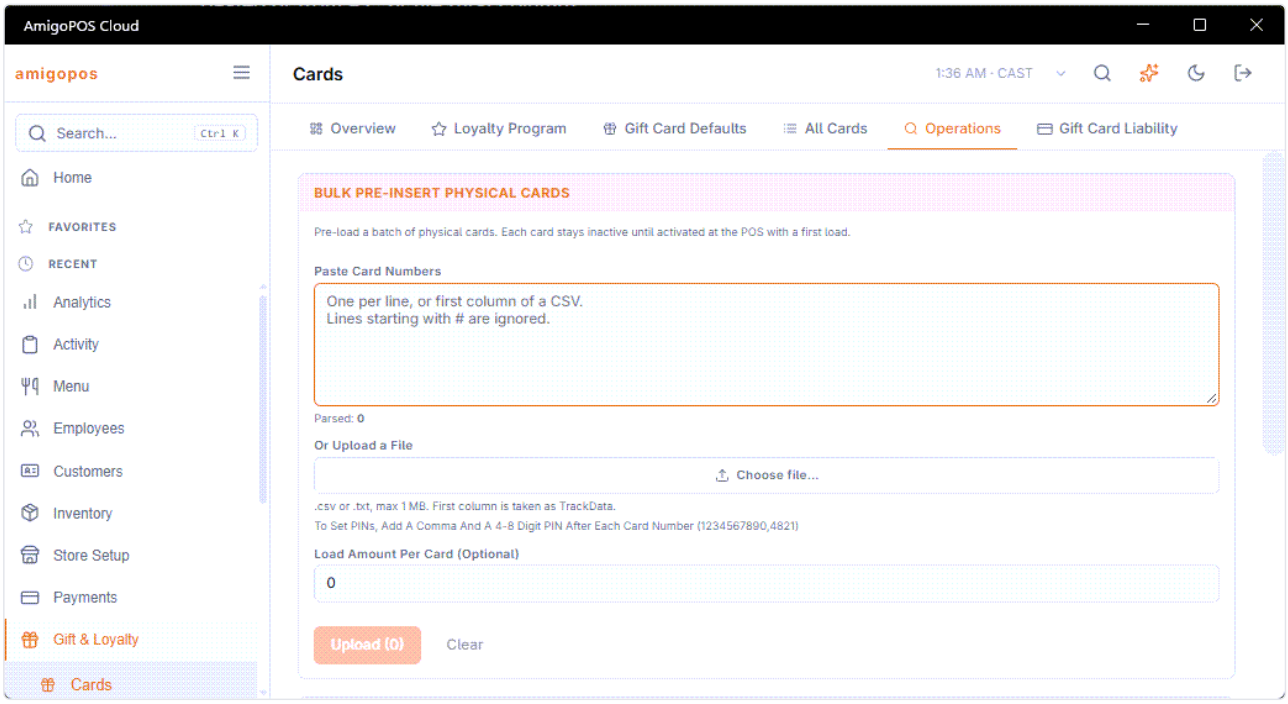
Adding cards in bulk

Customers, Gift & Loyalty › Managing cards

View online ↗

Loading a box of printed cards, loading the same value onto many cards, and setting their PINs.

Bulk Pre-Insert Physical Cards, on the **Operations** tab of **Back Office › Gift & Loyalty › Cards**, adds a whole box of printed cards at once from a list of card numbers.



The list

- **Paste Card Numbers** — one number per line, or the first column of a CSV; columns can be separated by commas, semicolons or tabs. Lines starting with # are ignored.
- **Or Upload a File** — **Choose file…** reads a .csv or .txt file of up to 1 MB into the box.

Parsed shows how many numbers were found; numbers shorter than 4 characters and repeats in the list are left out. **Clear** empties the box.

Two ways

- **Numbers only** — press **Upload**. The cards are created inactive, ready to be sold; each is activated by its first sale or load at the register. The result shows how many cards were inserted and how many were skipped because the business already has them; **View skipped cards** lists those.
- **With a Load Amount Per Card (Optional)** — for staff with the **Adjust And Transfer Gift Card Balances** permission. Every card in the list is created or activated and loaded with that amount, up to 1000 cards at a time. A **Reason** is required, such as the company the order was for. Uploading the same list again doesn't load twice. The result shows the cards loaded and the ones that weren't, with **View Cards**.

> Loading needs gift card adjustments allowed for the store (**Gift Card Adjustments Enabled** in All program settings (search), on by default).

PINs

For cards printed with a scratch-off PIN, staff with the same permission can write each line as `number,pin` (a comma, semicolon or tab between them; a PIN of 4 to 8 digits). After the cards are added, the PINs are set, and the result shows how many were and weren't. See

Card PINs.

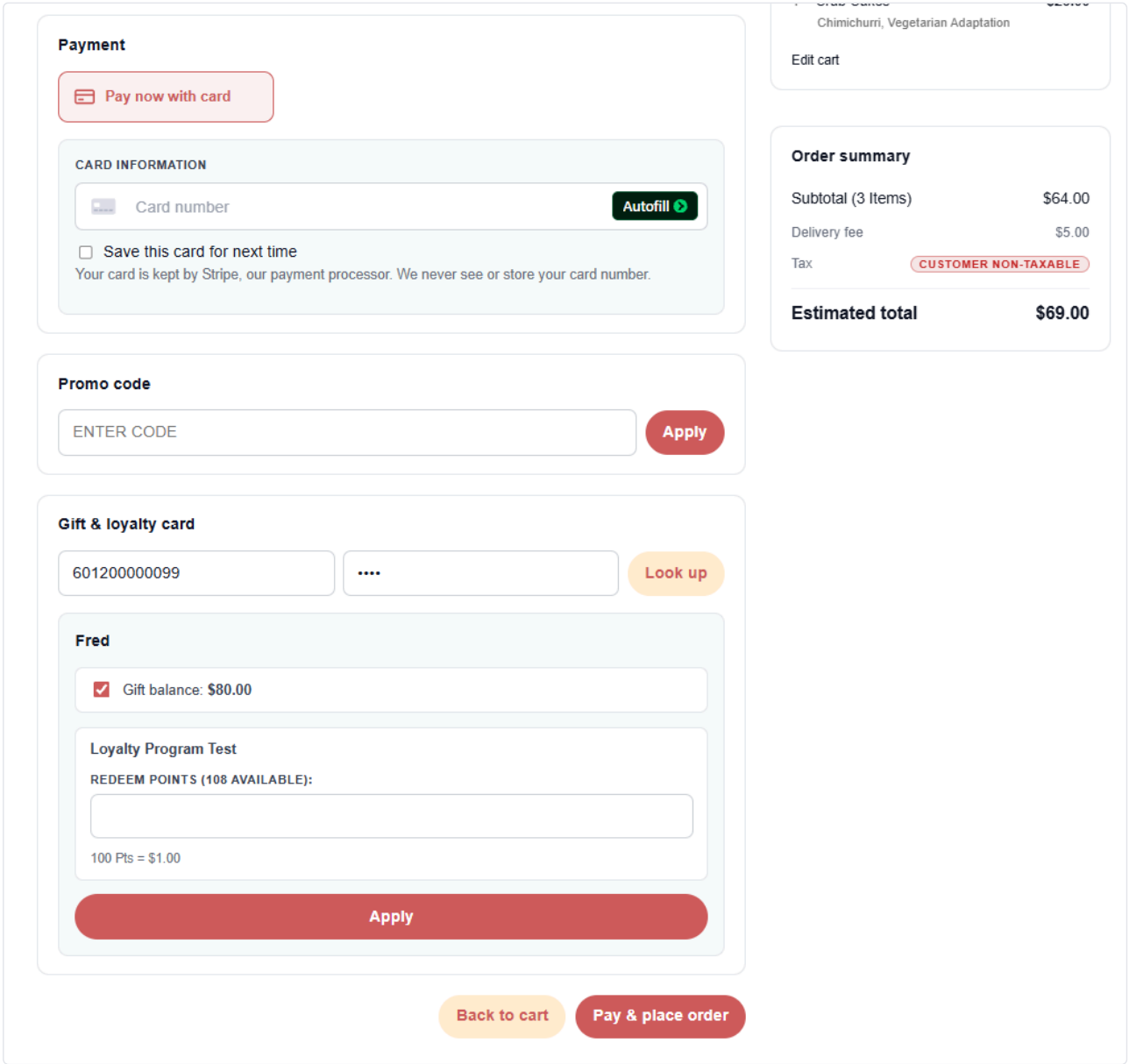
Card PINs

Customers, Gift & Loyalty › Managing cards

View online ↗

A security code asked for when a card is typed in online, lockout after wrong tries, and how to set PINs.

A card number alone is enough to use a card online, and printed numbers are often sequential. A PIN closes that gap: a card with a PIN needs it when it is typed in on the web ordering checkout or on the balance page. The register never asks for a PIN — the card is in hand.



Setting PINs

- **One card** — open it from **All Cards** in **Back Office › Gift & Loyalty › Cards**. Under **Card PIN**, type 4 to 8 digits and press **Set PIN**, or press **Remove PIN**.
- **Many cards** — add `number,pin` lines to the bulk upload on the **Operations** tab (Adding cards in bulk).

Both need the **Adjust And Transfer Gift Card Balances** permission; without it the Card PIN box doesn't show. PINs are stored in a form nobody can read back, so a forgotten PIN is replaced, not looked up.

Rules

These store settings are in All program settings (search):

- **Gift Card Online Requires Pin** — off (the default): only cards that have a PIN are asked for it. On: a card without a PIN can't be used online at all.
- **Gift Card Pin Max Failures** — after this many wrong PINs in a row (5), the card's online use locks and a fraud alert is raised; 0 never locks.
- **Gift Card Pin Lock Minutes** — how long the lock lasts (30). Setting or removing the PIN clears the lock.

Daily limits and fraud alerts

View online ↗

Per-card daily limits, the alerts raised for risky activity, and getting them by email.

Gift cards are cash-like, so AmigoPOS can limit how fast a card is used or loaded and raise an alert when something looks wrong. The limits and alert rules are store settings in All program settings (search); the alerts are listed on the **Operations** tab of **Back Office › Gift & Loyalty › Cards**.

Daily limits

- **Gift Card Max Redeems Per Day** — how many times one card can pay or be cashed out in 24 hours.
- **Gift Card Max Load Per Day** — how much value can be sold or reloaded onto one card in 24 hours, at the register and online.

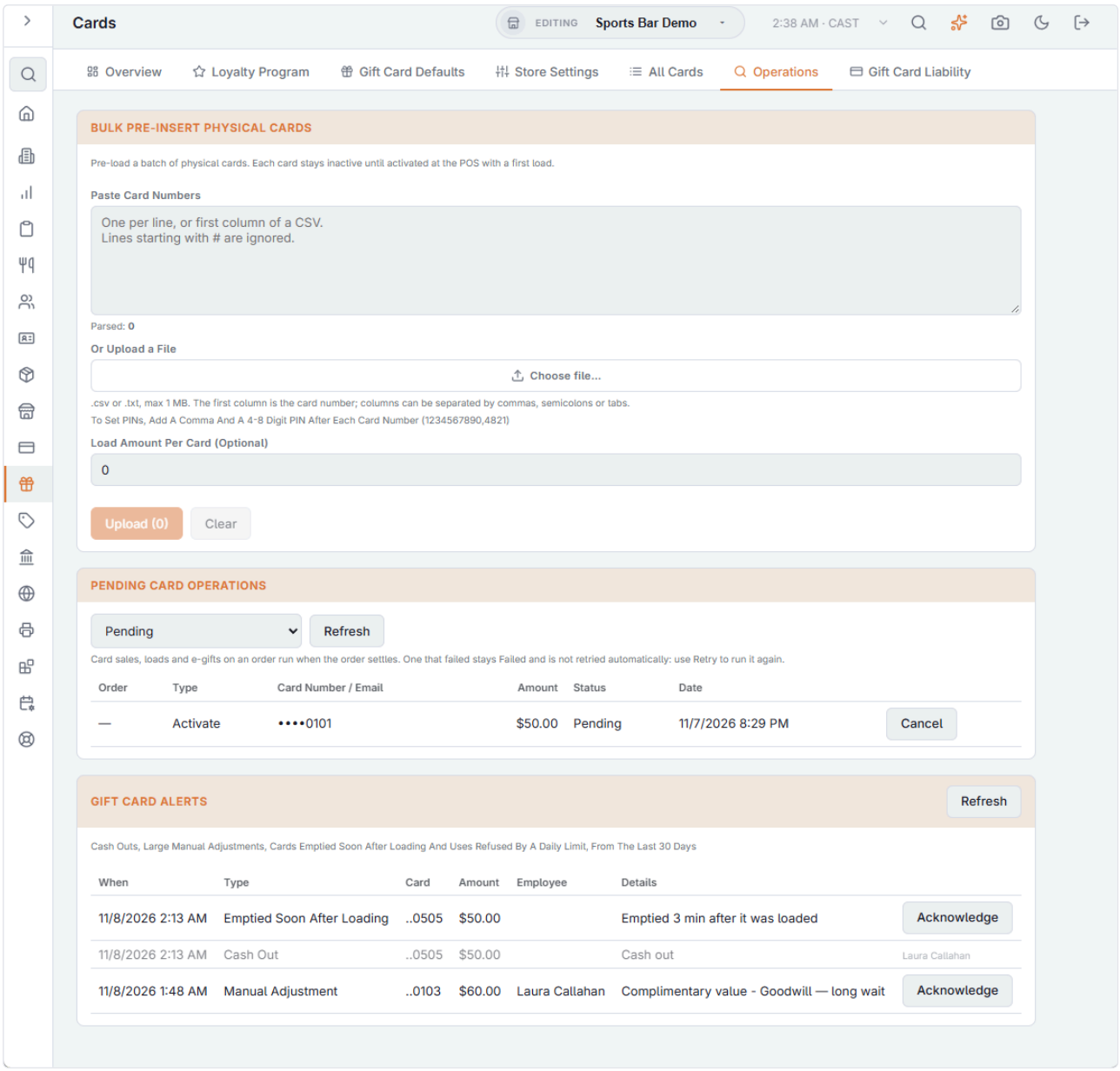
Both are 0 (no limit) until you set them. A refused use tells the cashier why and raises an alert. Transfers, adjustments, refunds, bulk loads and voids are never limited.

Alerts

Alert	Raised when	Setting
Cash Out	Any cash out	**Gift Card Alert On Cash Out** (on)
Manual Adjustment	An adjustment or complimentary value at or above the amount	**Gift Card Alert Adjust Over** (50; 0 = every one, -1 = never)
Emptied Soon After Loading	A card emptied within that many minutes after it was loaded	**Gift Card Alert Quick Drain Minutes** (60; 0 = off)
Refused By A Daily Limit	A daily limit refused a use or a load	The limits above
Locked After Wrong PINs	Too many wrong PINs online	**Gift Card Pin Max Failures** (see Card PINs)

Reviewing alerts

Gift Card Alerts lists the alerts of the last 30 days: **When**, the type, the **Card** (last four digits), the **Amount**, the **Employee** and the **Details**, shown in the language Back Office is shown in. After looking into one, press **Acknowledge**; the row is greyed out and shows who acknowledged it. **Refresh** loads new alerts.



Set **Gift Card Alert Email** to receive each store's new alerts by email as they happen, in the store's language; the details in the email stay in English.

> A cash out nobody can explain is the classic case: the alert names the card, the amount, the employee and the time.

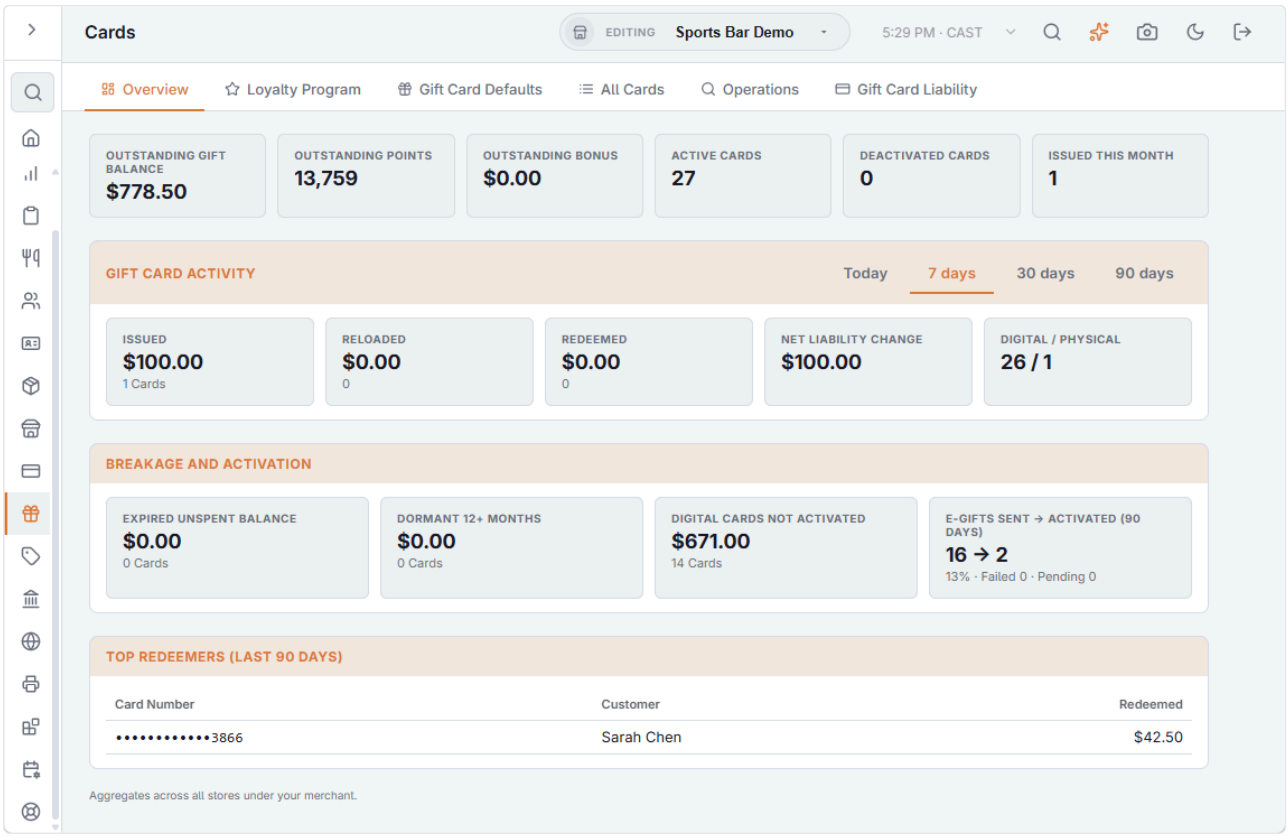
The Cards overview: balances, activity and breakage

Customers, Gift & Loyalty › Managing cards

View online ↗

What each figure on the Cards Overview tab means: outstanding balances, activity by period, expiring and dormant balances, and how many e-gifts were activated.

The **Overview** tab of **Back Office › Gift & Loyalty › Cards** is the one-screen picture of your cards: what is owed on them, how they are moving, and what is sitting unused. Every figure covers all the stores of the business together.



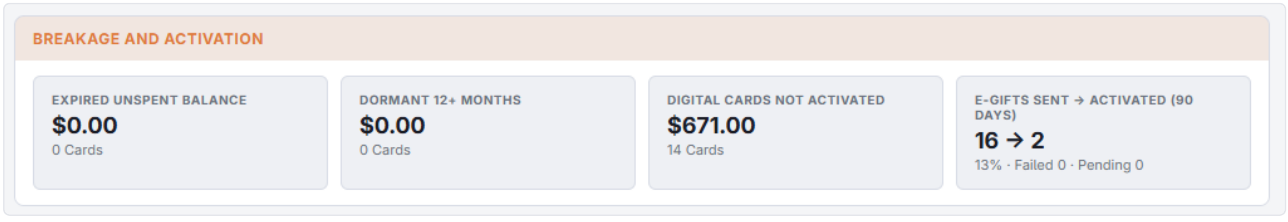
The top tiles

- **Outstanding Gift Balance** — what is left to spend on every gift card: activations and loads, less redemptions, with voided lines left out.
- **Outstanding Points** and **Outstanding Bonus** — loyalty points and bonus value on active cards.
- **Active Cards**, **Deactivated Cards** and **Issued This Month**.

Gift card activity

Pick **Today**, **7 days**, **30 days** or **90 days**. Each is a window counted back from now, so *Today* means the last 24 hours, not since midnight.

- **Issued**, **Reloaded** and **Redeemed** — the value and the number of cards in the window.
- **Net liability change** — issued plus reloaded, less redeemed. Below zero, guests spent more than was sold.
- **Digital / physical** — how many active cards are of each kind (not tied to the window).
- **Expiring balance** — balance on active cards that expires within 30, 60 and 90 days. Each figure includes the shorter ones; the line only shows when something expires within 90 days.



Breakage and activation

Fixed windows; hover a tile for its explanation.

- **Expired Unspent Balance** — value left on cards whose expiry date has passed, and how many cards.
- **Dormant 12+ Months** — balance on active, unexpired cards with no gift card activity for a year. Local rules decide how unclaimed balances are treated — see Gift card liability.
- **Digital Cards Not Activated** — digital gift cards with value on them that the recipient has not activated yet.

- **E-Gifts Sent → Activated (90 Days)** — digital gifts sent in the last 90 days, by email or text, against how many were activated, with the rate and the failed and pending sends. Cancelled sends are not counted, and whether an email was opened is not tracked.

Top Redeemers (Last 90 Days)

The five cards with the most redeemed in the last 90 days, with the customer. Click a row to open the card.

> A high *Digital Cards Not Activated* figure usually means gifts are going to wrong addresses or numbers. Check the failed sends in Manage digital gifts in the back office.

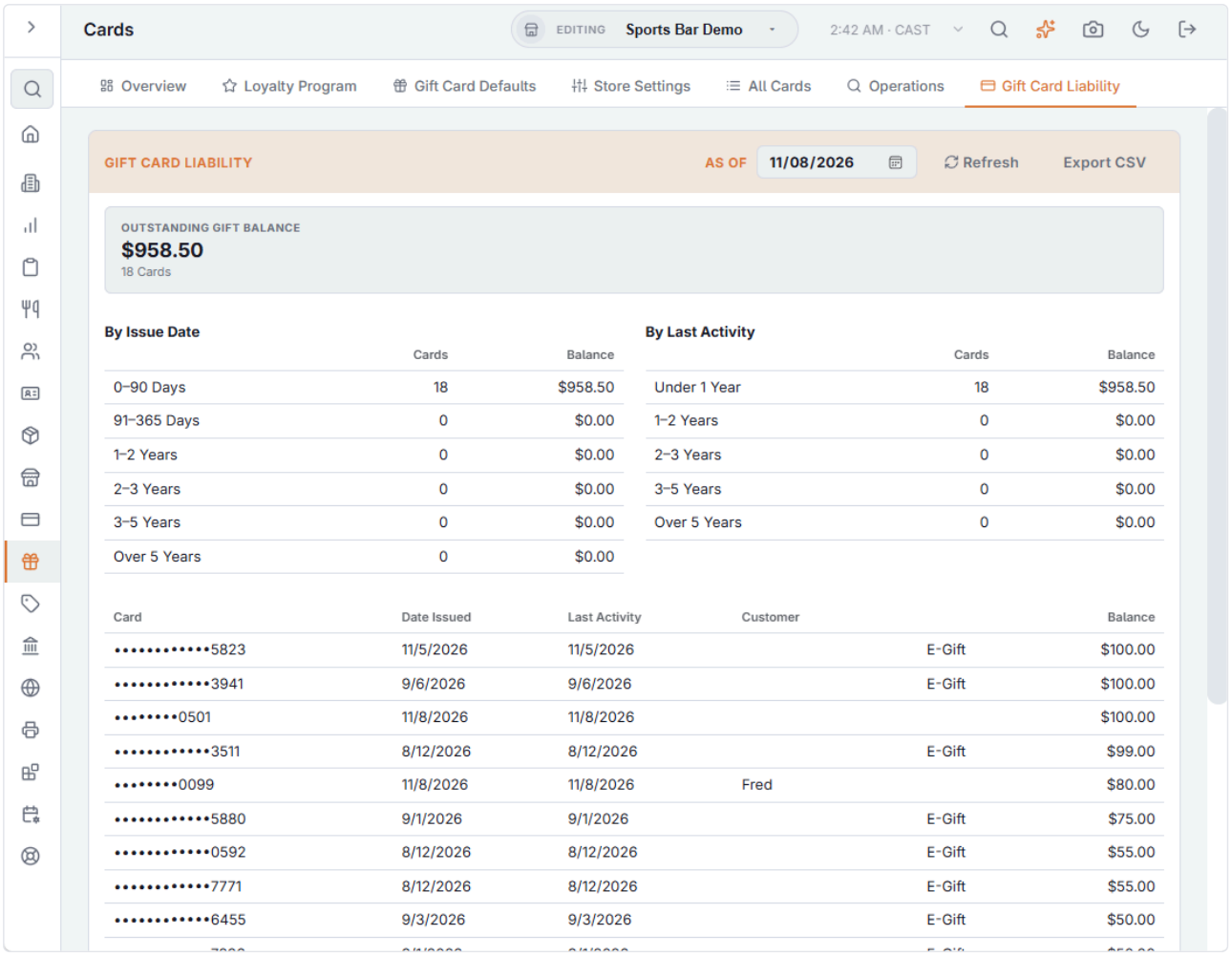
Gift card liability

Customers, Gift & Loyalty › Managing cards

View online ↗

What you owe on unused gift card balances on a date, aged by issue date and by last use, with a CSV of every card.

Unspent gift card value is money the business owes. The **Gift Card Liability** tab of **Back Office › Gift & Loyalty › Cards** shows it as of any date, for all your stores together, since a card can be spent at any of them.



Choosing the date

As Of opens on today and counts everything up to the end of that store day. Pick an earlier date for a month-end or year-end figure.

What it shows

- **Outstanding Gift Balance** — the sum of every card's balance on that date, with the number of cards that still hold value. Voided lines are left out.
- **By Issue Date** — how old the cards holding the balance are: 0–90 days, 91–365 days, 1–2, 2–3 and 3–5 years, and over 5 years.

- **By Last Activity** — how long since each card was last used: under 1 year, 1–2, 2–3 and 3–5 years, and over 5 years. A card never used counts from its issue date. Long-idle balances are the ones your accountant asks about.
- The card list — the cards with the largest balances first: card (masked), **Date Issued**, **Last Activity**, **Customer** (name, or email or phone), an **E-Gift** or **Disabled** mark, and **Balance**. The screen shows the first 200; the line under the list says how many there are in all.

Export CSV

Export CSV downloads the totals, both age tables and every card with a balance, with its customer's name, email and phone, for your books. Section titles and column headings are in the language the Back Office is shown in.

Rules on unclaimed gift card balances differ by country and state; the report gives the figures, your accountant decides what to do with them.

For balances that are expired, dormant or not activated yet, see The Cards overview: balances, activity and breakage.

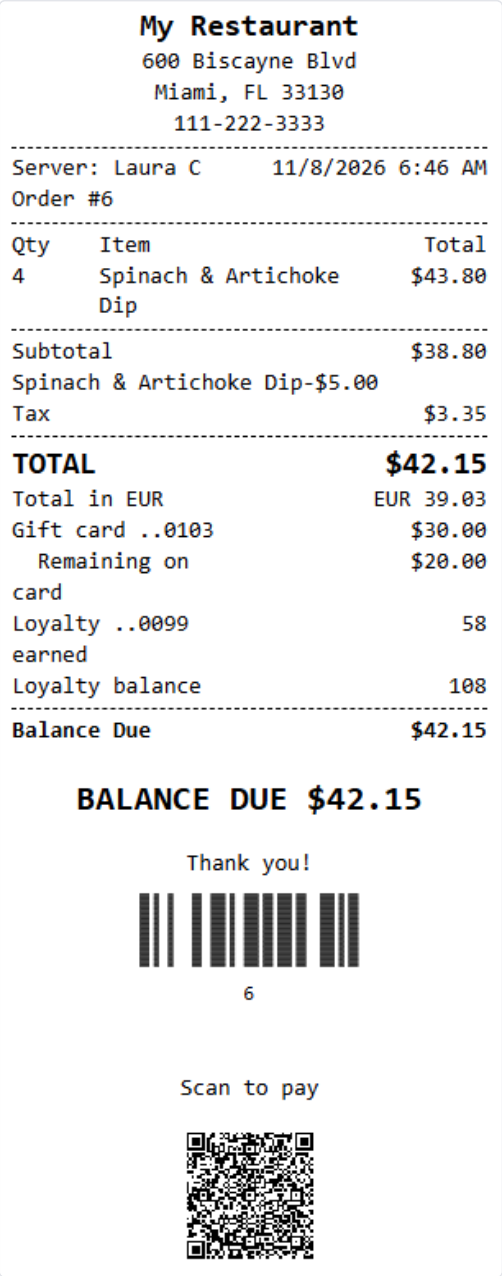
Gift card and loyalty lines on receipts

Customers, Gift & Loyalty › Managing cards

View online ↗

What the customer receipt shows for gift cards and loyalty, the template tokens, and adding them to a custom template.

The customer receipt can list each gift card that paid (the amount taken and what is left on it) and, when a loyalty card is on the order, the points or bonus earned and the card's balance. Points appear once the order is paid, because that is when they are earned.



Two store settings in All program settings (search), both on by default, turn each part off: **Receipt Show Gift Card Balance** and **Receipt Show Loyalty Points**.

Custom receipt templates

The default customer receipt already has these lines. A store with its own saved template needs this block pasted in, usually after the total and currency lines:

```
{BlockIf=GiftCards}
{Foreach=GiftCards}
Gift card ..{GiftCardLast4}{Col}{Right}{GiftCardAmount}
  Remaining on card{Col}{Right}{GiftCardBalance}
{EndForeach}
{EndIf}
{BlockIf=Loyalty}
Loyalty ..{LoyaltyCardLast4} earned{Col}{Right}{LoyaltyEarned}
```

```
Loyalty balance{Col}{Right}{LoyaltyBalance}
{EndIf}
```

Tokens: inside `{Foreach=GiftCards}`, `GiftCardLast4`, `GiftCardAmount` and `GiftCardBalance`; with `{BlockIf=Loyalty}`, `LoyaltyCardLast4`, `LoyaltyEarned` and `LoyaltyBalance` (points as whole numbers, bonus programs as money). Rewards taken as discounts print as a *Loyalty reward* discount line.

Settings and permissions reference

Customers, Gift & Loyalty › Managing cards

View online ↗

Every gift card and loyalty setting and permission in one table, with its default.

Where each gift card and loyalty option is set. The loyalty program, the gift card defaults and the reward catalog are on their tabs in **Back Office › Gift & Loyalty › Cards**. Store settings apply to the store you are editing and are found in All program settings (search) under the names below; for cards used across stores, reminders and warnings follow the settings of the store that issued the card. Permissions are set per job in **Back Office › Employees › People › Jobs & Permissions** (Jobs, roles, and permissions).

Permissions

Permission	New job	What it allows
Gift Cards	off	Opening the Gift Cards screen at the register. Without it, a manager approves.
Add Gift Card Value	off	Add Value on the Gift Cards screen. Without it, a manager approves.
Cash Out Gift Card	off	Paying out a gift card's balance in cash. Review it for every job.
Adjust And Transfer Gift Card Balances	off	Adjustments, complimentary value, transfers, voiding a card line, PINs and bulk loads.

Gift Card Defaults tab

- **Expiration (Days)** — the expiry given to a card when it is activated; 0 never expires, 1825 (5 years) by default.
- **Gift email "from" address** and **Online balance page URL** — see Set up digital gift cards.

Store settings

Setting	Default	What it does
Gift Cards Never Expire	off	New cards get no expiry date, and the expiry date on older cards is ignored at the register and online.
Gift Card Cash Out Max Balance	0	Largest balance that can be cashed out; 0 = no limit.
Gift Card Adjustments Enabled	on	Adjustments and bulk loads at all.
Gift Card Transfers Enabled	on	Balance transfers at all.
Gift Card Balance Reminder Days	0	Days unused before a balance reminder email; 0 = off. Also on Guest Offers › Settings as **Gift Card Balance Reminder (Days)**.
Gift Card Web Show Barcode	on	Card number and barcode on the e-gift page.
Gift Card Web Sales Enabled	off	Sells e-gifts in the store's online store (Selling gift cards in your online store).
Gift Card Web Sales Amounts	25,50,100	Amount buttons on the online gift card page.
Gift Card Web Sales Min Amount	10	Smallest online gift card; never less than 5.
Gift Card Web Sales Max Amount	250	Largest online gift card; Gift Card Max Load Per Day also applies.
Gift Card Web Sales On Program	off	Issues online gift cards on the shared card program.
Gift Card Max Redeems Per Day	0	Uses per card in 24 hours; 0 = no limit.
Gift Card Max Load Per Day	0	Value sold or reloaded per card in 24 hours; 0 = no limit.

Setting	Default	What it does
Gift Card Alert Email	blank	Where fraud alerts are emailed.
Gift Card Alert On Cash Out	on	Alert on every cash out.
Gift Card Alert Adjust Over	50	Alert on adjustments at or above this amount; 0 = every one, -1 = never.
Gift Card Alert Quick Drain Minutes	60	Alert when a card is emptied this soon after loading; 0 = off.
Gift Card Online Requires Pin	off	Cards without a PIN can't be used online.
Gift Card Pin Max Failures	5	Wrong PINs before online use locks; 0 = never.
Gift Card Pin Lock Minutes	30	How long the lock lasts.
Loyalty Rewards As Discounts	off	Rewards catalog in the Discounts screen.
Loyalty Rewards Pre Tax	on	Rewards lower the taxable amount.
Loyalty Convert To Gift Enabled	off	On a shared program card, guests can turn this store's points into gift balance (Loyalty on a program card).
Loyalty Expiry Warning Days	0	Days before points expire to warn by email; 0 = off.
Loyalty Prompt On Customer Display	off	The customer display asks for a phone number at payment.
Loyalty Closed Check Signup	on	Add Loyalty Card on paid orders.
Receipt Show Gift Card Balance	on	Gift card lines on customer receipts.
Receipt Show Loyalty Points	on	Loyalty lines on customer receipts.

Sending digital gifts by text message also needs **Send Text Messages** and **Digital Gift Cards** on in SMS settings.

> A new store starts with these defaults: every limit and email off, the cash-out permission on and the adjustment permission off. Review both permissions before the store opens.

Shared Card Program

What the shared card program is

Customers, Gift & Loyalty › Shared Card Program

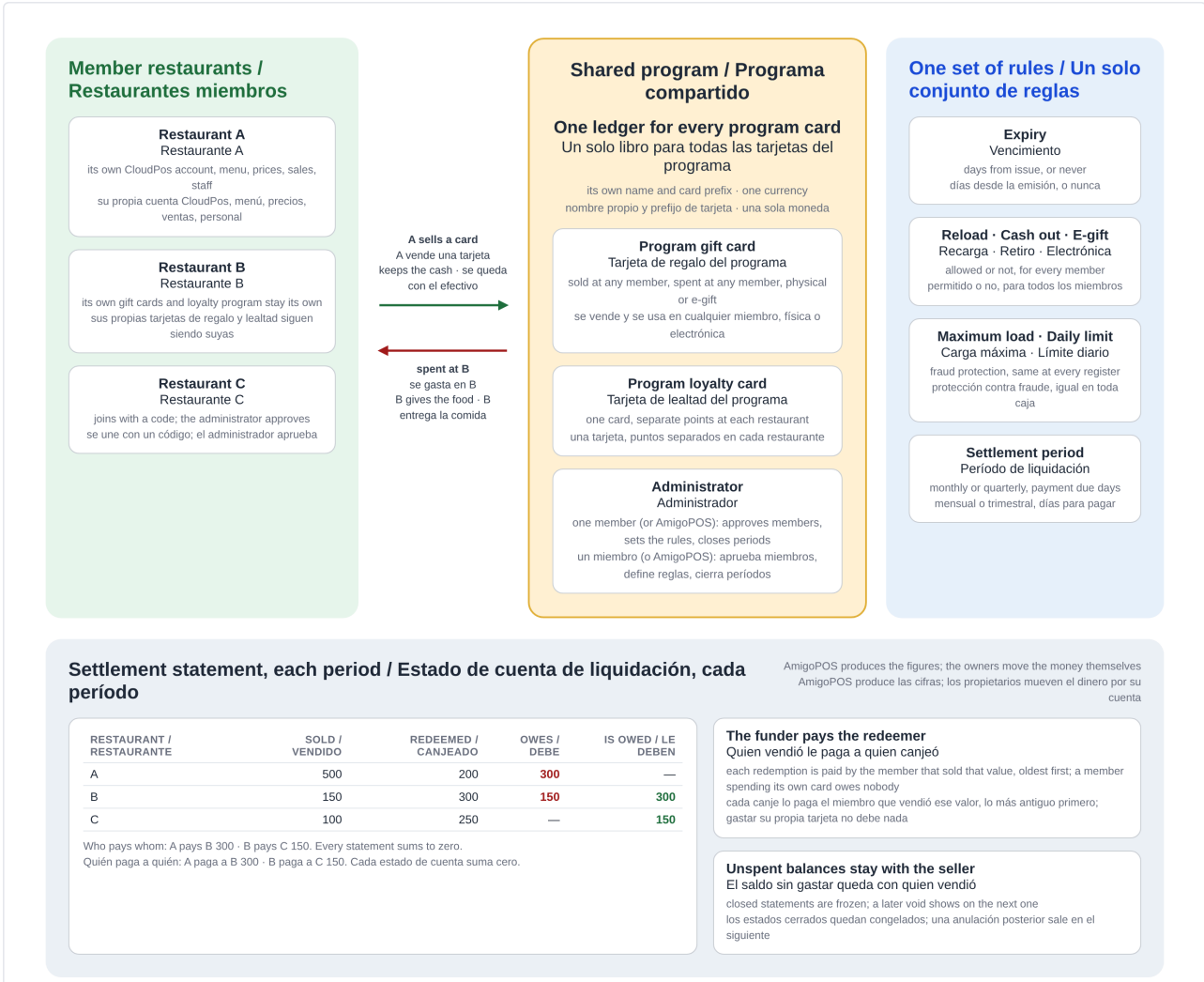
View online ↗

One gift and loyalty card for a group of separately owned restaurants: what is shared, what stays private, who runs it, and how the money is settled.

Restaurants with different owners sometimes want to sell **one gift card that works at all of them** — a dining card for a resort, a street, a family of restaurants under separate companies. In AmigoPOS each business has its own cards, and they work only at that business's locations. The **shared card program** is the layer that lets several businesses share cards without sharing anything else.

A program sits above the businesses. It has its own name (for example "Harbour Dining Card"), its own card numbers (every program card starts with the program's prefix), **one set of rules** and **one shared balance ledger**. Each restaurant joins as a *member*. Members sell program cards and accept them; AmigoPOS keeps the ledger and, at the end of every period, produces a **settlement statement** that tells the owners who pays whom.

In one picture: the members, the program between them, the rules that apply everywhere, and the statement that settles the money.



What stays yours

- Your own gift cards keep working at your locations only, exactly as before.
- Your loyalty program, its earning rules, rewards and tiers are yours. On a program card, each restaurant keeps **its own points** (Loyalty on a program card).
- Your menu, prices, sales, reports, staff and customer lists are never visible to another member.
- Other members see **none** of your private activity. On the program itself they see only their own sales and redemptions; the administrator sees every member's program activity, and only that.

What is shared

- **Program gift cards** — sold at any member, physical or e-gift, spent at any member (Program cards at the register).
- **Program loyalty cards** — one card the guest carries everywhere; points stay separate per restaurant, and a guest can see what they hold at the other members.
- **The rules** — expiry, reload, cash out, e-gifts, maximum load, daily limit and the settlement period are set once for the whole program (Administering a program).
- **The statement** — every member gets its own; the administrator gets the full one (Settlement statements).

Who does what

Who	Does
AmigoPOS	Creates the program, sets its name, card prefix, currency and administrator, and can add members directly.

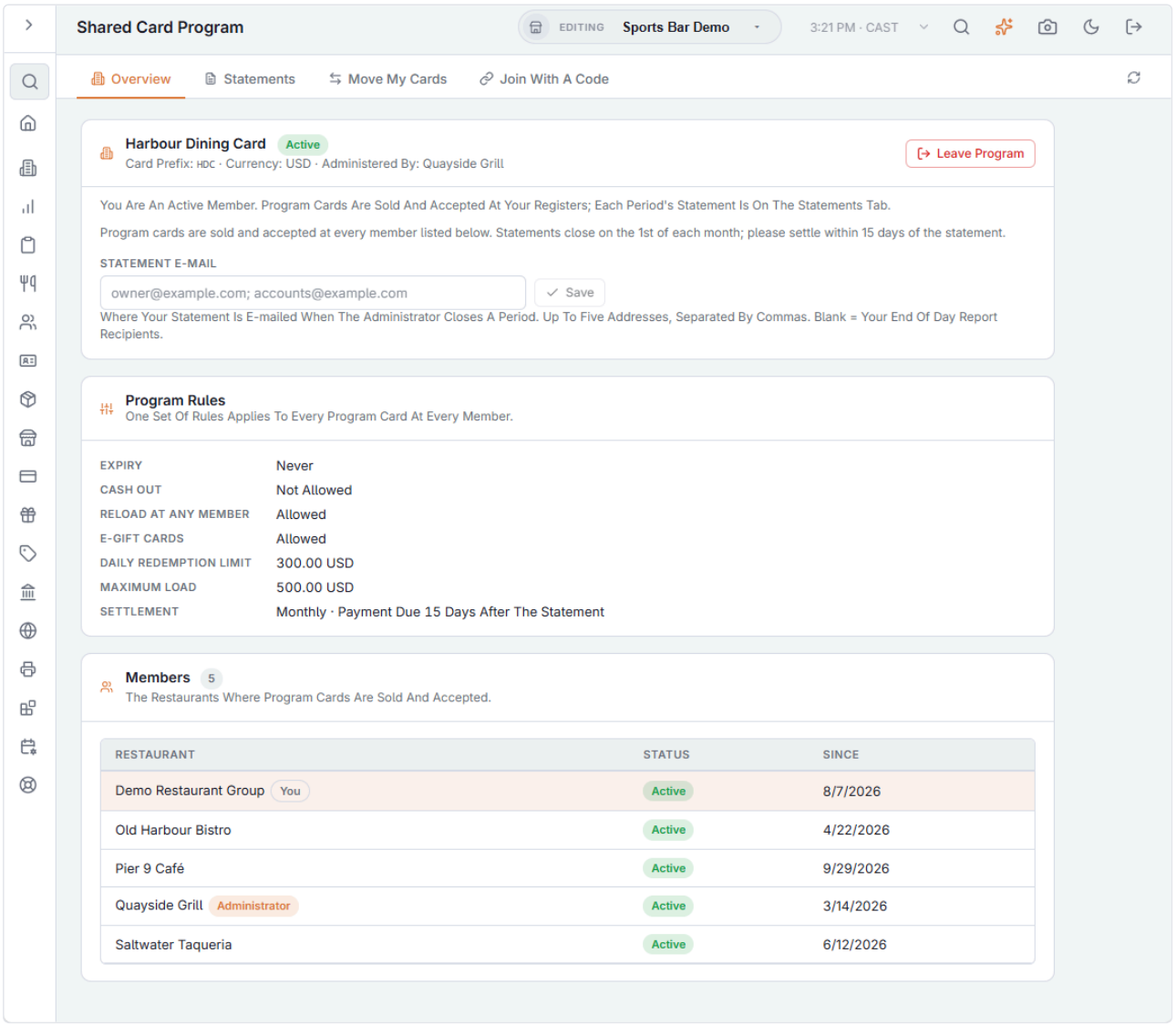
Who	Does
The administrator (one member restaurant, or AmigoPOS)	Approves requests to join, removes members, edits the rules, hands out the join code and closes each settlement period.
Each member	Sells and accepts program cards at its registers, reads its own statement, sets where its statements are e-mailed, and pays or collects what the statement says.

The one rule to remember

The restaurant that **sells** a program card keeps the cash. The restaurant where it is **spent** gives the food and drink. The statement makes the seller pay the redeemer for the value that was spent, and unspent balances stay with the seller. AmigoPOS produces the figures and never holds or moves any money (How the money moves between members).

Where to find it

Everything a member needs is on one page: **Back Office › Gift & Loyalty › Shared Card Program**. The Overview tab shows the program you belong to, your status and the rules; the other tabs are Statements, Move My Cards and Join With A Code, plus Settings, Members and Join Code when you administer the program.



The guest profile on a program card — name, phone and e-mail — lives on the one card, so every member that looks the card up sees and can edit it. Balances, points and history stay private per member; the guest's contact details do not.

Read in this order: how the money moves, then joining, then the register and statement topics. Owners should also agree in writing on the settlement period, the payment deadline and what happens to balances that expire or are never used — those are business decisions, not something the software decides.

How the money moves between members

View online ↗

Who keeps the cash, who gives the food, and how each redemption becomes an amount one member owes another on the statement.

Every program card balance is value that **some member sold** and was paid cash for. When a guest spends that value somewhere else, the member that gave the food is out of pocket until the seller pays it back. The statement is the list of those pay-backs.

The rule

Each redemption is paid by the members that funded the card, oldest value first. A member spending value it sold itself owes nobody.

- Restaurant A sells a card for 50. A keeps the 50.
- The guest spends 30 at restaurant B. B gave 30 of food; on the statement **A owes B 30**.
- The guest spends the last 20 at A. A sold that value and A redeemed it: nothing is owed.
- If B then reloads the card with 25, B keeps that cash and becomes the funder of those 25 — whoever redeems them later is paid by B.

A month with three members

Restaurant	Sold	Redeemed	Owes	Is owed	Net
A	500	200 (its own cards)	300 to B	—	−300
B	150	300 (A's cards)	150 to C	300 from A	+150
C	100	250 (150 of B's, 100 of its own)	—	150 from B	+150
Total	750	750	450	450	0

The owes and is-owed columns always add up to the same figure, so every statement **sums to zero**: the owners can settle directly between themselves, and no pool account is needed.

What each movement means on the statement

Movement	Effect
Sale or reload at a register, online reload	Value *funded* by that member; it keeps the cash. Shown under **Sold**.
Payment with the card, cash out	Value *redeemed* at that member; the funders of that value owe it that amount. Shown under **Redeemed**.
Void of a line	Reverses the original and is counted **when the void happens**. A payment voided after a period closed appears as a negative line on the next statement.
Transfer to another card	The value moves with its funding; nothing is owed.
Adjustment that removes balance	The value disappears and nobody is paid — the funder keeps the cash. Shown under **Other Debits**.
Complimentary value, bulk load, imported balance, refund to the card, points converted to gift balance	Value put on the card without cash, funded by the member that gave it. Whoever redeems it later is paid by that member. Shown under **Other Credits**.

Unspent balances

Value nobody has spent yet stays with the member that sold it — it was paid for the card and still has the cash. What happens when a balance expires or is never used is for the owners to agree; the statement never moves it.

AmigoPOS does not hold or transfer funds. The statement says who pays whom and by when; the owners move the money themselves — by bank transfer, or through the group however they prefer.

> The **Funded By** column on the statement's transaction list shows, for every redemption, which member's value was spent. That is the line to look at when an amount owed seems surprising.

Joining a program

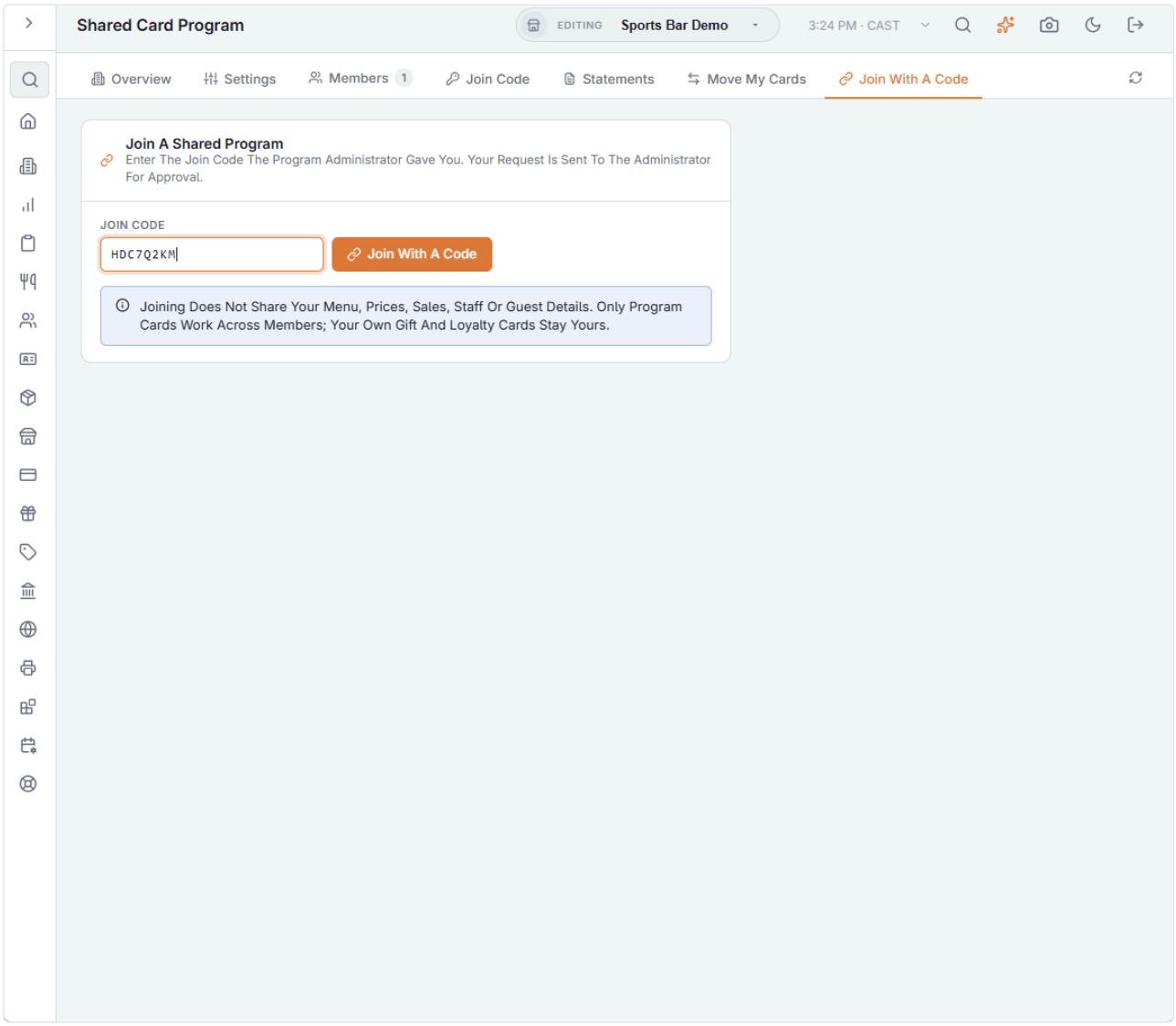
View online ↗

Getting into a program with a join code or an invitation, what each status means, the Overview tab, and how to leave.

Programs are created by AmigoPOS; a restaurant becomes a member either by entering the program's **join code** or by accepting an **invitation**. Nobody is made a member without agreeing: the administrator approves requests, and the restaurant accepts invitations.

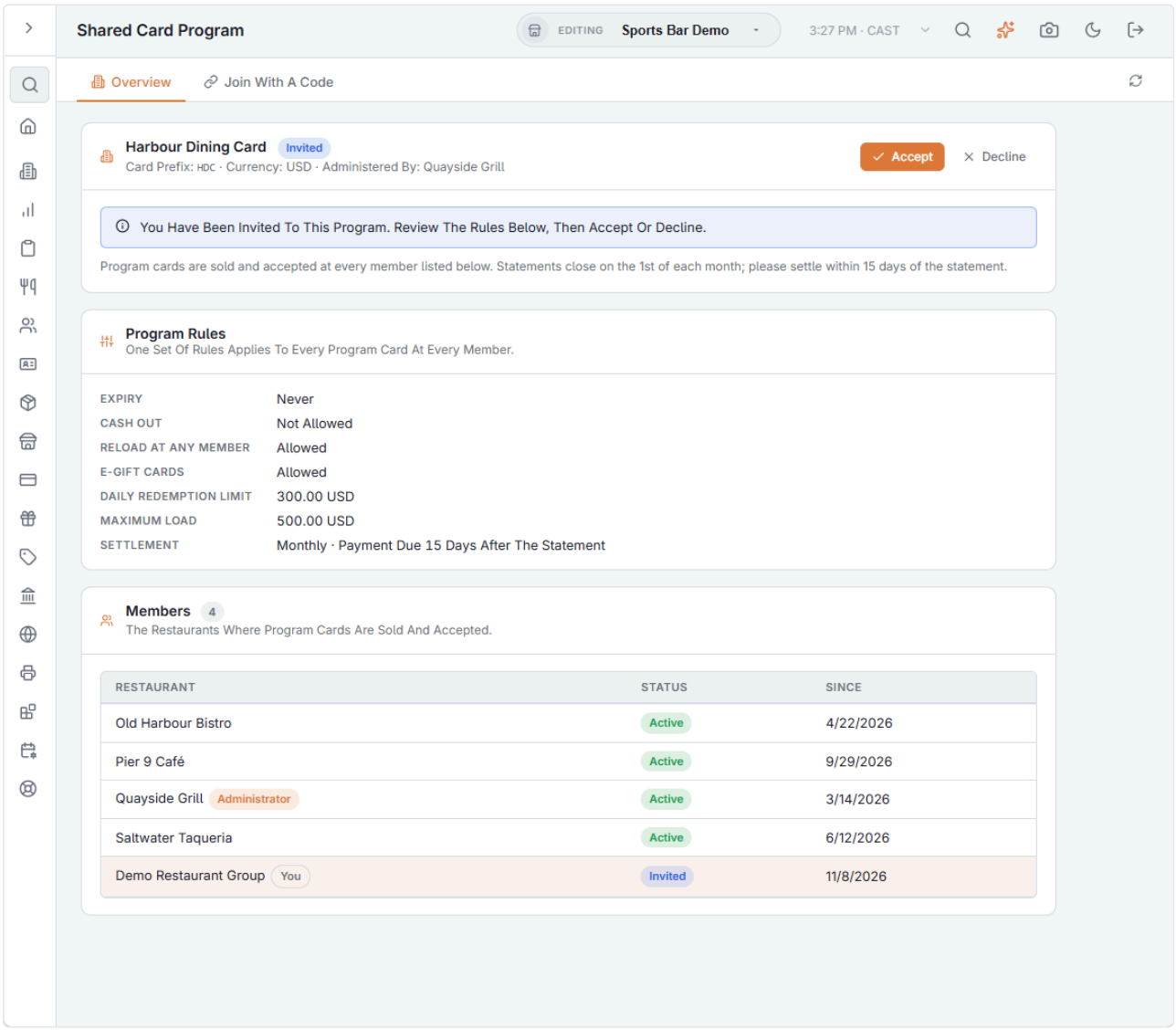
Join with a code

1. Ask the program administrator for the join code.
2. Open **Back Office › Gift & Loyalty › Shared Card Program** and the **Join With A Code** tab.
3. Type the code and tap **Join With A Code**. Your request is sent to the administrator and the program appears on the Overview tab as *Requested*.
4. When the administrator approves it, your status becomes *Active* and program cards start working at your registers.



Accept an invitation

When the administrator (or AmigoPOS) invites you, the program appears on the Overview tab with the *Invited* badge and the rules below it. Review the rules, then **Accept** or **Decline**.



Statuses

Badge	Meaning
Requested	You entered the code; waiting for the administrator. You can **Cancel Request**.
Invited	The administrator added you; waiting for you to accept.
Active	Your registers sell and accept program cards; you get statements.
Left	You left or were removed. Cards you sold stay redeemable at the other members, and you still see your past statements.
Declined	You declined the invitation, or the administrator refused the request. The administrator can invite you again.

The Overview tab

For each program you belong to: the program's name, card prefix, currency and administrator; your status; the **Program Rules** (read-only unless you administer the program); the **Members** that sell and accept the cards; and your **Statement E-mail** — where your statement is sent when a period is closed (Settlement statements). If you belong to more than one program, a selector at the top of the page switches between them.

What changes at the register

Nothing to set up. From the moment you are Active, any card whose number starts with the program's prefix is a program card at every one of your stores: it can be sold, reloaded (if the rules allow), paid with and voided like any gift card, and e-gifts can be issued under the program (Program cards at the register).

Leaving

Leave Program on the Overview tab stops your registers selling and accepting program cards from that moment. Cards you sold remain redeemable at the other members, and your final statement settles what you still owe or are owed. The administrator member cannot leave: AmigoPOS hands the program over first.

> Joining shares nothing but the program cards: not your menu, prices, sales, staff or guest lists. Only program cards cross between restaurants.

Administering a program

Customers, Gift & Loyalty › Shared Card Program

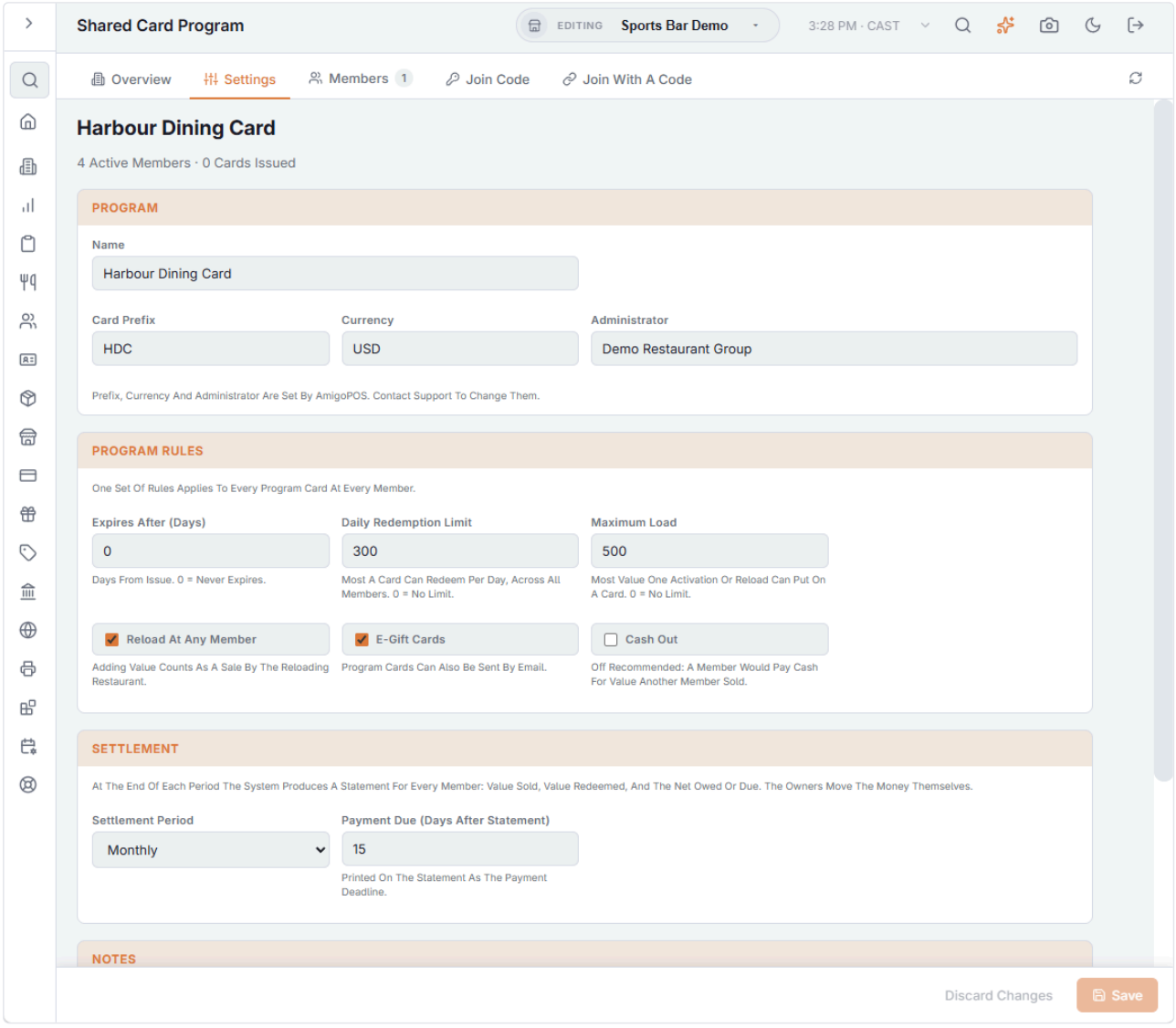
View online ↗

For the administrator member: the rules and what each one means, approving and removing members, and the join code.

One member restaurant administers each program (or AmigoPOS does, when no member has been named). On its Shared Card Program page that member shows the **You Administer** badge and gets three extra tabs: **Settings**, **Members** and **Join Code**. The administrator is also an ordinary member: it sells and accepts program cards and gets its own statement, plus the full one.

Settings: the program rules

One set of rules applies to every program card at every member. The administrator may change the name, the rules and the notes; the **card prefix**, the **currency** and the **administrator** are set by AmigoPOS, and the prefix is locked once the first card has been issued.



Rule	What it does	Suggested
Expires After (Days)	Days from issue until a program card expires; 0 = never. Stamped on the card when it is activated, so a change applies to cards issued from then on. The store's own "never expire" setting does not apply to program cards.	Agree one rule for the whole group.
Reload At Any Member	Value can be added to an existing program card at any member. A reload counts as a sale by the reloading restaurant.	On.
Cash Out	A balance can be paid out in cash.	Off: a member would pay cash for value another member sold.
E-Gift Cards	Program cards can be issued as e-gifts sent by e-mail, from the register or from Back Office.	On.
Maximum Load	Most value one activation or reload can put on a card; 0 = no limit.	Fraud protection.
Daily Redemption Limit	Most a card can redeem in 24 hours *across all members*; 0 = no limit.	Fraud protection.
Settlement Period	Monthly or Quarterly calendar periods.	Monthly is typical.
Payment Due (Days After Statement)	Printed on every statement as the payment deadline.	15.

Rule	What it does	Suggested
Notes	Free text every member sees on its Overview tab — a good place for the group's agreed terms.	

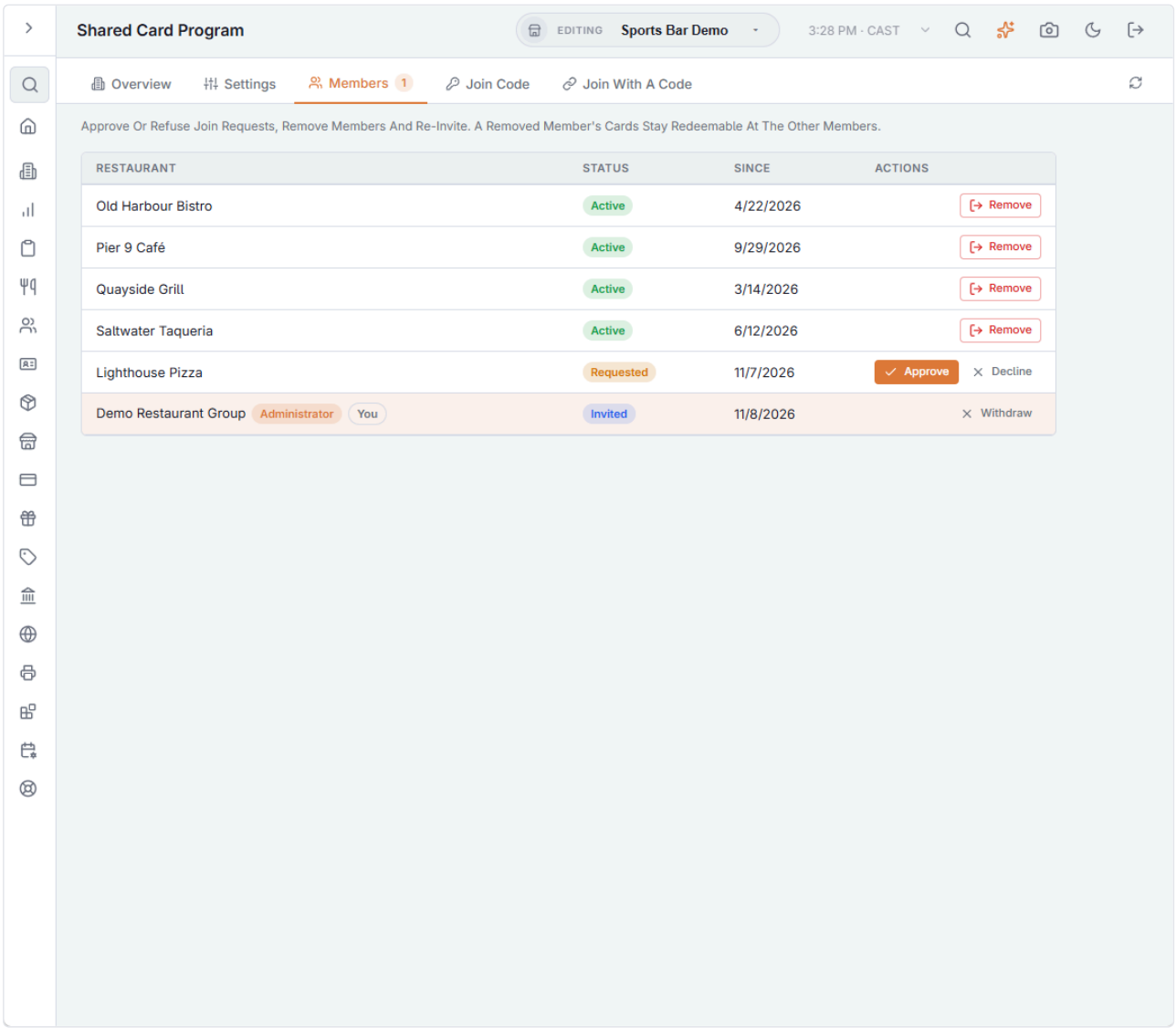
> Program rules replace the store's gift card settings for program cards at every member: expiry, reload, cash out, maximum load and the daily limit come from the program, not from the store.

Members

The Members tab lists every restaurant with its status and the date it joined. For each row:

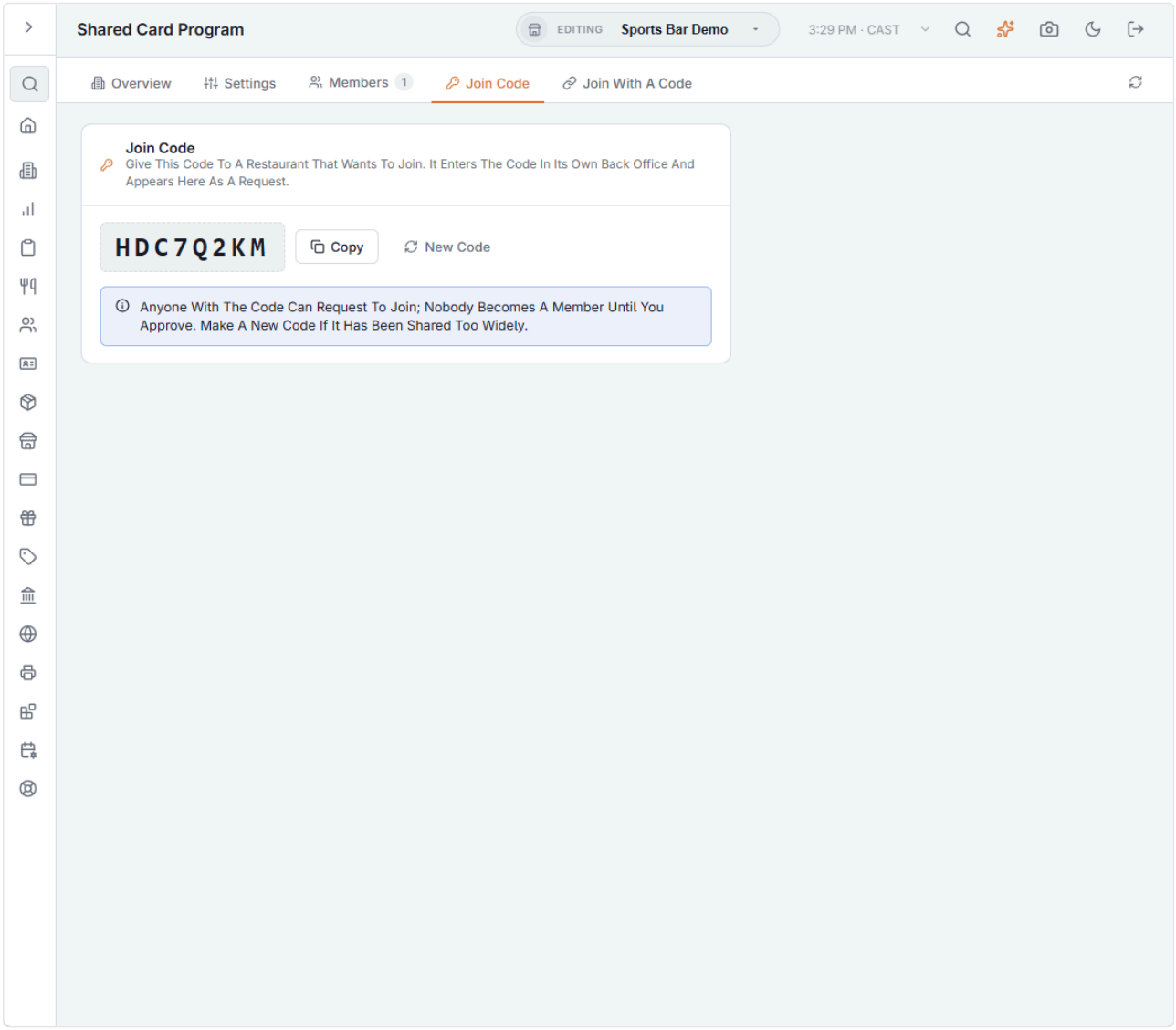
- **Requested** — **Approve** makes the restaurant Active; **Decline** refuses it.
- **Invited** — **Withdraw** takes the invitation back.
- **Active** — **Remove** stops its registers selling and redeeming program cards; the cards it sold stay redeemable and its final statement settles what is owed.
- **Left** or **Declined** — **Invite Again**.

A member is only ever created by the restaurant itself (join code or accepting an invitation) or by AmigoPOS; the administrator approves, removes and invites.



Join code

Give the code to a restaurant that wants to join; it enters the code in its own Back Office and appears on your Members tab as a request. Anyone with the code can request, but nobody becomes a member until you approve. **New Code** replaces it — the old one stops working at once — if it has been shared too widely.



Closing periods

The administrator closes each settlement period from the Statements tab, which freezes that statement and e-mails every member its copy (Settlement statements).

> AmigoPOS sees every program under Admin Tools and can create programs, add members directly, hand the administration to another member and switch a program off. A program that is switched off stops accepting its cards everywhere until it is switched on again.

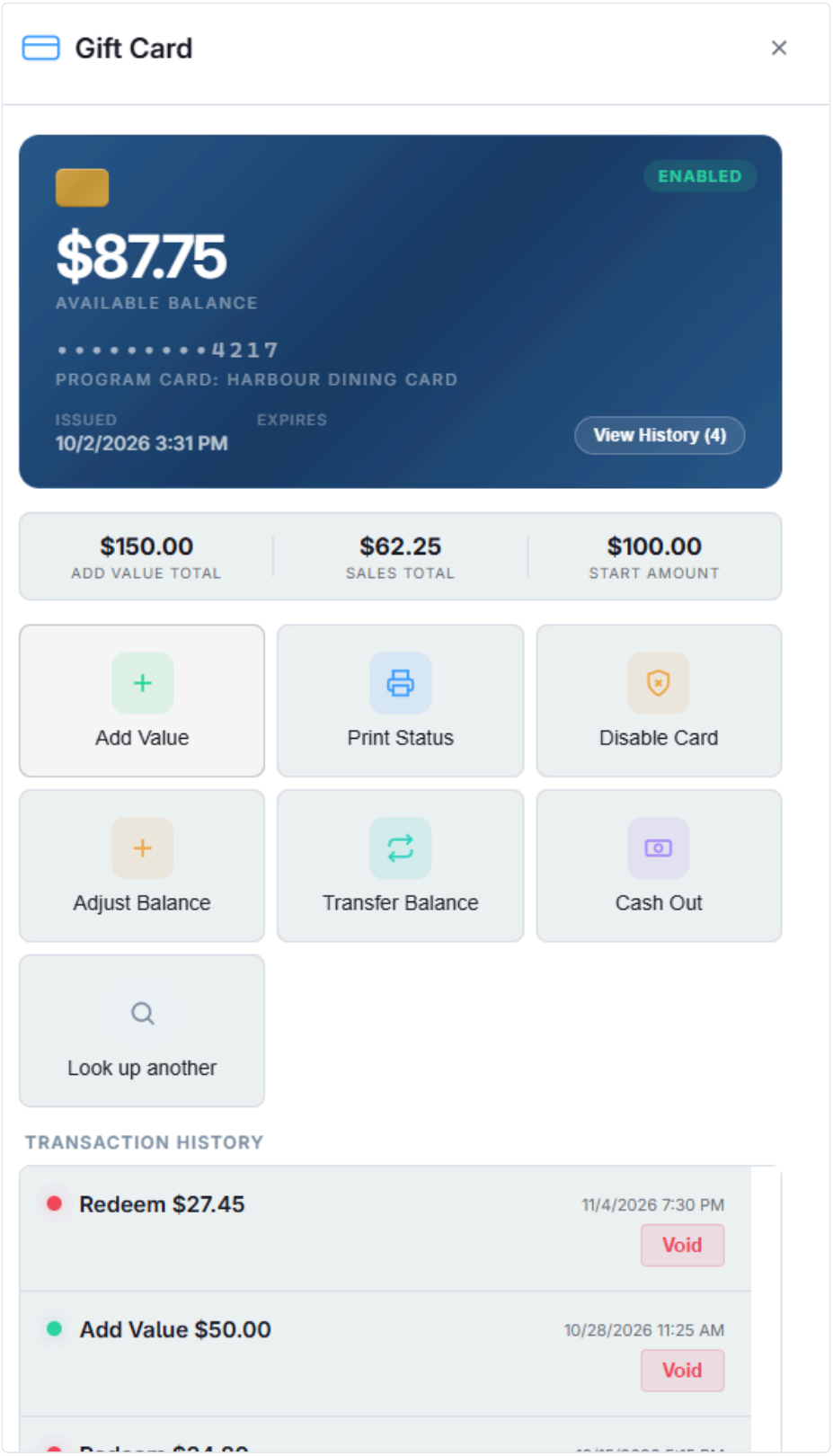
Program cards at the register

Customers, Gift & Loyalty › Shared Card Program

View online ↗

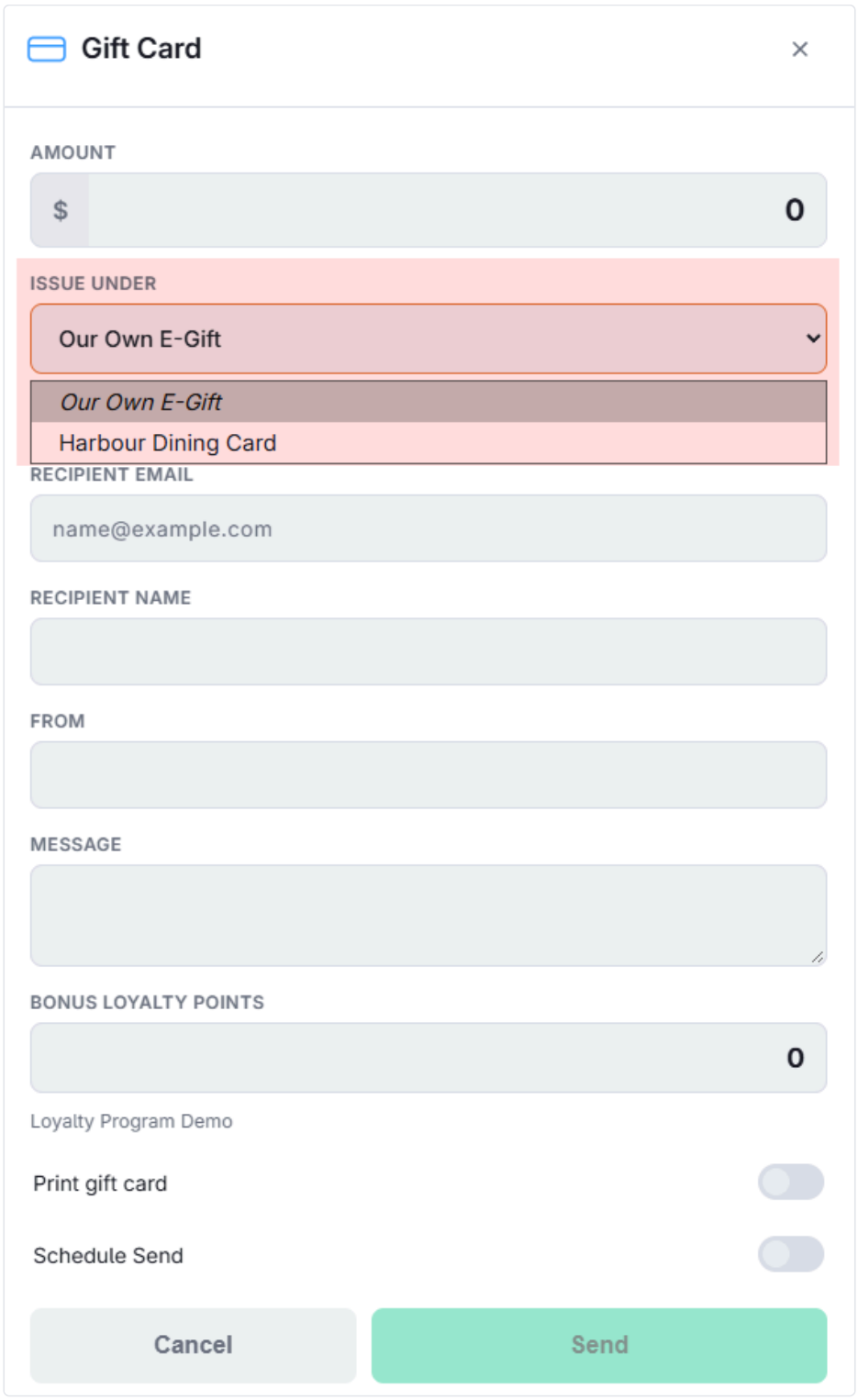
Selling, reloading, paying with and voiding program cards at any member, e-gifts under the program, the messages staff may see, and what Back Office shows.

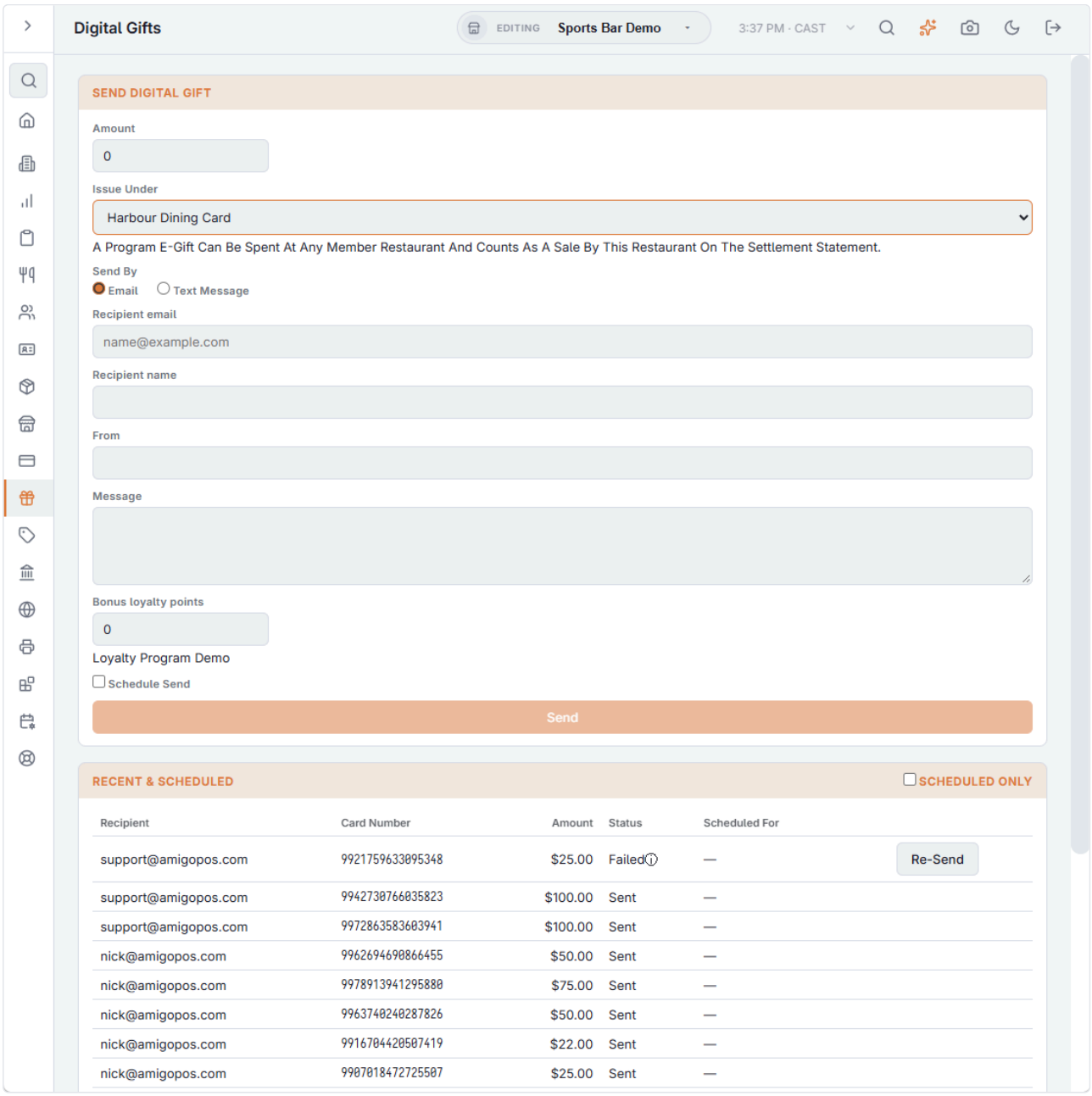
For staff, nothing changes. They swipe, scan or type the card as they do today; AmigoPOS recognises a program card by its number — it starts with the program's prefix — and sends the transaction to the shared ledger instead of the store's own. Balance checks, partial payments and voids work the same way. Cards a member moved into the program keep their old numbers and are recognised too (Moving your existing cards into the program).



Selling and activating

- **Physical cards** — activate a card with the program's prefix at any member, the same way as your own cards; the card is created on the program ledger the first time it is activated. A box of numbered cards can also be loaded in advance by any member with Adding cards in bulk: numbers that start with the prefix go to the program automatically.
- **E-gifts** — on the register's Send E-Gift form an **Issue Under** picker appears when the store is an Active member of a program that allows e-gifts: choose *Our Own E-Gift* or the program. In Back Office, **Gift & Loyalty › Digital Gifts** has the same picker. A program e-gift's code carries the prefix, it is e-mailed like any other e-gift, and it counts as a sale by the issuing restaurant.
- **Reload** — at any member, if the program allows it; it counts as a sale by the reloading restaurant. The program's **Maximum Load** caps every activation and reload.


Gift Card
AMOUNT
$
0
ISSUE UNDER
Our Own E-Gift
Our Own E-Gift
Harbour Dining Card
RECIPIENT EMAIL
name@example.com
RECIPIENT NAME
FROM
MESSAGE
BONUS LOYALTY POINTS
0
Loyalty Program Demo
Print gift card
Schedule Send
Cancel
Send



Paying, voiding, refunding

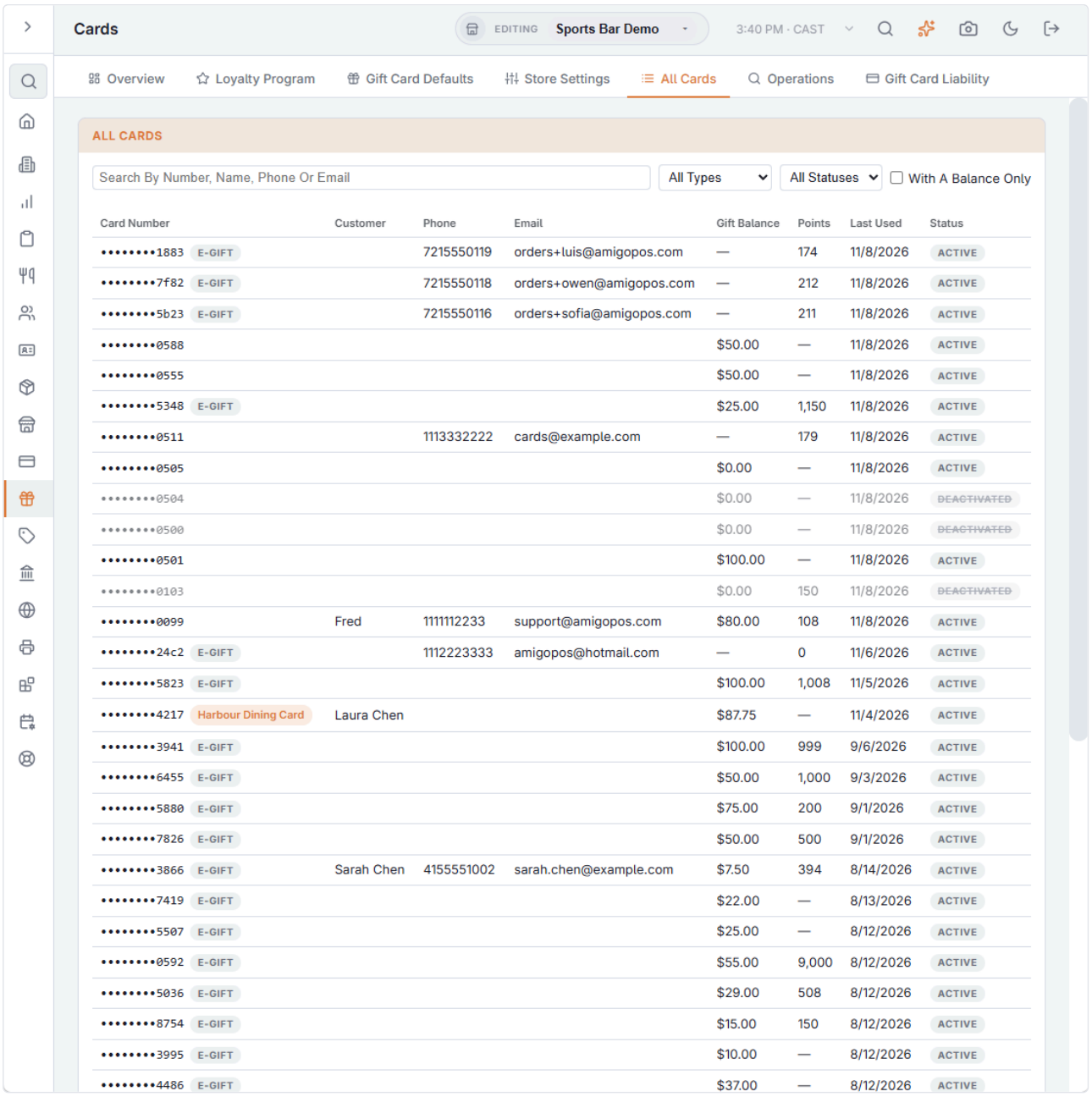
- A program card is a gift card payment like any other (Paying with a gift card). The program's **Daily Redemption Limit** counts what the card redeemed in the last 24 hours at *every* member.
- Expiry follows the program's rule only; the store's "never expire" setting does not apply.
- Voids and refunds to the card work as today, on your own lines. A void is counted on the statement when it happens, even if the original sale was in a period that is already closed.
- **Cash Out** is only offered when the program allows it (Cashing out a gift card).
- **Adjustments** work as on your own cards; a **transfer** must stay within the program — a balance cannot move between a program card and a private card (Adjusting and transferring a balance).

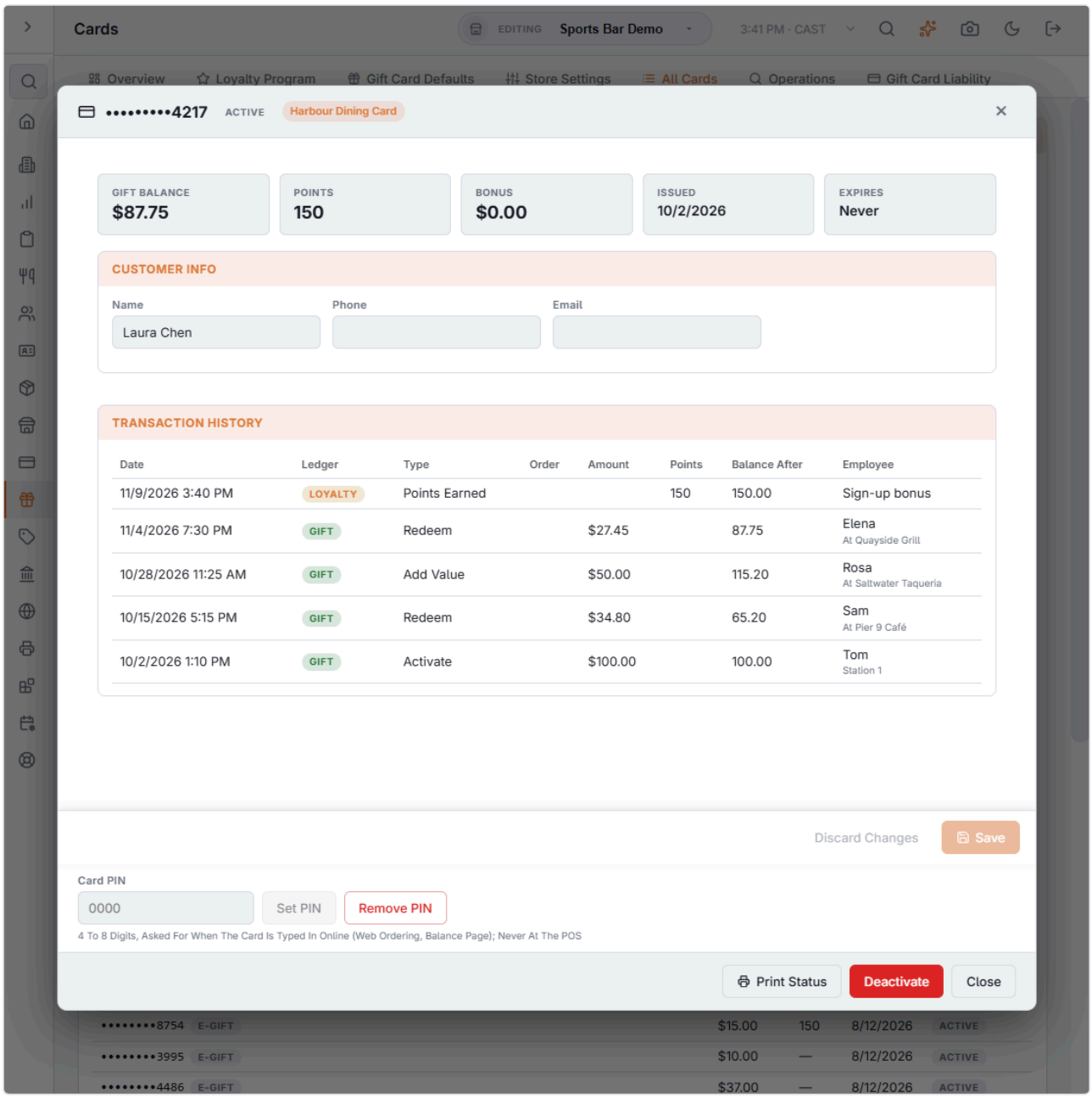
Messages staff may see

Message	Why
This Is A Shared Program Card And This Restaurant Is Not A Member Of Its Program.	The card belongs to a program your store is not an Active member of — you never joined, you left or were removed, or the program is switched off. Nothing can be done with it here.
Reloads Are Not Allowed On Program Cards. / Cash Out Is Not Allowed On Program Cards. / E-Gift Cards Are Not Allowed On This Program.	The program's rules; the administrator can change them.
Load Exceeds The Program Maximum.	The activation or reload is above the program's Maximum Load.
Daily Redemption Limit Reached For This Card.	The card has redeemed the program's daily limit across all members in the last 24 hours.
A Transfer Must Stay Within The Same Program.	Source and destination cards are not in the same program.

In Back Office

- **Gift & Loyalty › Cards › All Cards** lists the program cards your stores sold with a **Program Card** badge, next to your own cards (Finding a card: All Cards).
- The card detail window shows the whole program history of a card, with an **At** column naming the member where each line happened (The card detail window).
- Your gift card liability report covers your own cards only; program value is accounted for on the statements.
- Sales of program cards appear in your sales and End of Day exactly like sales of your own cards — you were paid the cash.


Cards
EDITING Sports Bar Demo
3:40 PM · CAST
Overview
Loyalty Program
Gift Card Defaults
Store Settings
All Cards
Operations
Gift Card Liability
ALL CARDS
Search By Number, Name, Phone Or Email
All Types
All Statuses
With A Balance Only
Card Number
Customer
Phone
Email
Gift Balance
Points
Last Used
Status
••••••••1883 E-GIFT — 7215550119 orders+luis@amigopos.com — 174 11/8/2026 ACTIVE
••••••••7f82 E-GIFT — 7215550118 orders+owen@amigopos.com — 212 11/8/2026 ACTIVE
••••••••5b23 E-GIFT — 7215550116 orders+sofia@amigopos.com — 211 11/8/2026 ACTIVE
••••••••0588 — $50.00 — 11/8/2026 ACTIVE
••••••••0555 — $50.00 — 11/8/2026 ACTIVE
••••••••5348 E-GIFT — $25.00 1,150 11/8/2026 ACTIVE
••••••••0511 — 1113332222 cards@example.com — 179 11/8/2026 ACTIVE
••••••••0505 — $0.00 — 11/8/2026 ACTIVE
••••••••0504 — $0.00 — 11/8/2026 DEACTIVATED
••••••••0500 — $0.00 — 11/8/2026 DEACTIVATED
••••••••0501 — $100.00 — 11/8/2026 ACTIVE
••••••••0103 — $0.00 150 11/8/2026 DEACTIVATED
••••••••0099 Fred 1111112233 support@amigopos.com $80.00 108 11/8/2026 ACTIVE
••••••••24c2 E-GIFT — 1112223333 amigopos@hotmail.com — 0 11/6/2026 ACTIVE
••••••••5823 E-GIFT — $100.00 1,008 11/5/2026 ACTIVE
••••••••4217 Harbour Dining Card Laura Chen — $87.75 — 11/4/2026 ACTIVE
••••••••3941 E-GIFT — $100.00 999 9/6/2026 ACTIVE
••••••••6455 E-GIFT — $50.00 1,000 9/3/2026 ACTIVE
••••••••5880 E-GIFT — $75.00 200 9/1/2026 ACTIVE
••••••••7826 E-GIFT — $50.00 500 9/1/2026 ACTIVE
••••••••3866 E-GIFT Sarah Chen 4155551002 sarah.chen@example.com $7.50 394 8/14/2026 ACTIVE
••••••••7419 E-GIFT — $22.00 — 8/13/2026 ACTIVE
••••••••5507 E-GIFT — $25.00 — 8/12/2026 ACTIVE
••••••••0592 E-GIFT — $55.00 9,000 8/12/2026 ACTIVE
••••••••5036 E-GIFT — $29.00 508 8/12/2026 ACTIVE
••••••••8754 E-GIFT — $15.00 150 8/12/2026 ACTIVE
••••••••3995 E-GIFT — $10.00 — 8/12/2026 ACTIVE
••••••••4486 E-GIFT — $37.00 — 8/12/2026 ACTIVE



Program cards are not redeemable offline. The balance lives in the shared ledger, so a register without a connection cannot accept them — the same rule as for every gift card.

Loyalty on a program card

Customers, Gift & Loyalty › Shared Card Program

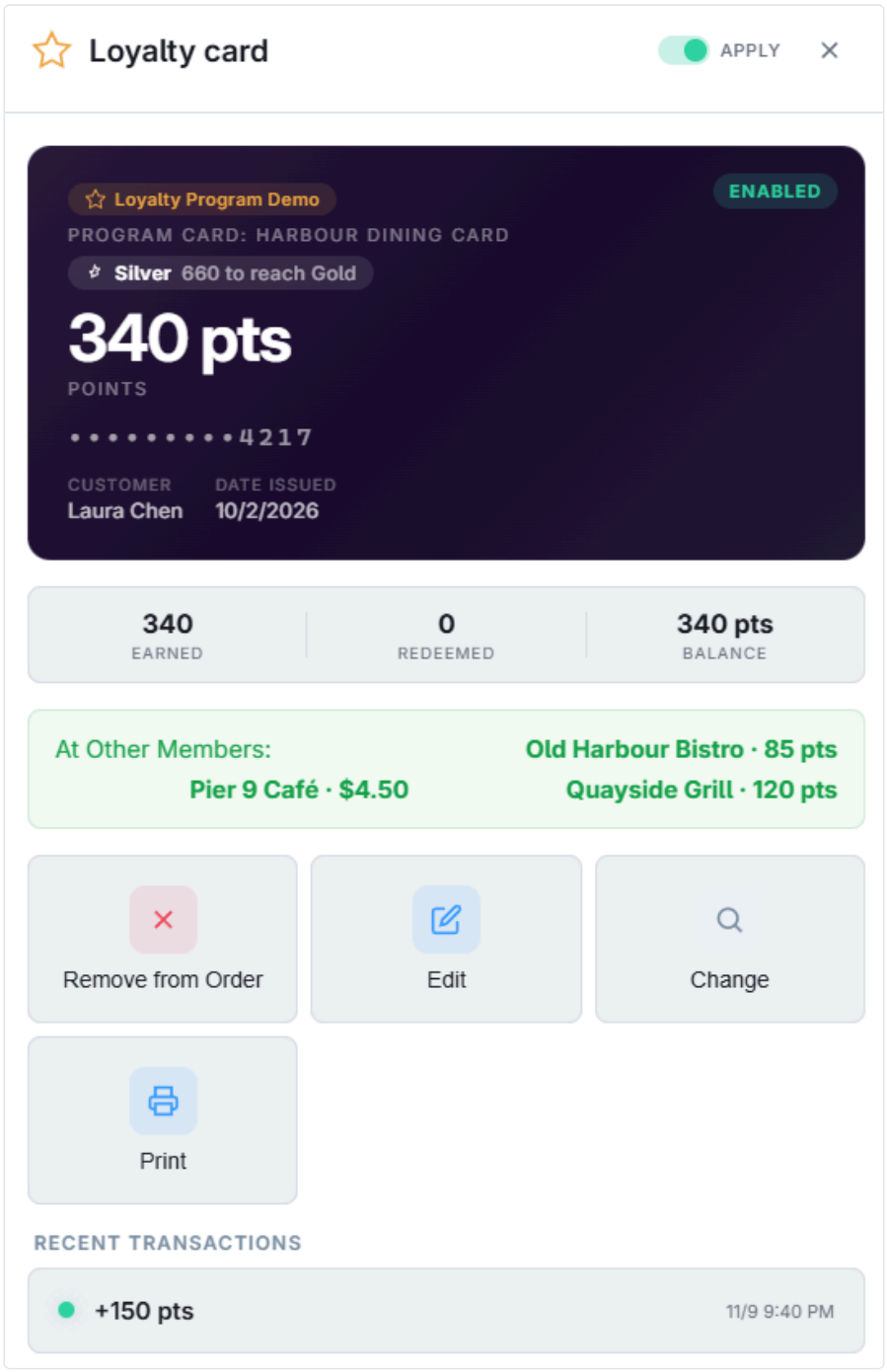
View online ↗

One card, separate points at each restaurant: checking in at any member, what the guest sees, and turning points into gift balance.

Loyalty is harder to share than gift value because every restaurant values a point differently. The program therefore shares the **card**, not the points: the guest carries one program card, and **each restaurant keeps its own points balance on it**, earned and spent under that restaurant's own program, rules, rewards and tiers (How loyalty works). Points earned at one member are never spent at another.

Checking in

- Scan or type the program card at any member, or look the guest up by **phone** or **e-mail**: a guest who signed up at one member checks in by phone at every other member too.
- The Loyalty screen shows the program's name under the card, and your own balance, tier and recent activity — only yours.
- **At Other Members** lists what the guest holds at the other restaurants, read-only. It is cross-promotion: "you have 120 points at …" said at your register.



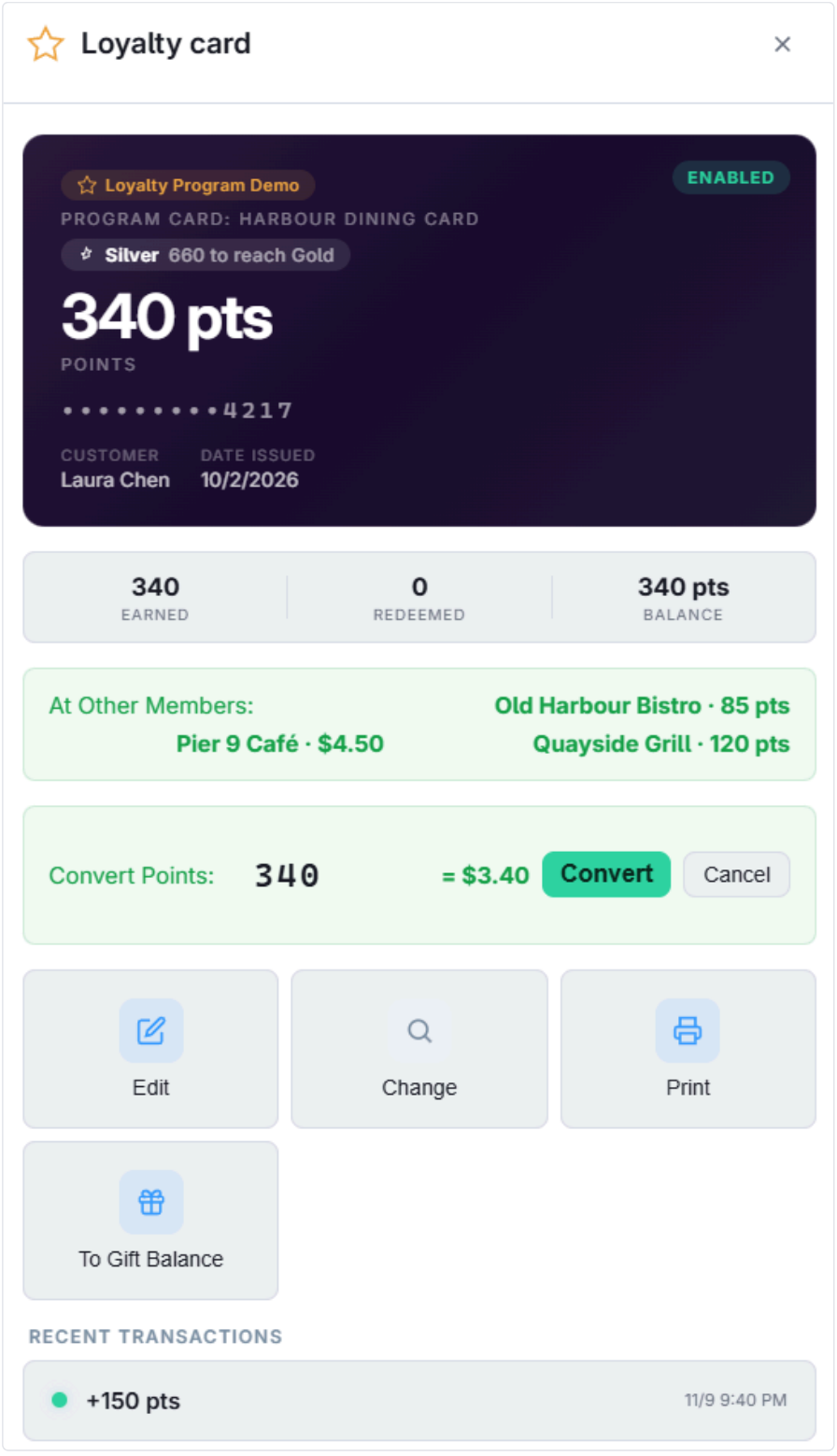
Signing a guest up

- Registering a **physical card with the program's prefix** creates a program card: it works at every member from then on.
- A sign-up by **phone or e-mail only** (no card number) creates one of your own private loyalty cards, as today — it is not shared. Hand the guest a program card if the group wants them on the shared card.

Points into gift balance

A guest can turn the points (or bonus) earned at your restaurant into **gift balance on the program card**, spendable at any member. The value is calculated at *your* program's redemption value per point, and the gift load is funded by your restaurant — on the statement it counts like value you sold, so whoever redeems it later is paid by you. The guest's points are reduced by what was converted.

1. Turn on the store setting **Loyalty Convert To Gift Enabled** (off by default; see Settings and permissions reference).
2. Check the guest in on the Loyalty screen. When the card is a program card and there is a balance, the **To Gift Balance** button appears.
3. Enter the points (or bonus amount) to convert — the gift value is shown as you type — and tap **Convert**.
4. The card's history shows a loyalty redemption and a gift load marked **Points Converted**.



The guest profile — name, phone and e-mail — sits on the one program card and is visible to every member that looks the card up, and any member can edit it. Points, gift value and history stay private per member.

Bonus points on a program e-gift are preloaded under the issuing restaurant's loyalty program, like any e-gift. Loyalty lines on receipts, expiry warnings and reminder e-mails follow the settings of the restaurant whose points they concern.

Settlement statements

Customers, Gift & Loyalty › Shared Card Program

View online ↗

Periods, what the Statements tab shows a member and the administrator, closing a period, the statement e-mail and corrections after a close.

At the end of every settlement period AmigoPOS produces a statement for every member: the value it sold, the value redeemed at its registers, and what it owes or is owed. The owners move the money themselves; the statement is the agreed record of the amounts.

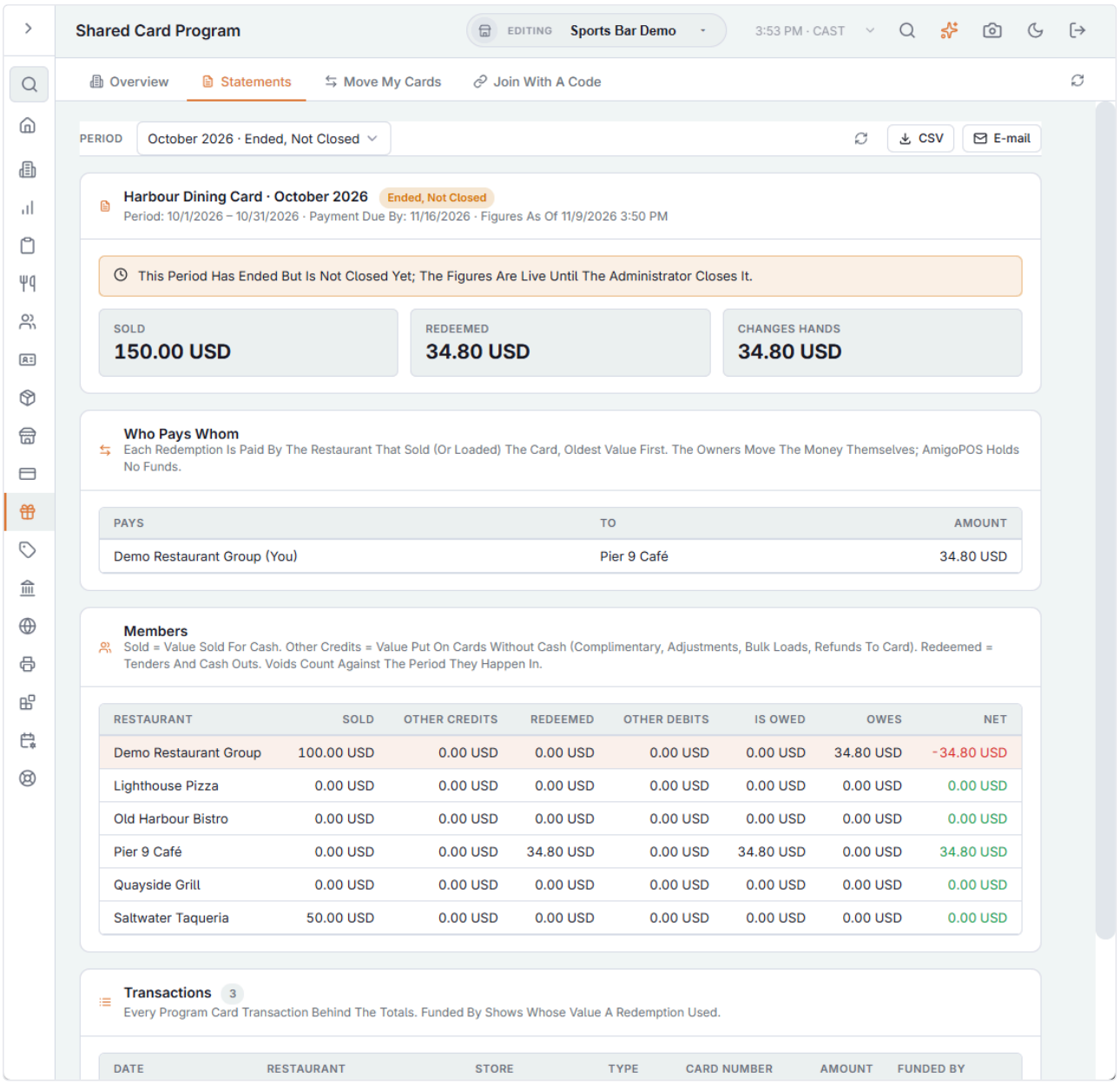
Periods

Periods are calendar **months** or **quarters**, whichever the program's rule says, counted in the program's time zone (the administrator's first store). The first period starts with the program's first card transaction. Each period is **Current** (still running — the figures change), **Ended, Not Closed** (over; the figures are live until the administrator closes it) or **Closed** (frozen as it was at closing).

The Statements tab

On **Back Office › Gift & Loyalty › Shared Card Program › Statements**, pick the period at the top.

- **Header** — the period, its dates, the payment due date, and when it was closed or generated.
- **Tiles** — Sold, Redeemed, **You Are Owed**, **You Owe** and **Net**.
- **Who Pays Whom** — the amounts between you and each other member for this statement. A negative amount is a correction of an earlier period.
- **Your Activity** — Sold (for cash), Other Credits (value given without cash), Redeemed (as a payment or cash out), Other Debits (balance removed by adjustment), Is Owed, Owes and Net.
- **Transactions** — every program line of yours in the period, plus the redemptions elsewhere that your value funded, each with **Funded By**: which member's value was spent, and how much of it.
- **CSV** downloads the lines and payables; **E-mail** sends you the statement as a PDF.



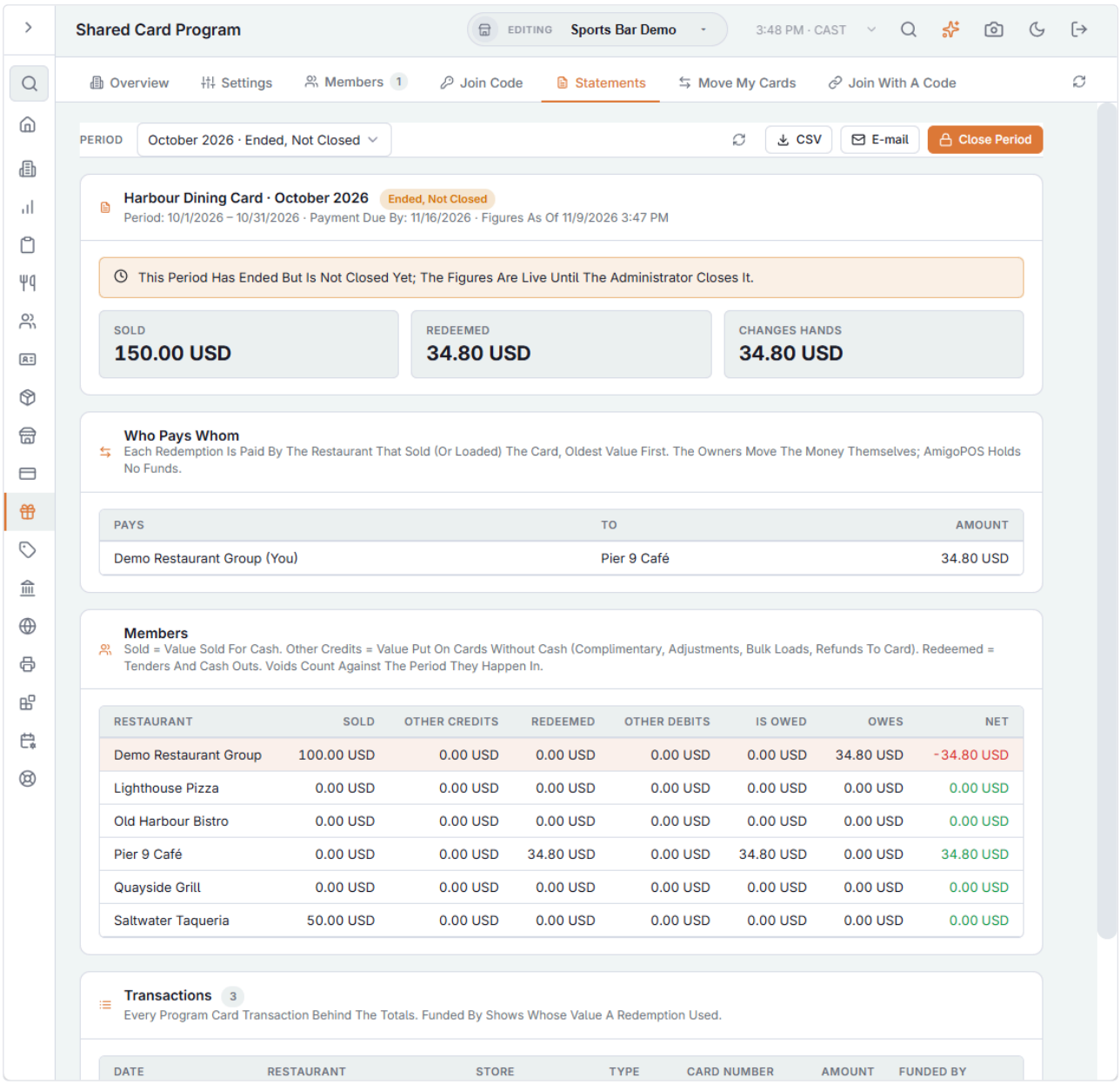
Transactions 3

Every Program Card Transaction Behind The Totals. Funded By Shows Whose Value A Redemption Used.

DATE	RESTAURANT	STORE	TYPE	CARD NUMBER	AMOUNT	FUNDED BY
10/2/2026 1:10 PM	Demo Restaurant Group (You)	Fine Dining Demo	Sale	…4217	100.00 USD	
10/15/2026 5:15 PM	Pier 9 Café	ZZSCP04-1	Payment	…4217	34.80 USD	Demo Restaurant Gr
10/28/2026 11:25 AM	Saltwater Taqueria	ZZSCP03-1	Sale	…4217	50.00 USD	

Closing a period (administrator)

The administrator sees every member, every line and every payable, and the **Close Period** button on the earliest period that has ended. Periods close in order — the button is not offered on a later period while an earlier one is still open. Closing freezes the statement exactly as shown and e-mails every member its own copy (the administrator gets the full one).



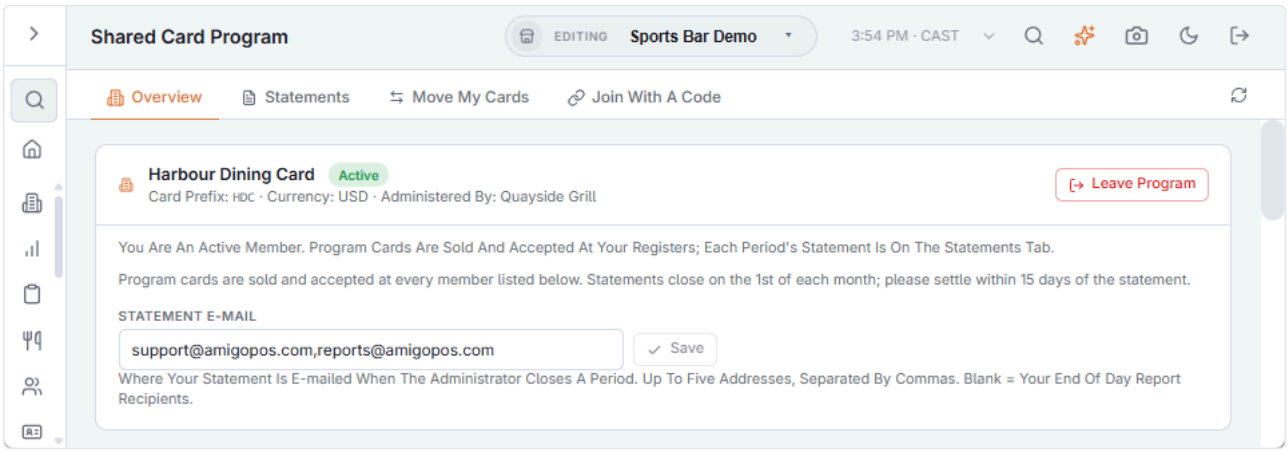
An ended period that is not closed still shows live figures: a void written today changes last month's numbers until last month is closed. Close periods promptly after they end, and before the owners pay each other.

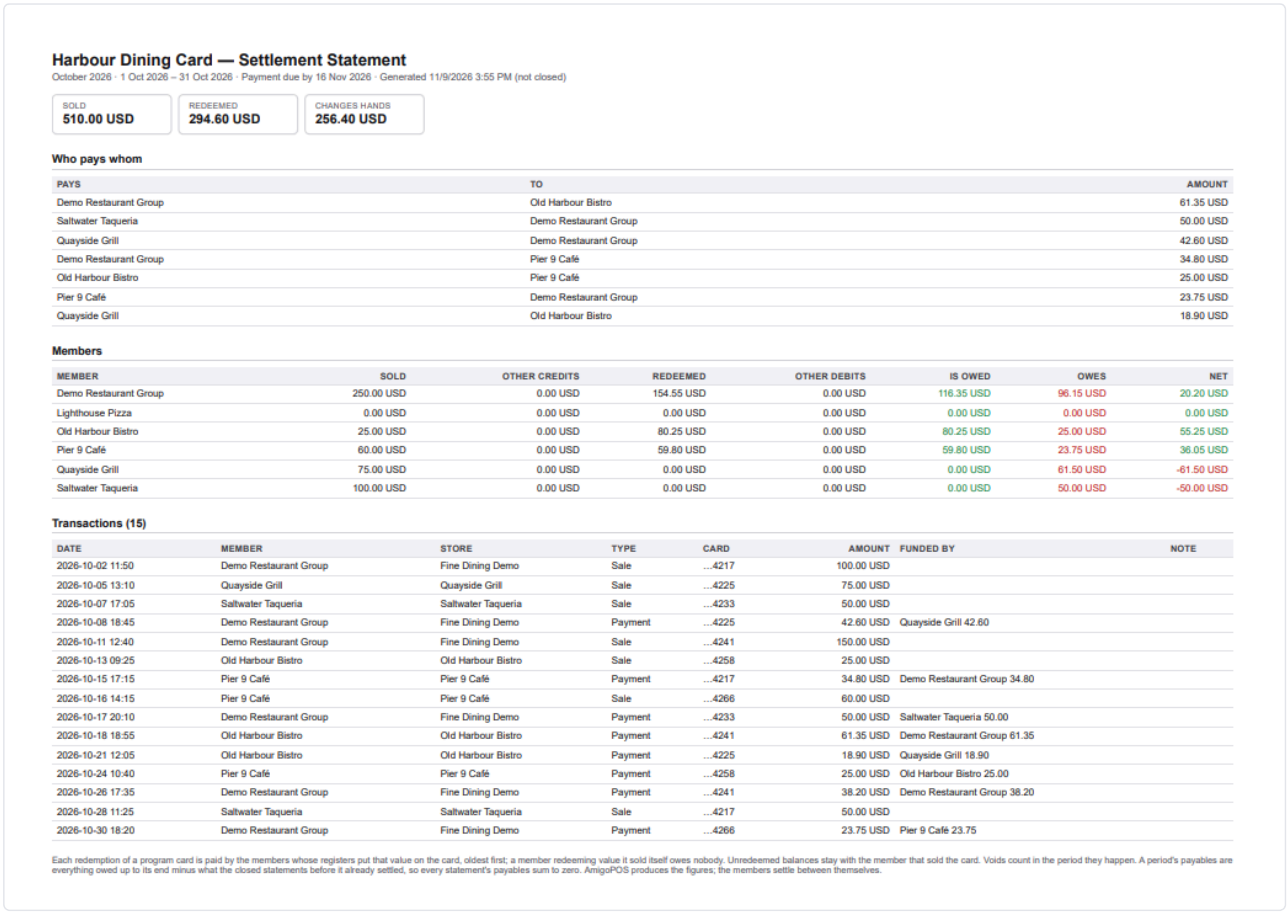
Corrections after a close

Nothing in a closed statement is ever rewritten. A payment voided after its period closed appears as a negative line on the *next* statement and reduces what is owed then. A period's statement is therefore "everything owed up to its end, minus what the closed statements before it already settled", and the note *An Earlier Period Is Still Unclosed* warns that the amounts include what that period left unsettled.

The statement e-mail

- Each member sets its **Statement E-mail** on the Overview tab — up to five addresses. Blank means the member's End Of Day report recipients.
- When a period is closed, every member with an address gets its statement as a landscape PDF with a short summary in the message; the toast after closing tells the administrator how many were sent and how many members have no address.
- **E-mail** on the Statements tab sends you any period's statement again — also an open period, marked as not closed.





Harbour Dining Card — Settlement Statement

October 2026 · 1 Oct 2026 – 31 Oct 2026 · Payment due by 16 Nov 2026 · Generated 11/9/2026 3:55 PM (not closed)

SOLD	REDEEMED	CHANGES HANDS
510.00 USD	294.60 USD	256.40 USD

Who pays whom

PAYS	TO	AMOUNT
Demo Restaurant Group	Old Harbour Bistro	61.35 USD
Saltwater Taqueria	Demo Restaurant Group	50.00 USD
Quayside Grill	Demo Restaurant Group	42.60 USD
Demo Restaurant Group	Pier 9 Café	34.80 USD
Old Harbour Bistro	Pier 9 Café	25.00 USD
Pier 9 Café	Demo Restaurant Group	23.75 USD
Quayside Grill	Old Harbour Bistro	18.90 USD

Members

MEMBER	SOLD	OTHER CREDITS	REDEEMED	OTHER DEBITS	IS OWED	OWES	NET
Demo Restaurant Group	250.00 USD	0.00 USD	154.55 USD	0.00 USD	116.35 USD	96.15 USD	20.20 USD
Lighthouse Pizza	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
Old Harbour Bistro	25.00 USD	0.00 USD	80.25 USD	0.00 USD	80.25 USD	25.00 USD	55.25 USD
Pier 9 Café	60.00 USD	0.00 USD	59.80 USD	0.00 USD	59.80 USD	23.75 USD	36.05 USD
Quayside Grill	75.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	61.50 USD	-61.50 USD
Saltwater Taqueria	100.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	50.00 USD	-50.00 USD

Transactions (15)

DATE	MEMBER	STORE	TYPE	CARD	AMOUNT	FUNDED BY	NOTE
2026-10-02 11:50	Demo Restaurant Group	Fine Dining Demo	Sale	...4217	100.00 USD		
2026-10-05 13:10	Quayside Grill	Quayside Grill	Sale	...4225	75.00 USD		
2026-10-07 17:05	Saltwater Taqueria	Saltwater Taqueria	Sale	...4233	50.00 USD		
2026-10-08 18:45	Demo Restaurant Group	Fine Dining Demo	Payment	...4225	42.60 USD	Quayside Grill 42.60	
2026-10-11 12:40	Demo Restaurant Group	Fine Dining Demo	Sale	...4241	150.00 USD		
2026-10-13 09:25	Old Harbour Bistro	Old Harbour Bistro	Sale	...4258	25.00 USD		
2026-10-15 17:15	Pier 9 Café	Pier 9 Café	Payment	...4217	34.80 USD	Demo Restaurant Group 34.80	
2026-10-16 14:15	Pier 9 Café	Pier 9 Café	Sale	...4266	60.00 USD		
2026-10-17 20:10	Demo Restaurant Group	Fine Dining Demo	Payment	...4233	50.00 USD	Saltwater Taqueria 50.00	
2026-10-18 18:55	Old Harbour Bistro	Old Harbour Bistro	Payment	...4241	61.35 USD	Demo Restaurant Group 61.35	
2026-10-21 12:05	Old Harbour Bistro	Old Harbour Bistro	Payment	...4225	18.90 USD	Quayside Grill 18.90	
2026-10-24 10:40	Pier 9 Café	Pier 9 Café	Payment	...4258	25.00 USD	Old Harbour Bistro 25.00	
2026-10-26 17:35	Demo Restaurant Group	Fine Dining Demo	Payment	...4241	38.20 USD	Demo Restaurant Group 38.20	
2026-10-28 11:25	Saltwater Taqueria	Saltwater Taqueria	Sale	...4217	50.00 USD		
2026-10-30 18:20	Demo Restaurant Group	Fine Dining Demo	Payment	...4266	23.75 USD	Pier 9 Café 23.75	

Each redemption of a program card is paid by the members whose registers put that value on the card, oldest first; a member redeeming value it sold itself owes nobody. Unredeemed balances stay with the member that sold the card. Voids count in the period they happen. A period's payables are everything owed up to its end minus what the closed statements before it already settled, so every statement's payables sum to zero. AmigoPOS produces the figures; the members settle between themselves.

A member that has left still sees and receives the statements of the periods it was part of; its last statement settles what it still owes or is owed.

Moving your existing cards into the program

Customers, Gift & Loyalty › Shared Card Program

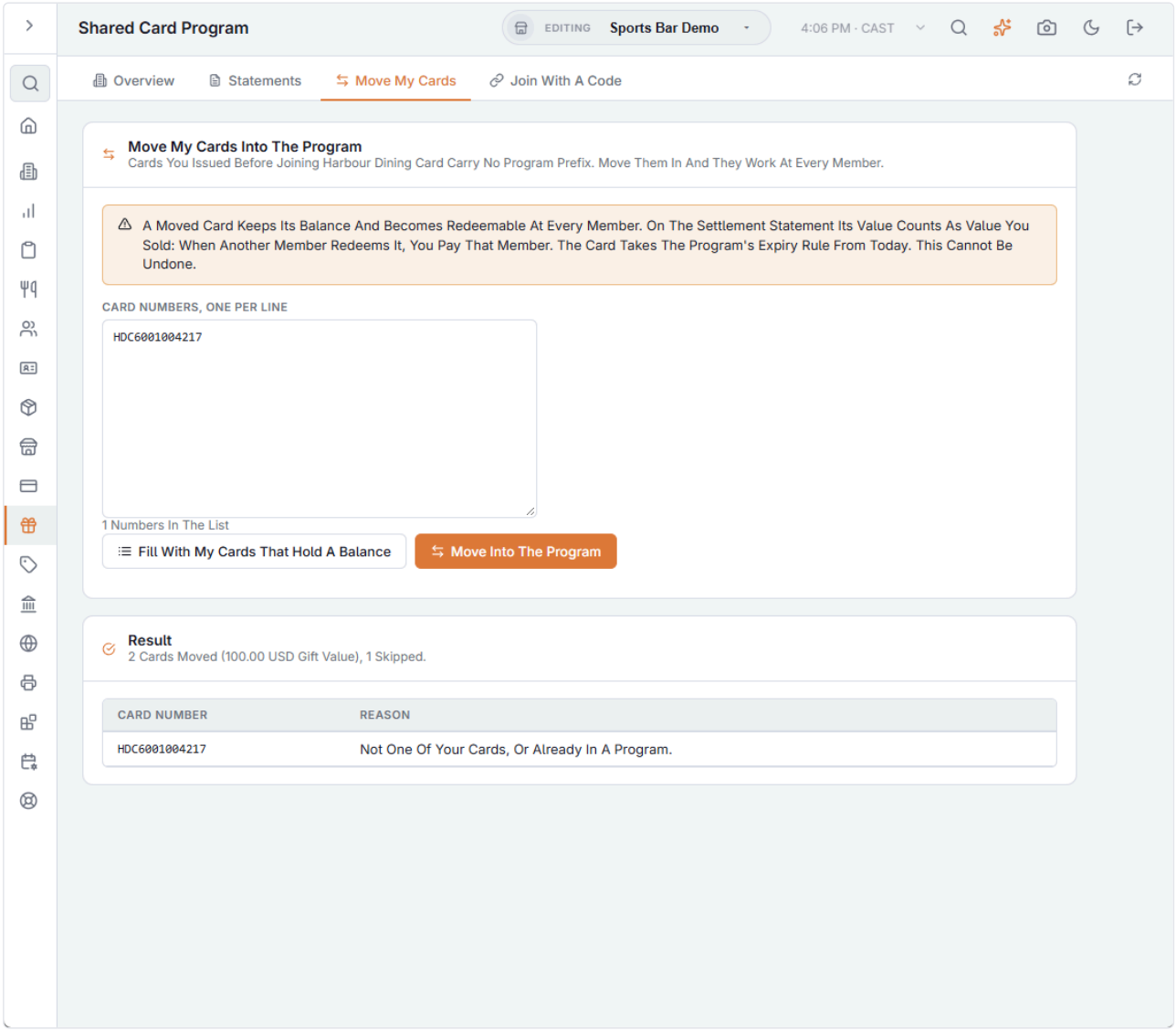
View online ↗

Bringing cards you sold before joining (or imported from a previous system) into the program so they work at every member, and what that means on the statement.

Cards you issued before joining carry no program prefix, so other members cannot see them. If the group agrees that those cards should work everywhere — typically cards that were already shared under a previous system — move them into the program. The card keeps its number and its balance; from then on it is recognised at every member.

Moving cards

1. Open **Back Office › Gift & Loyalty › Shared Card Program › Move My Cards**.
2. Paste or scan the card numbers, one per line — or tap **Fill With My Cards That Hold A Balance** to list every card of yours that still carries gift value, points or bonus and is in no program. The line under the box counts the numbers; a note tells you how many cards were listed and their gift value.
3. Tap **Move Into The Program** and confirm.
4. The result card reports how many cards were moved and their gift value, and lists any number that was skipped with the reason. Skipped numbers stay in the box so you can correct them and try again.



What moving does

- The balance becomes redeemable at every member. On the statement its value counts as **value you sold**: when another member redeems it, you pay that member.
- The card takes the program’s expiry rule, counted from the day it is moved (never, when the program’s rule is never).
- Loyalty points on the card stay with your restaurant; the other members start at zero on that card.
- PINs, the guest profile and a deactivated status are kept. The move cannot be undone from Back Office.

Why a number is skipped

Reason	Meaning
Not One Of Your Cards, Or Already In A Program.	The number is not a card your business issued, or it already belongs to a program.
The Program Already Has A Card With This Number.	Another member moved or sold a card with the same number; the two cannot both be program cards.

Agree with the group first. Which restaurant moves a card decides who "sold" it on the statement — that restaurant pays whoever redeems the balance. If one restaurant is to carry all the old cards, that restaurant imports and moves them.

Cards from a previous system are first brought into your own stock the usual way (AmigoPOS support imports them under the same numbers), then moved in with this tab. Physical cards that are still blank need no moving: a card with the program's prefix becomes a program card the first time it is activated.

Questions and troubleshooting

View online ↗

What to check when a program card is refused, a statement looks wrong, a period will not close or a statement e-mail does not arrive.

A program card is refused at a register

- *This Is A Shared Program Card And This Restaurant Is Not A Member…* — the store is not an Active member of that card's program: it never joined, it left or was removed, or the program is switched off. Check the Overview tab; ask the administrator or AmigoPOS.
- *Card not found* at another member, while the issuing restaurant finds it — the card has no program prefix and was never moved into the program (Moving your existing cards into the program).
- *Card has expired* — program cards follow the program's expiry rule, not the store's "never expire" setting.
- *Daily Redemption Limit Reached* — counted across every member in the last 24 hours; try again later or have the administrator raise the limit.
- The register is offline — gift cards, program cards included, need a connection.

An e-gift will not issue under the program

- The **Issue Under** picker is missing: the store is not an Active member, or the program does not allow e-gifts.
- *Load Exceeds The Program Maximum* — lower the amount or have the administrator raise Maximum Load.

The statement does not look right

- The figures are not simply "sold minus redeemed". Each redemption is paid by the members that funded that card, oldest value first, and redeeming your own cards owes nobody (How the money moves between members). The **Funded By** column explains every amount.
- A **negative** line or payable is a void of something from an earlier, closed period: voids count when they happen.
- *An Earlier Period Is Still Unclosed* — the amounts include what that period left unsettled; close the earlier period first.
- Last month's figures changed — the period has ended but is not closed, so it is still live. Ask the administrator to close it.
- Value given away for free, bulk loads and imported balances appear under **Other Credits** and are paid for by the member that gave them when someone redeems them.

Close Period is not offered

- Only the administrator (or AmigoPOS) can close, and only the **earliest** period that has ended. A period still running cannot be closed, and a later period cannot be closed before an earlier one.

No statement e-mail arrived

- Check the member's **Statement E-mail** on the Overview tab; if it is blank, the member's End Of Day report recipients are used, and a member with neither is counted as "without an address" in the toast after closing.
- Look in spam for a message from the reports address; the sender shows as the program's name via AmigoPOS.
- **E-mail** on the Statements tab sends your copy again at any time.

Loyalty

- Points earned at another member do not show in your balance — by design, each restaurant keeps its own points. They are listed under **At Other Members**.
- **To Gift Balance** is missing — the store setting *Loyalty Convert To Gift Enabled* is off, the card is not a program card, or the guest has no balance at your restaurant.
- A guest's name or phone changed — another member may have edited the shared profile on the card.

Who to contact

Membership, rules, join codes and closing periods are the program administrator's. Creating a program, changing its prefix, currency or administrator, and switching it on or off are done by AmigoPOS support.

CHAPTER 17

Inventory

How inventory works

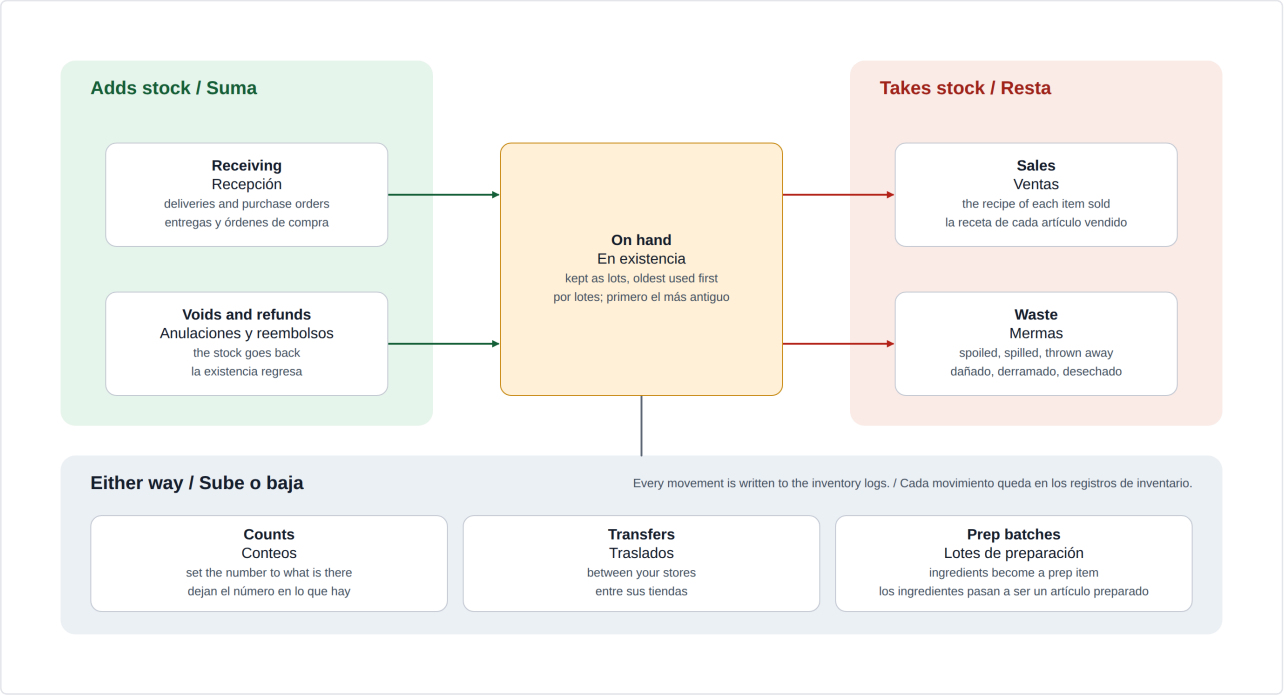
Inventory

View online ↗

What moves stock, how on hand and cost are worked out, and when sales come off.

Inventory follows every item from the delivery door to the plate. This topic explains the moving parts once, so the numbers on the **Back Office › Inventory** pages make sense.

In one picture: what adds stock, what takes it, and what can do either.



What moves stock

- **Sales** take each item's recipe out of stock a few seconds after the order is sent. Modifiers with recipes take theirs too, scaled by the modifier level and the pour size — see How modifiers, levels and pour sizes use stock.
- **Voids, returns and refunds** put the stock back. Lowering the quantity on a line that was already sent puts back the difference.
- **Receiving** adds stock at the delivery's cost, whether you receive a delivery by itself or against a Purchase orders.
- **Waste**, **counts** and **transfers** each record their own movement, and all of it shows in Inventory logs.
- **Prep batches** take their ingredients out and put the prep item in; they are listed on the Prep page — see Making prep batches.

On hand, cost and stock value

Every delivery is kept as its own lot with its own cost, and stock is used oldest first (FIFO), so each sale is costed at what that stock actually cost.

- **On Hand** is what is left across all lots.
- **Stock Value** is what those lots cost.
- **Cost Per Unit** is the current cost that recipes and food cost use: the average cost of the stock on hand, else the last delivery, else the case cost.

All three show at the top of the item editor — see Items, units, aisles, categories.

Selling more than you have

When a sale needs more than is on hand, the sale still goes through and the item shows as **Oversold** (below zero). The next delivery or count fills that gap first, so the numbers catch up on their own. Whether the POS should instead warn or stop the sale is set in Stock rules: when an item runs out.

Days and times

Inventory is kept by the store's business day, set by **Business Day Start Time** (Store Setup › General Settings, Reporting): when the day starts at 4 a.m., a sale at 1 a.m. belongs to the night before. End of day applies any sales still waiting before it records the day's closing stock — see End-of-day inventory.

> Menu items with no recipe don't move stock. Start with the items that cost the most and sell the most — see Recipes (yield, cost, ingredients).

What the stock is worth

Because every lot keeps the cost it was received at, the value of the stock on hand is always known. The Inventory Valuation: what your stock is worth report (printer button on Items List) totals it by category for month end; Menu Costing: cost, margin and a recommended price for every item uses the same costs to show what each menu item costs to make and what it should sell for.

Setup

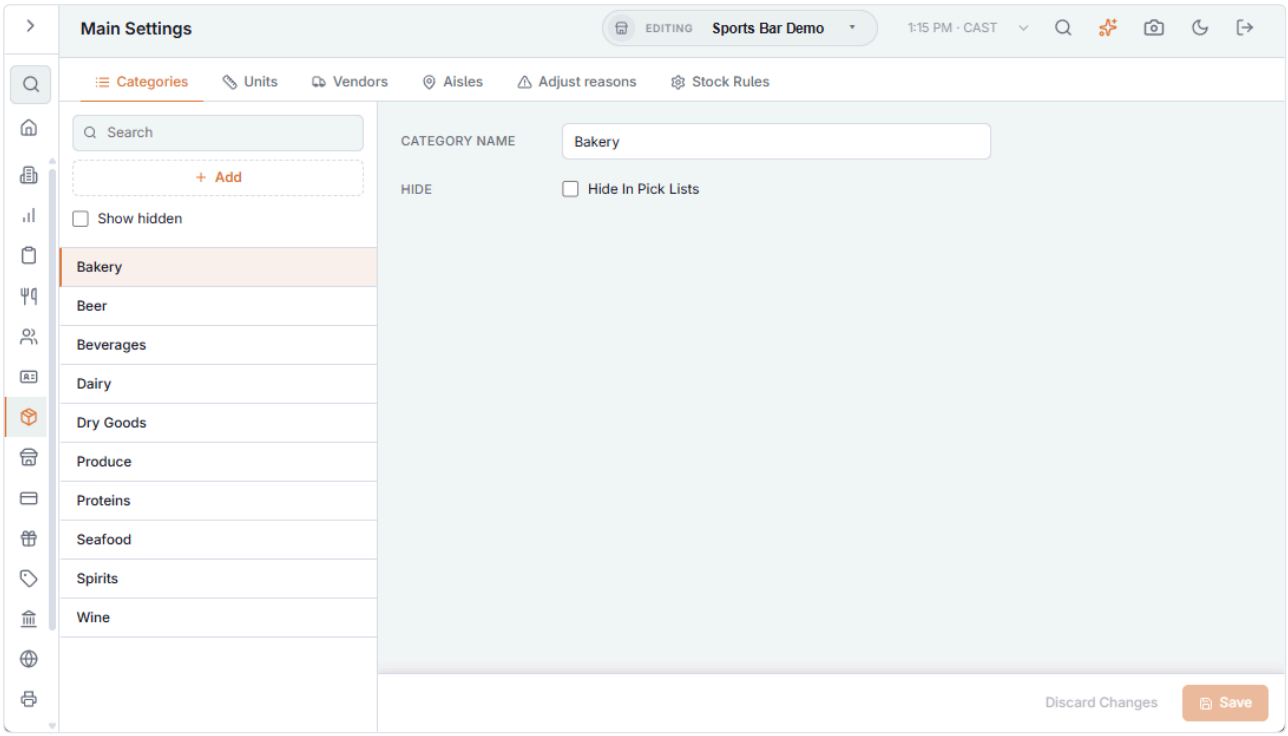
Inventory settings

Inventory › Setup

View online ↗

The lists inventory is built on — categories, units, vendors, aisles and adjust reasons — and what happens when an item runs out.

Back Office › Inventory › Setup › Main Settings holds the lists the rest of inventory is built on — categories, units, vendors, aisles and adjust reasons — and the store's stock rule. Each list is a tab. Items can't be created on **Items List** until there is at least one category, unit, vendor and aisle.



Working with a list

- The left side lists the entries, with a search box and a **+** button to add one. Categories, vendors and aisles also have **Show hidden**, which brings hidden entries back into the list (greyed).
- Pick an entry to open it on the right. Changes are kept until you choose **Save**; **Discard** puts the entry back as it was. A name is required.
- Only adjust reasons can be deleted. Categories, vendors and aisles are hidden instead, so the history that uses them keeps its names.

The tabs

Tab	What you enter	Where it is used
Categories	**Category name** and **Hide**.	Groups items on Items List, the count page and the Inventory Valuation report, which subtotals by category.
Units	**Unit name**, **Abbreviation**, **Pack description** and **Case description** (new units start with Pack and Case).	Every item is counted, received and valued in one unit. The pack and case descriptions name the boxes on the printed count sheet.
Vendors	Name, address, phone, hours, notes, **Preferred** and **Hide**.	Receiving, purchase orders and each item's suppliers — see Vendors.
Aisles	**Description**, **Sort Order** and **Hide**.	Each item's stock aisle. The count page and the count sheet walk the aisles in sort order.
Adjust reasons	**Description**. A reason can be deleted.	The reasons offered when you record waste and on each line of a count. They show in the Shrinkage tab of Inventory logs.
Stock Rules	One choice under **When An Item Runs Out**. It saves as soon as you pick it.	What the POS does when a menu item can't be made from stock — see Stock rules: when an item runs out.

Hidden entries

The **Hide** box reads **Hide In Pick Lists**. A hidden category, vendor or aisle stays on the items and records that already use it, but it is no longer offered when you pick one — in the item editor, for example, or a vendor on Receive Inventory and Purchase Orders.

> Main Settings, Recipe Editor and Menu Costing need the **Inventory Settings** permission. For how stock moves once the lists are in place, see How inventory works.

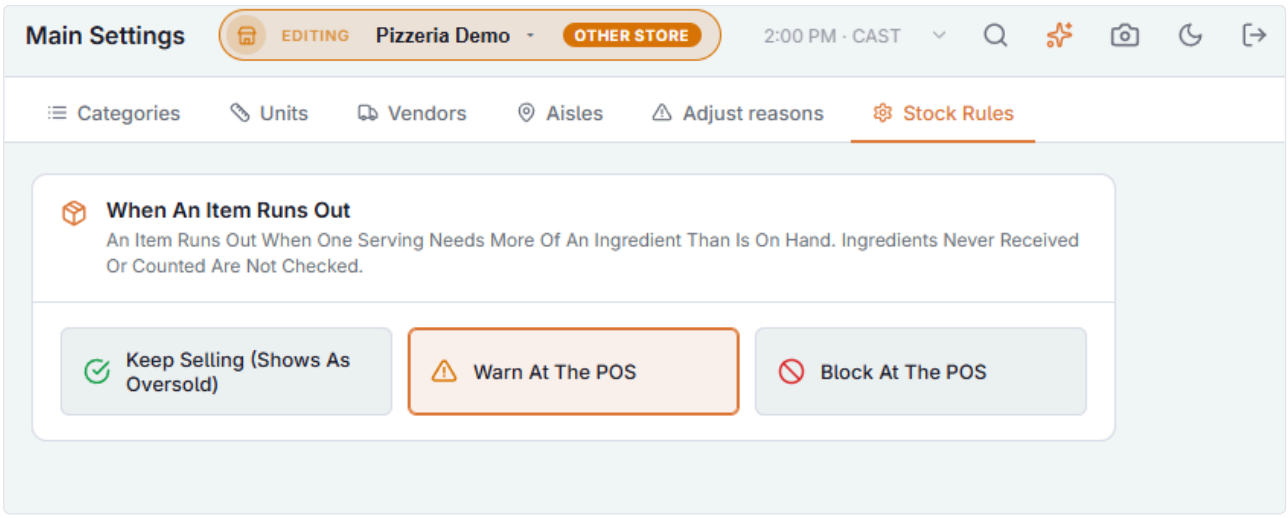
Stock rules: when an item runs out

Inventory › Setup

View online ↗

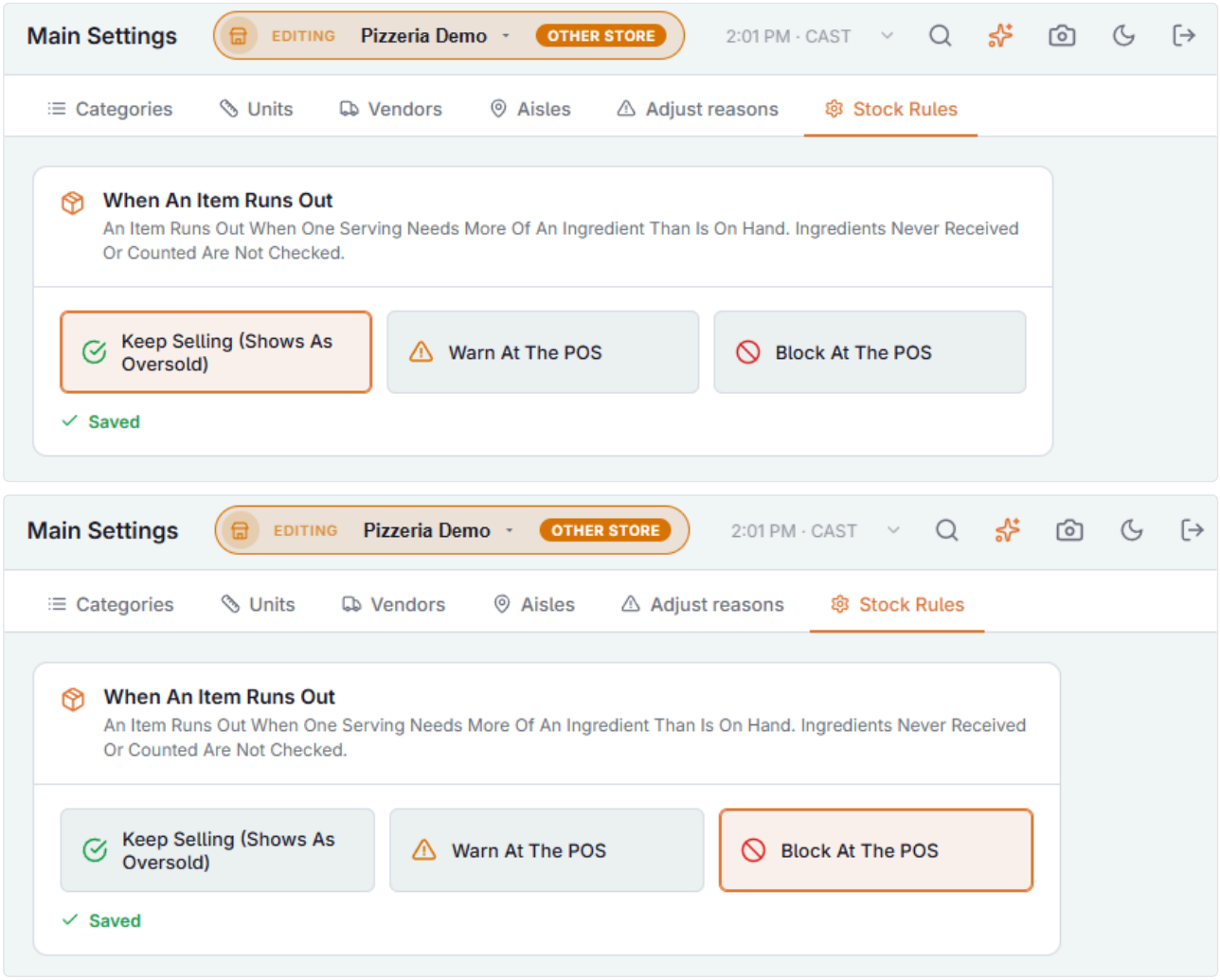
Choose whether the POS keeps selling, warns, or blocks items whose ingredients have run out.

A stock rule decides what the POS does when a menu item needs more of an ingredient than is on hand. Set it in **Back Office › Inventory › Setup › Main Settings**, **Stock Rules** tab, under **When An Item Runs Out**.



The three choices

- **Keep Selling (Shows As Oversold)** — the default. The POS doesn't change; the ingredient goes below zero and shows as **Oversold** until the next delivery or count.
- **Warn At The POS** — the item's button gets an amber outline and a **Low** badge. Tapping it still adds the item, with a message such as "Not Enough Mozzarella In Stock".
- **Block At The POS** — the button is greyed out like a sold-out item, with an **Out** badge, and can't be added. Picking it from search shows "Out Of Stock: Mozzarella" instead.



When an item counts as out

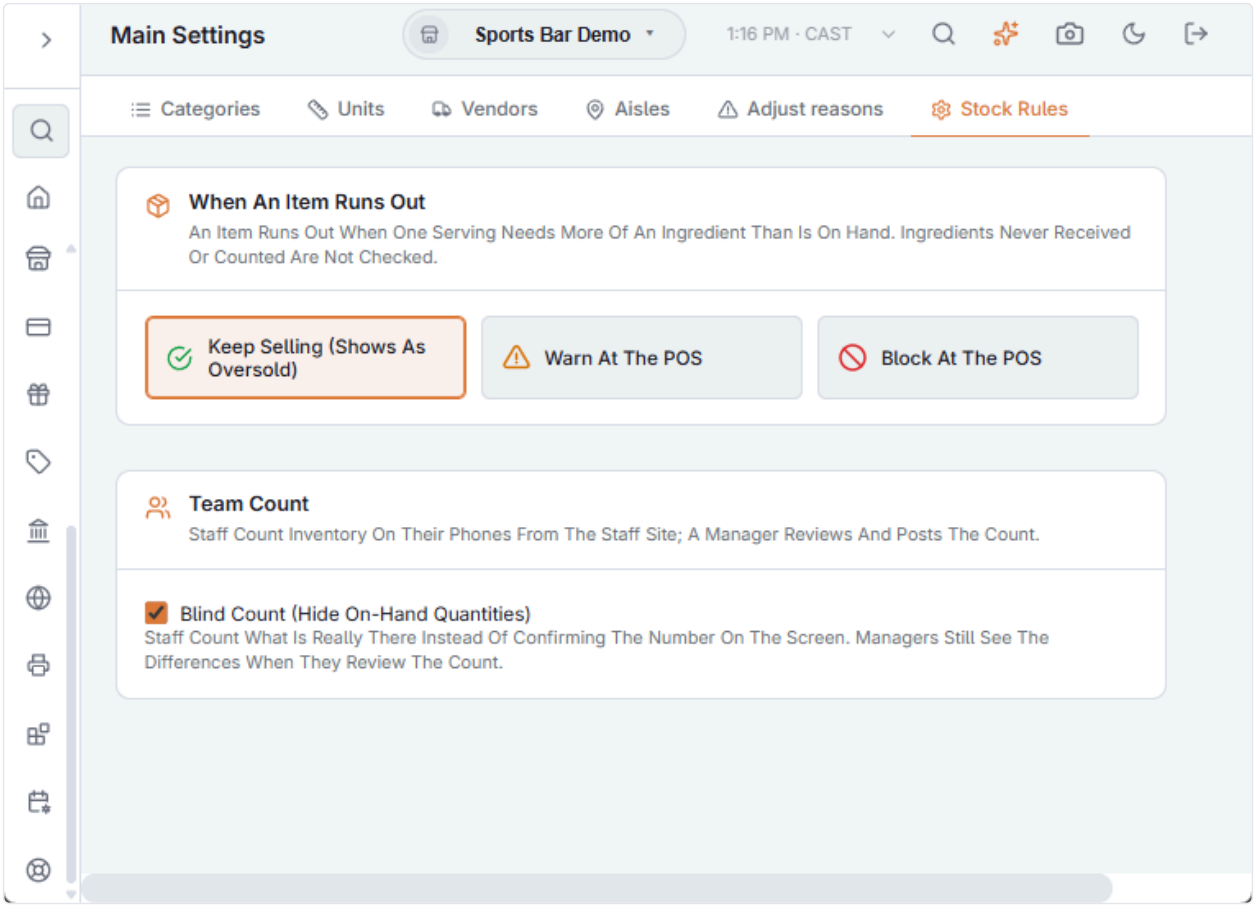
- An item runs out when **one serving** needs more of any ingredient in its recipe than is on hand.
- Ingredients that were never received or counted are not checked, so a new ingredient doesn't block its menu items before its first delivery.
- Only the item's own recipe is checked; modifiers are not.
- The POS refreshes the list in the background about once a minute and when you change categories, so a delivery or a count clears the badges shortly after it is saved.

Stock rules follow real inventory. Menu item counters are separate: a counter is a number you set by hand, and a counter at zero makes the item sold out whatever the stock rule says.

Blocking is only as good as your receiving and counts. Start with **Warn At The POS** for a few weeks; move to blocking once the Low badges match what the kitchen sees.

Team count: blind counting

The **Team Count** card on the same tab has **Blind Count (Hide On-Hand Quantities)**, on by default. The staff site's count screen then doesn't show how much is on hand, so staff count what is really there instead of confirming the number on the screen. Managers still see on-hand and the differences when they review the count. See Counting inventory as a team on your phones.



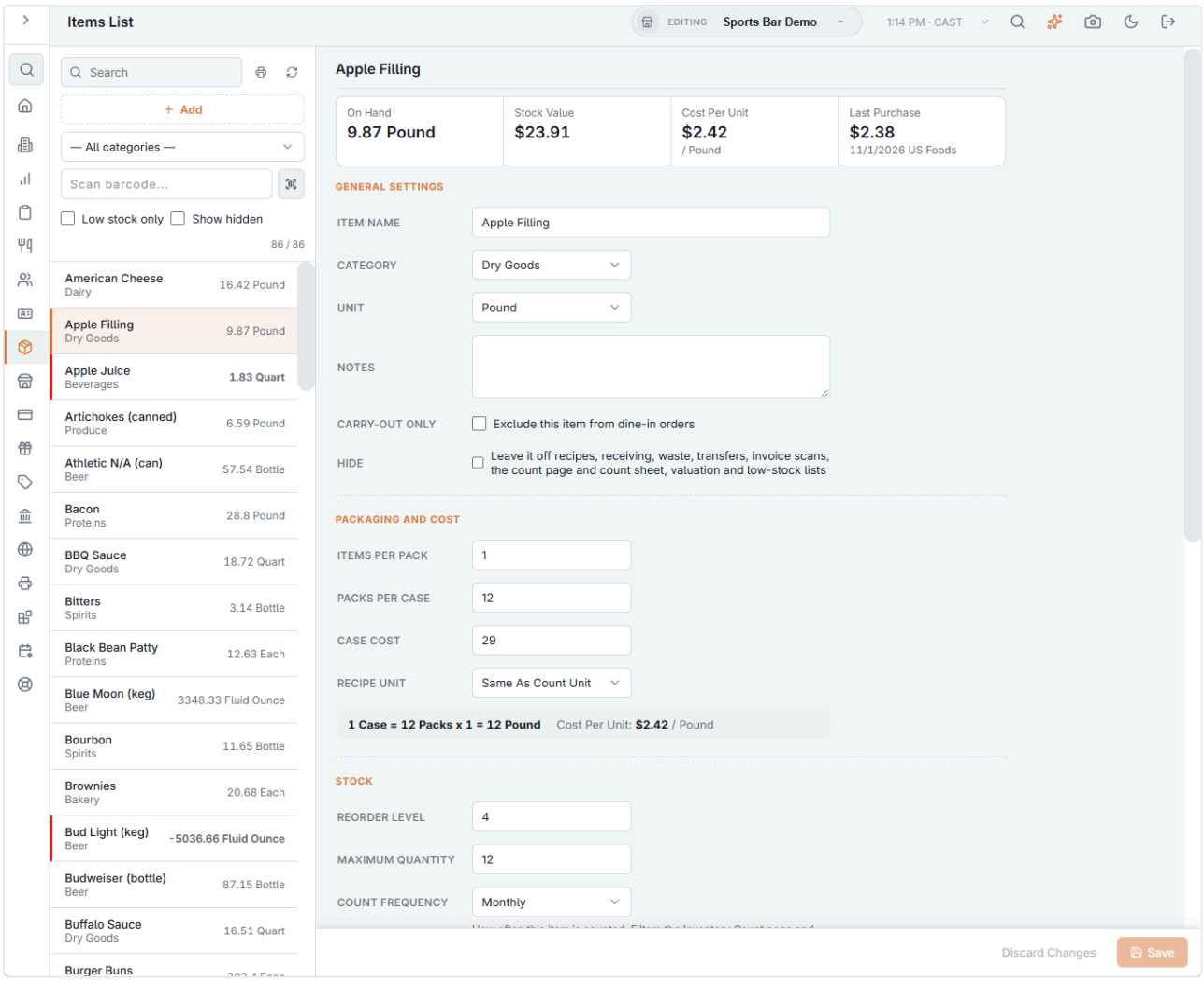
Items, units, aisles, categories

Inventory › Setup

View online ↗

The structure behind inventory: items, units, packaging, aisles and categories, and the live facts on each item.

Back Office › Inventory › Setup › Items List is where you create and edit inventory items — the physical stock, such as the flour, the vodka or the to-go cups. The list is on the left and the selected item opens on the right.



The list

- **Search** finds an item by name or by any of its SKUs. The category list narrows it to one category.
- **Scan barcode** — scan or type a barcode and press Enter. The item whose unit, pack or case SKU matches opens; if none does, the code goes into the search box.
- **Low stock only** shows items at or below their reorder level, including those at zero or below. **Show hidden** adds hidden items, greyed. The counter shows how many items are listed out of the total.
- Each row shows the item's category and what is on hand in its unit; low items are marked.
- The printer button prints the Inventory Valuation: what your stock is worth for the category picked (or all). Refresh reloads the list. **+** adds an item; it is available once there is at least one category, unit, vendor and aisle in Inventory settings.

The facts at the top

An existing item shows where it stands now: **On Hand**, **Stock Value**, **Cost Per Unit** and **Last Purchase** (the cost, date and vendor of the last delivery). An item below zero is tagged **Oversold** and one at or below its reorder level **Low stock**. **Not Received Yet** means no delivery is on record, and **No Cost Yet** means there is no cost from stock, deliveries or the case cost. How inventory works explains how these are worked out.

The item editor

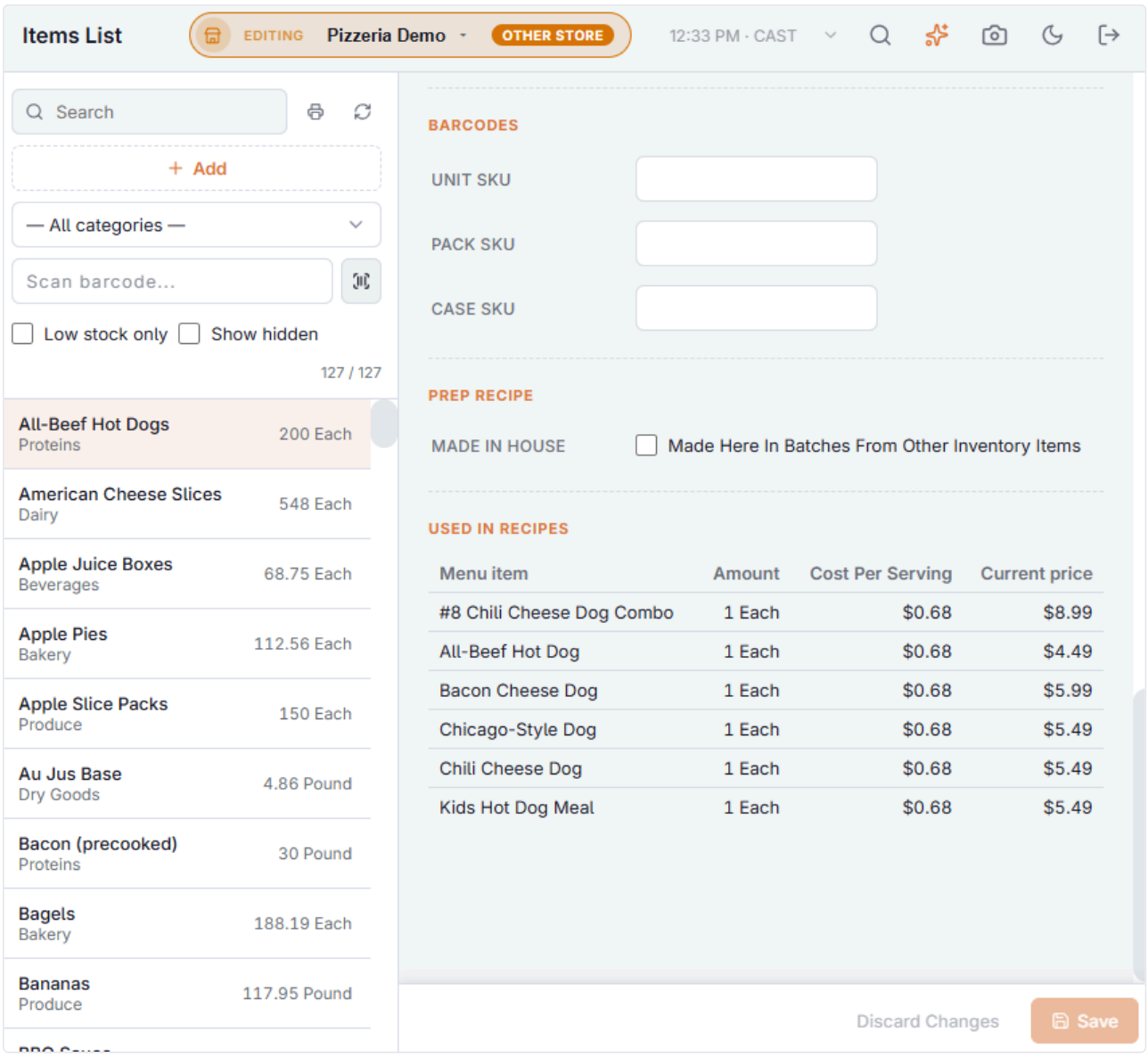
Changes are kept until you choose **Save**; **Discard** reloads the item. Items are not deleted; hide them instead.

- **General Settings** — **Item name**, **Category**, **Unit** (what the item is counted, received and valued in; required) and **Notes**.
  - **Carry-out only** — the item is taken from stock only on to-go orders, for example a to-go container in a recipe. Stock rules don't check it.

    - **Hide** — takes the item out of use. It leaves recipes, receiving, waste, transfers, invoice scans, the count page and count sheet, the Inventory Valuation and the low-stock lists, and the list shows it only with Show hidden.
- **Packaging And Cost** — **Items per pack**, **Packs per case** and the **Case Cost**. Sizes can be fractional: a 0.75 L bottle when you count in liters, a 22.68 kg sack. A line under the fields confirms the result, for example *1 Case = 4 Packs x 6 = 24 each*, with the cost per unit that follows from the case cost.
- **Recipe Unit** — an optional smaller unit for recipes, such as ounces of an item counted in pounds — see Recipe units: count in one unit, use in another.
- **Stock** — **Reorder level** (the low-stock mark, **Suggest From Par Levels** on purchase orders and **Below Par** on transfers), **Maximum quantity** (the par level those suggestions order up to), **Count frequency** (Daily, Weekly, Bi-weekly or Monthly, which the count page and count sheet filter by) and **Stock aisle** (the walk order on the count page).
- **Supplier** — **Preferred supplier** (selected for you when receiving the item; decides which supplier's purchase orders suggest it) and **Backup supplier**.
- **Barcodes** — **Unit SKU**, **Pack SKU** and **Case SKU**, so each scan reads as the right amount.
- **Prep Recipe** — for items made in house from other items — see Prep items made in house.

Used In Recipes

The bottom of the editor lists every menu item and modifier whose recipe uses the item, with the amount, the cost per serving and the current price. Check it before changing an item's unit or hiding it; **Not Used In Any Recipe** means nothing depends on it.



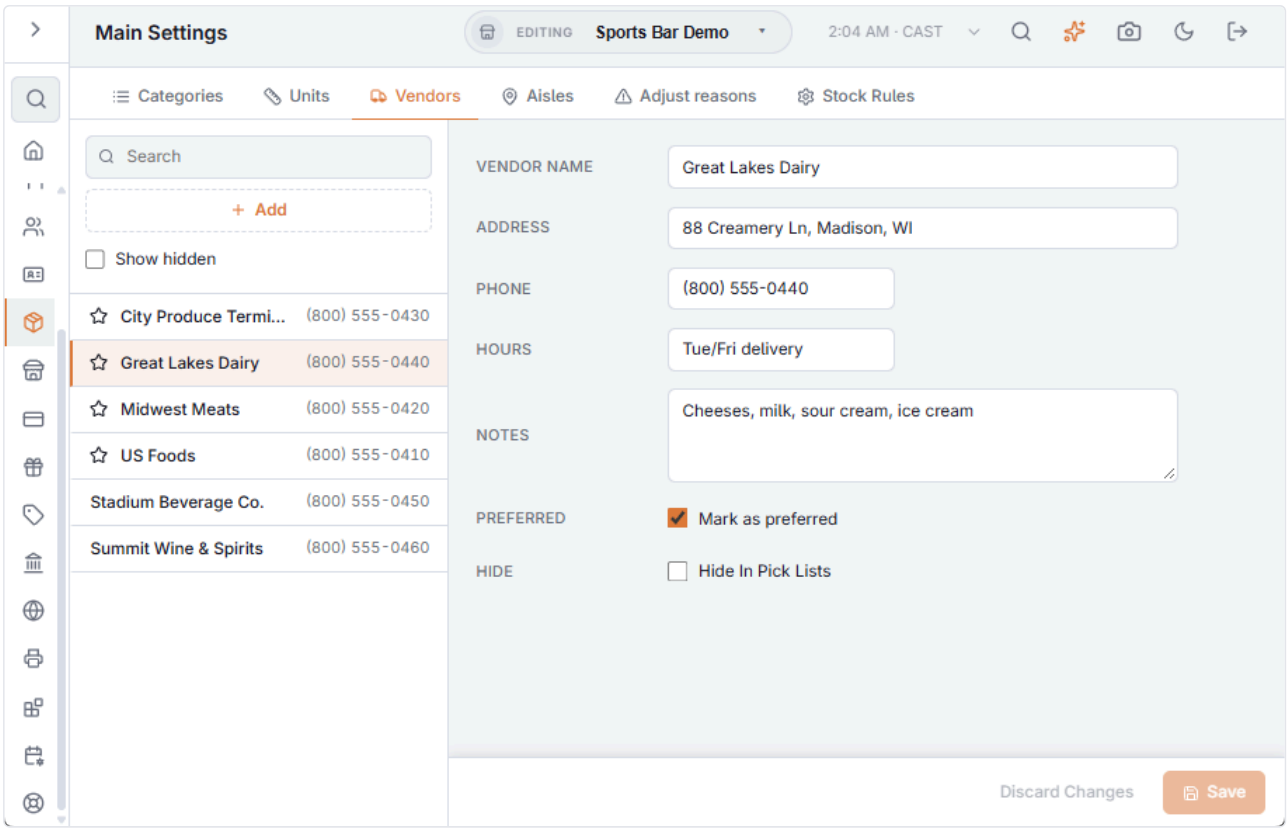
Vendors

Inventory › Setup

View online ↗

The suppliers you buy stock from, their details, and where receiving, purchase orders and items use them.

Back Office › Inventory › Setup › Main Settings, **Vendors** tab, is the list of suppliers you buy stock from. Receiving, purchase orders and each item's preferred and backup supplier all pick from it.



A vendor's details

- **Vendor name** — required.
- **Address**, **Phone** and **Hours** — for your reference. The phone also shows beside the name in the list.
- **Notes** — a short note, up to 50 characters, such as an account number or the delivery days.
- **Preferred** (**Mark as preferred**) — preferred vendors get a star in the list and come first in the vendor list on **Receive Inventory**, where the first preferred vendor is also the starting choice.
- **Hide** (**Hide In Pick Lists**) — for a vendor you no longer use. Past deliveries keep the vendor's name, but it is no longer offered when you pick a vendor. Tick **Show hidden** to find it again.

Choose **Save** to keep your changes or **Discard** to undo them. Vendors can't be deleted; hide them instead.

Where vendors are used

- **Items** — each item has a **Preferred supplier** and a **Backup supplier** (Items, units, aisles, categories). When you pick an item on Receive Inventory, its preferred supplier is selected for you.
- **Receiving** — every delivery records its vendor, and a delivery can't be saved without one. The vendor shows in the Received tab of Inventory logs and on the **Price Changes** view of Purchase Orders.
- **Purchase orders** — each order is for one supplier. With a supplier picked, **Suggest From Par Levels** and **Suggest From Usage** only add items whose preferred supplier it is, and **Draft From Forecast** makes one draft per preferred supplier — see Purchase orders.

> Set the preferred supplier on every item you reorder. Items with no supplier are left out of the drafts that **Draft From Forecast** makes.

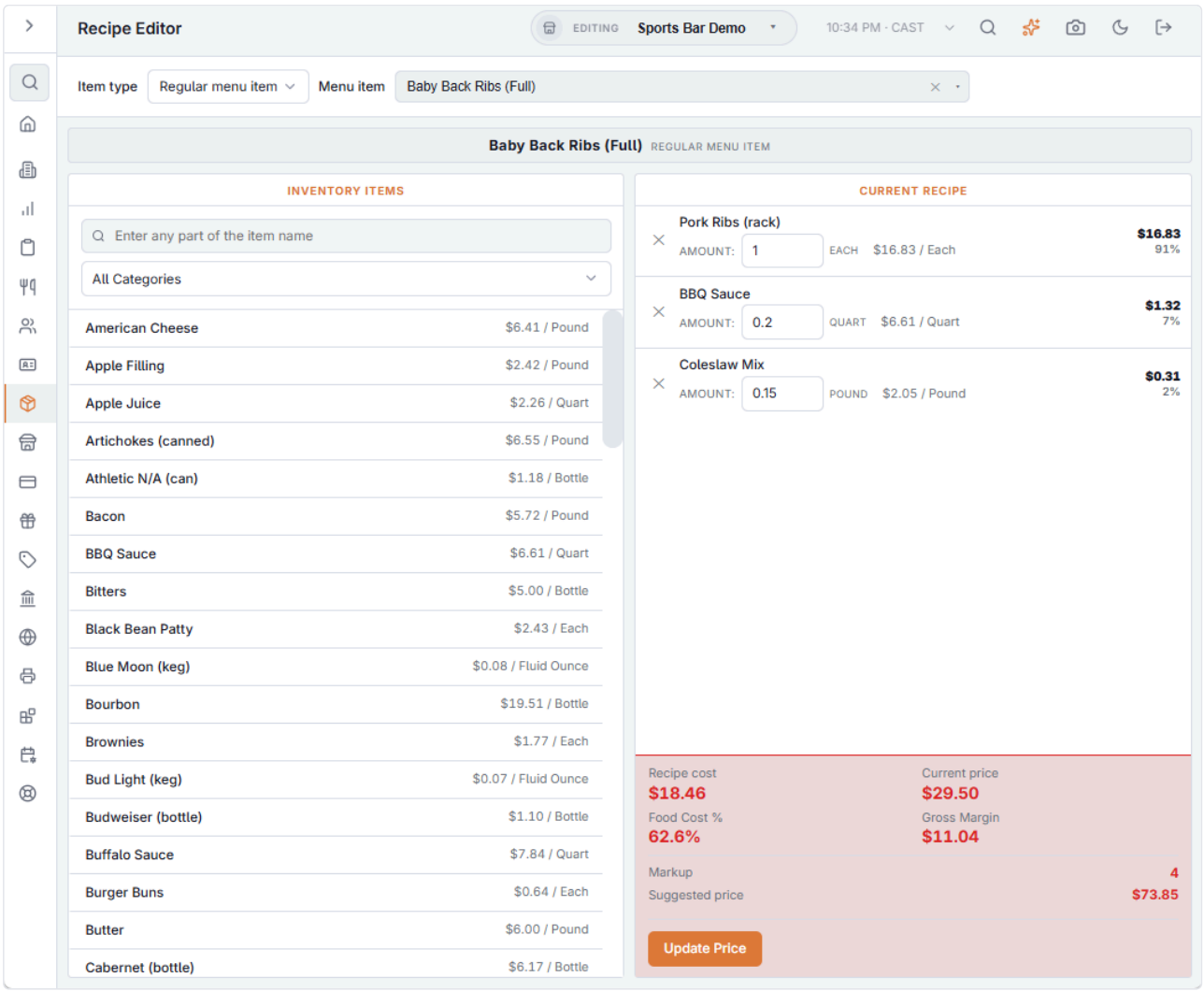
Recipes (yield, cost, ingredients)

Inventory › Setup

View online ↗

Linking menu items to the inventory they use, and what each plate costs.

A **recipe** ties a menu item or modifier to the inventory it uses, so each sale takes stock and has a food cost. Recipes are built in **Back Office › Inventory › Setup › Recipe Editor**, one item at a time.



Picking what to build

- **Item type** — **Regular menu item**, **Bar menu item** or **Modifiers**.
- **Menu item** (or **Modifier**) — type part of the name and pick it. Each entry shows its category, or its modifier group, underneath.

Adding ingredients

1. Find the ingredient in **Inventory items** on the left: search by name, or pick a category. Each item shows its cost per unit. Hidden items are not listed.
2. Pick it and enter the quantity for one serving. If the item has a recipe unit, choose it or the count unit from the list beside the box (see Recipe units: count in one unit, use in another). The **Fractions** list fills the box with 1/2 to 1/50.
3. Choose **Add**. **Cost Per Serving** under the box shows what the line will cost.

Every change saves right away: adding a line, changing an **Amount** in **Current recipe**, or removing a line with ✕. A burger might be 1 patty, 1 bun and 1.5 oz of lettuce; a well gin and tonic 1.5 oz gin, 4 oz tonic and 1 lime wedge.

What each plate costs

- Each line shows its cost per unit, its **cost** and its **share** of the plate, so the expensive line stands out.
- **Recipe cost** is the total of the lines at current ingredient costs. **Food Cost %** is that cost as a share of the **Current price**, and **Gross Margin** is what's left of the price after the ingredients.
- An ingredient with no cost yet (never received and no case cost) is tagged **No Cost Yet** and counts as zero. Prep items use the cost of their prep recipe until their first batch.

Suggested price

Suggested price is the recipe cost × the **Markup** shown above it:

- for a menu item, the **Markup** of its menu category (Menu › Menu Setup › Menu Categories);
- for a modifier, the **Markup** of its modifier group (Menu › Menu Setup › Food Modifiers);
- when there is none, the store's target food cost % from Menu Costing: cost, margin and a recommended price for every item › Pricing Targets (30% makes a markup of 3.33).

Update Price sets the item's or modifier's price to the suggested price. The suggested price is not rounded; Menu Costing applies your rounding rule.

What recipes drive

- **Depletion** — each sale takes the recipe's quantities out of stock a few seconds after the order is sent. Modifiers with recipes take theirs too, scaled by the level and the pour size — see How modifiers, levels and pour sizes use stock.
- **Food cost** — cost of goods and food cost % on Inventory performance come from recipes.
- **Stock rules** — a menu item runs out when one serving of its recipe needs more than is on hand — see Stock rules: when an item runs out.

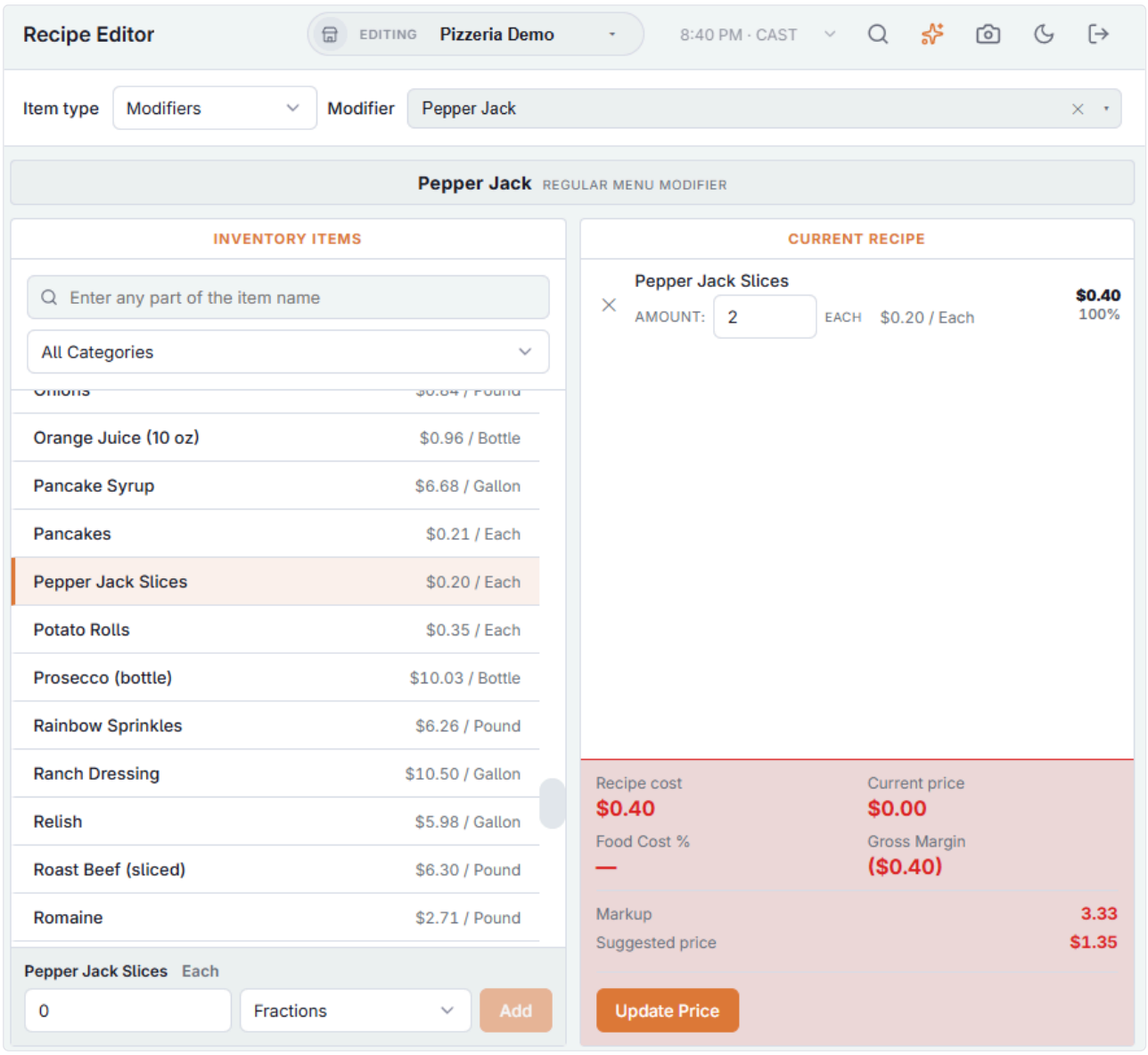
> Update recipes when portions change — a recipe that says 6 oz while the kitchen pours 8 makes every count show a shortage.

Costing the whole menu at once

The Recipe Editor shows one item at a time. Menu Costing: cost, margin and a recommended price for every item lists every item with its recipe cost, food cost %, margin, sales and recommended prices, reprices items from the table, and can Market Check: what comparable items sell for nearby.

Modifier recipes

Modifiers take stock too: "extra cheese" is an ounce of cheese, "bacon" two strips. Set **Item type** to **Modifiers**, pick the modifier (listed with its group) and enter its ingredients exactly as for a menu item. Every sale of the modifier then takes that recipe out of stock, scaled by the level the guest chose.



Recipe units: count in one unit, use in another

Inventory › Setup

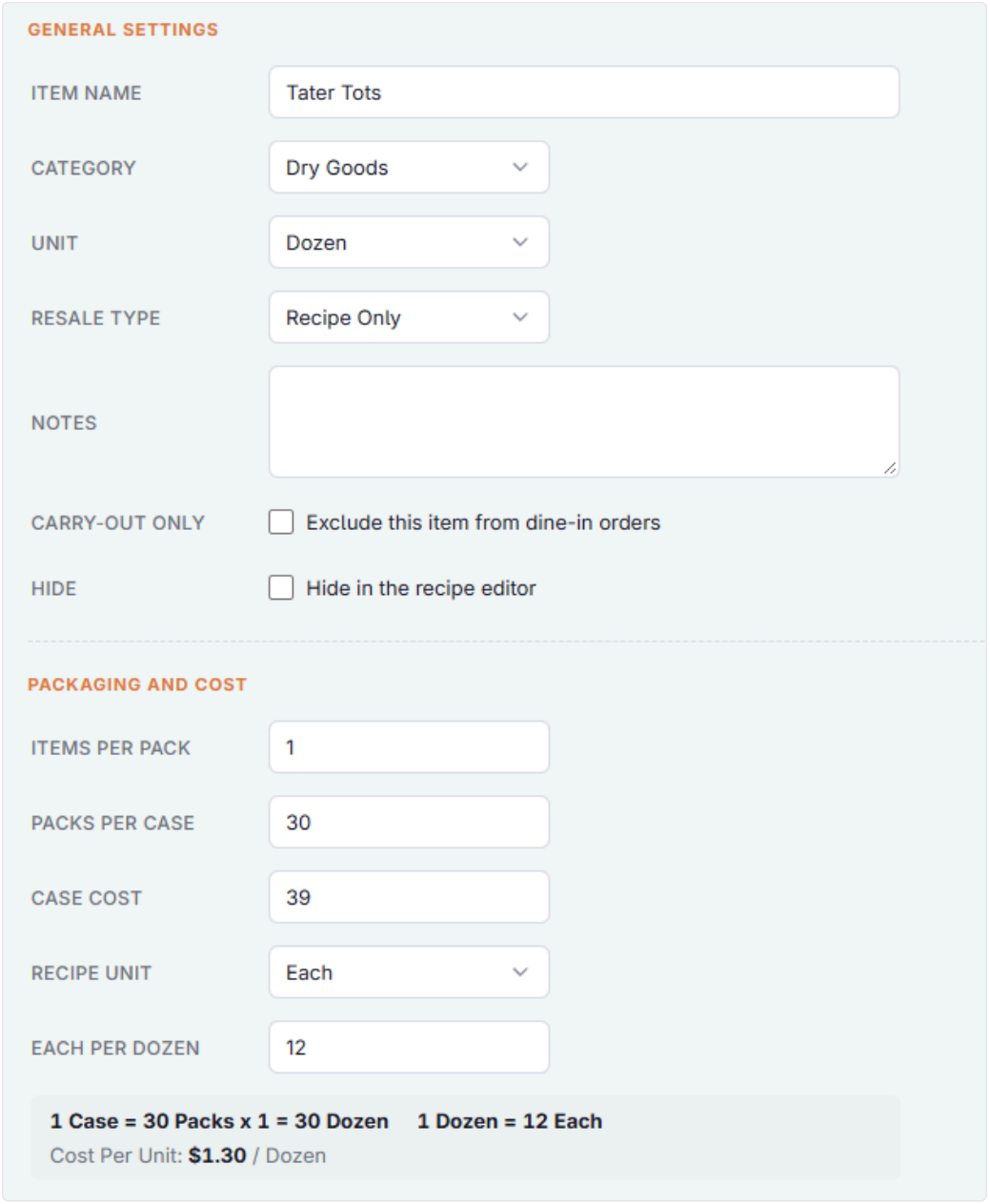
View online ↗

Counting cheese by the pound while recipes use ounces, or wine by the bottle while pours are in ounces.

Every inventory item is counted, received and valued in its **unit** (the count unit). A **recipe unit** lets recipes use a smaller unit of the same item — ounces of a cheese counted in pounds, ounces of a wine counted in bottles — without doing the math on every recipe line. It is set on the item in **Back Office › Inventory › Setup › Items List**.

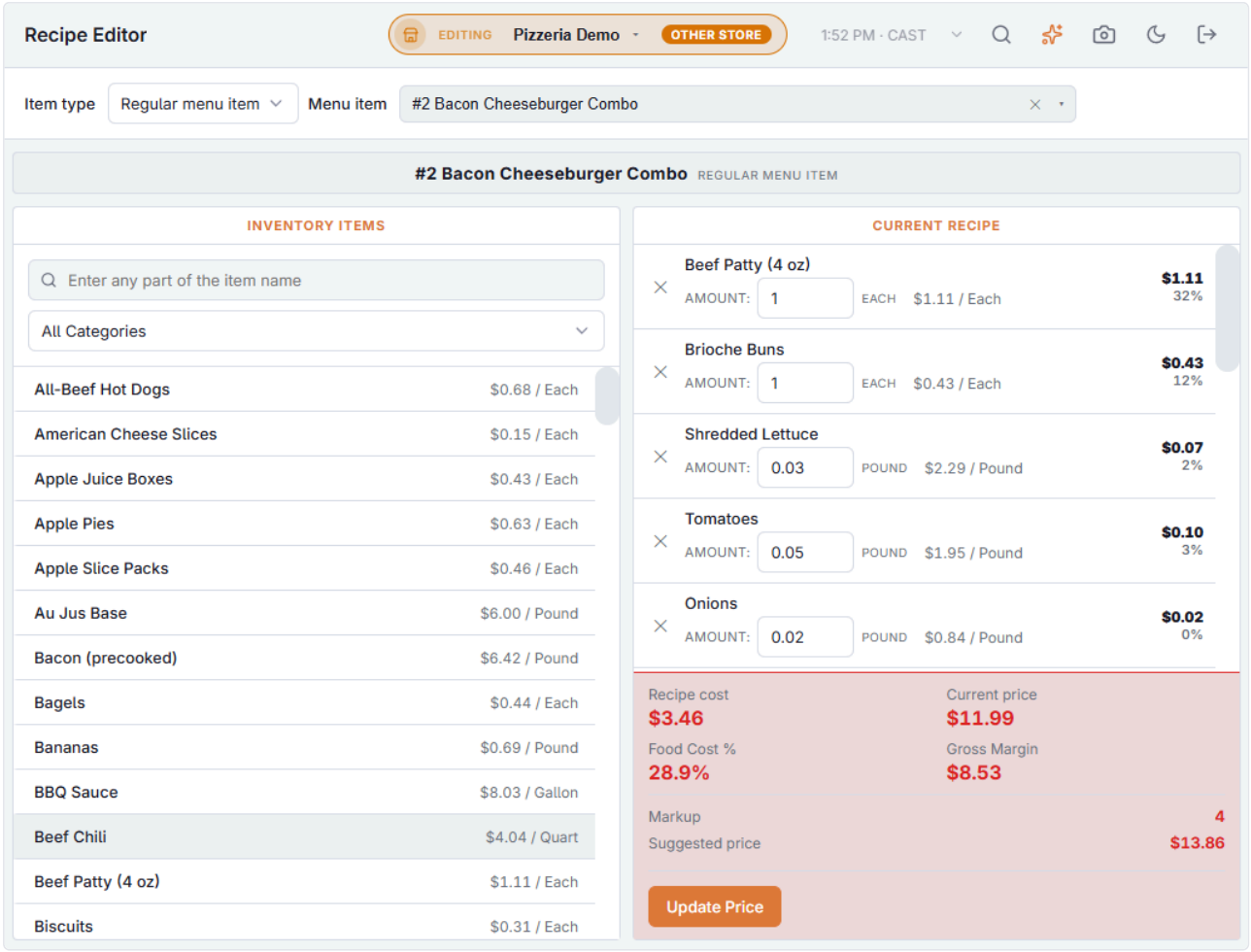
Setting it up

1. Open the item and go to **Packaging And Cost**.
2. Pick the **Recipe Unit**. **Same As Count Unit** means no conversion.
3. In the box that appears, labelled for example **oz Per lb**, enter how many recipe units are in one count unit. The line below confirms it, for example *1 lb = 16 oz*. The item can't be saved with a recipe unit and no number ("Enter How Many oz Are In One lb").



Using it in recipes

In the Recipes (yield, cost, ingredients), when you pick an ingredient that has a recipe unit, a unit list next to the quantity offers the recipe unit (chosen first) and the count unit. The cost shown follows the unit you pick, and the line keeps the unit it was added in. Prep recipe lines on the item editor have the same unit list on every line — see Prep items made in house.



What happens to stock

Stock always stays in the count unit. A sale that uses 4 oz of a cheese counted in pounds takes 0.25 lb. **Used In Recipes** on the item editor shows each recipe's amount in the unit it was entered in.

> Get the conversion right before building recipes on it. Changing it later changes every recipe line entered in the recipe unit, from the next sale on.

How modifiers, levels and pour sizes use stock

Inventory › Setup

View online ↗

Extra, Lite and No on modifiers, pour sizes on drinks, and what happens when a pour is changed after sending.

A sale takes the menu item's recipe from stock. Three things change how much: the recipes of the modifiers added to it, the level picked with a food modifier, and the upcharge a bar item is sold with. Recipes are entered in **Back Office › Inventory › Setup › Recipe Editor**, levels in **Back Office › Menu › Menu Setup › Food Modifiers** and upcharges in **Back Office › Menu › Menu Setup › Menu Categories**.

Modifiers with recipes

A modifier can have its own recipe, the same way as a menu item — "Add Bacon" with two strips of bacon. In the **Recipe Editor**, set **Item type** to **Modifiers** and pick the modifier; the list holds both food and bar modifiers. See Recipes (yield, cost, ingredients).

Each time the modifier is sold, its recipe comes off stock along with the item's. A modifier with no recipe takes nothing.

Levels: Extra, Lite, No

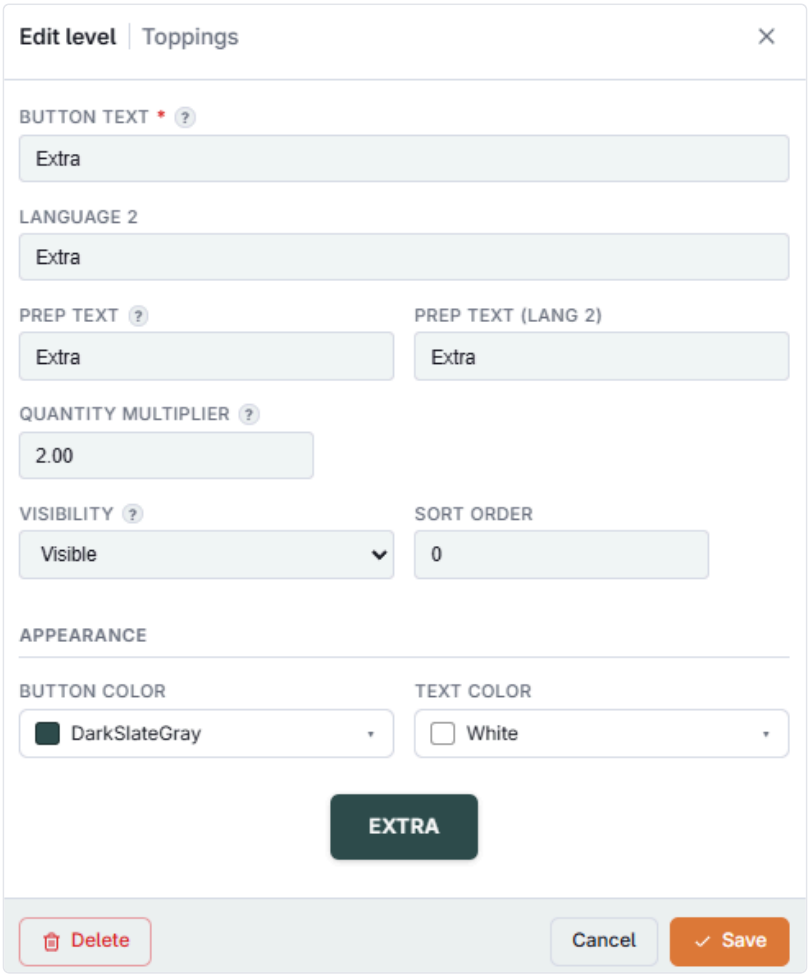
Levels exist only for food modifiers. Open a group in **Food Modifiers**, go to its **Levels** tab and open a level (or choose **Add level**). Its **Quantity multiplier** is the share of the modifier's recipe that one serving at that level takes:

- **1** — a full serving. New levels start at 1.
- **2** — double, for an Extra level; **0.5** half, for a Lite level.
- **0** — nothing, for a level such as Hold or On The Side.

The field takes a value from 0 to 99. A modifier picked without a level takes its recipe once. The multiplier never changes the price; prices per level are set on each modifier — see Food modifiers, groups, and levels.

A level named **No**, **None**, **Without** or **Sin** (or the Arabic equivalents) is a removal, whatever its multiplier: it takes nothing from stock, is never charged and never uses an included slot. On the register it also does not count toward the group's required or maximum choices.

Levels take stock the same way on orders from the register, the online ordering site and QR table ordering.



> "No Onions" doesn't give back onions that are part of the burger's own recipe. If guests often remove an ingredient, put it on a modifier instead of the base recipe.

Bar modifiers and qualifiers

Bar modifiers have no groups and no levels. A bar modifier with a recipe, such as a Red Bull with one can, takes its recipe once each time it is added to a drink. A qualifier tapped before a bar modifier changes the text on the ticket, not what the modifier takes — except a qualifier with **Removes The Mixer** ticked (qualifiers named *No*, *None*, *Without* or *Sin* start ticked): then the modifier takes nothing from stock. Its price is unchanged. See Bar modifiers, qualifiers, and recipes. See Bar modifiers, qualifiers, and recipes.

Pour sizes: bar upcharges

Sizes such as Double or Tall are the upcharges of a bar category. Each upcharge has an **Inventory Adjustment**, which multiplies the drink's recipe when the drink is sold with that upcharge: 2 for a Double takes twice the pour, and 1 the normal pour. 0 or an empty box also counts as the normal pour. See Bar menu upcharges (Double, Tall, Premium, Virgin).

- The adjustment applies to the drink's own recipe only. Bar modifiers on the drink take their own recipe once: a Double vodka with Red Bull takes two pours of vodka and one can.
- If a bartender changes the upcharge on a drink that was already sent, stock is corrected: what the drink took is put back and the new size is taken, dated at the original sale.

Prep items made in house

Inventory › Setup

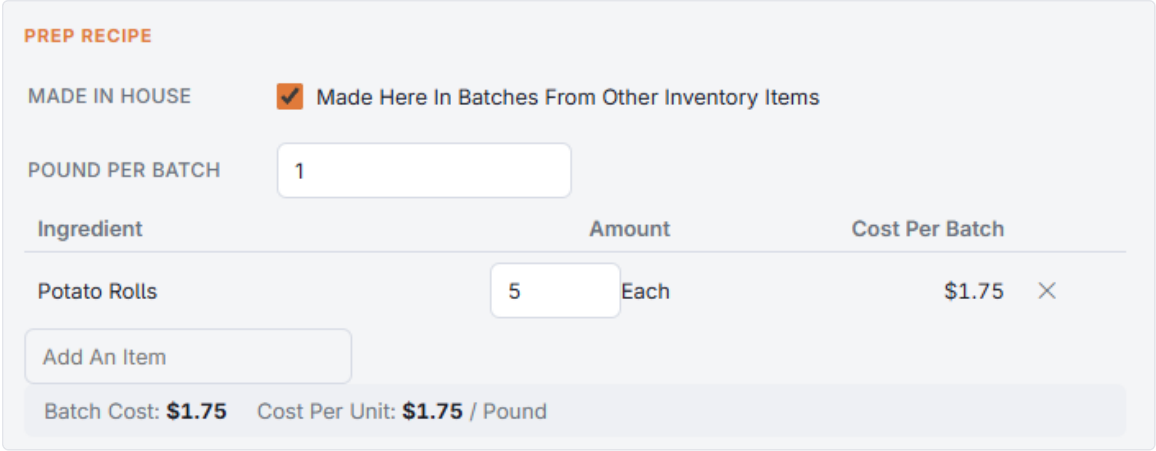
View online ↗

Sauces, dough and other items you make in batches from your own ingredients, costed per batch.

A prep item is stock you make yourself — a marinara, a pizza dough, a house dressing — from other inventory items. Menu recipes use it like any other ingredient, and its cost comes from what went into it.

Setting up a prep item

1. Create the item in **Back Office › Inventory › Setup › Items List**, with the unit you count it in (for example L or kg).
2. In the **Prep Recipe** section, turn on **Made In House**.
3. Enter how much one batch makes (shown as, for example, *4 L Per Batch*).
4. Add the ingredients for one batch, with quantities in their count or recipe unit — see Recipe units.
5. Save the item. The section shows the **Cost Per Batch** of each line, the **Batch Cost** and the resulting cost per unit.



- A prep item can use other prep items (a pizza sauce made with a roasted garlic paste), up to three levels deep. An item can't be an ingredient of itself; the editor warns "An Ingredient Is Itself Made From This Item".
- Before the first batch is made, the item's cost per unit comes from its prep recipe, so menu recipes that use it show a food cost from day one.

Making it

Record each batch on the **Prep** page: the ingredients come off stock and the prep item goes in at what the batch actually cost — see Making prep batches. Sales then take the prep item from its own stock.

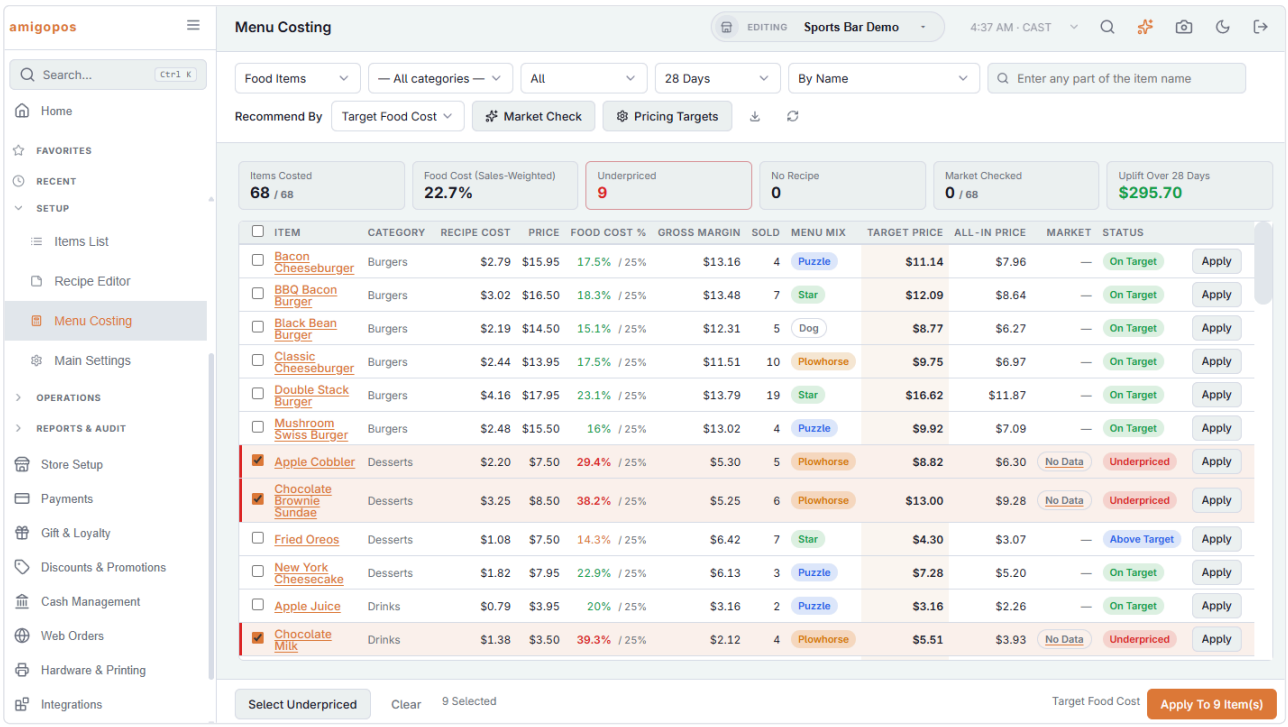
Menu Costing: cost, margin and a recommended price for every item

Inventory › Setup

View online ↗

One table for the whole menu: recipe cost, price, food cost %, margin, sales and two recommended prices, with one-tap repricing.

Back Office › Inventory › Setup › Menu Costing lists every menu item with what one serving costs to make, what it sells for, and what it should sell for. It reads the same recipes and costs as the Recipes (yield, cost, ingredients), but for the whole menu at once, and it can change prices from the table.



The toolbar

- **Item Type** — **Food Items**, **Bar Items** or **Modifiers**. Modifiers are listed by modifier group and have no Menu Mix or Market column.
- **Category** and **Status** — the status list has **Needs Attention** (underpriced, no recipe, no price, or a partial cost), each status on its own, and **Below Market** / **Above Market**.
- **Sales Window** — 7, 28, 90 or 365 days of sales for the Sold column and the menu mix.
- **Sort** — **By Name**, **Worst Food Cost First**, **Lowest Margin First**, **Most Sold First**, **Biggest Uplift First** or **Biggest Gap To Market First**. The search box matches item and category names.
- **Recommend By**, **Market Check**, **Pricing Targets**, the download button (CSV of the rows shown) and Refresh.

Above the table, the KPIs show **Items Costed**, **Food Cost (Sales-Weighted)**, the number **Underpriced** and with **No Recipe**, **Market Checked**, and the **Uplift** (below).

What each column means

Column	Meaning
Item	Tap a menu item's name to open it in the item editor. **Hidden** marks an item that is hidden on the POS.
Recipe cost	The ingredients of one serving at their current cost: average cost of the stock on hand, else the last delivery, else the case cost. A **Partial** badge means at least one ingredient has no cost yet, so the figure is understated.
Price	The item's menu price.
Food Cost %	Recipe cost as a share of the price, next to the target for that item (for example *17.5% / 25%*). Red when underpriced, blue when well under the target.
Gross Margin	Price minus recipe cost.
Sold	Units sold in the sales window. Hover for the revenue.
Menu Mix	Menu-engineering class within the item's category: **Star** (popular and profitable), **Plowhorse** (popular, low margin), **Puzzle** (profitable, slow), **Dog** (slow and low margin). Hover a badge for the suggested action.
Target Price	Recipe cost ÷ target food cost %, rounded by your rounding rule.
All-In Price	Recipe cost ÷ the share left for ingredients once labor, overhead and profit are covered (see Pricing Targets).

Column	Meaning
Market	What comparable items sell for nearby, from the Market Check: what comparable items sell for nearby.
Status	**Underpriced** (food cost more than 2 points over target), **On Target**, **Above Target** (more than 10 points under — room, or a premium item), **No Recipe**, **No Price**.

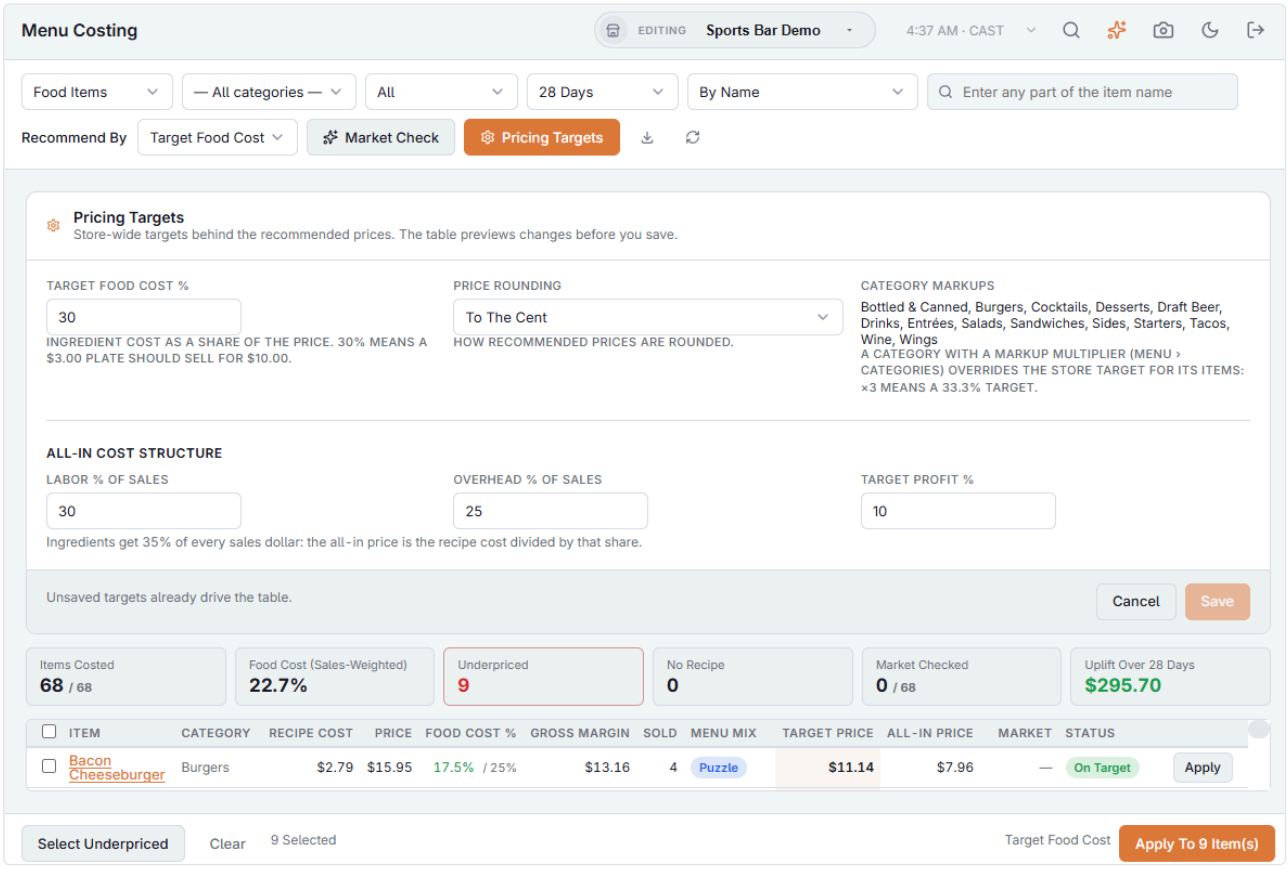
Where the target comes from

Every item has a target food cost %. A menu category with a **Markup** multiplier (Menu › Menu Setup › Menu Categories) sets it for its items: ×4 means a 25% target, ×3 means 33.3%. A modifier group's **Markup** does the same for its modifiers. Everything else uses the store target from the Pricing Targets panel.

Pricing Targets

Tap **Pricing Targets** in the toolbar. The table previews every change before you save, so you can see what a different target does to the recommended prices. **Save** keeps the targets; **Cancel** drops the changes.

- **Target Food Cost %** — the store-wide target; 30% means a $3.00 plate should sell for $10.00.
- **Price Rounding** — how recommended prices are rounded: **To The Cent**, **Nearest .25**, **Nearest .50**, **Ending In .95**, **Ending In .99** or **Whole Number**. The .95 and .99 rules never round below the unrounded price.
- **Category Markups** — the categories whose markup overrides the store target.
- **All-In Cost Structure** — **Labor % Of Sales**, **Overhead % Of Sales** and **Target Profit %**, from your P&L. What is left is the share for ingredients, and the All-In Price is the recipe cost divided by that share. If the three add up to 100% or more there is nothing left and no all-in price is shown.

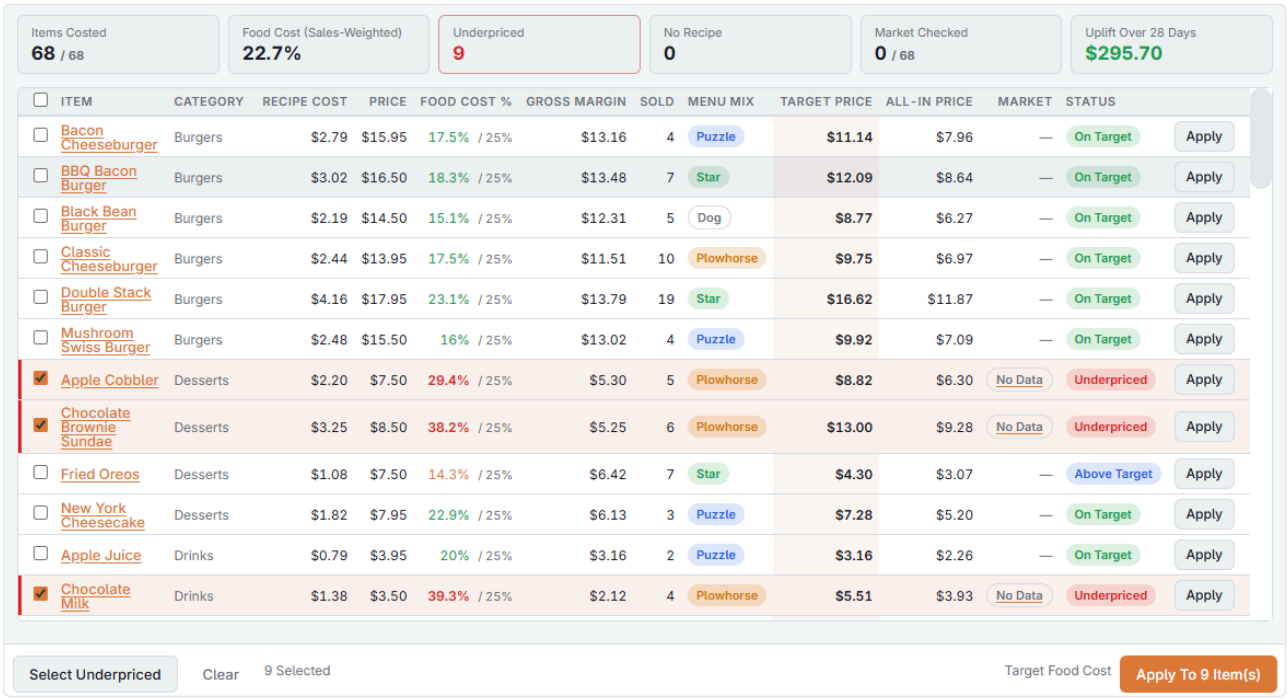


Changing prices

Recommend By decides which recommendation the Apply buttons use: **Target Food Cost**, **All-In Cost** or **Market Price**. Then either:

1. Tap **Apply** on one row to set that item to its recommended price, or
2. Tick several rows (or tap **Select Underpriced** to tick the underpriced rows shown), check the count in the footer and tap **Apply To N Item(s)**. A confirmation states how many items change and by which rule.

Every station picks up the new prices right away. With **Market Price**, rows whose market price is flagged **Check** are left out of Apply To N Item(s) and can only be applied one at a time — see Market Check: what comparable items sell for nearby.



> **Uplift:** the last KPI estimates what the underpriced items would have added to margin over the sales window at their recommended price (with **Market Price**, every item priced below its market price) — a quick measure of what repricing is worth.

Tonight's push items

The star next to an item's name marks it as tonight's push item: suggestions offer it first whenever it fits. Tap it again to stop pushing the item. See Setting up Insight and Suggestions.

Market Check: what comparable items sell for nearby

Inventory › Setup

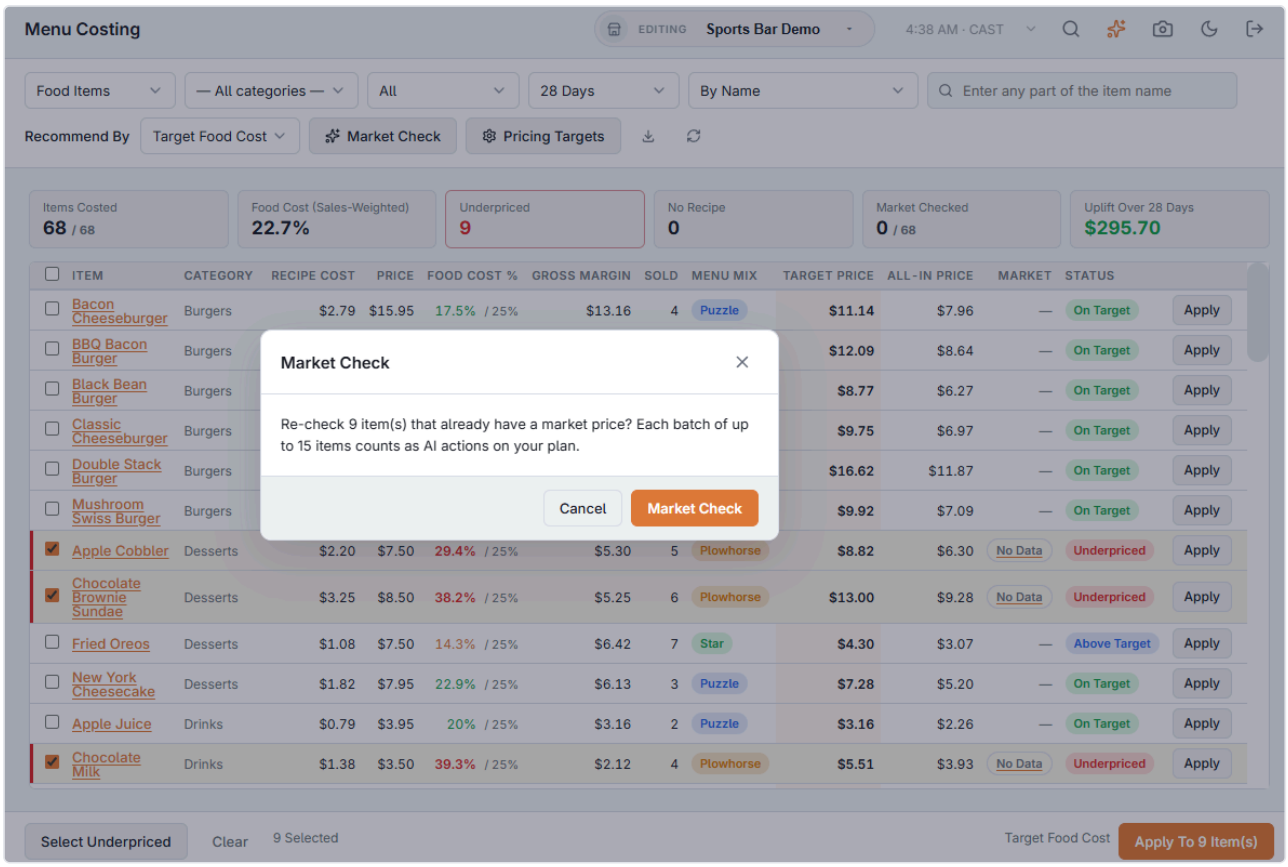
View online ↗

The AI looks up what restaurants near you charge for comparable items, keeps the result for two weeks, and shows it as a third recommended price.

On **Back Office › Inventory › Setup › Menu Costing**, **Market Check** asks the AI to search the web for what comparable dishes and drinks sell for at restaurants near your store's address. The answer comes back as a low, typical and high price, a one-line summary and the sources it used, and is kept for 14 days so the page doesn't search twice for the same item. See Menu Costing: cost, margin and a recommended price for every item for the rest of the page.

Running a check

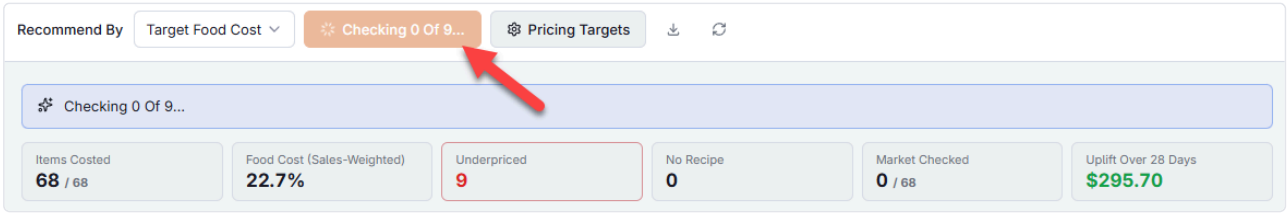
1. Choose **Food Items** or **Bar Items** (modifiers are not checked) and, ideally, one category — batches of related items search better than a mixed list.
2. Either tick the rows you want checked, or tick nothing to check every item on screen that has no market price yet.
3. Tap **Market Check** and confirm. Items are sent in batches of 15, about a minute each; the button counts up ("Checking 15 Of 42…"), the table fills in as each batch finishes, and a message reports the result at the end. You can keep working on the page while it runs.



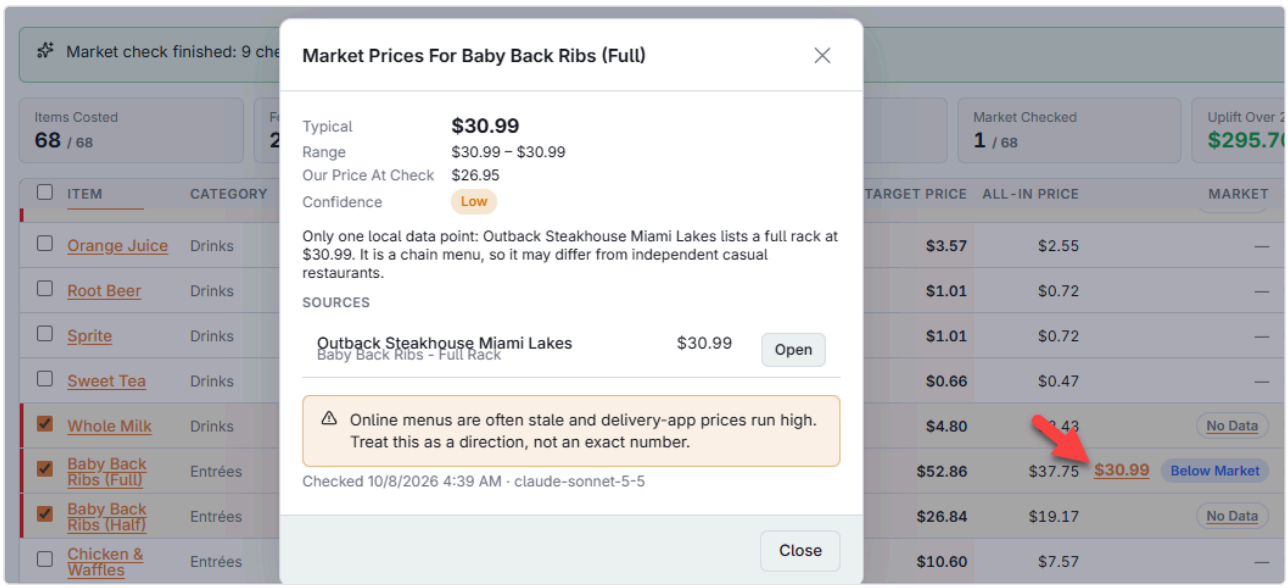
To check an item again — after a price change nearby, or when the first answer was thin — tick rows that already have a market price and tap Market Check. When every ticked row already has one, the check is a re-check, and the confirmation says so.

Reading the Market column

- The **typical** price in bold with the low–high range beside it.
- A badge comparing your price with the range: **Below Market**, **In Range** or **Above Market**.
- **Check** — the market price is more than 40% from your price, below the recipe cost, or there is neither a price nor a recipe cost to compare it with. It is more likely a misread or a different dish than the market.
- **No Data** when nothing comparable turned up. Tap it — the window shows the AI's own note on why.



Tap any market price to see where it came from: typical and range, **Our Price At Check**, the **Confidence** (High = three or more local menus agree, Medium = two, Low = one or only delivery apps), the summary, and each source with an **Open** button that shows the link as a QR code and lets you copy it.



Using it to reprice

Set **Recommend By** to **Market Price** and the Apply buttons use the typical market price, rounded by your rounding rule. The status filters **Below Market** / **Above Market** and the sort **Biggest Gap To Market First** bring the items that matter to the top.

Rows flagged **Check** are left out of **Apply To N Item(s)**; the footer says how many were left out. Apply one on its own row: a confirmation shows your price and the market price before it changes.

Treat it as a direction, not a number. Online menus are often stale and delivery-app prices run 15–30% high; the AI is told both and weighs them down, but it can only see what is published. Confidence Low means one source or delivery apps only.

Cost: each batch is one AI call with web searches and counts as three AI actions on your plan. Results that are still fresh are reused free of charge. See AI usage, limits and your monthly allowance.

Operations

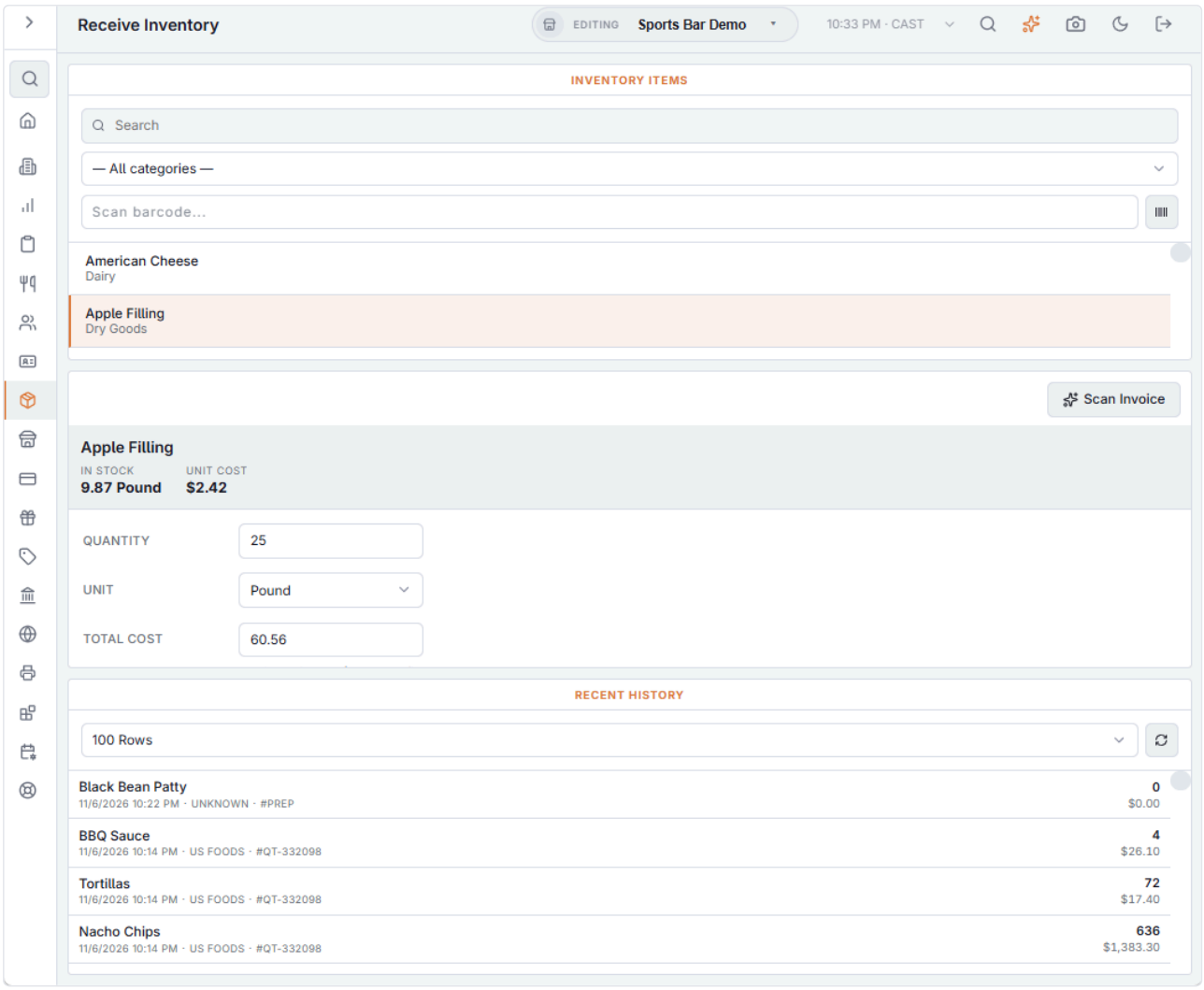
Receiving inventory

Inventory › Operations

View online ↗

Booking deliveries in and updating costs.

Back Office › Inventory › Operations › Receive Inventory records deliveries one item at a time: the quantity joins the stock as a new lot, and its cost joins the item's cost history. The page has three columns: the items on the left, the entry form in the middle and the recent deliveries on the right.



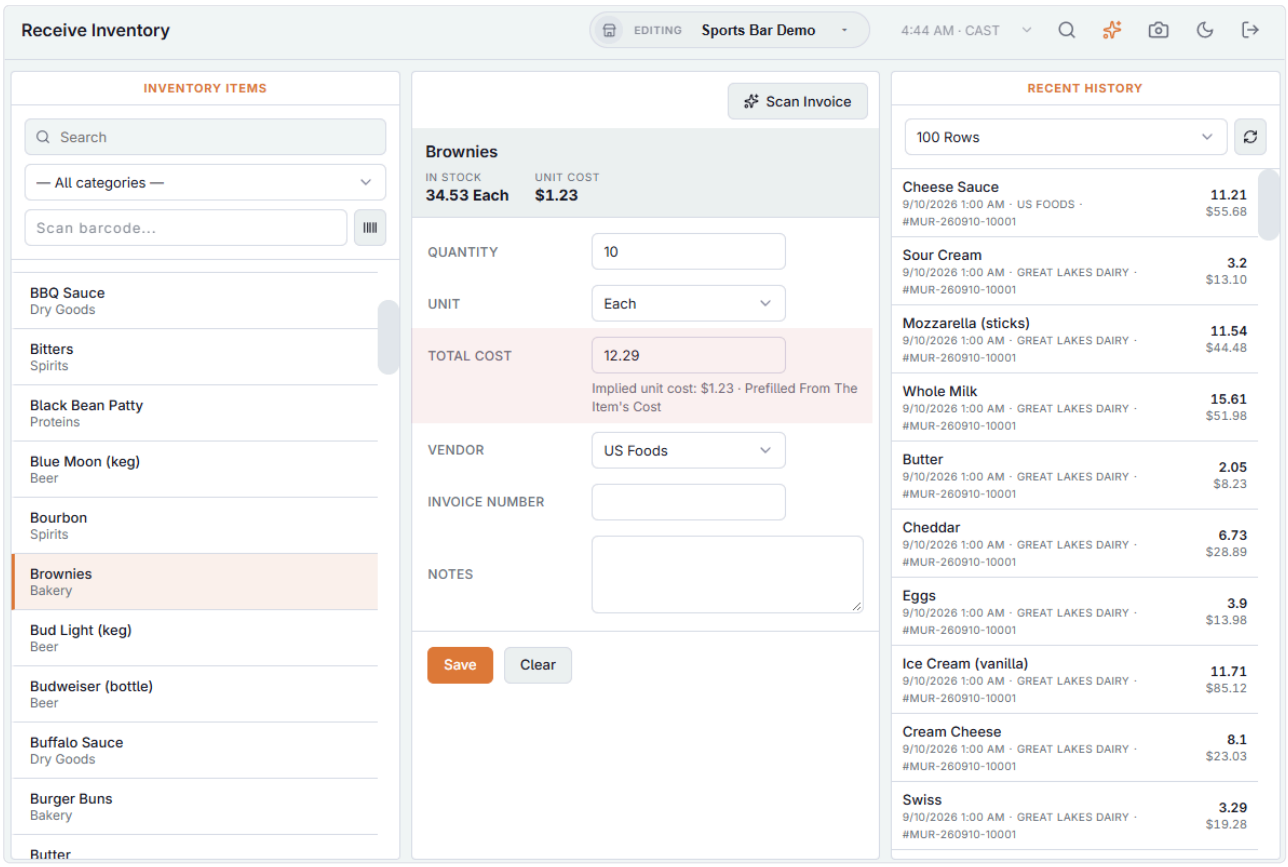
Receiving an item

1. Find the item on the left by name or category, or **scan its barcode** into the **Scan barcode** box and press Enter. A scan picks the item, the unit, pack or case that the barcode belongs to, and a quantity of 1. Hidden items are not listed.
2. The form shows what is **In stock** and the item's current **Unit cost**. Enter the **Quantity** and pick the **Unit**: the item's unit, or a pack or case (shown with how many units it holds).
3. Check the **Total cost** against the invoice line (see below). The **Implied unit cost** under it is the total divided by the units received; a surprise there usually means the wrong unit or a supplier price change.
4. Check the **Vendor** (required), enter the **Invoice number** from the delivery paperwork and any **Notes** (shorted 2 cases, credit pending).
5. Choose **Save**. A message confirms what was received; the item stays selected so you can enter the next delivery line. **Clear** empties the form.

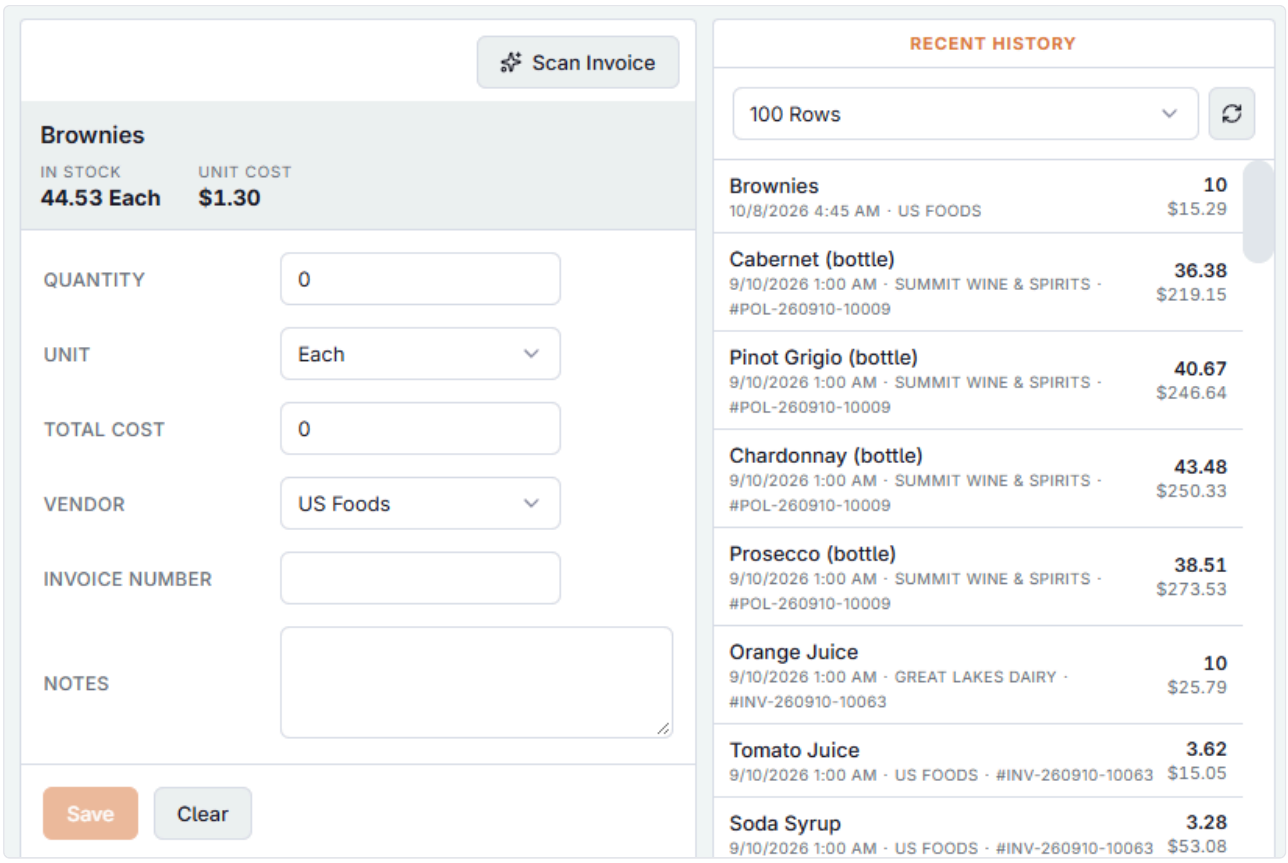
Stock and costs update as soon as you save. Every delivery shows in the Received tab of Inventory logs and in the Inventory audit log.

Cost prefilled, supplier preselected

When you pick an item, the page selects its preferred supplier and fills **Total cost** as you enter the quantity and unit: the case cost × cases when you receive cases, otherwise the item's current unit cost × units. The hint under the box says *Prefilled From The Item's Cost* until you type the invoice total, which always wins; clearing the box hands control back to the prefill.



After saving a case delivery at a price that differs from the item's case cost, a note offers to make the new price the item's case cost (**Update Case Cost**) or to **Keep** the old one. The case cost is what recipes fall back on when nothing is on hand and no delivery is on record, so keeping it current matters.



Recent history

The right-hand column lists the latest deliveries for all items, newest first: the item, date and time, vendor, invoice number, quantity and cost. Pick how many rows to show (100 up to 100,000) and refresh it with the button beside the list.

Fractional packs and cases

Pack and case sizes can be fractional (a 22.68 kg sack, a 0.75 L bottle when you count in liters), and the unit list converts them exactly.

Receiving a purchase order

When the delivery was ordered through **Purchase Orders**, receive it from the order instead: the lines start from what was ordered, costs that moved 5% or more are flagged, and the order's status updates — see Purchase orders.

To receive a whole invoice from a photo, choose **Scan Invoice** above the form — see Scanning a supplier invoice.

Supplier bills in Xero

With Xero connected and **Post Supplier Bills** switched on, each receiving is sent to Xero at End Of Day as a bill from its supplier — one bill per supplier invoice number, so enter the number from the delivery paperwork when you receive. Stock transfers between your own stores are never sent. See Supplier Bills.

> Who can open the page is set by the **Receive Inventory** permission.

Scanning a supplier invoice

Inventory › Operations

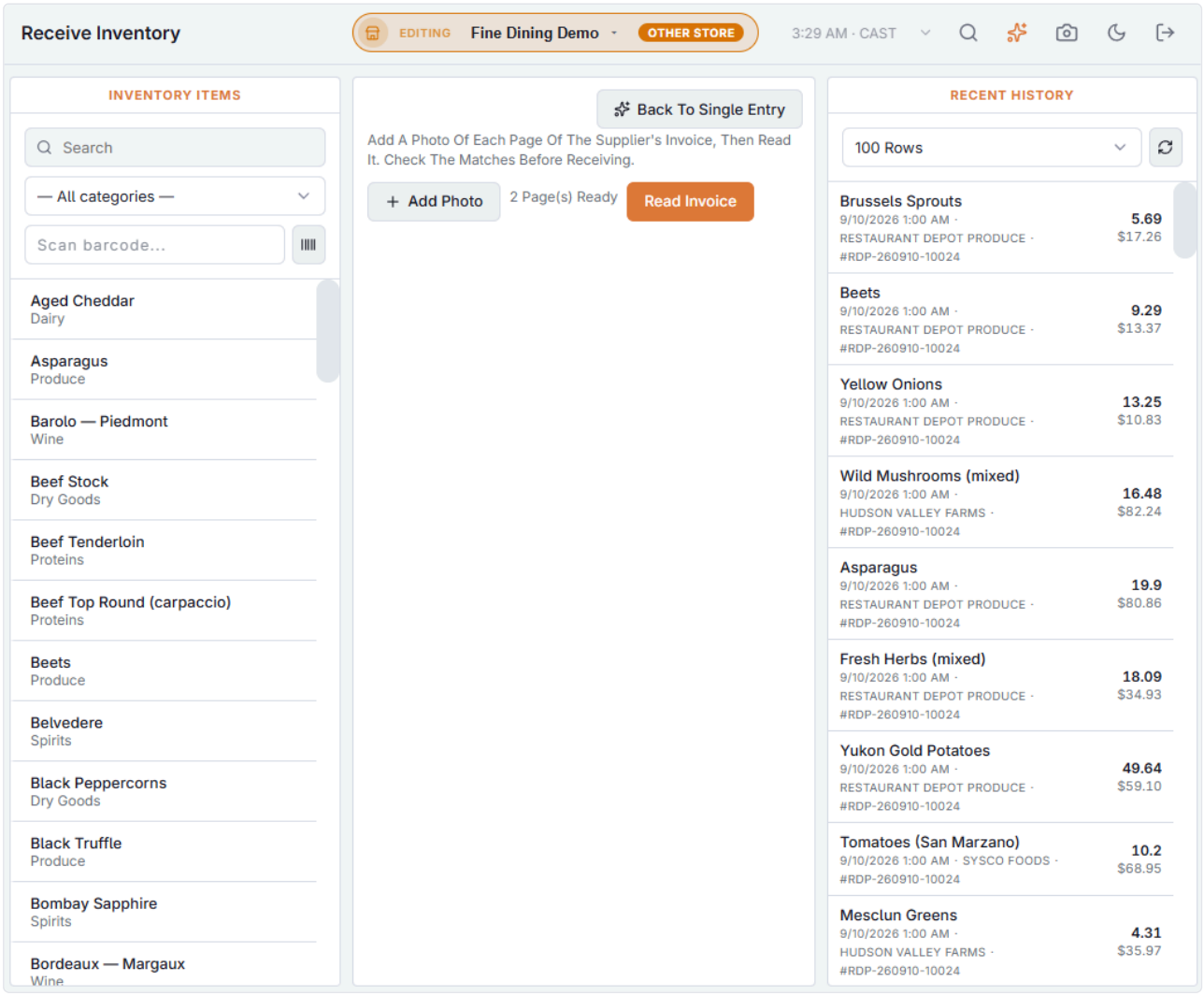
View online ↗

Photograph a supplier invoice and receive every line at once, after checking the matches.

Instead of receiving items one at a time, you can photograph the supplier's invoice or delivery note and receive every line in one go.

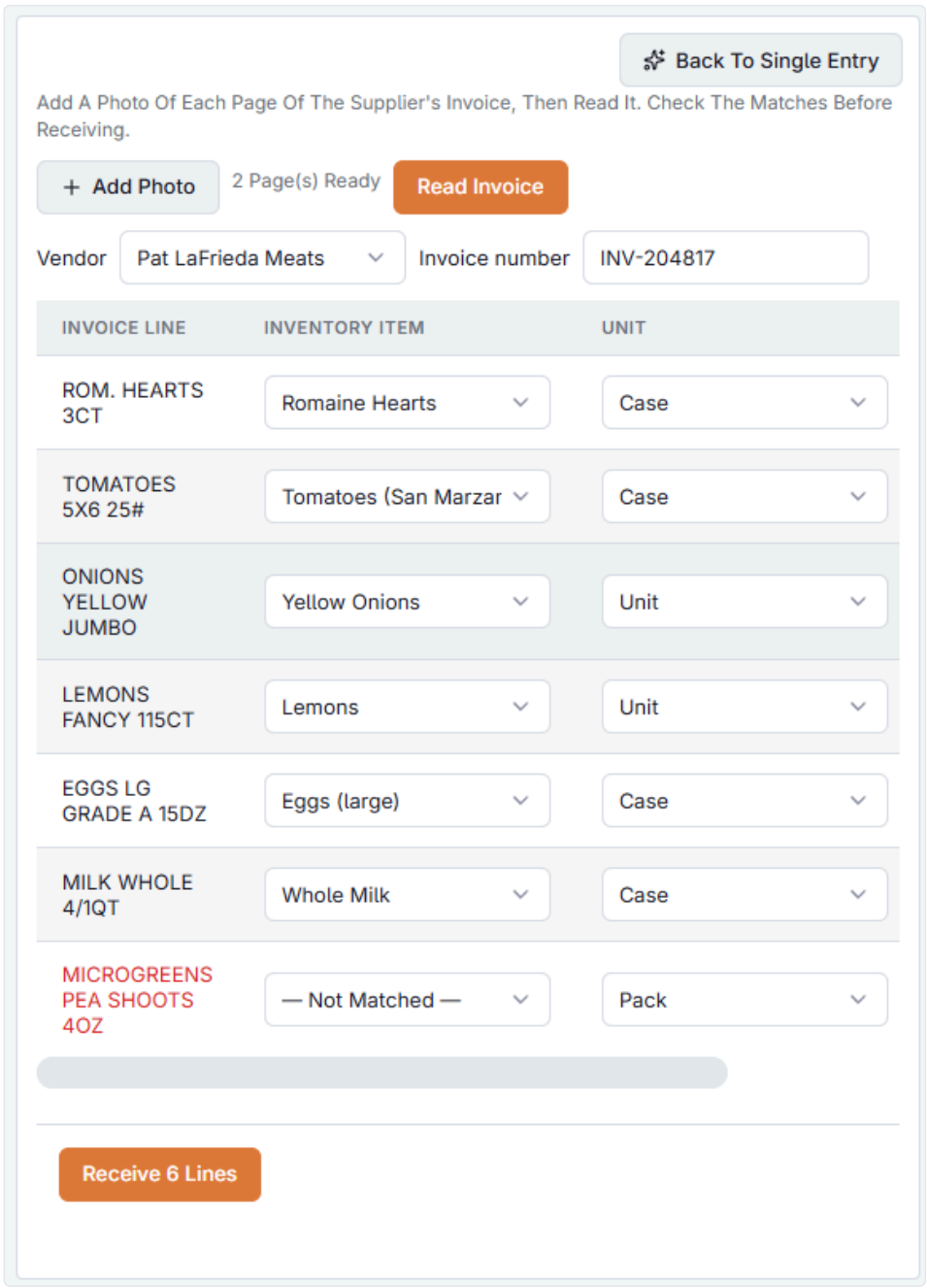
1. On **Back Office › Inventory › Operations › Receive Inventory**, choose **Scan Invoice** above the entry form.
2. **Add Photo** for each page of the invoice (up to five pages; a PDF also works).

3 Choose **Read Invoice**.



Checking the lines

Each line of the invoice comes back matched to one of your inventory items — by meaning, not exact wording, so “Rom. hearts 3ct” can match *Romaine*. For every line you see the invoice text, the matched item, whether the quantity counts units, packs or cases, the quantity delivered and the line total. The supplier and invoice number are filled in from the invoice; a supplier you already picked on the page wins.



Check every line. Change any match, unit, quantity or total that is wrong. Lines left **Not Matched** are skipped.

Receiving

Receive saves each matched line exactly as if you had entered it on its own, including the audit log. Packs and cases are converted to units with the item's pack and case sizes, and each line's cost comes from its line total.

> **Note:** each scan counts as two AI actions. See AI usage, limits and your monthly allowance.

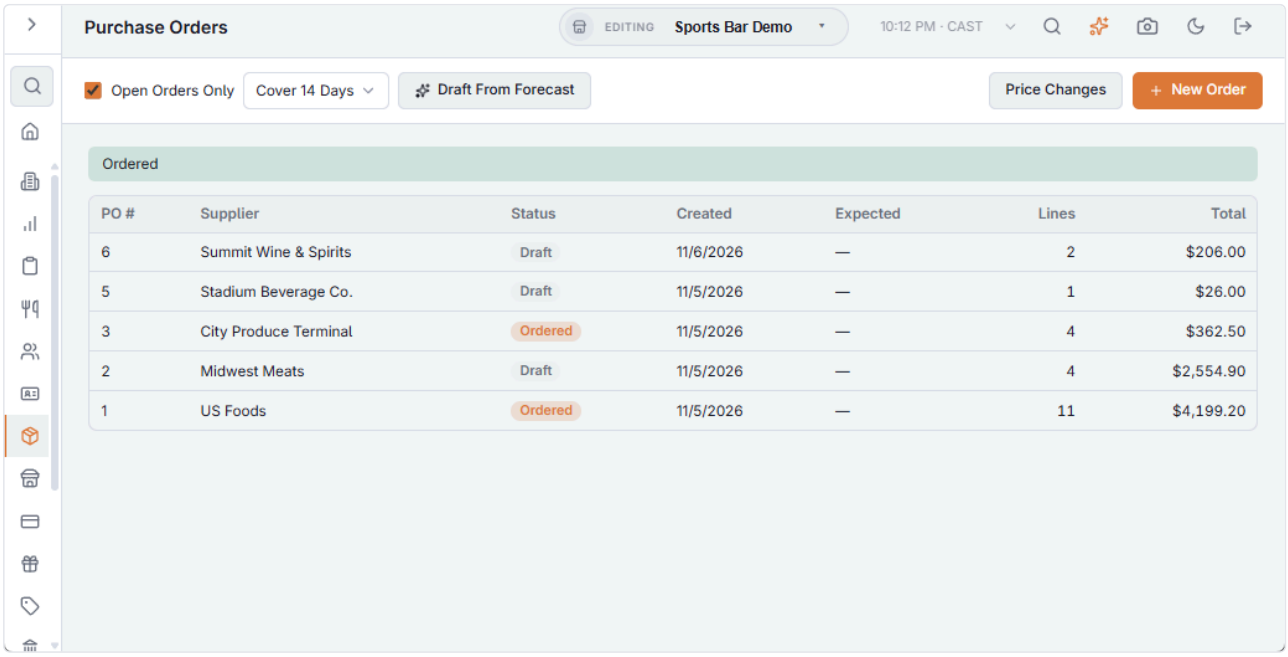
Purchase orders

Inventory › Operations

View online ↗

Build orders by hand, from reorder levels or from the forecast, then receive them into stock.

Back Office › Inventory › Operations › Purchase Orders is where you build what to buy, keep track of what is on its way, and receive it when it arrives.



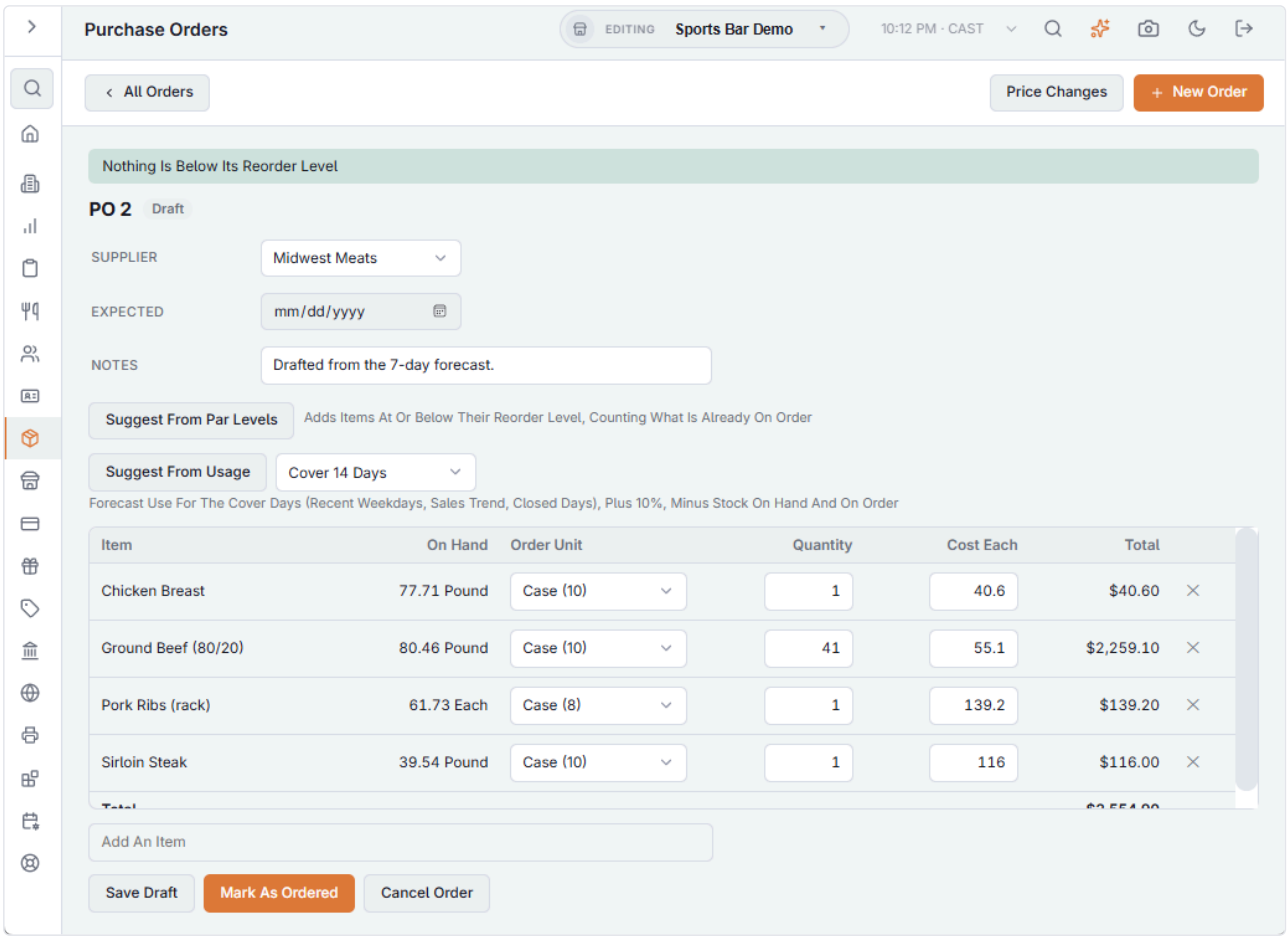
The order list

The list shows each order's **PO #**, **Supplier**, **Status**, **Created** and **Expected** dates, **Lines** and **Total**. **Open Orders Only** (on when the page opens) hides received and cancelled orders. Click an order to open it. The toolbar also has **Draft From Forecast** with its **Cover N Days** list (see Drafting purchase orders from the forecast), **Price Changes** and **New Order**.

Creating an order

1. Choose **New Order**. Pick the **Supplier** (or **No Supplier**), an **Expected** date and any **Notes**.
2. Add lines by typing part of an item's name in **Add An Item** and picking it from the list; the supplier's items are listed first. Or let the order fill itself:
   - **Suggest From Par Levels** adds items at or below their reorder level, counting what is already on order, and orders each back up to its maximum quantity (or its reorder level when no maximum is set).
   - **Suggest From Usage** adds what the next 3, 7 or 14 days are expected to use — see Ordering from the forecast.

   With a supplier picked, both suggestions only add items whose preferred supplier it is.
3. On each line set the **Order Unit** (Unit, Pack or Case, from the item's packaging), the **Quantity** and the **Cost Each**. **On Hand** shows beside each item, and the **Total** adds up as you go. ✕ removes a line.
4. **Save Draft** to keep working on it, or **Mark As Ordered** once it has gone to the supplier.



Order status

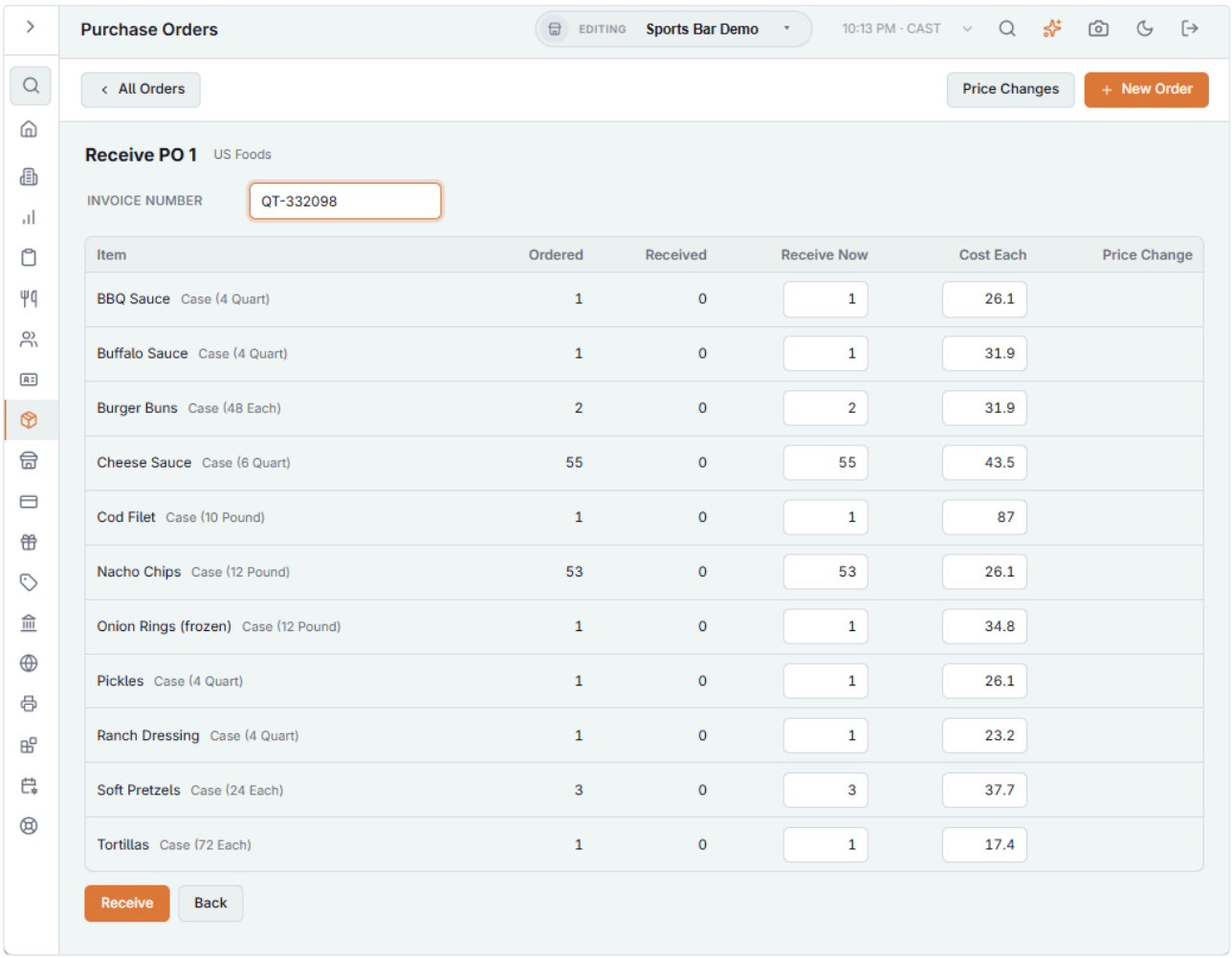
Orders move through **Draft**, **Ordered**, **Partly Received** and **Received**. Only a draft can be changed; open orders count as “on order” in both suggestions, so nothing is ordered twice.

Status	Buttons
Draft	**Save Draft**, **Mark As Ordered**, and **Cancel Order** once the draft has been saved.
Ordered	**Receive**, **Edit Order** (back to Draft) and **Cancel Order**.
Partly Received	**Receive** for the rest, or **Close As Received** when the remaining lines won’t arrive.

Cancel Order asks first; a cancelled order can’t be ordered or received.

Receiving an order

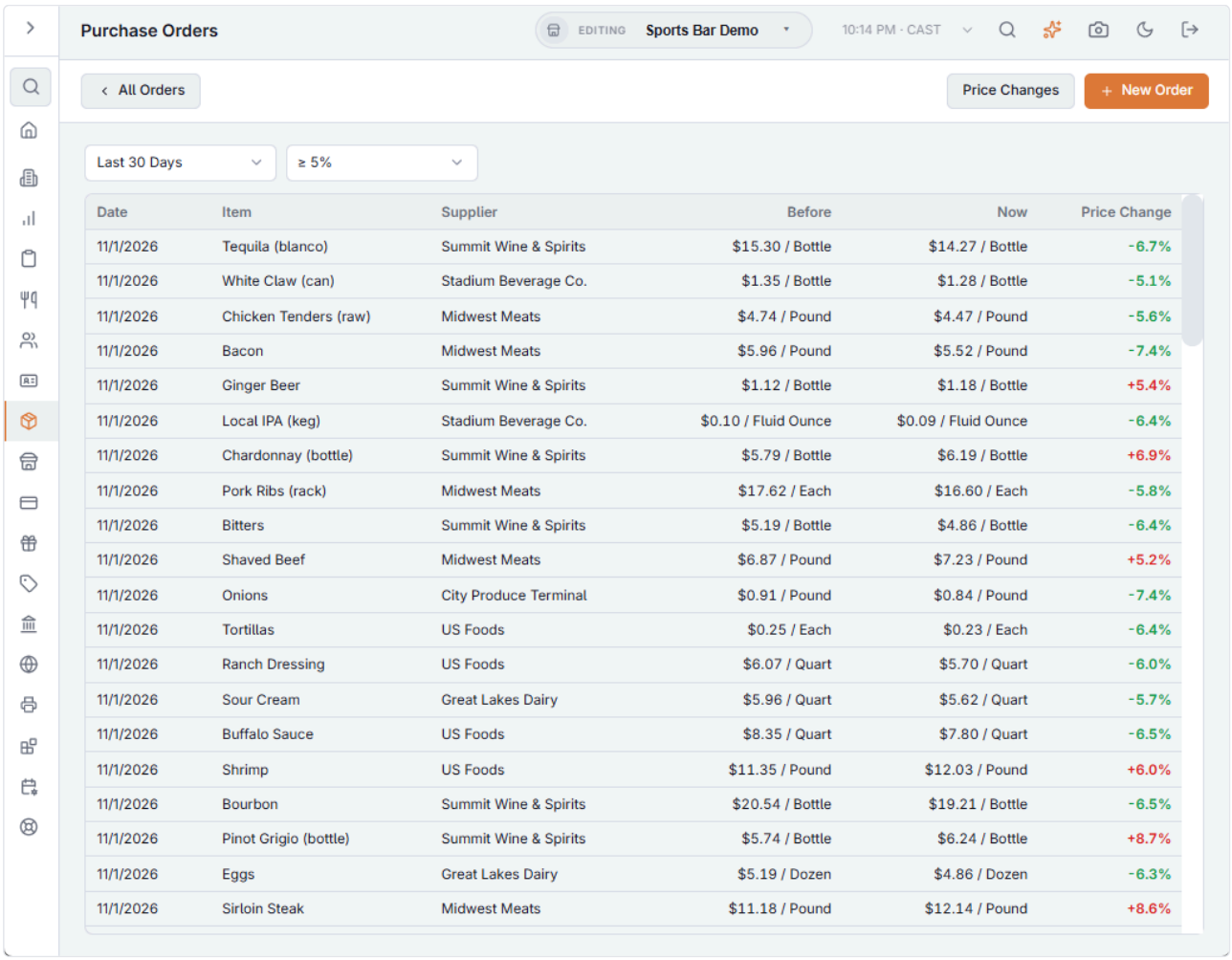
1. Open the order and choose **Receive**.
2. Enter the **Invoice Number** from the delivery paperwork. For each line the screen shows what was **Ordered** and already **Received**; enter what arrived in **Receive Now** and what it actually cost in **Cost Each**. More than ordered is accepted.
3. Choose **Receive**. The stock goes in at those costs. If part of the order is still coming, it becomes **Partly Received**; otherwise **Received**. **Back** returns to the order without receiving.



A line whose cost differs 5% or more from the order's **Cost Each** shows the change in the **Price Change** column, and the screen counts them (for example "2 Price Changes Of 5% Or More"). Receiving an order adds stock exactly as Receiving inventory does.

Price changes

Price Changes lists the deliveries whose cost per unit moved from the previous delivery of the same item. Pick the period (**Last 30**, **60** or **90 Days**) and the smallest change to show (5%, 10% or 20%). Each row shows the **Date**, **Item**, **Supplier**, the **Before** and **Now** cost per unit, and the **Price Change**.



Date	Item	Supplier	Before	Now	Price Change
11/1/2026	Tequila (blanco)	Summit Wine & Spirits	$15.30 / Bottle	$14.27 / Bottle	-6.7%
11/1/2026	White Claw (can)	Stadium Beverage Co.	$1.35 / Bottle	$1.28 / Bottle	-5.1%
11/1/2026	Chicken Tenders (raw)	Midwest Meats	$4.74 / Pound	$4.47 / Pound	-5.6%
11/1/2026	Bacon	Midwest Meats	$5.96 / Pound	$5.52 / Pound	-7.4%
11/1/2026	Ginger Beer	Summit Wine & Spirits	$1.12 / Bottle	$1.18 / Bottle	+5.4%
11/1/2026	Local IPA (keg)	Stadium Beverage Co.	$0.10 / Fluid Ounce	$0.09 / Fluid Ounce	-6.4%
11/1/2026	Chardonnay (bottle)	Summit Wine & Spirits	$5.79 / Bottle	$6.19 / Bottle	+6.9%
11/1/2026	Pork Ribs (rack)	Midwest Meats	$17.62 / Each	$16.60 / Each	-5.8%
11/1/2026	Bitters	Summit Wine & Spirits	$5.19 / Bottle	$4.86 / Bottle	-6.4%
11/1/2026	Shaved Beef	Midwest Meats	$6.87 / Pound	$7.23 / Pound	+5.2%
11/1/2026	Onions	City Produce Terminal	$0.91 / Pound	$0.84 / Pound	-7.4%
11/1/2026	Tortillas	US Foods	$0.25 / Each	$0.23 / Each	-6.4%
11/1/2026	Ranch Dressing	US Foods	$6.07 / Quart	$5.70 / Quart	-6.0%
11/1/2026	Sour Cream	Great Lakes Dairy	$5.96 / Quart	$5.62 / Quart	-5.7%
11/1/2026	Buffalo Sauce	US Foods	$8.35 / Quart	$7.80 / Quart	-6.5%
11/1/2026	Shrimp	US Foods	$11.35 / Pound	$12.03 / Pound	+6.0%
11/1/2026	Bourbon	Summit Wine & Spirits	$20.54 / Bottle	$19.21 / Bottle	-6.5%
11/1/2026	Pinot Grigio (bottle)	Summit Wine & Spirits	$5.74 / Bottle	$6.24 / Bottle	+8.7%
11/1/2026	Eggs	Great Lakes Dairy	$5.19 / Dozen	$4.86 / Dozen	-6.3%
11/1/2026	Sirloin Steak	Midwest Meats	$11.18 / Pound	$12.14 / Pound	+8.6%

To draft an order for every supplier at once from the forecast, see Drafting purchase orders from the forecast.

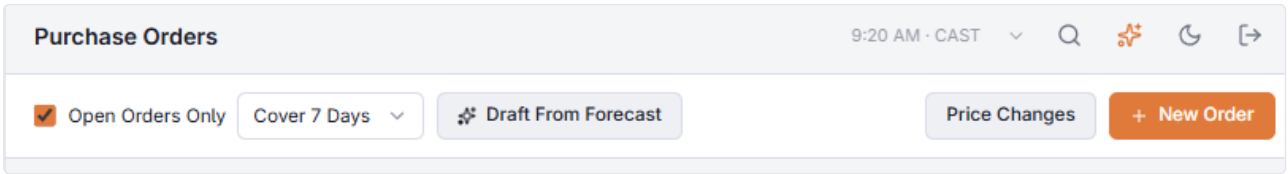
Drafting purchase orders from the forecast

Inventory › Operations

View online ↗

One click drafts an order for every supplier with what the coming days need.

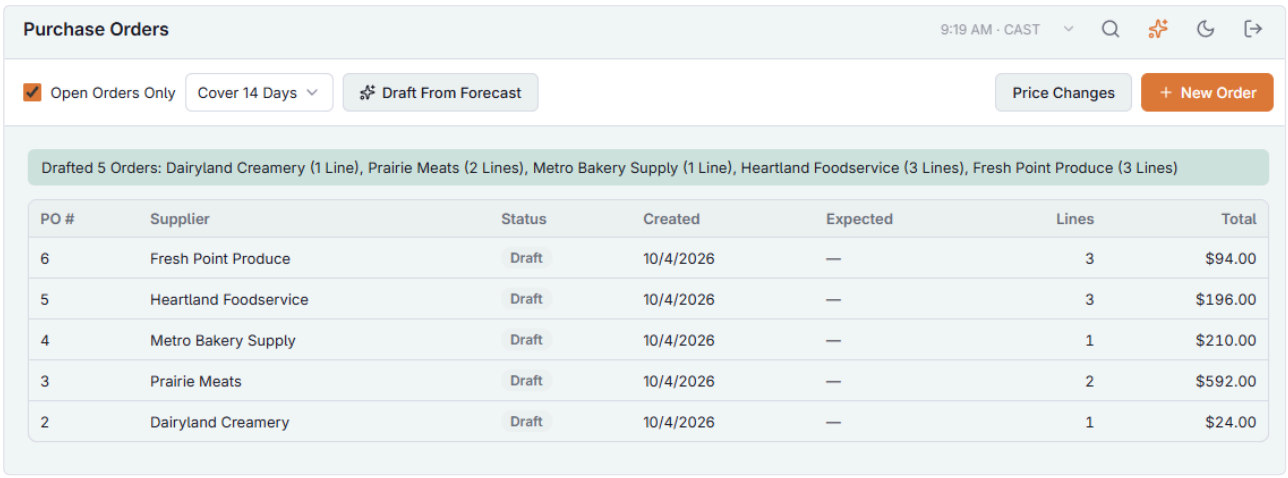
On **Back Office › Inventory › Operations › Purchase Orders**, pick how many days to cover (3, 7 or 14) and choose **Draft From Forecast**. The Back Office creates one **draft** purchase order per supplier, filled with what those days are expected to need.



What goes on each draft

- The same quantities as Ordering from the forecast: expected use plus 10%, minus what is on hand and already on order, in whole cases.
- Items are grouped by their preferred supplier. Items with no supplier set are counted and reported instead of ordered — set a supplier on the item to include it.
- A supplier that already has an open draft is skipped, so clicking twice does not create duplicates.

A message then lists the drafts it made (supplier and number of items), the suppliers it skipped, and how many items have no supplier.



Nothing is sent

Drafts go to nobody. Open each one, adjust it, and mark it ordered when you place the order — see Purchase orders.

The assistant can do the same: *draft our orders for the weekend* shows each supplier, item count and estimated total, and creates the drafts after you confirm.

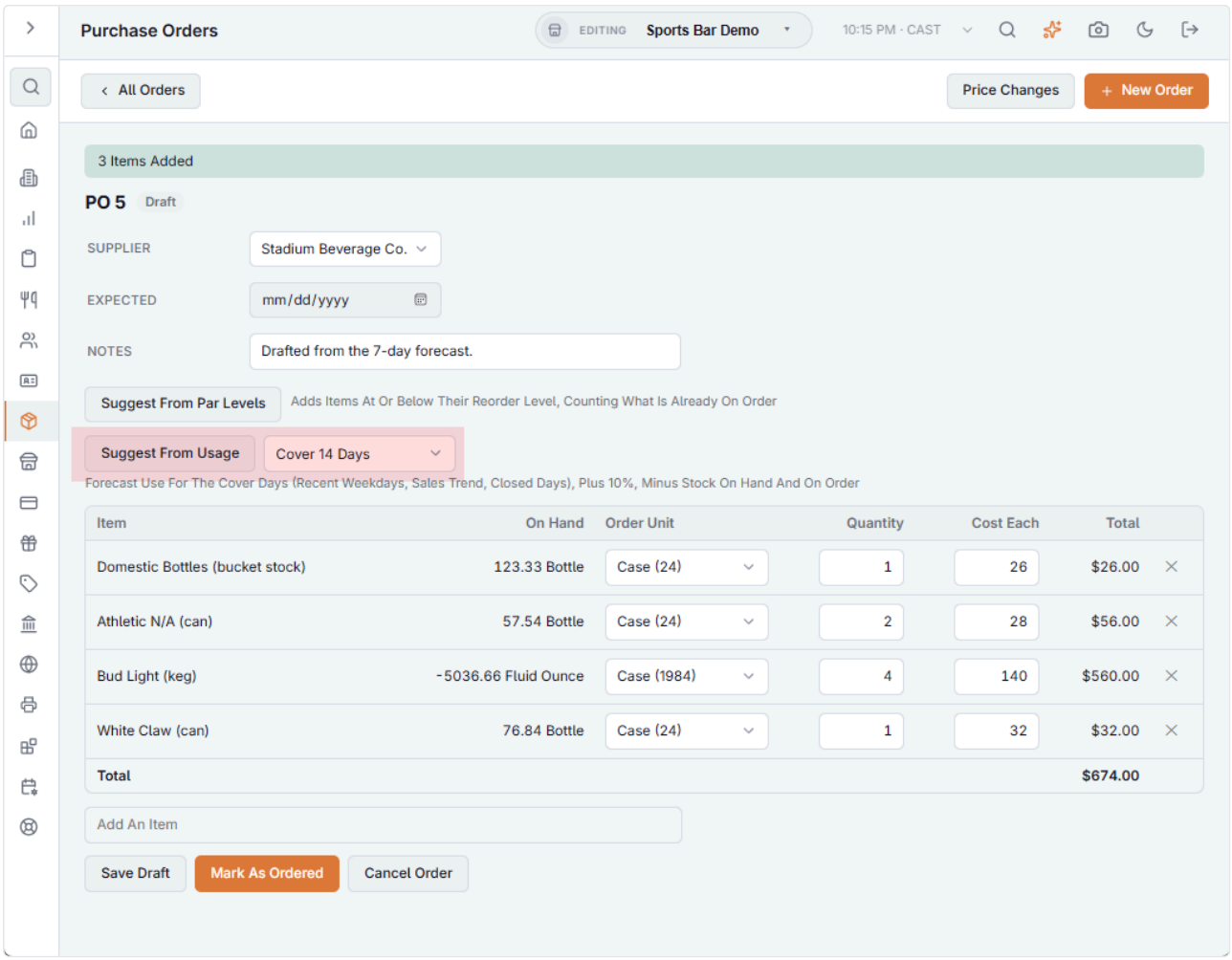
Ordering from the forecast

Inventory › Operations

View online ↗

How Suggest From Usage works out what the next few days will use, and what it takes off.

On a draft purchase order, pick **Cover 3 Days**, **Cover 7 Days** or **Cover 14 Days** and choose **Suggest From Usage**. The order fills with what those days are expected to use, less what you already have — see Purchase orders for the rest of the order.



What it works out, per ingredient

1. The expected use for each day in the cover period, starting today.
2. Plus 10% as a safety margin.
3. Minus what is **on hand** and what is already **on order** on other open orders.
4. Rounded up to whole cases when the item has a case size, otherwise whole units.

Items that don't need ordering are left off. With a supplier picked, only items whose preferred supplier it is are considered.

How the expected use is forecast

- It uses the same forecast as Demand forecast: the store's daily sales forecast, with the weekday pattern, the recent sales trend, and the days the store is usually closed counted as zero.
- An ingredient used on most days follows its own recent use on the same weekday, weighted toward the most recent weeks.
- An ingredient used on fewer than 8 days follows its share of the forecast sales.
- The history is the last 8 weeks, counting only full days since sales started coming off stock, so a new setup isn't under-ordered.

> The forecast knows your weekly rhythm, not your calendar. Before a holiday, an event or a menu change, raise the quantities by hand.

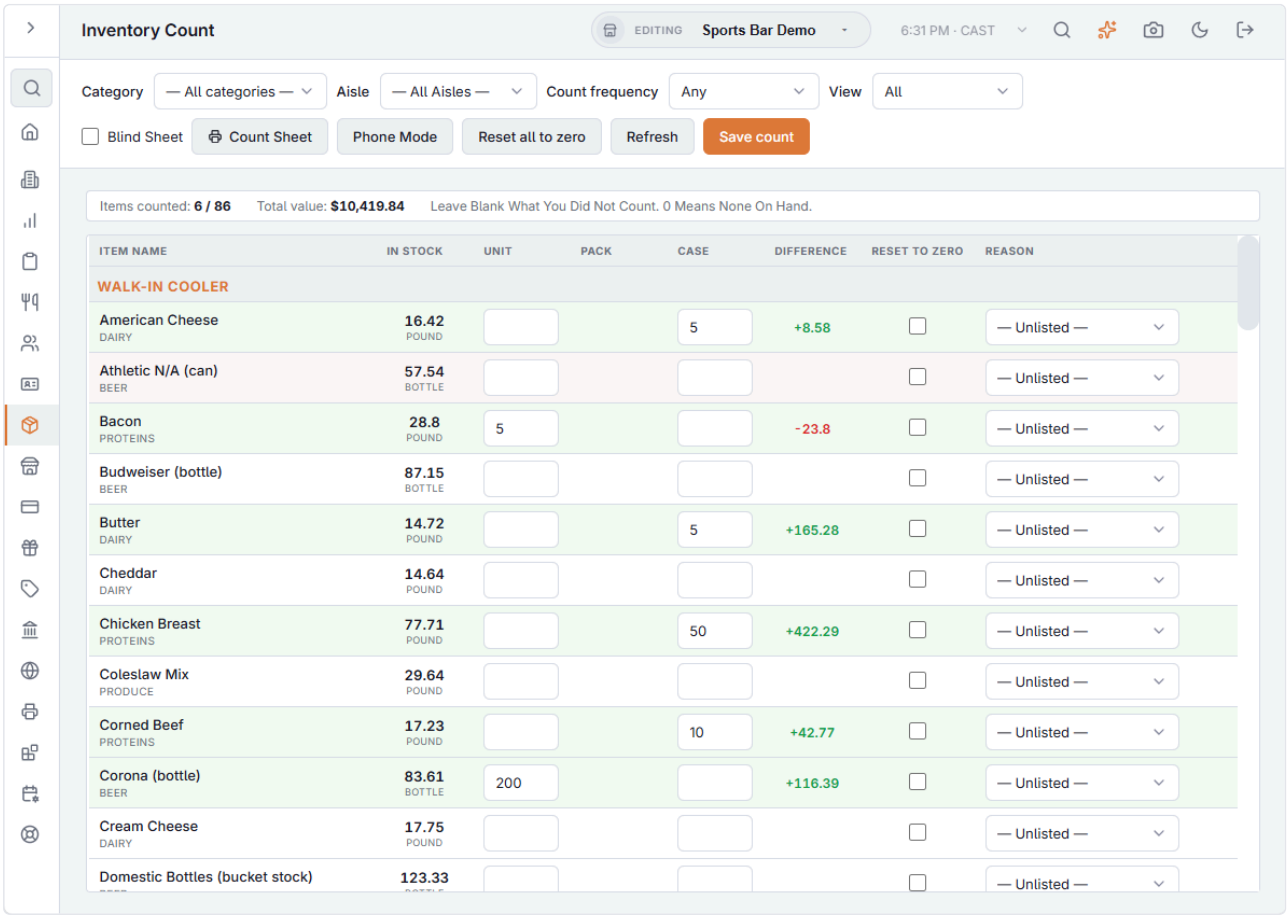
Inventory counts

Inventory › Operations

View online ↗

Counting stock on a sheet or a phone, what blank and zero mean, and what saving a count changes.

Back Office › Inventory › Operations › Inventory Count reconciles the system's stock with what is on the shelf. Enter what you counted, save, and the difference is posted as an adjustment.



Choosing what to count

- Hidden items are not listed. **Category**, **Aisle** (**All Aisles** for every aisle) and **Count frequency** (Daily, Weekly, Bi-weekly or Monthly, as set on each item) narrow the sheet. **View** switches between **All** and **Low stock** (at or below the reorder level).
- The sheet follows the stock aisles in their sort order, then item name, so you can walk the shelves in order; items without an aisle are grouped under **No Aisle**.
- The banner shows **Items counted** out of the items shown and the **Total value** of their stock.

Counting on the sheet

1. Enter what's on the shelf in the **Unit** box. Items with packaging also get **Pack** and **Case** boxes, which add up into units. **Leave blank what you did not count — 0 means none on hand.**
2. The **Difference** column shows counted minus **In stock** as you type, so a typo stands out before it's saved.
3. Pick a **Reason** for a line if you want the adjustment to carry one; otherwise it is **Unlisted**. Reasons come from Inventory settings.
4. **Reset to zero** on a line sets the item to zero whatever is on hand. **Reset all to zero** marks every line shown.
5. What you enter stays when you change filters, so you can count one area, switch to the next and save once. **Refresh** reloads the sheet and discards what you entered.

Saving

Save count lists every counted line — *Reduce quantity to*, *Increase quantity to*, *No change* or *Reset to zero* — for you to **Confirm**. Then the page reports how many items were updated; if any failed, they are listed with the reason. Only the lines you counted are posted.

What saving a count does

- A count posts the **difference** between what you counted and the in-stock figure the sheet showed. Sales and deliveries that happen while the sheet is open stay on the books — nothing is erased.

- Found less: the missing stock comes off oldest first, at its real cost, and is logged as a shortage. Found more: it is added back at the last purchase cost, and is not treated as a purchase.
- Sales still waiting to come off stock are applied first, so they are never mistaken for shrinkage.
- Each item's last count date is updated.

Counting on phones, as a team

Counting at the shelves is done on the staff site: its **Inventory Count** screen lets several people count at once, and each item saves as it is typed. While a team count is open, this page shows a **Team Count In Progress** bar with the progress, who started it and who is counting; managers review the differences and post the count from the bar's **Review & Post**. See Counting inventory as a team on your phones.

A team count is separate from the grid on this page: its counts don't appear in the grid, and **Save count** doesn't post them.

> Count differences are adjustments, visible in Inventory logs (Shortages, Overages and Shrinkage tabs) and in the Inventory audit log. A count entered carelessly is worse than no count: it resets the stock to a wrong number.

After saving a count with differences, **Explain Differences** shows the likely cause of each big one — see Explaining count differences.

Counting on paper

The **Count Sheet** button prints the items shown as a PDF in the same walk order, with boxes for units, packs and cases; tick **Blind Sheet** to leave the on-hand column off. See Printing a count sheet.

> Give each item a **Count frequency** on the item editor — daily for the expensive items that move fast (proteins, liquor), weekly for staples, monthly for the storeroom — and filter by it to count the right set each time.

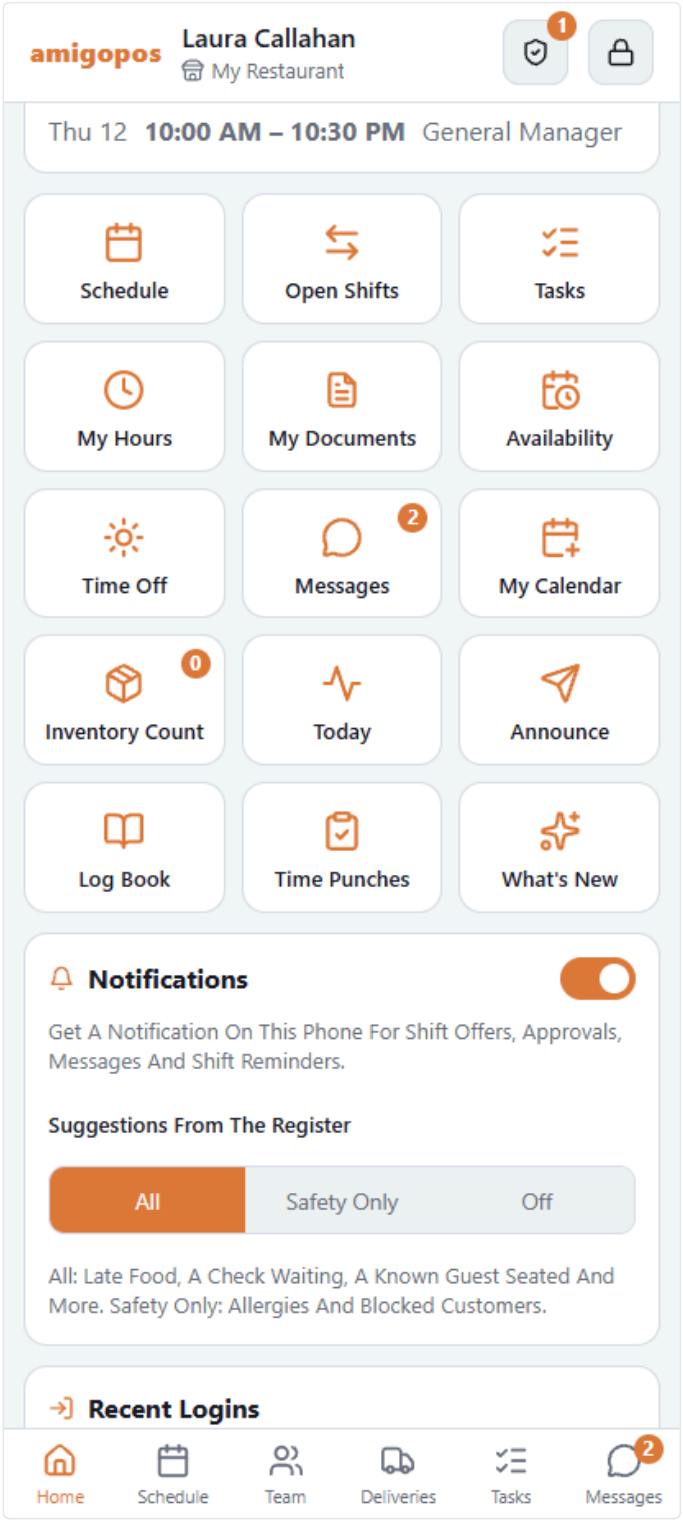
Counting inventory as a team on your phones

Inventory › Operations

View online ↗

Staff count the shelves on the staff site, several people at once; a manager reviews the differences and posts the count.

Inventory is counted at the shelves, phone in hand. The staff site's **Inventory Count** screen lets several people count at the same time — each takes an aisle — and saves every item the moment it is typed, so nothing is lost if a phone drops its signal. A manager then reviews the differences and posts the count, on the phone or in Back Office.

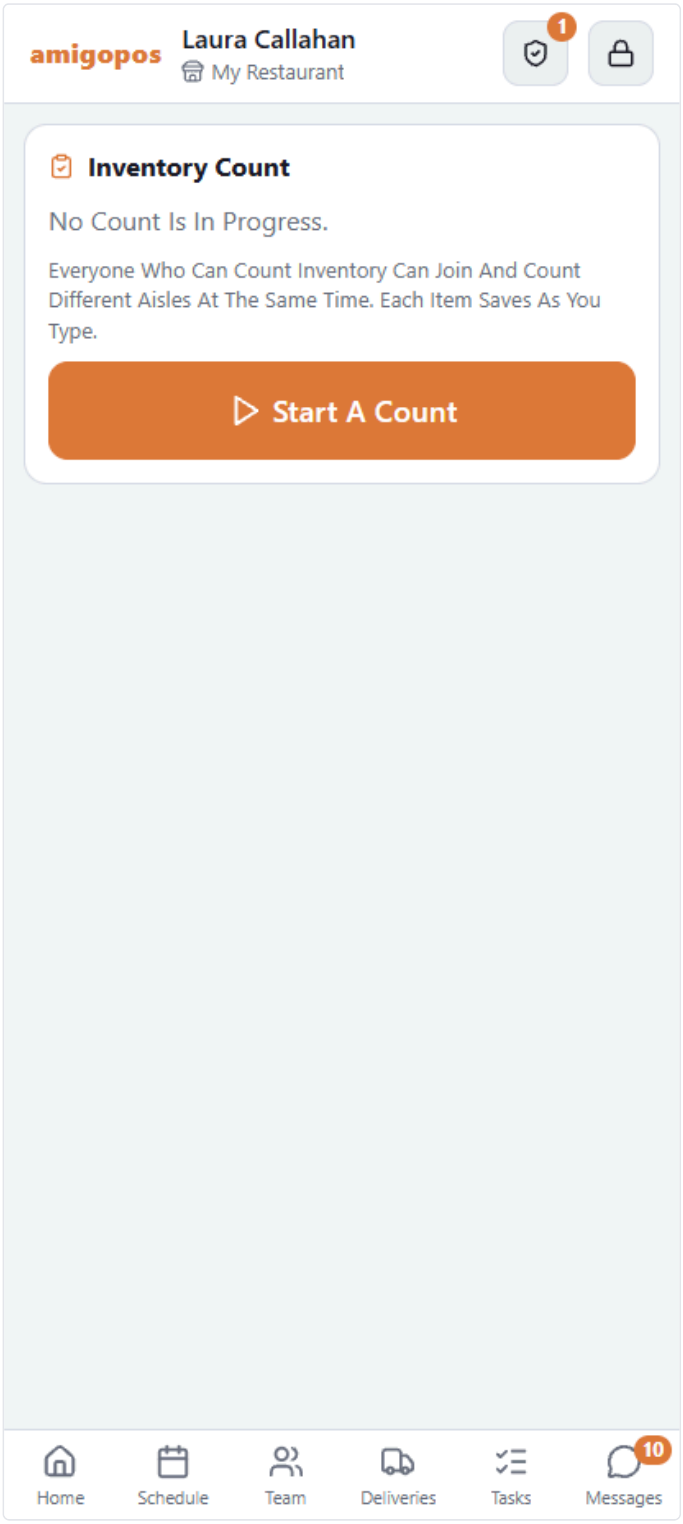


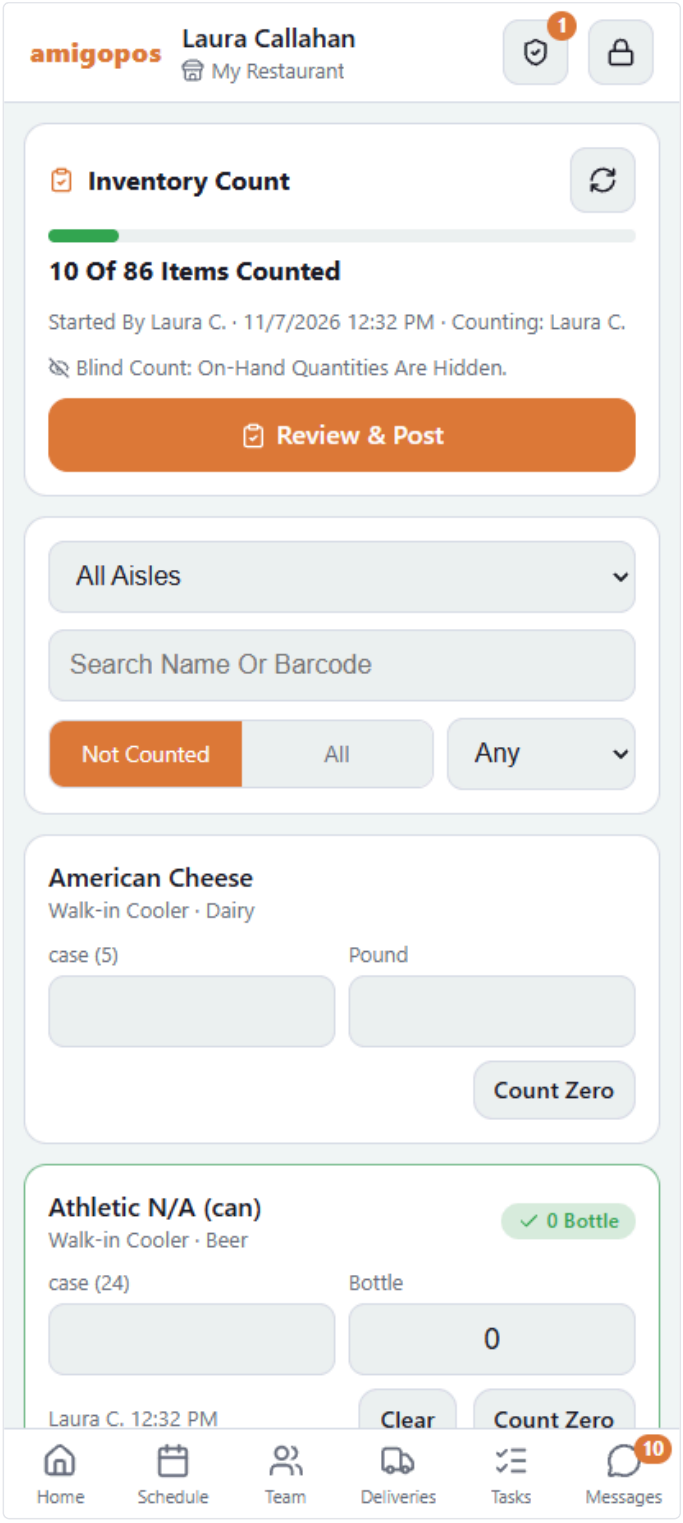
Who can count

- Anyone whose job has **Inventory Count** ticked (Inventory group of the job's permissions) — staff without Back Office access included. Jobs with **Manager Screen** can always count. See Jobs, roles, and permissions.
- Only managers (**Manager Screen**) can post or discard a count.
- The **Inventory Count** tile shows on the staff site's Home screen only for these people. Setting up the staff site is in Using the staff site on your phone.

Starting or joining a count

1. On the staff site's Home screen, tap **Inventory Count**.
2. If no count is in progress, tap **Start A Count**. A store has one count at a time: everyone who opens the screen while it is open joins the same count, and the tile's badge shows how many items have been counted so far.
3. The top card shows the progress (for example *214 Of 860 Items Counted*), who started the count and who is counting.

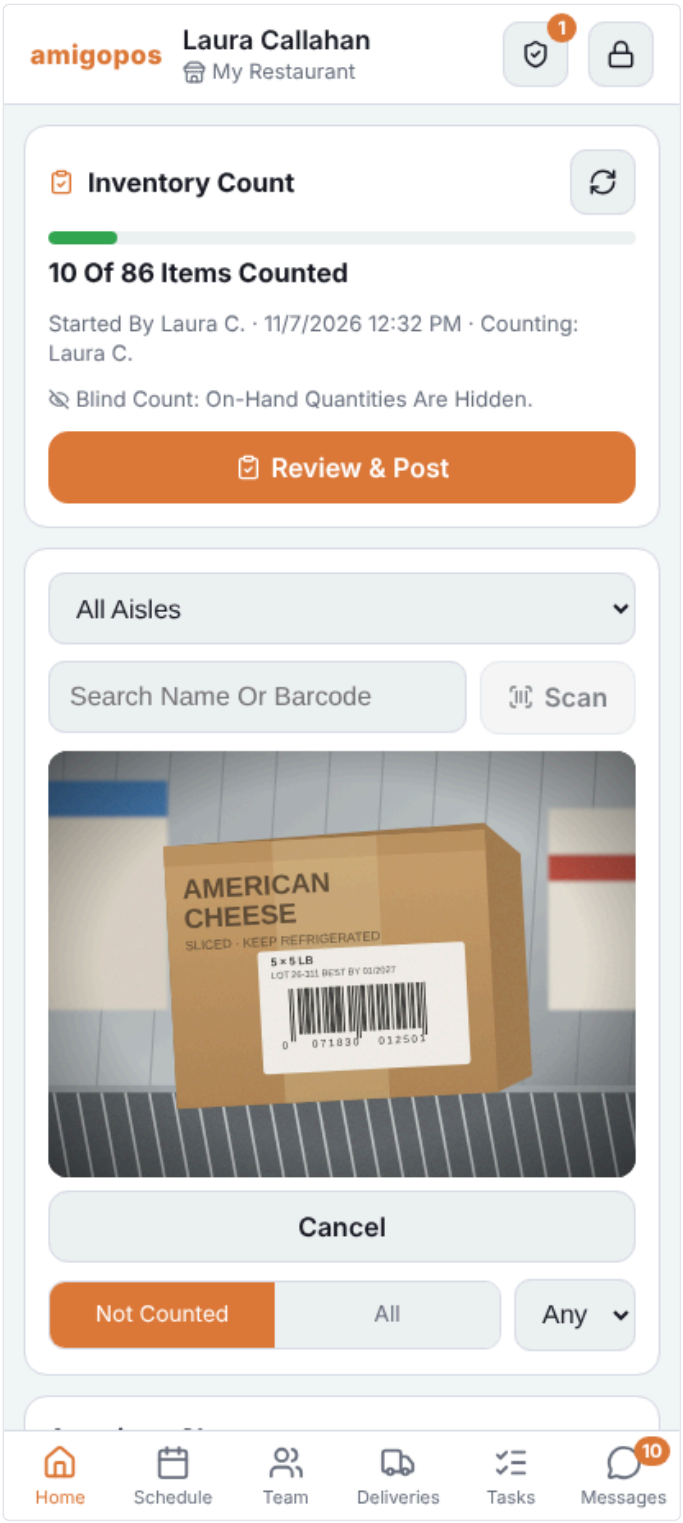




Finding the items

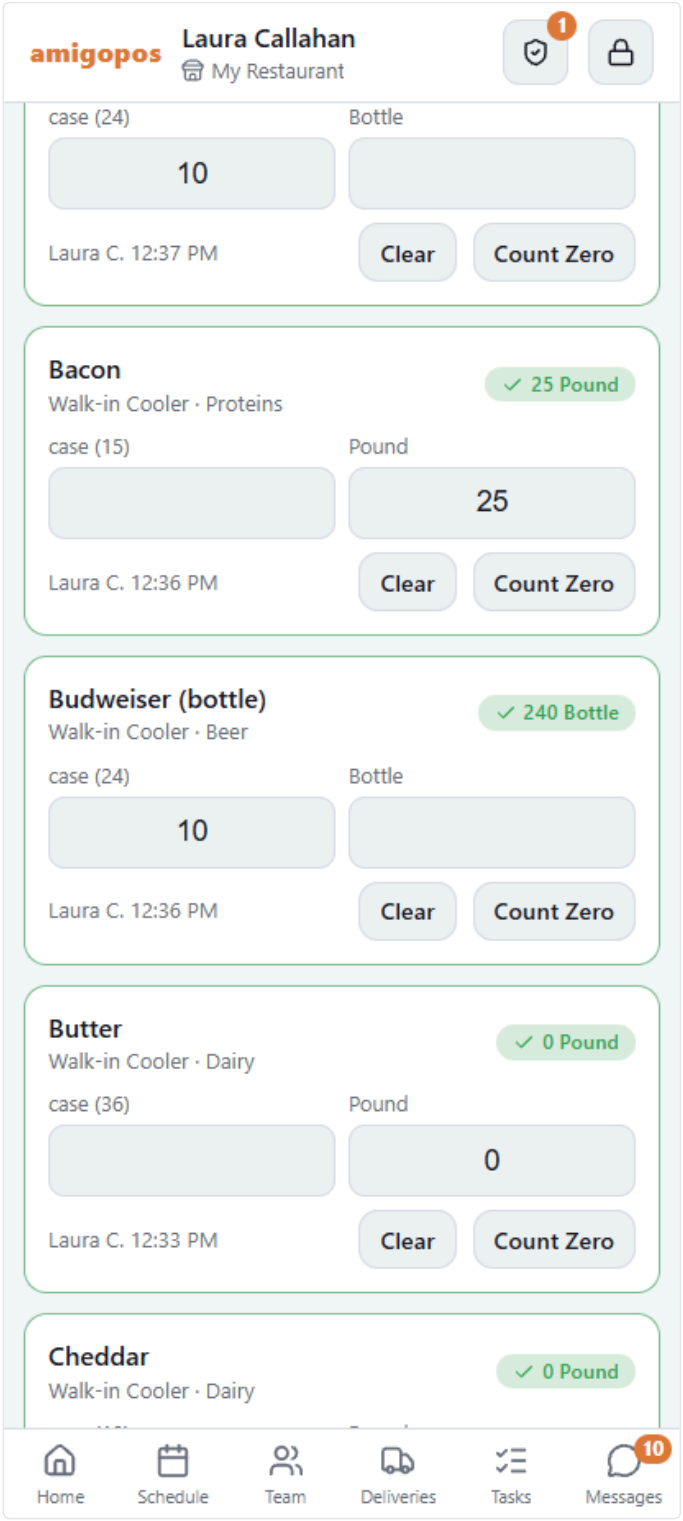
- **Aisle** — pick an aisle and its items are listed in shelf order (aisles in their sort order, then item name). **All Aisles** lists everything; **No Aisle** lists items without one. Split the aisles between the people counting.
- **Not Counted** (the default) hides the items someone has already counted, so the list is what is left to do. **All** shows every item. An item you are typing stays on the list until you leave the screen.
- The frequency picker narrows the list to the items counted **Daily**, **Weekly**, **Bi-weekly** or **Monthly**, as set on each item.

- **Search Name Or Barcode** looks through the whole store, whatever aisle is picked, by item name or by the item's unit, pack or case SKU.
- **Scan** opens the phone's back camera and finds the item by its barcode. It needs a browser that can read barcodes (Chrome on Android); where it can't, such as Safari on iPhone, the button is not shown — type the SKU into the search box instead.
- Long lists show 60 items at a time, with **Show More** at the bottom.



Typing a count

1. Type what is on the shelf. Every item has a box for its count unit; items with packs or cases also get **Pack** and **Case** boxes (the size is in brackets), which add up into units.
2. Each item saves when you leave the box — there is no save button. A green chip then shows the total in units, and the line shows who counted it and when.
3. **Count Zero** records an item as out (0 on hand). **Clear** removes the count, so the item is not counted again. As on the Back Office sheet, a blank item is *not counted* and 0 means *none on hand*.
4. If two people count the same item, the last one saved is the count, and the line shows who saved it.

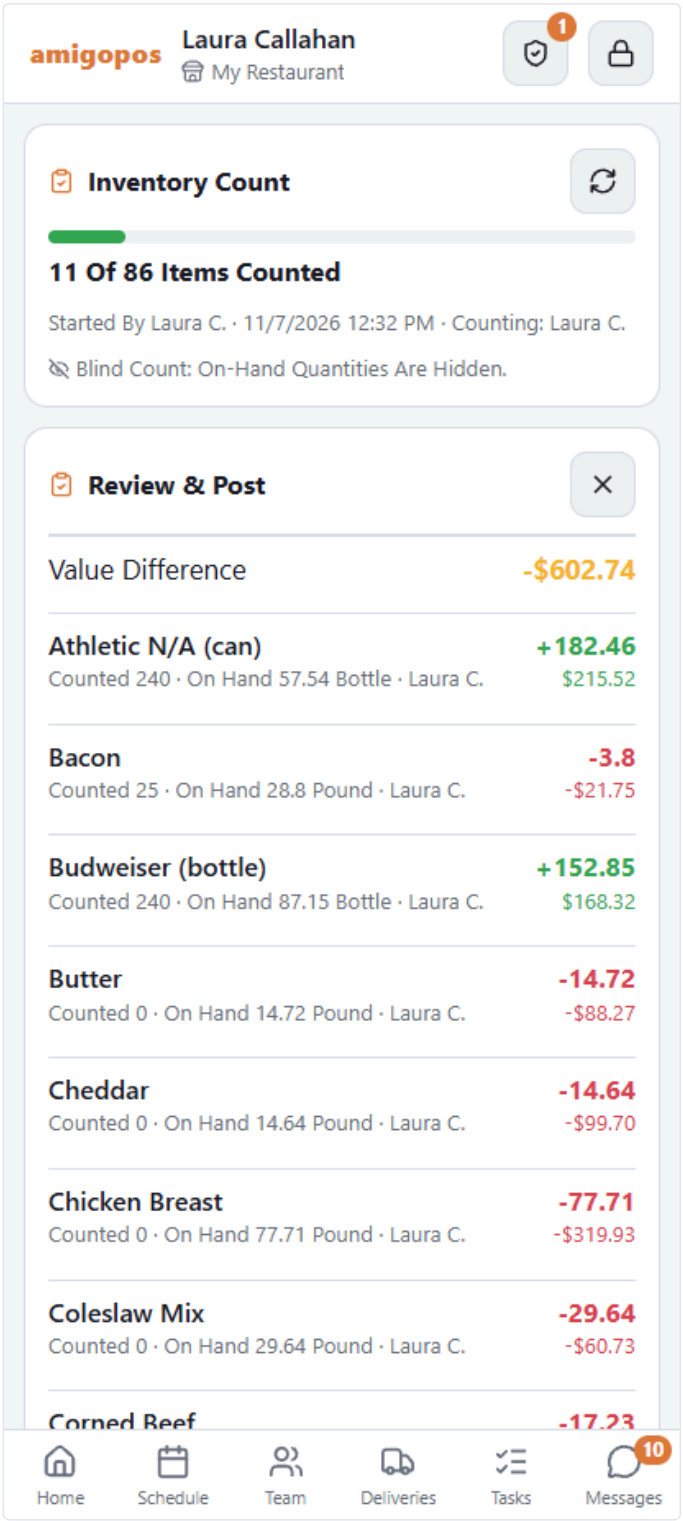


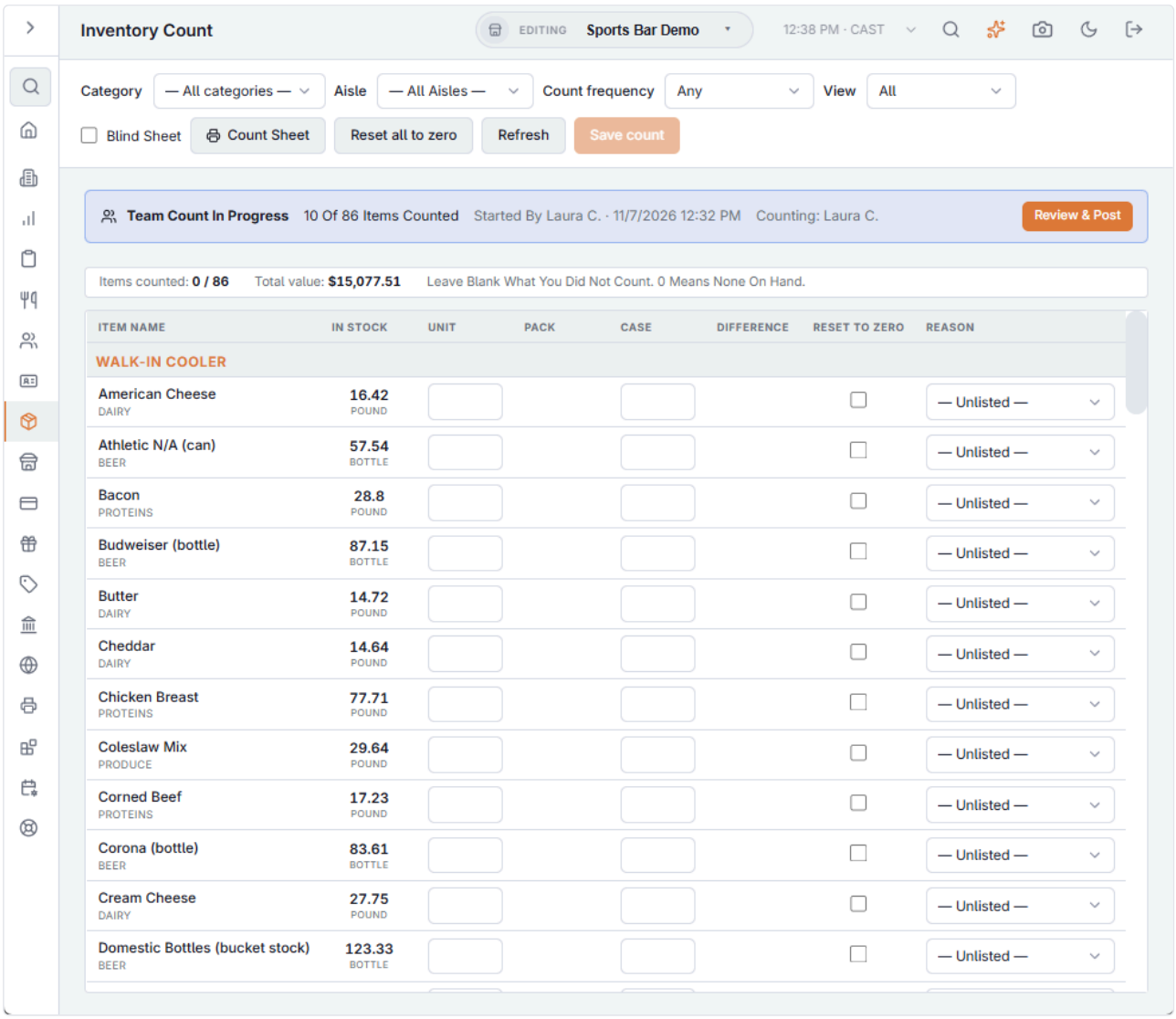
Blind count. By default the count screen does not show how much the system thinks is on hand, so people count what is really there instead of confirming a number. Managers still see on-hand and the differences when they review. The setting is **Blind Count** on the **Team Count** card of the Stock Rules tab — see Stock rules.

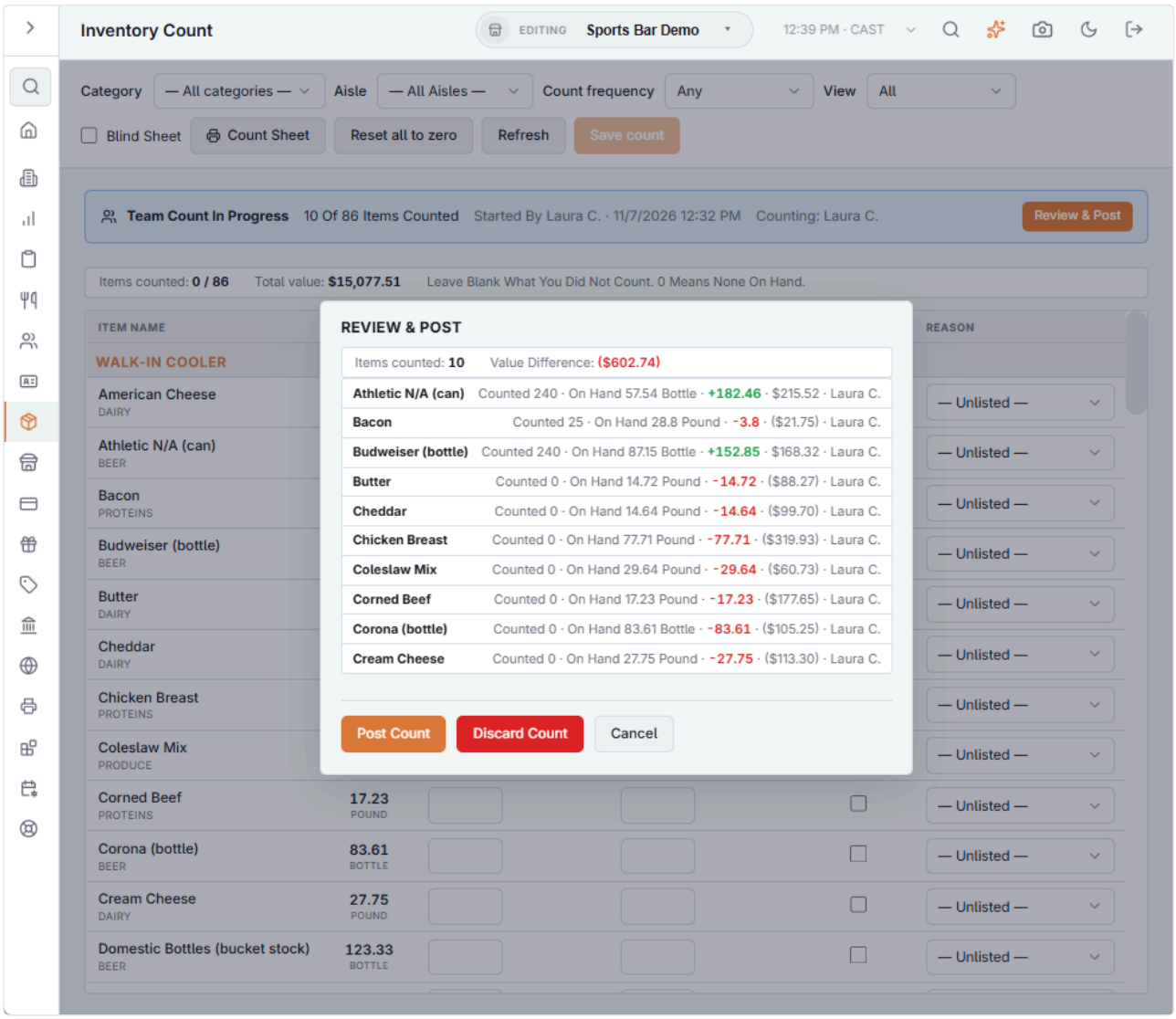
Reviewing and posting (managers)

On the phone, a manager taps **Review & Post** on the top card. In Back Office, **Inventory › Operations › Inventory Count** shows a **Team Count In Progress** bar while a count is open, with the same **Review & Post**.

- The review lists every counted item: what was counted against what was on hand when it was counted, the difference (short in red, over in green), its value at the item's cost, and who counted it. The **Value Difference** at the top is the total.
- **Post Count** applies the count to stock. Both places ask before posting.
- **Discard Count** closes the count without changing anything in stock. It asks first.




Inventory Count
EDITING Sports Bar Demo
12:38 PM · CAST
Category — All categories —
Aisle — All Aisles —
Count frequency Any
View All
Blind Sheet
Count Sheet
Reset all to zero
Refresh
Save count
Team Count In Progress 10 Of 86 Items Counted Started By Laura C. · 11/7/2026 12:32 PM Counting: Laura C.
Review & Post
Items counted: 0 / 86 Total value: $15,077.51 Leave Blank What You Did Not Count. 0 Means None On Hand.
ITEM NAME IN STOCK UNIT PACK CASE DIFFERENCE RESET TO ZERO REASON
WALK-IN COOLER
American Cheese DAIRY 16.42 POUND — Unlisted —
Athletic N/A (can) BEER 57.54 BOTTLE — Unlisted —
Bacon PROTEINS 28.8 POUND — Unlisted —
Budweiser (bottle) BEER 87.15 BOTTLE — Unlisted —
Butter DAIRY 14.72 POUND — Unlisted —
Cheddar DAIRY 14.64 POUND — Unlisted —
Chicken Breast PROTEINS 77.71 POUND — Unlisted —
Coleslaw Mix PRODUCE 29.64 POUND — Unlisted —
Corned Beef PROTEINS 17.23 POUND — Unlisted —
Corona (bottle) BEER 83.61 BOTTLE — Unlisted —
Cream Cheese DAIRY 27.75 POUND — Unlisted —
Domestic Bottles (bucket stock) BEER 123.33 BOTTLE — Unlisted —



What posting does

- Each item is compared with what was on hand **at the moment it was counted**, after the sales waiting to come off stock were applied. Sales made after an item was counted stay on the books, so a count spread over a morning is still fair.
- Posting works like saving a count on the Back Office page: found less comes off oldest first at its real cost and is logged as a shortage; found more is added back at the last purchase cost. Each item's last count date is updated. See Inventory counts.
- If an item can't be posted, the others still are; the ones that failed stay on the open count, and the review says how many. Post again to finish them.
- Once every item is posted the count closes, and the next **Start A Count** begins a new one.

A team count is separate from the grid on the Back Office Inventory Count page: counts typed on phones do not appear in the grid, and the grid's **Save count** does not post them. Use one or the other for a given count.

Give each person an aisle, start with the walk-in before service, and use the **Daily** filter for the nightly count of proteins and liquor.

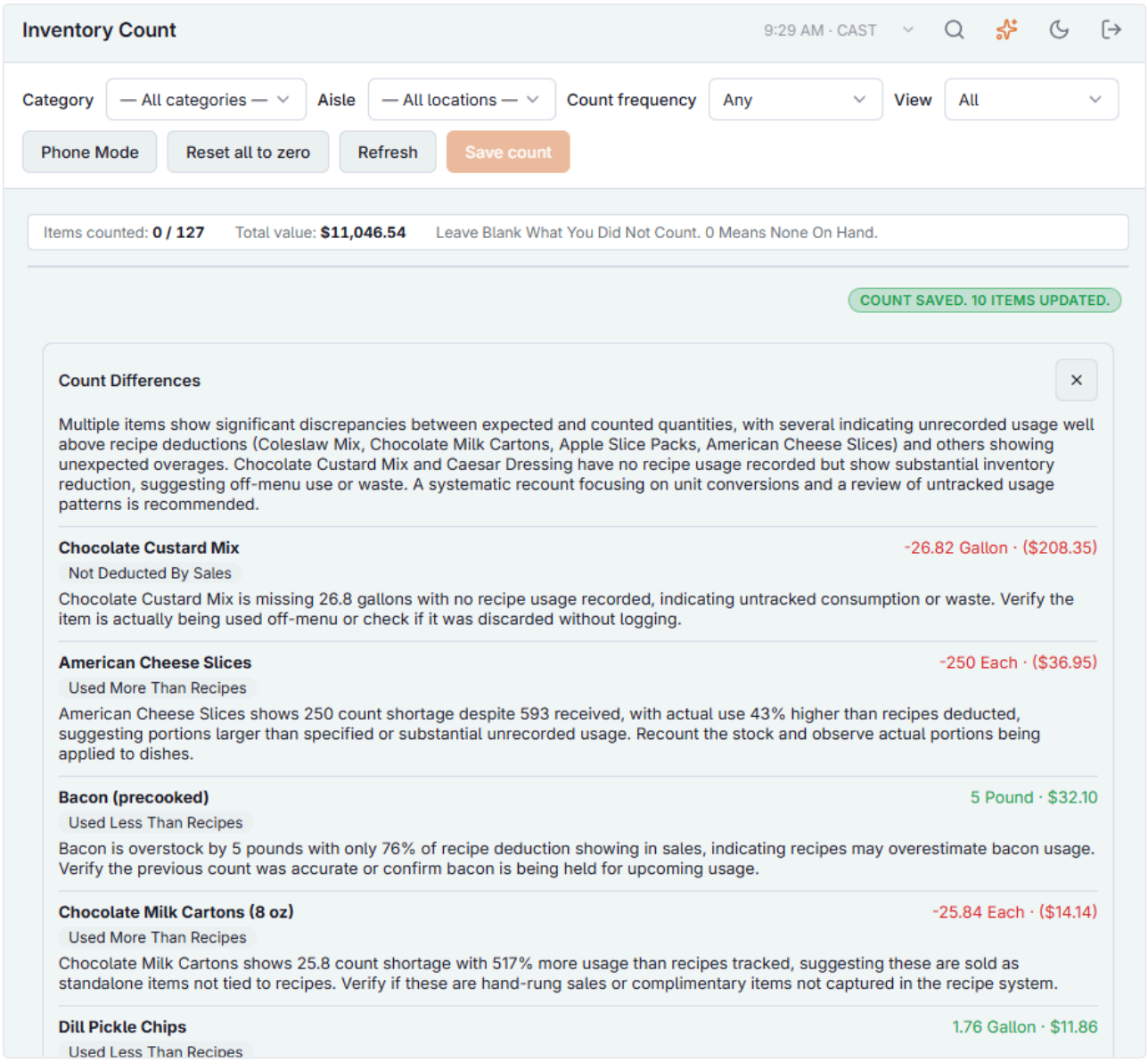
Explaining count differences

Inventory › Operations

View online ↗

After a count, see the likely cause of each big difference and what to check.

After you save an inventory count that has differences, **Explain Differences** appears next to the saved message. It looks at the items with the biggest differences by value (up to 15) and what happened to each since its previous count.



The labels

These come from your own records, not from the AI:

- **Possible Pack Or Case Mix-Up** — the difference is exactly one to three packs or cases, as if something was counted in the wrong unit.
- **Matches A Delivery** — the difference is the size of one delivery: entered but not all received, or received but never entered.
- **Not Deducted By Sales** — a shortage on an item that sales never took off (no recipe uses it), so all its use only shows at a count.
- **Used More Than Recipes** / **Used Less Than Recipes** — the difference is 10% or more of what recipes took off: bigger portions, unrecorded waste or theft, or recipes set higher than what is served.
- **First Count** — the item had no earlier count, so the last 14 days are used.

The explanations

For each item the AI writes one or two sentences with the most likely cause and one thing to check, plus a short summary of the whole count, in your language. It works only from the numbers shown and says so when nothing explains a difference — then a recount is the next step. When AI is not available, the numbers and labels still show.

See also Inventory counts.

Printing a count sheet

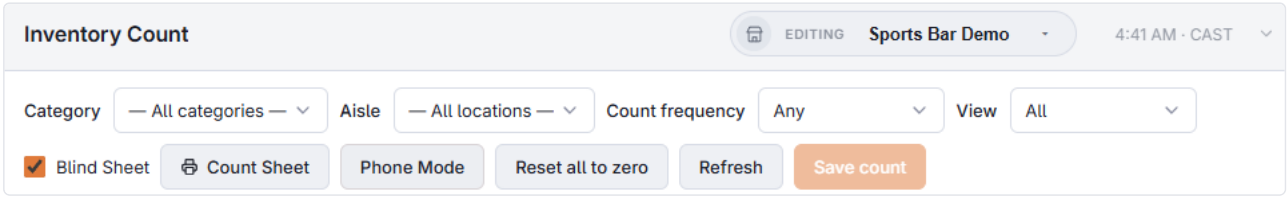
Inventory › Operations

View online ↗

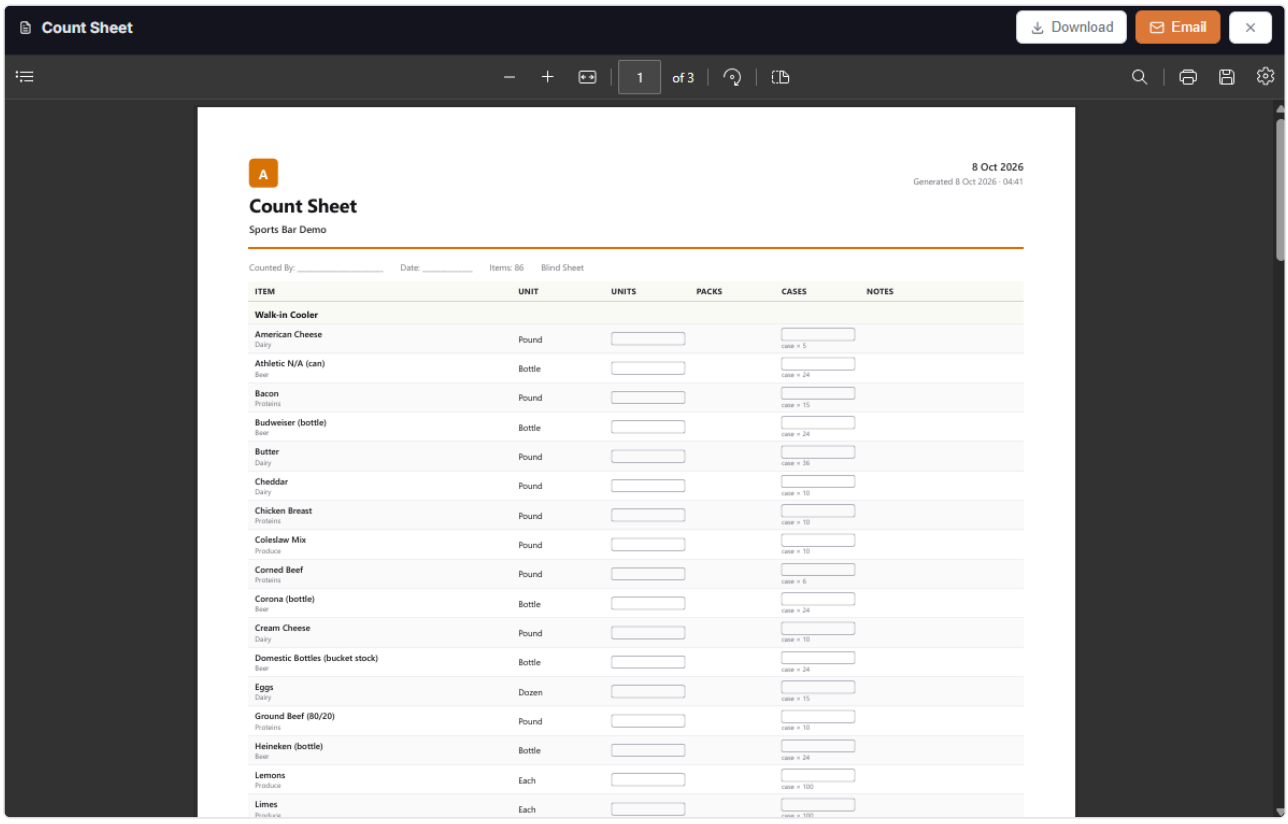
A PDF of the Inventory Count page in walk order, with boxes for units, packs and cases, and an optional blind version without the on-hand column.

Some stores count on paper and key the numbers in afterwards. The **Count Sheet** button on **Back Office › Inventory › Operations › Inventory Count** prints the items the page shows — the same filters, the same walk order (aisles in their sort order, then item) — with a blank box per item for units, packs and cases and a notes column. Hidden items are left off.

1. Set the filters as for an on-screen count: category, aisle, count frequency, or the Low stock view.
2. Tick **Blind Sheet** if the counter should not see the on-hand figure; otherwise it prints next to the item, in red when the item is at or below its reorder level.
3. Tap **Count Sheet**. The PDF preview opens with Download and Email buttons.



Each row names the item and its count unit, and prints the pack and case sizes under the boxes (“Pack × 6”, “Case × 24”, using the unit’s pack and case descriptions) so the counter knows what a pack is. The header shows the filters used, the header row repeats on every page, and a counted-by / date line sits at the top.



Entering the sheet

Back on the Inventory Count page with the same filters, type each line as counted. Leave a line blank when the item was not counted and write 0 only for an item that is really out — the same rule as the on-screen grid. The sheet’s footer repeats it for the counter. See Inventory counts for how counts are posted.

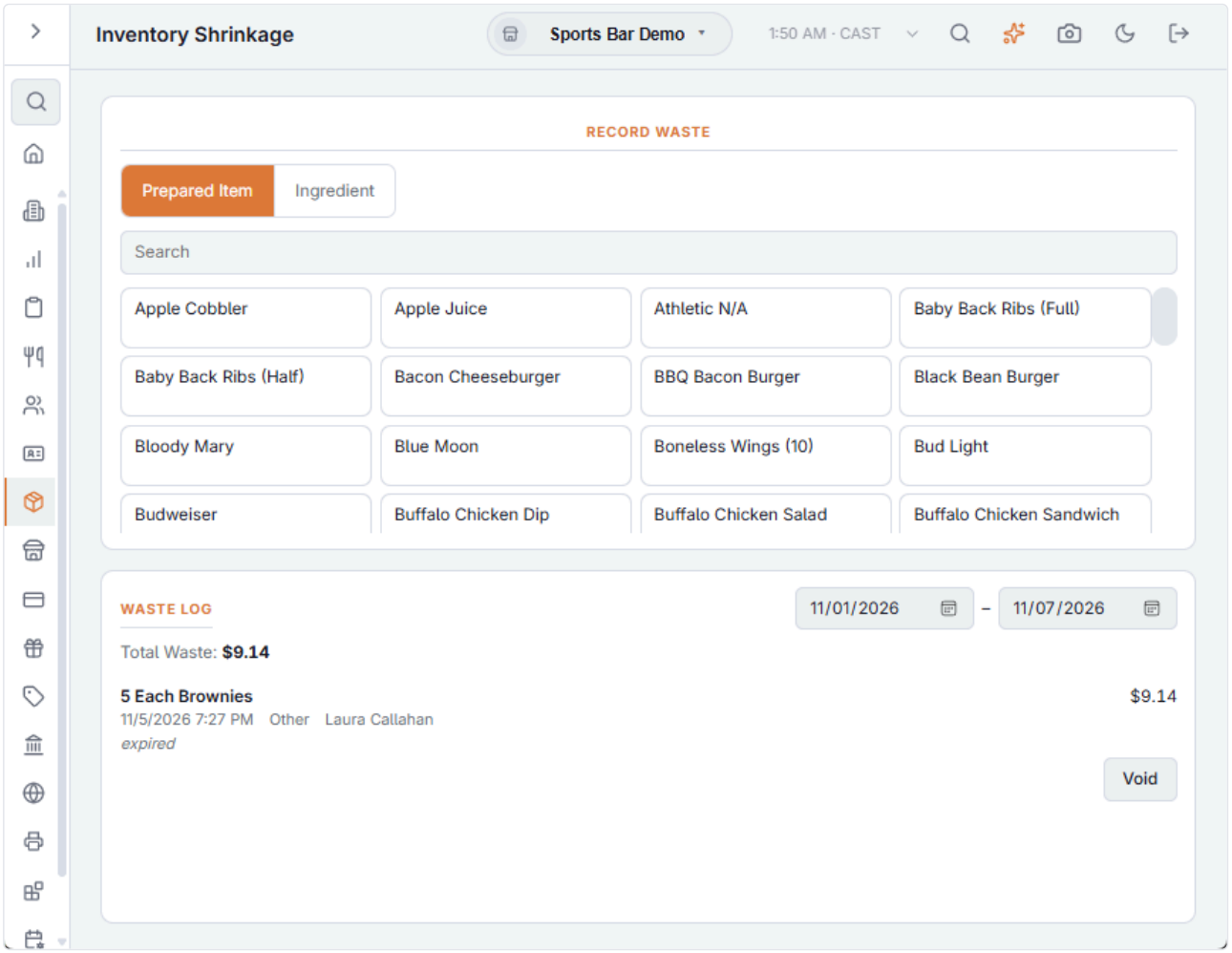
Waste and shrinkage

Inventory › Operations

View online ↗

Recording waste of ingredients or prepared items, at the POS or in the Back Office, and undoing a mistake.

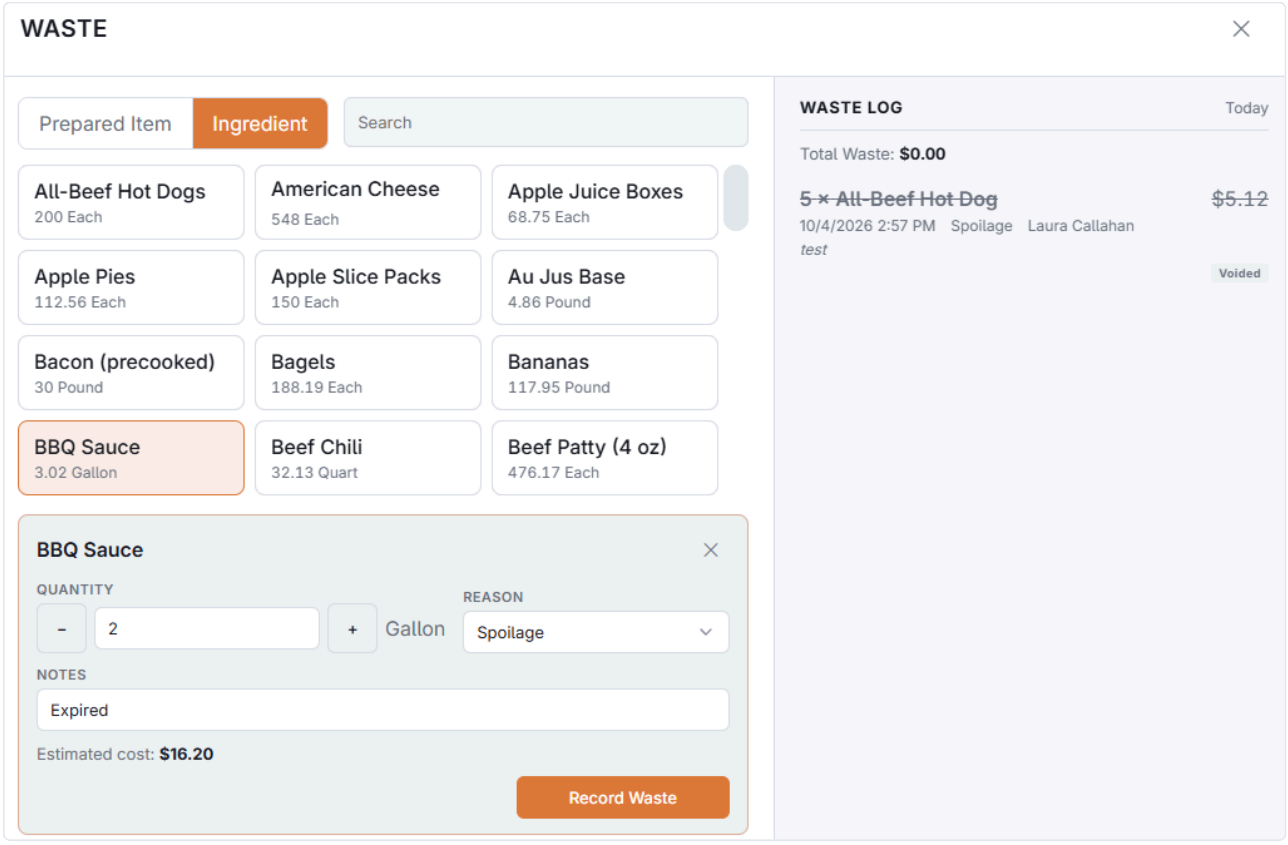
Back Office › Inventory › Operations › Inventory Shrinkage records known losses — the dropped tray, the spoiled case, the plate sent back — when they happen, so stock stays true and each loss has a reason instead of turning up later as an unexplained count difference. Record waste on the left; the **Waste Log** is on the right.



Recording waste

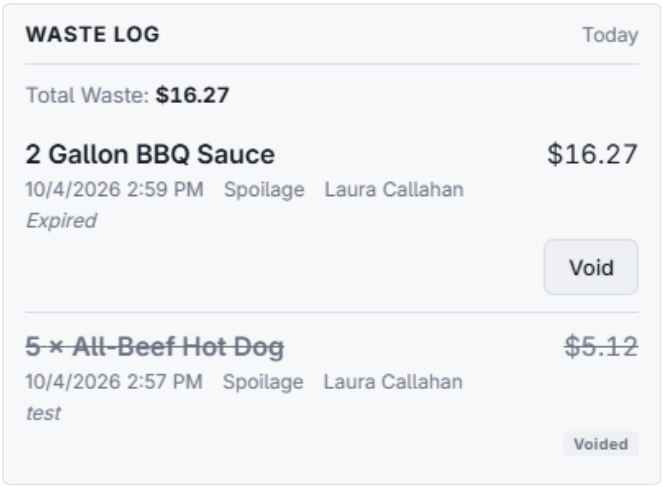
At the register, **Waste** on the More menu opens the same form. Both work the same way:

1. Choose **Prepared Item** for a menu item that was made and thrown away — its whole recipe comes off stock — or **Ingredient** for raw stock (a spoiled case of lettuce). A menu item without a recipe can't be wasted this way: "This Item Has No Recipe. Record Its Ingredients Instead."
2. Search for the item and pick it. Ingredients show what is on hand.
3. Enter the **Quantity** (the − and + buttons step by one; an ingredient is in its unit), pick a **Reason** (required) and add **Notes** if needed. For an ingredient, the **Estimated cost** shows before you record. If the quantity is more than is on hand, you're told it will show as oversold.
4. Choose **Record Waste**. The stock comes off oldest first, at its real cost.



The Waste Log

The **Waste Log** lists the waste for the business days between the two dates (the last seven days when the page opens): the quantity and item, its cost, when, the reason, who recorded it and any notes, with the **Total Waste** at the top. **Void** asks “Put The Stock Back?”; confirm with **Void** to undo an entry recorded by mistake, or choose **Keep**. A voided entry stays in the log marked **Voided**.



Reasons

The reason list is kept in **Main Settings**, **Adjust reasons** tab — see Inventory settings. The same reasons are offered on each line of a count. Keep the list short and distinct: spoilage, breakage and over-portioning each point to a different fix, and one reason for everything hides which one you have.

> Every waste entry shows in Inventory logs: in the Usage tab, and in the Shrinkage tab with its reason and cost. Recording waste needs the **Inventory Shrinkage** permission in the Back Office.

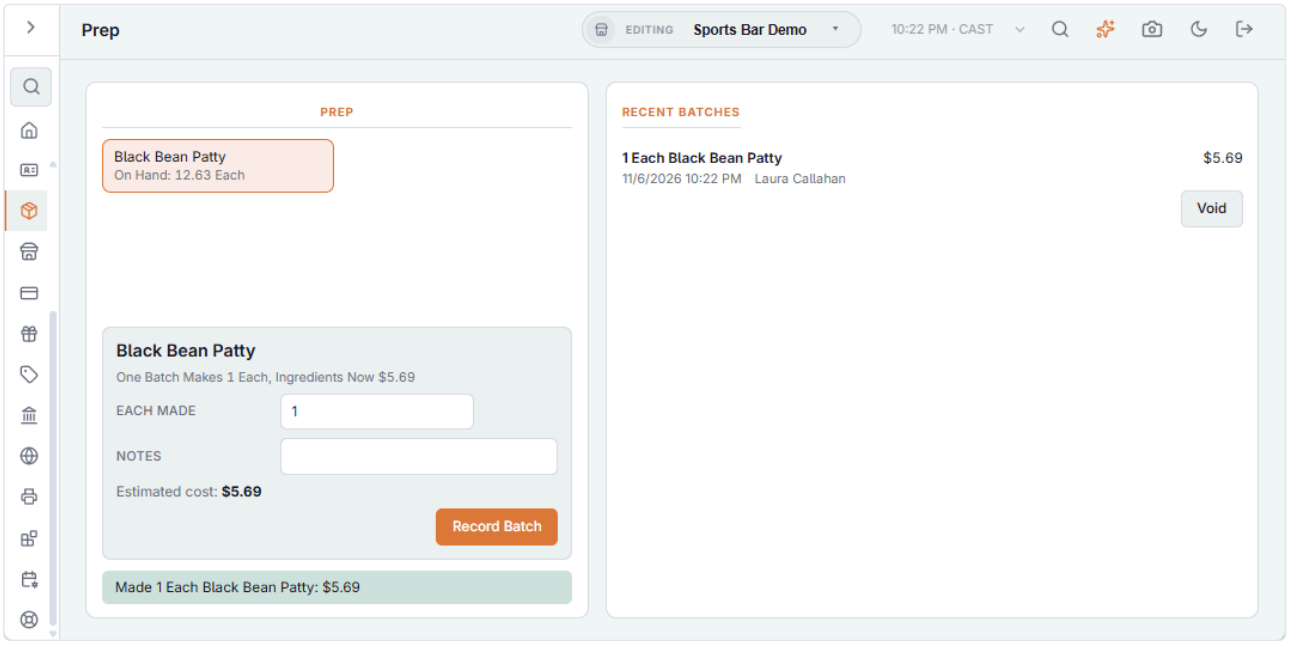
Making prep batches

Inventory › Operations

View online ↗

Recording what the kitchen made, so ingredients come off stock and the prep item goes in at its real cost.

The **Prep** page (Back Office › Inventory › Operations › Prep) lists every item made in house, with what is on hand and what one batch costs right now (for example “One Batch Makes 4 L, Ingredients Now $6.80”). Items appear here once they are set up — see Prep items made in house.



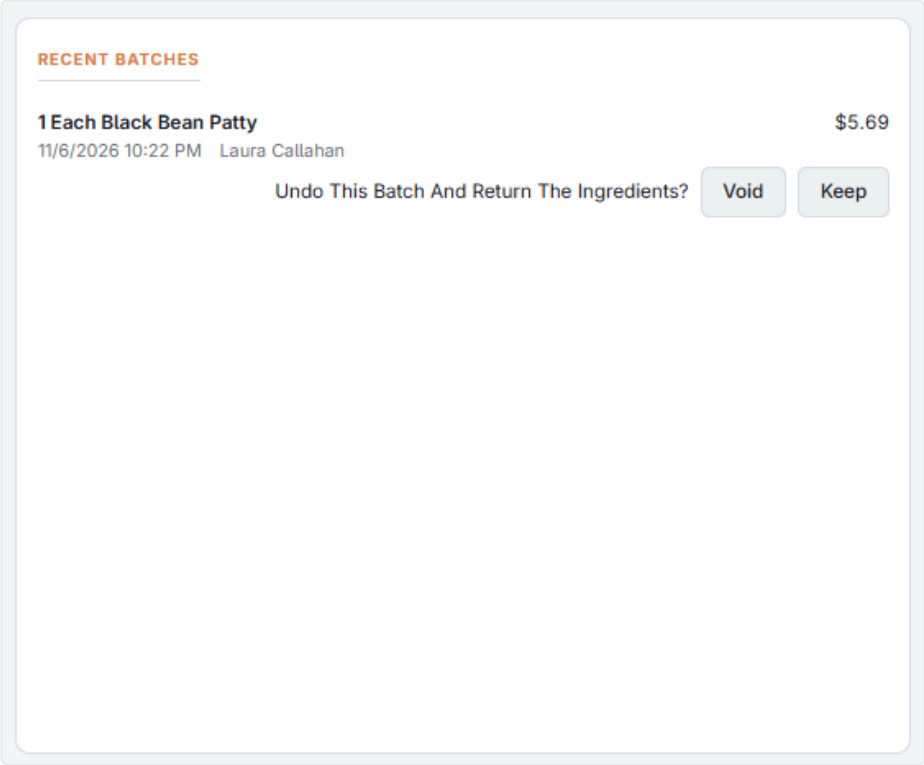
Recording a batch

1. Pick the item. The quantity starts at one batch; change it to what was actually made (half a batch, two batches).
2. Add notes if needed and choose **Record Batch**.

The ingredients come off stock at their real, oldest-first cost, and the prep item goes into stock at what that batch cost. An ingredient that runs short goes below zero and shows as **Oversold**, just like a sale.

Recent Batches

Recent Batches lists the last 7 days of batches with their cost. **Void** undoes a batch recorded by mistake: the ingredients go back and the prep item comes out.



Record batches when they are made, not at the end of the week. A sauce sold before its batch is recorded shows as oversold, and the batch recorded later fills that gap.

End-of-day inventory

Inventory › Operations

View online ↗

The closing stock each End Of Day records, by business day, to see how stock moves from day to day and week to week.

Back Office › Inventory › Operations › End of Day Inventory shows the closing stock that each End Of Day records, filed by business day, so you can see how stock moves from day to day and week to week.

What End Of Day records

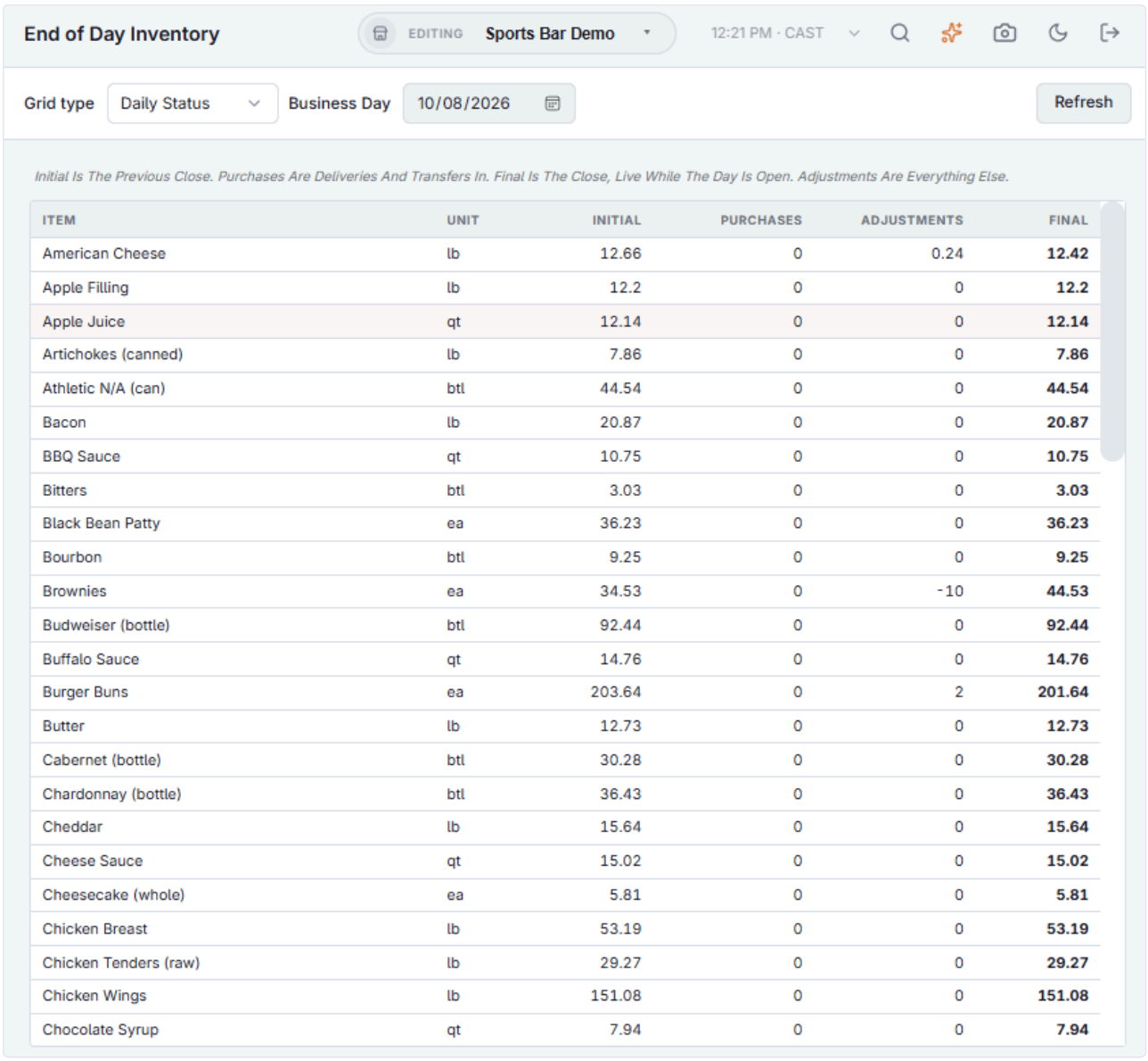
End of day first applies any sales still waiting to come off stock, so the day's usage is complete, and then records every item's closing stock for that business day. The business day follows **Business Day Start Time** — see The business day and when it rolls over. Running End Of Day itself is covered in Running end of day.

The views

Pick a **Grid type**; the line under the toolbar says what the numbers are. **Refresh** reloads them.

- **Day of Week** — for the **Start Date** to **End Date** you pick (the last week when the page opens), each item's average close on each weekday, Sun to Sat, and its overall **Average**.
- **Month** — pick the **Month** and **Year**: each day's close in that month, and the average.
- **Daily Status** — one **Business Day**, item by item: **Initial** (the previous close), **Purchases** (deliveries and transfers in), **Adjustments** (everything else: sales, waste, counts, prep, transfers out) and **Final** (the close, live while the day is still open). Items with no stock and no movement are left out.

Every view lists the item's category, name and unit. When End Of Day has not run for the dates picked, the page shows "No End Of Day Records For These Dates".



ITEM	UNIT	INITIAL	PURCHASES	ADJUSTMENTS	FINAL
American Cheese	lb	12.66	0	0.24	**12.42**
Apple Filling	lb	12.2	0	0	**12.2**
Apple Juice	qt	12.14	0	0	**12.14**
Artichokes (canned)	lb	7.86	0	0	**7.86**
Athletic N/A (can)	btl	44.54	0	0	**44.54**
Bacon	lb	20.87	0	0	**20.87**
BBQ Sauce	qt	10.75	0	0	**10.75**
Bitters	btl	3.03	0	0	**3.03**
Black Bean Patty	ea	36.23	0	0	**36.23**
Bourbon	btl	9.25	0	0	**9.25**
Brownies	ea	34.53	0	-10	**44.53**
Budweiser (bottle)	btl	92.44	0	0	**92.44**
Buffalo Sauce	qt	14.76	0	0	**14.76**
Burger Buns	ea	203.64	0	2	**201.64**
Butter	lb	12.73	0	0	**12.73**
Cabernet (bottle)	btl	30.28	0	0	**30.28**
Chardonnay (bottle)	btl	36.43	0	0	**36.43**
Cheddar	lb	15.64	0	0	**15.64**
Cheese Sauce	qt	15.02	0	0	**15.02**
Cheesecake (whole)	ea	5.81	0	0	**5.81**
Chicken Breast	lb	53.19	0	0	**53.19**
Chicken Tenders (raw)	lb	29.27	0	0	**29.27**
Chicken Wings	lb	151.08	0	0	**151.08**
Chocolate Syrup	qt	7.94	0	0	**7.94**

A count tells you what is really on the shelf; this page tells you what the system closed with. Count the few items that matter most often — see Inventory counts.

Reports & Audit

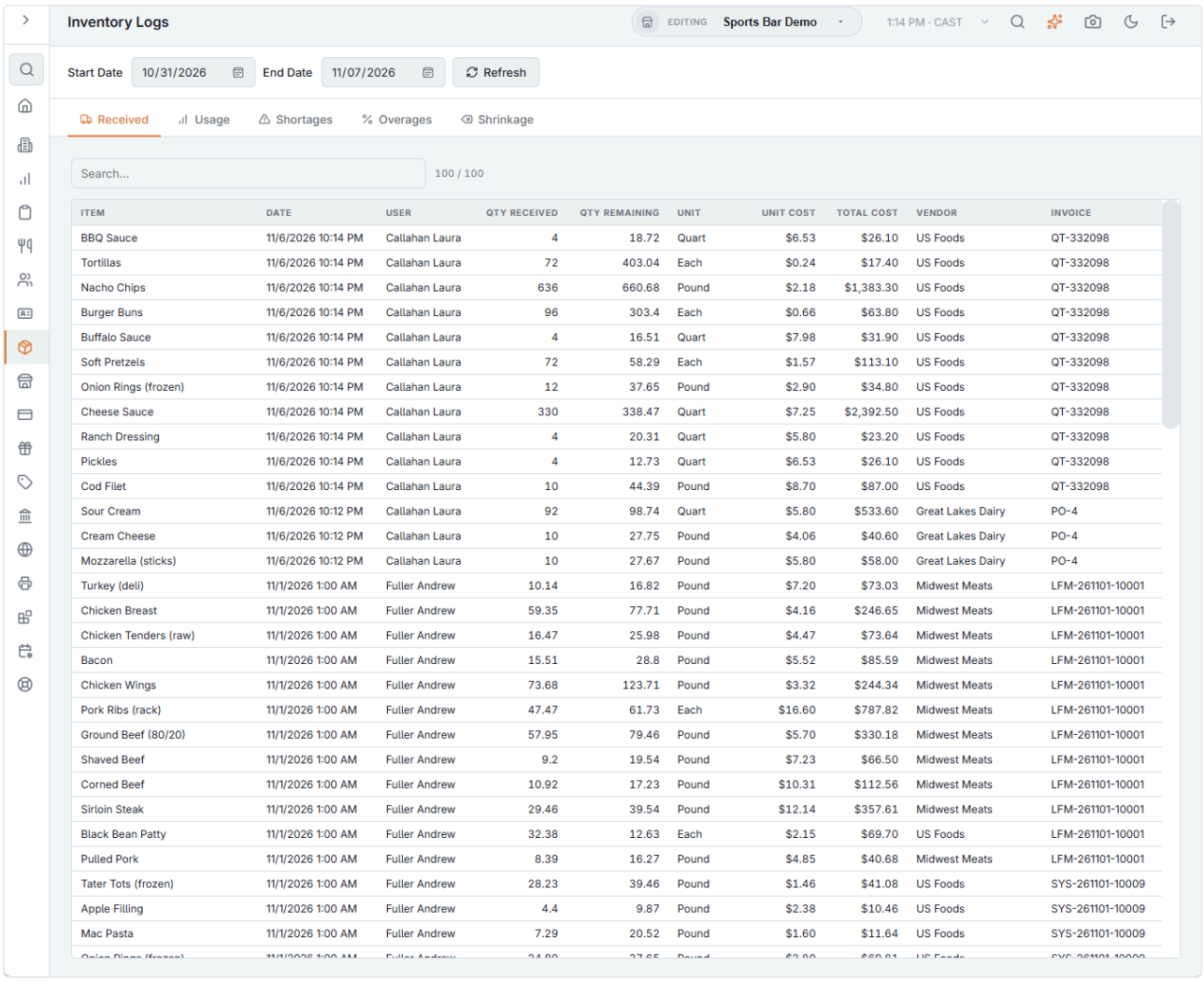
Inventory logs

Inventory › Reports & Audit

View online ↗

Stock movement by date range: purchases, usage, count differences and waste.

Back Office › Inventory › Reports & Audit › Inventory Logs is the movement journal: every change to stock between a **Start Date** and an **End Date**, by business day. The page opens on the last seven days; changing a date reloads the open tab, and **Refresh** reloads it again. Each tab has its own search box and shows how many rows match out of the total.



ITEM	DATE	USER	QTY RECEIVED	QTY REMAINING	UNIT	UNIT COST	TOTAL COST	VENDOR	INVOICE
BBQ Sauce	11/6/2026 10:14 PM	Callahan Laura	4	18.72	Quart	$6.53	$26.10	US Foods	QT-332098
Tortillas	11/6/2026 10:14 PM	Callahan Laura	72	403.04	Each	$0.24	$17.40	US Foods	QT-332098
Nacho Chips	11/6/2026 10:14 PM	Callahan Laura	636	660.68	Pound	$2.18	$1,383.30	US Foods	QT-332098
Burger Buns	11/6/2026 10:14 PM	Callahan Laura	96	303.4	Each	$0.66	$63.80	US Foods	QT-332098
Buffalo Sauce	11/6/2026 10:14 PM	Callahan Laura	4	16.51	Quart	$7.98	$31.90	US Foods	QT-332098
Soft Pretzels	11/6/2026 10:14 PM	Callahan Laura	72	58.29	Each	$1.57	$113.10	US Foods	QT-332098
Onion Rings (frozen)	11/6/2026 10:14 PM	Callahan Laura	12	37.65	Pound	$2.90	$34.80	US Foods	QT-332098
Cheese Sauce	11/6/2026 10:14 PM	Callahan Laura	330	338.47	Quart	$7.25	$2,392.50	US Foods	QT-332098
Ranch Dressing	11/6/2026 10:14 PM	Callahan Laura	4	20.31	Quart	$5.80	$23.20	US Foods	QT-332098
Pickles	11/6/2026 10:14 PM	Callahan Laura	4	12.73	Quart	$6.53	$26.10	US Foods	QT-332098
Cod Filet	11/6/2026 10:14 PM	Callahan Laura	10	44.39	Pound	$8.70	$87.00	US Foods	QT-332098
Sour Cream	11/6/2026 10:12 PM	Callahan Laura	92	98.74	Quart	$5.80	$533.60	Great Lakes Dairy	PO-4
Cream Cheese	11/6/2026 10:12 PM	Callahan Laura	10	27.75	Pound	$4.06	$40.60	Great Lakes Dairy	PO-4
Mozzarella (sticks)	11/6/2026 10:12 PM	Callahan Laura	10	27.67	Pound	$5.80	$58.00	Great Lakes Dairy	PO-4
Turkey (deli)	11/1/2026 1:00 AM	Fuller Andrew	10.14	16.82	Pound	$7.20	$73.03	Midwest Meats	LFM-261101-10001
Chicken Breast	11/1/2026 1:00 AM	Fuller Andrew	59.35	77.71	Pound	$4.16	$246.65	Midwest Meats	LFM-261101-10001
Chicken Tenders (raw)	11/1/2026 1:00 AM	Fuller Andrew	16.47	25.98	Pound	$4.47	$73.64	Midwest Meats	LFM-261101-10001
Bacon	11/1/2026 1:00 AM	Fuller Andrew	15.51	28.8	Pound	$5.52	$85.59	Midwest Meats	LFM-261101-10001
Chicken Wings	11/1/2026 1:00 AM	Fuller Andrew	73.68	123.71	Pound	$3.32	$244.34	Midwest Meats	LFM-261101-10001
Pork Ribs (rack)	11/1/2026 1:00 AM	Fuller Andrew	47.47	61.73	Each	$16.60	$787.82	Midwest Meats	LFM-261101-10001
Ground Beef (80/20)	11/1/2026 1:00 AM	Fuller Andrew	57.95	79.46	Pound	$5.70	$330.18	Midwest Meats	LFM-261101-10001
Shaved Beef	11/1/2026 1:00 AM	Fuller Andrew	9.2	19.54	Pound	$7.23	$66.50	Midwest Meats	LFM-261101-10001
Corned Beef	11/1/2026 1:00 AM	Fuller Andrew	10.92	17.23	Pound	$10.31	$112.56	Midwest Meats	LFM-261101-10001
Sirloin Steak	11/1/2026 1:00 AM	Fuller Andrew	29.46	39.54	Pound	$12.14	$357.61	Midwest Meats	LFM-261101-10001
Black Bean Patty	11/1/2026 1:00 AM	Fuller Andrew	32.38	12.63	Each	$2.15	$69.70	US Foods	LFM-261101-10001
Pulled Pork	11/1/2026 1:00 AM	Fuller Andrew	8.39	16.27	Pound	$4.85	$40.68	Midwest Meats	LFM-261101-10001
Tater Tots (frozen)	11/1/2026 1:00 AM	Fuller Andrew	28.23	39.46	Pound	$1.46	$41.08	US Foods	SYS-261101-10009
Apple Filling	11/1/2026 1:00 AM	Fuller Andrew	4.4	9.87	Pound	$2.38	$10.46	US Foods	SYS-261101-10009
Mac Pasta	11/1/2026 1:00 AM	Fuller Andrew	7.29	20.52	Pound	$1.60	$11.64	US Foods	SYS-261101-10009

The tabs

- **Received** — deliveries: the item, date, who received it, **Qty received** and **Qty remaining** of that lot, the unit, **Unit cost**, **Total cost**, **Vendor** and **Invoice**. Transfers in from another store are listed too, with the transfer number as the invoice. Count overages, returns and prep batches move stock but are not deliveries, so they are not listed.
- **Usage** — stock taken out: the item, date, user, the **Menu item** and **Order** it went into, **Qty used**, unit and **Cost**. Waste and count shortages also appear here, without a menu item.
- **Shortages** — stock that counts found missing: the item, date, who counted, the **Quantity** missing, its unit and its **Cost**.
- **Overages** — stock found by counts and added back at the last purchase cost: the quantity found and how much of it is still on hand.
- **Shrinkage** — every stock adjustment with its category, quantity, unit, **Cost**, **Reason**, user and date, and the **Total cost** at the top: waste recorded on the Inventory Shrinkage page or at the POS (see Waste and shrinkage), count differences in either direction, and stock sent to another store.

Using the log

This is the drill-down behind the inventory numbers: a cost-of-goods spike on Inventory performance traces to specific usage or receiving lines here, and a count difference traces to its adjustment and reason. Prep batches are not in the log; they are listed on the Prep page — see Making prep batches.

> The logs show *what* moved. The Inventory audit log shows *who* made each manual stock change, such as a delivery, a count or a refund, with its notes.

Inventory Valuation: what your stock is worth

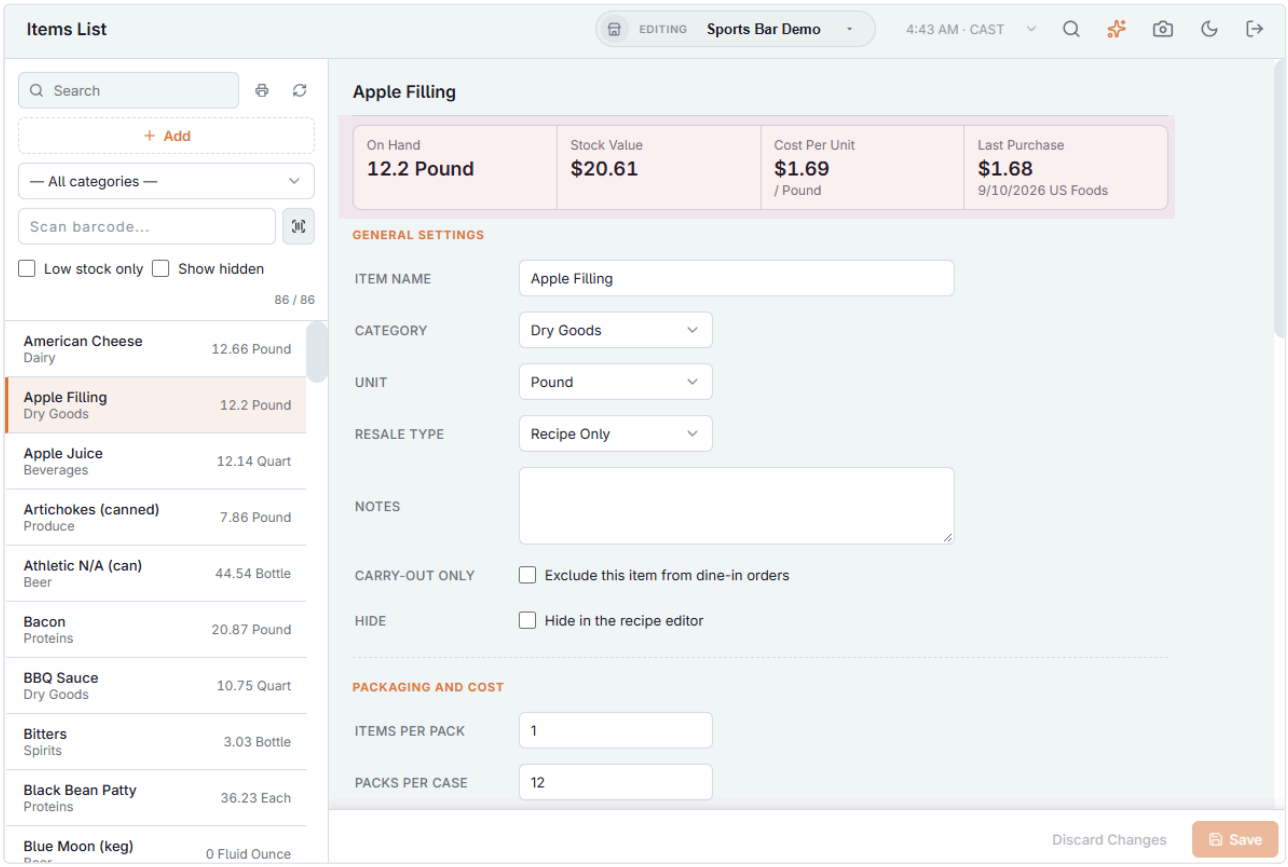
Inventory › Reports & Audit

View online ↗

A month-end PDF of stock value by category, from each lot's remaining quantity at the cost it was received.

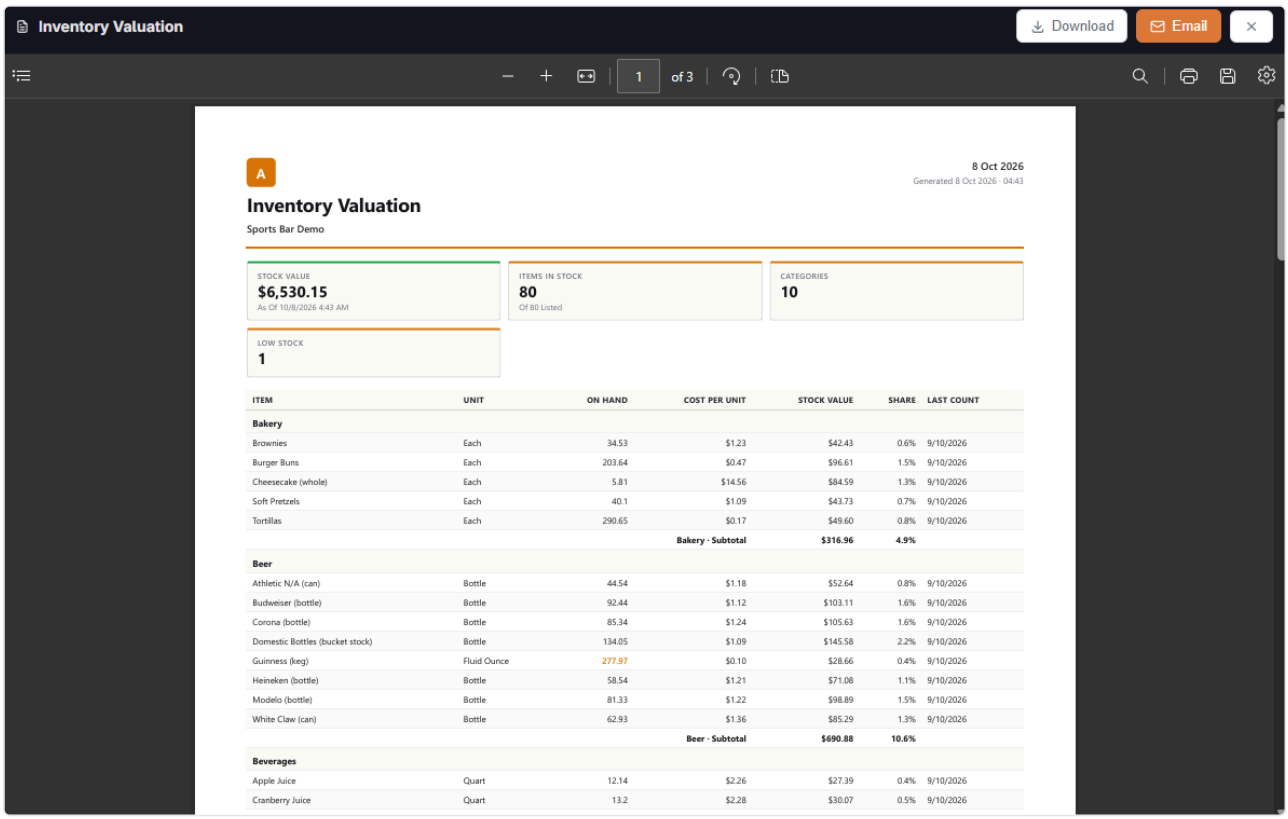
The **Inventory Valuation** report puts a value on everything on the shelf: every item that is not hidden, with its live on hand and what that stock is worth, grouped by category with subtotals. You print it from **Back Office › Inventory › Setup › Items List**. It is the figure an accountant asks for at month end.

1. Open **Items List**.
2. Pick a category in the list's category filter to value one category, or leave it on all.
3. Tap the printer button next to Refresh. The PDF preview opens with Download and Email.



What the report shows

- At the top: the total **Stock Value** as of the time it was built, **Items In Stock** out of the items listed, the number of **Categories**, and **Low Stock** with how many items are sold short.
- Per item: **Unit**, **On Hand**, **Cost Per Unit**, **Stock Value**, its **Share** of the total and the **Last Count** date. Items at or below their reorder level and items sold short are marked.
- A subtotal for each category and the total at the end.



How the value is calculated

Stock arrives in lots — deliveries, transfers in, prep batches and returns — each at the cost it came in at, and sales use up the oldest lot first (see How inventory works). The value of an item is the remaining quantity of each of its lots at that lot's cost, so a price change at the supplier only affects the stock bought since. An item sold short (negative on hand) carries no value until stock arrives. Unit cost on a line with stock is value ÷ on hand; a line with nothing on hand shows the item's current unit cost for reference.

> Sales still waiting to be applied to stock are applied before the report is built, so the on-hand figures are current to the minute.

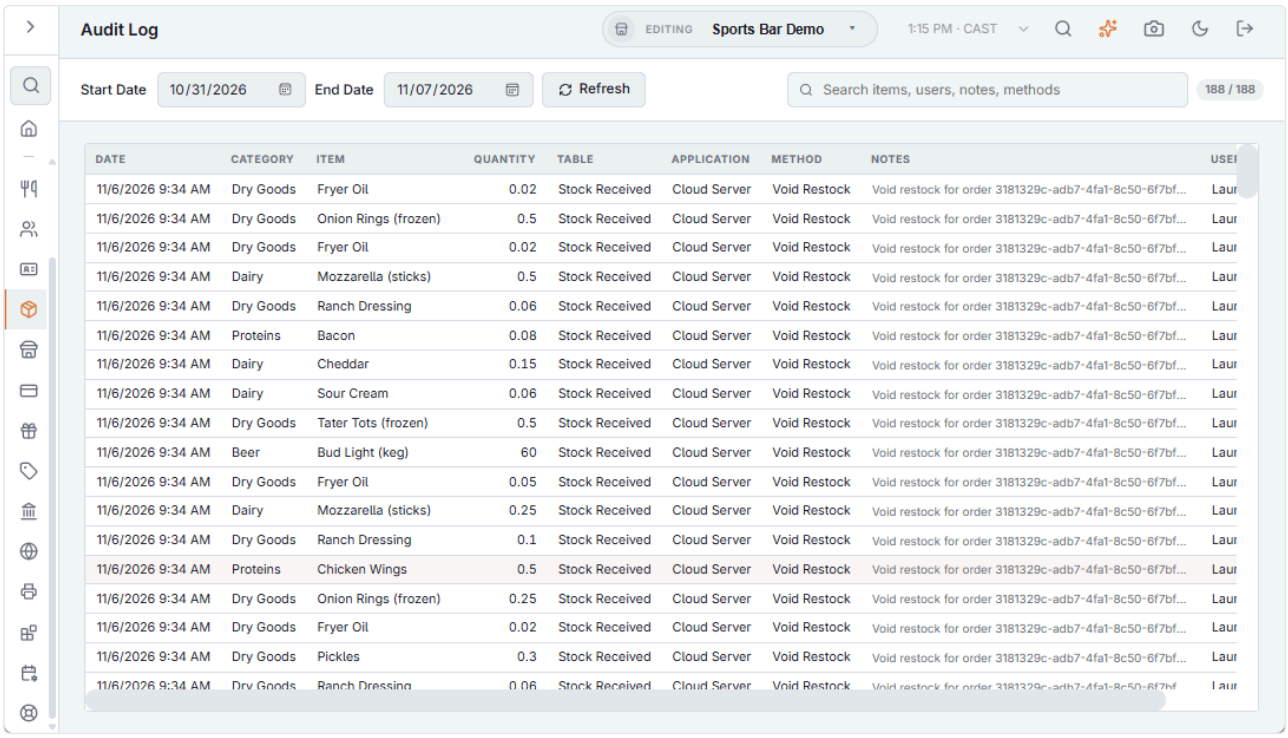
Inventory audit log

Inventory › Reports & Audit

View online ↗

The manual changes made to stock — deliveries, count changes and stock put back from voids and refunds — with who made each one and when.

Back Office › Inventory › Reports & Audit › Audit Log lists the manual changes made to stock, with who made them and when. Use it with Inventory logs: the logs show what moved, the audit log shows who moved it.



What is recorded

- Deliveries entered on **Receive Inventory**, one at a time or from a scanned invoice.
- Count changes saved on **Inventory Count**: each shortage, overage or reset to zero, with what the sheet showed and what was on hand.
- Stock put back when an order is voided, when items are returned to inventory, or when a line is refunded.

Sales, waste, prep batches, purchase order receipts and transfers are not listed here; they have their own records on their pages and in Inventory Logs.

Reading the log

- Pick the **Start Date** and **End Date** (the last seven days when the page opens); the list reloads when you change a date. **Refresh** reloads it again.
- Each row shows the **Date**, the item's **Category** and **Item**, the **Quantity** (positive for stock added, negative for stock taken), **Table**, **Application** and **Method** (which record changed and which part of the program changed it, such as *Stock Received* and *Inventory Count*), the **Notes** and the **User**. The standard notes, such as those of a delivery or a count, are shown in your language; anything the counter typed is shown as typed. Changes made by the system with no user show **System**.
- The search box matches items, categories, users, notes, methods, applications and tables, as shown on screen. The badge beside it shows how many rows match out of the total. Newest rows are at the top.

> When an item's stock jumped and you don't know why, search the item here first: a delivery entered twice or a count typed in the wrong unit shows up with the person and the time.

CHAPTER 18

Store Setup

Store and workflow

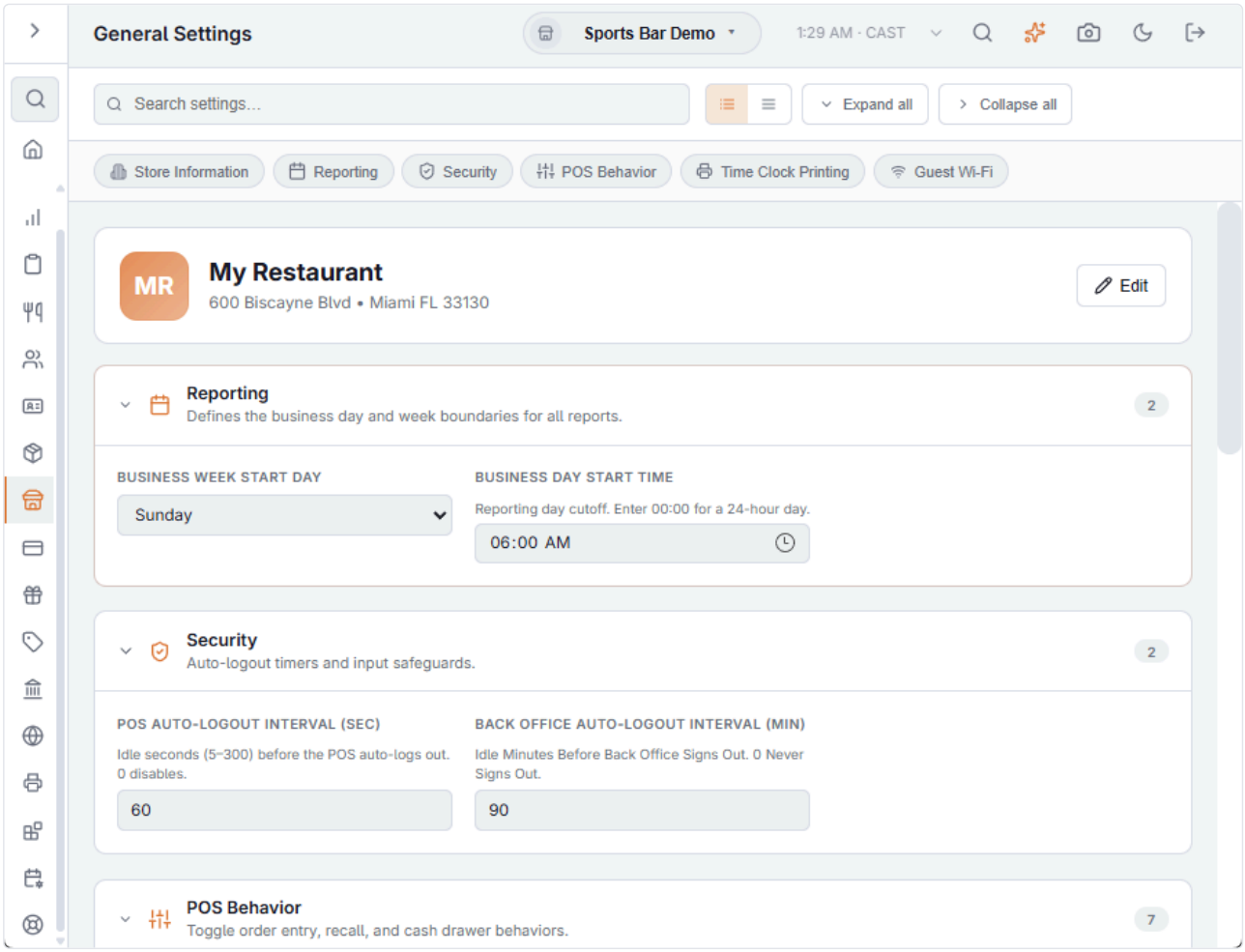
General settings

Store Setup › Store and workflow

View online ↗

Store identity, region, business day, idle sign-out, register behaviors, time clock slips and guest Wi-Fi.

Back Office › Store Setup › General Settings holds the store's basics: its name and address, language, time zone and currency, the business day, the idle sign-out timers, a handful of register behaviors, the time clock slips and the guest Wi-Fi details.



There is no Save button. A switch or drop-down saves the moment you change it; a box saves when you leave it, with a tick to confirm. Registers pick most changes up the next time they load their settings.

Store Information

- **Business name**, **street address**, **address line 2**, **city**, **region**, **postal code** and **phone** — the store as it appears at the top of receipts, reports and the slips the register prints.
- **Reply-To Email** — when a guest replies to an email the store sends them (receipts, online orders, reservations, gift cards, statements, guest offers, surveys and delivery updates), the reply goes to this address. Leave it blank and replies go to the sending address.
- **Language And Region** — how money, numbers and dates are shown on this store's registers, receipts and reports; the currency symbol comes from it. A register applies a change when it leaves Back Office or at its next sign-in.

- **Time Zone** — the store's local time for business days, reports and schedules.
- **Base Currency** — the currency prices and cash drawers are kept in. See Accepting Foreign Currency.

Reporting

- **Business Week Start Day** — the first day of the week in weekly reports.
- **Business Day Start Time** — when one business day ends and the next begins, so a bar open past midnight keeps the night on one day. 00:00 makes it a calendar day. See The business day and when it rolls over.

Security

- **POS Auto-Logout Interval (sec)** — seconds without a touch before the register counts down and signs the user out. 0 never signs out.
- **Back Office Auto-Logout Interval (Min)** — the same while Back Office is on screen, in minutes. 0 never signs out.

POS Behavior

Setting	On
Allow combine after split	An order that was split, or made by a split, can be combined like any other. Off, **Combine** refuses such an order and does not offer it as a source. See Combining orders.
Assign cash drawers	Cashiers claim a cash drawer when they clock in, and their cash is kept on that drawer. See Assigning drawers to users at clock-in.
Auto-Settle Fractional Balance	An order left owing one cent or less is closed automatically.
Auto-Settle Zero Balance Orders	An order saved with nothing to pay and no payments, such as one discounted to zero, is closed automatically.
Display only clocked-in servers	The transfer list shows only servers who are clocked in.
Recall list defaults to "My Orders"	The orders list opens on the user's own orders. Anyone allowed to see other employees' orders can switch to Open or All.
Hide open pre-auths on recall list	An order that is paid in full but still has a card pre-authorization waiting to be captured is left out of the orders list. Bar tabs always show.

Time Clock Printing

Print clock-in confirmation and **Print clock-out confirmation** print a slip on the station's receipt printer at each punch: the store's name and address, Clock In or Clock Out, the employee, the job and the time. See Clocking in and out.

Guest Wi-Fi

The network name, password, security type and whether the network is hidden. The guest Wi-Fi slip, the join code on receipts and the QR table cards all read these, so a new password is entered once. See Printing guest Wi-Fi details.

> To find a setting on any page, use All program settings (search).

Printing guest Wi-Fi details

Store Setup › Store and workflow

View online ↗

Set up the guest network details once, then hand them out on a printed slip, add them to an order type, or put a scan-to-join code on the receipt.

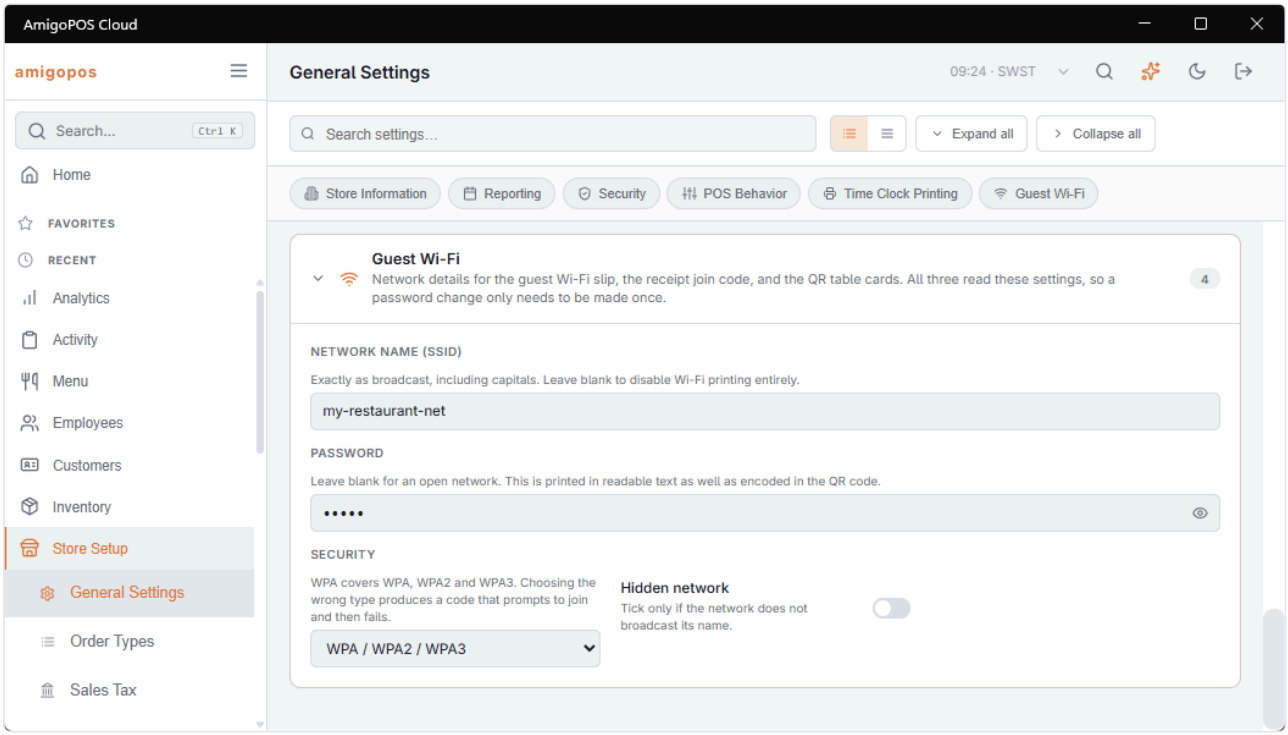
Reciting a sixteen-character Wi-Fi password across a noisy dining room is nobody's favourite part of service. Configure the guest network once and the POS can print it — as a slip a server hands over, automatically with certain order types, or as a scan-to-join code on the receipt.

1. Configure the network

Open **Store Setup › General Settings** and expand the **Guest Wi-Fi** section. Four fields:

- **Network name (SSID)** — exactly as it is broadcast, including capitals. Leaving it blank disables Wi-Fi printing everywhere.

- **Password** — leave blank for an open network. It is masked on screen, but it still prints in readable text on the slip.
- **Security** — `WPA` covers WPA, WPA2, and WPA3 and is what you want in almost every case. `WEP` is for genuinely old equipment. `nopass` is an open network with no password.
- **Hidden network** — tick only if the network does not broadcast its name.



Printing the credentials makes them portable — a slip in a pocket works from the car park. That is fine for a guest network that is properly isolated, and not fine if guest Wi-Fi shares a network with your POS stations, kitchen displays, or print agents. If you are not certain which you have, ask whoever set up your network before switching this on.

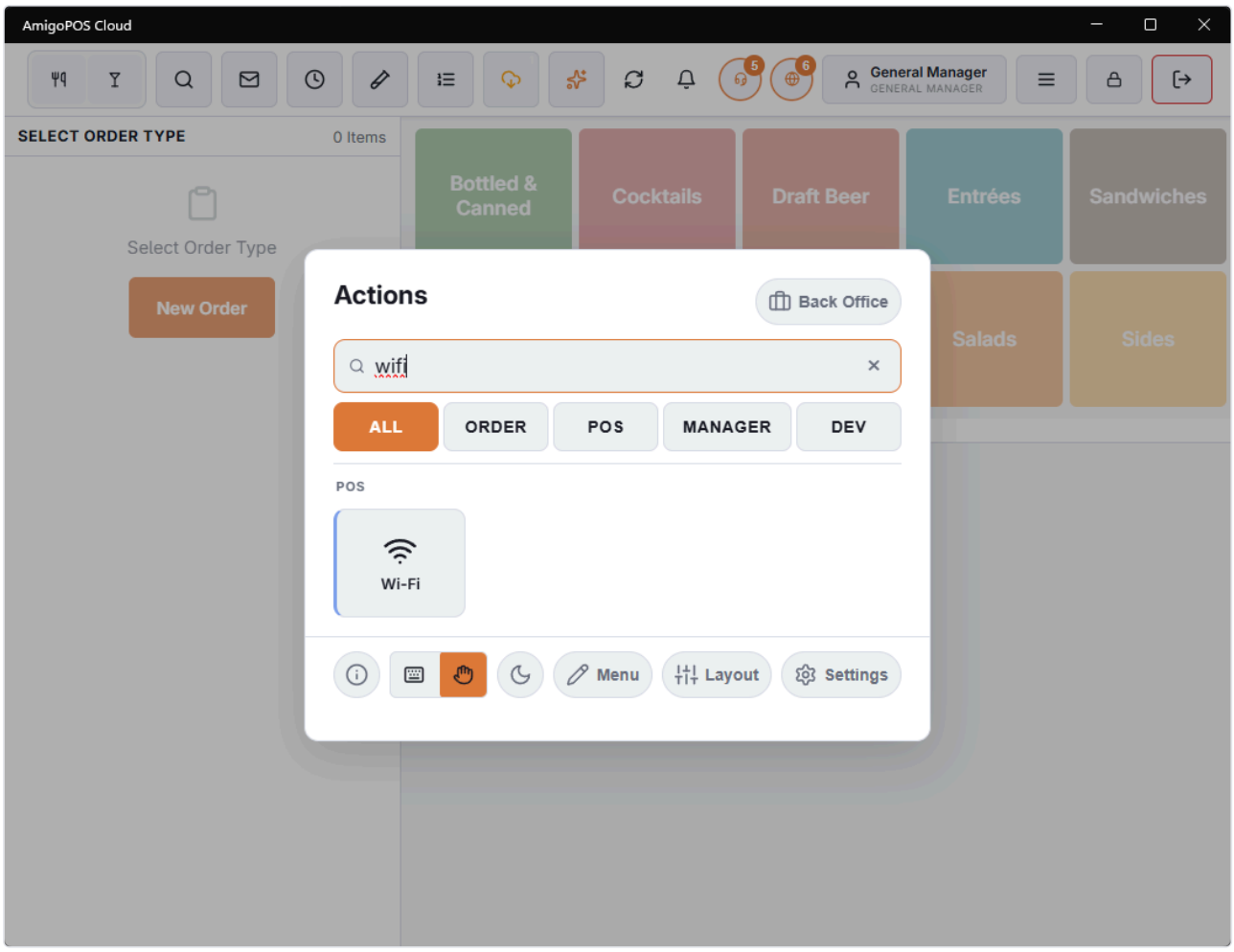
Changes take effect immediately — print a test slip straight after saving to confirm the new details came through.

2. Choose how it gets to the guest

Three routes, and they work happily together.

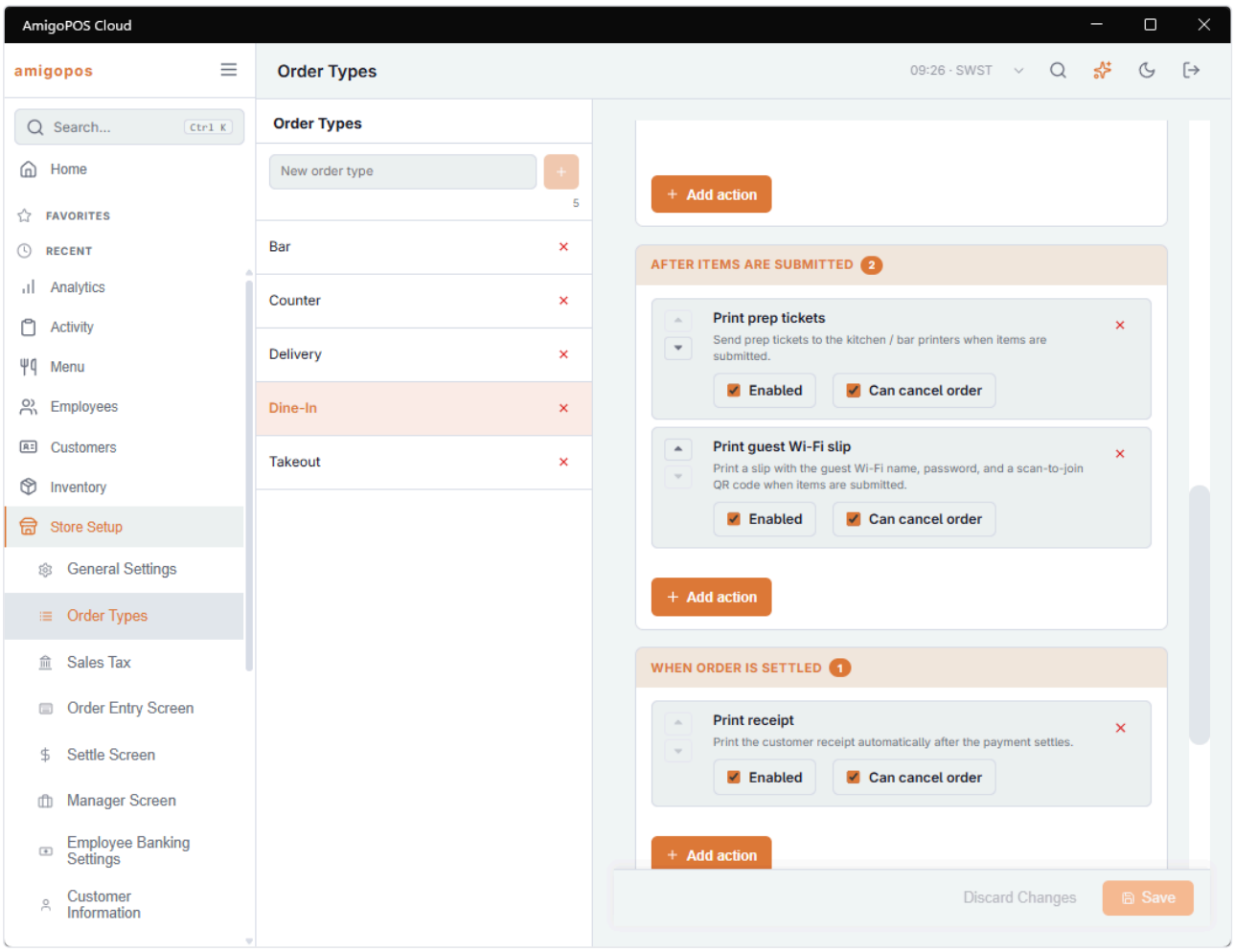
On demand from the POS

A **Wi-Fi** button in the POS More Menu prints a slip immediately. This is the everyday case: a guest asks, the server taps once, done.



Automatically, for chosen order types

Add the **Print guest Wi-Fi slip** action to an order type under **Store Setup › Order Types › Workflow**, in the *After The Order Is Sent* stage. The first time an order of that type is sent, a slip prints alongside the food; sending more items later doesn't print another.



This is aimed squarely at counter service and coffee shops, where the guest orders at the counter, takes their receipt and their food, and then sits down — exactly when they want the Wi-Fi. Because it is set per order type, you can give it to Counter and Dine-In while leaving Delivery and Takeout alone.

> The slip does not reprint when an order is recalled. A guest adding a second round already has one, and reprinting every time wastes paper and confuses the counter.

On the customer receipt

Add the `{WifiQRCode}` token to your customer receipt template for a scan-to-join code at the bottom of every receipt. One caveat, handled automatically: if you also use QR pay-at-table, the Wi-Fi code is suppressed on any receipt carrying a payment code. Two codes centimetres apart on an 80 mm receipt are both in the camera frame at any realistic distance, and a guest who scans the wrong one concludes your payment link is broken.

3. What prints

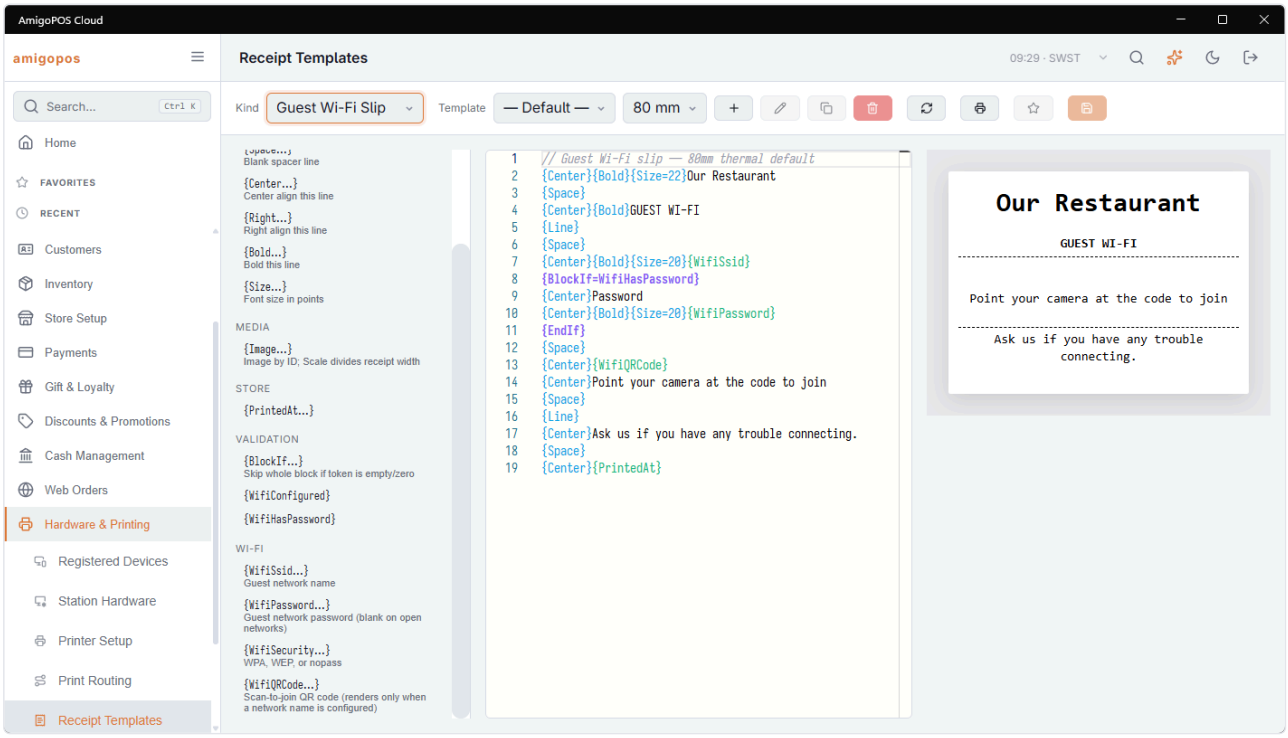
The default slip shows your business name, the network name, the password, and a QR code that joins the network when scanned. Modern iPhones and Android phones recognise the code with the plain camera app — no app to install.

> The credentials are printed as readable text as well as encoded in the code, deliberately. Not every guest can use a Wi-Fi QR code, and a code with no fallback is worse than no code at all. Keep both if you customise the template.

4. Customising the slip

The slip is a full print template, editable under **Hardware & Printing › Receipt Templates** — choose the *Guest Wi-Fi Slip* kind. That means it can carry more than credentials: house rules, opening hours, your social handles, or a promotion. The guest holds this slip for the rest

of their visit, which makes it a considerably better promotion surface than anything stuck to a table.



Tokens available to the template:

- `{WifiSsid}` — the network name.
- `{WifiPassword}` — the password.
- `{WifiSecurity}` — WPA, WEP, or nopass.
- `{WifiQRCode}` — the scan-to-join code.
- `{PrintedAt}` — date and time the slip was printed.
- `{BlockIf=WifiHasPassword}` … `{EndIf}` — wraps a block that should only appear on password-protected networks, so an open network doesn't print an empty Password heading.

Troubleshooting

The button reports success but nothing prints

Almost always no network name configured. The slip is deliberately suppressed rather than feeding blank paper, so check **Store Setup › General Settings › Guest Wi-Fi** first. Otherwise confirm your receipt printer is online with a normal test print — the slip goes to the receipt printer, not a prep printer.

The code scans but the phone won't join

- Check the password for typos — the printed text and the code come from the same setting, so both are wrong together and neither will work.
- Check the security type. A network set to `WPA` in settings but actually running WEP produces a code that prompts and then fails.
- If the network is hidden, make sure the hidden setting is ticked; otherwise the phone looks for a broadcast network and finds nothing.

The code prints very large

Longer passwords need more data in the code, and more data means a physically bigger code at the same print density. A very long passphrase can produce a code that dominates the slip. Shortening the passphrase is the simplest fix and usually a fair trade for a guest network.

The Wi-Fi code is missing from receipts

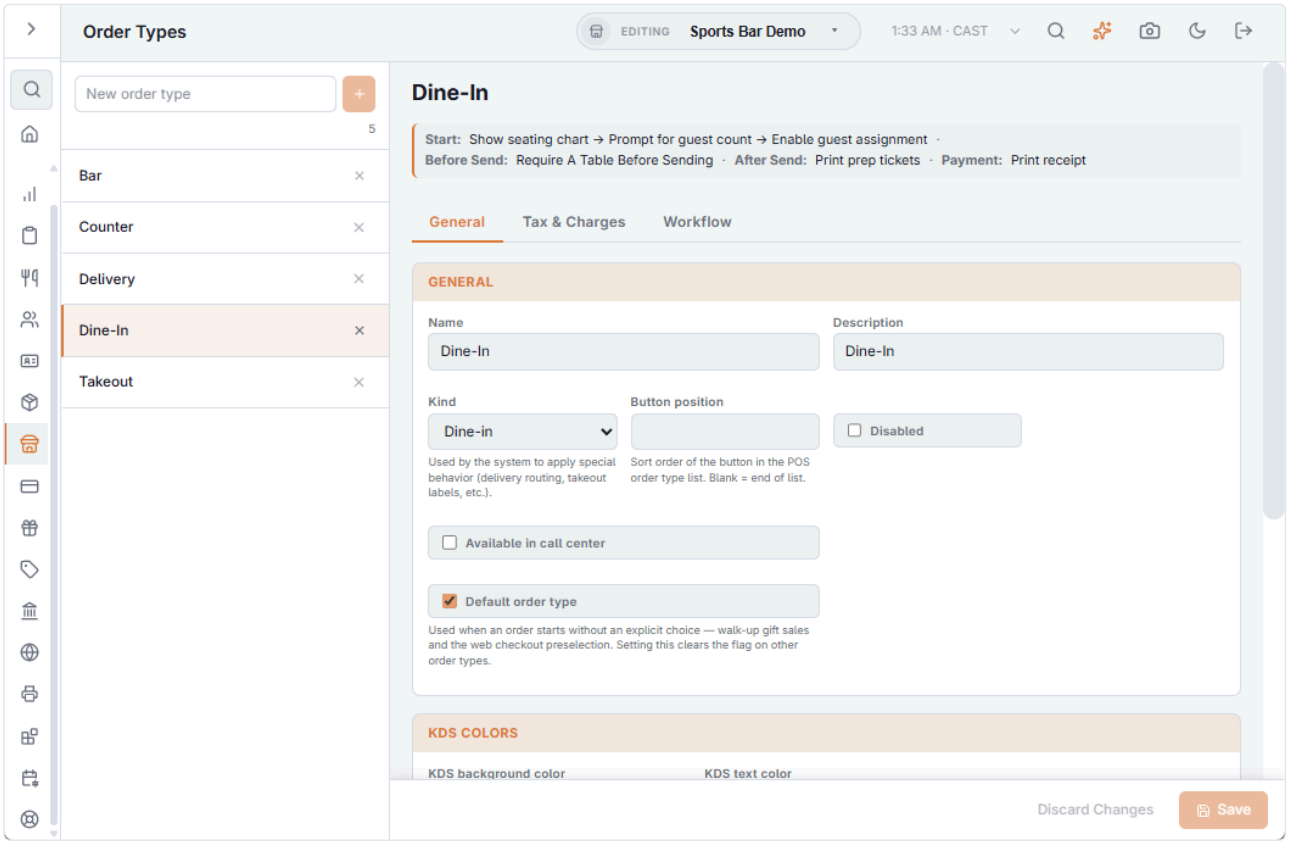
If the receipt also carries a QR pay-at-table code, the Wi-Fi code is suppressed by design — see above. Otherwise check that `{WifiQRCode}` is actually in your receipt template and that a network name is configured.

Order types and workflow

View online ↗

Setting up each order type: what it asks, checks and prints, its money rules, and the workflow at a glance.

Order types (**Back Office › Store Setup › Order Types**) define the kinds of orders the store takes — Dine-In, Takeout, Delivery, Bar, Counter, Phone — and each type carries its full behavior: what the register asks when an order starts, what it checks before sending, what it prints, how payment behaves, its money rules and how its tickets look in the kitchen.

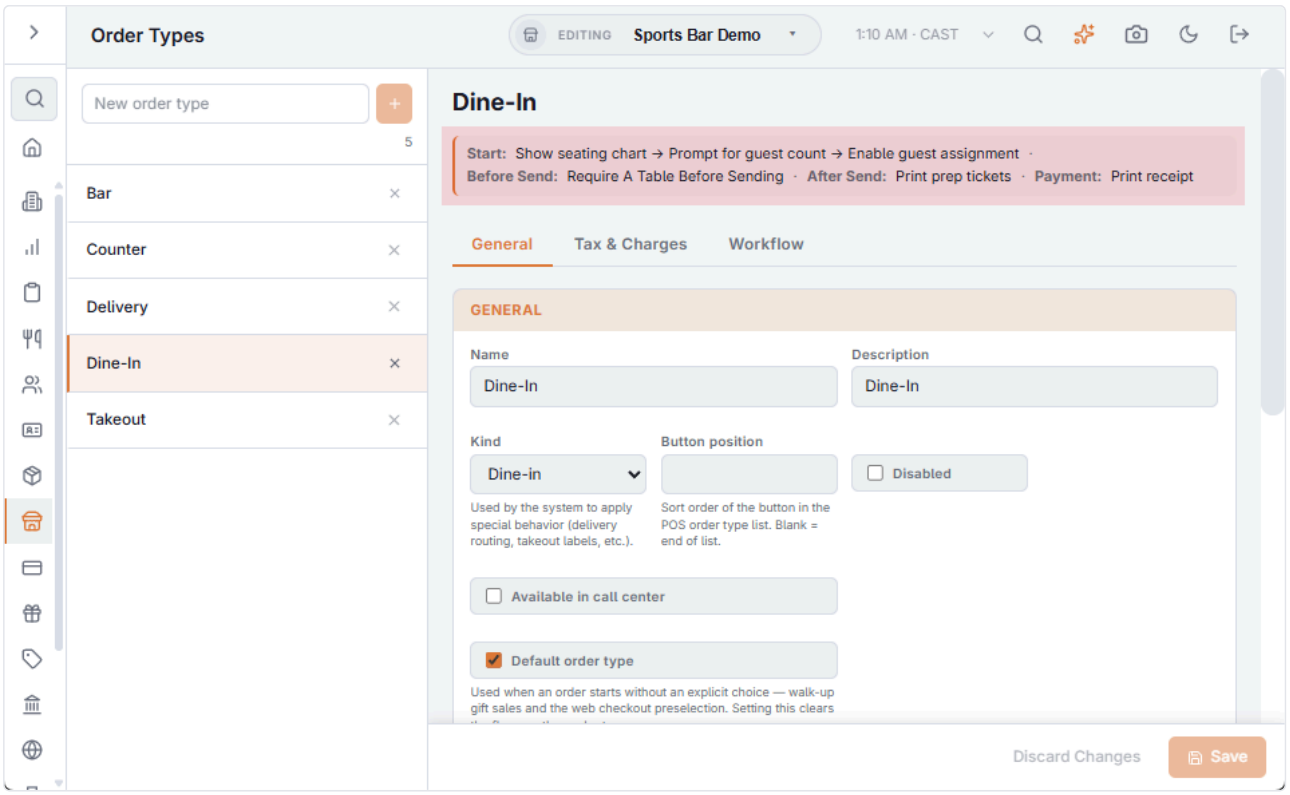


The editor

Pick a type in the list on the left, or type a name in **New order type** and press **+**. The editor has three tabs: **General**, **Tax & Charges** and **Workflow**. **Save** and **Discard Changes** at the bottom apply to the first two tabs; changes on the Workflow tab are saved as you make them.

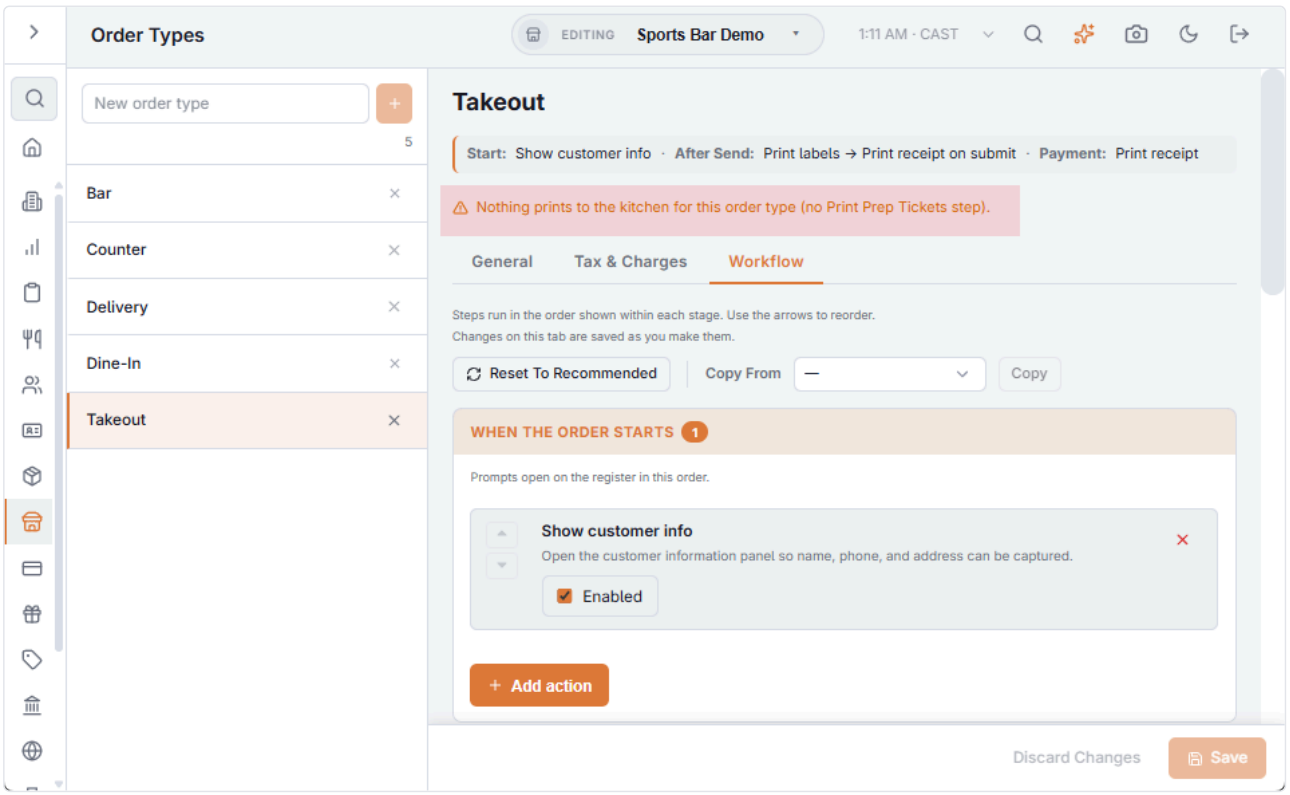
The workflow at a glance

Under the type's name, on every tab, one line lists the workflow steps that are switched on, stage by stage, in the order they run — for example *Start: Show seating chart → Prompt for guest count → Enable guest assignment · After Send: Print prep tickets · Payment: Print receipt*. Click the line to open the Workflow tab.



A warning shows under the line when the setup is almost certainly a mistake:

- **Nothing prints to the kitchen** — the type has no *Print prep tickets* step switched on.
- **Orders won't appear on the delivery board** — the kind is Delivery but no *Delivery Dispatch* step is switched on.
- **The beverage isn't enforced** — *Force beverage selection* is on without *Validate beverage rule*, so the beverage category opens first but the order can be sent without one.



General

- **Name** and **Description**.
- **Kind** — Dine-in, Takeout, Delivery, Bar or Other / custom. It is the type's family: it decides the recommended workflow, and Delivery applies the delivery zone charges.
- **Button position** on the order-type picker (blank puts it at the end), and **Disabled** to take the type off the register. A disabled type stays in the Back Office list, faded.
- **Available in call center** for types a call-center seat can submit.
- **Default order type** — the type used when an order starts without a choice (a walk-up gift card sale, online checkout). Only one type can be the default.
- **KDS Colors** — **KDS background color** and **KDS text color** for the type's tickets, plus **Aging warning (minutes)** (1–240) and **Late warning (minutes)** (1–480); blank uses the Station default (Aging and late thresholds): delivery tickets can run tighter clocks than dine-in.

Tax & Charges

- **Tax** — **Non-taxable** and **Bar menu tax included** (see below); **Bar menu disabled** keeps the bar menu categories off orders of this type; **Charge for takeout containers** makes items marked *Takeout Non-taxable* (on the item or its category) tax-free on this type.
- **Surcharge type** — No surcharge, Percentage or Fixed amount per order of this type. With a surcharge, **Surcharge amount**, **Surcharge label** and **Surcharge tax rate** appear.
- **Mandatory gratuity** — with it switched on: **Gratuity %**, the party size that triggers it (**Apply to parties of *n* Or More**; it comes off again if the party drops below), and whether tax is included and discounts are excluded when it is calculated. **Print Gratuity Suggestions on Receipt** and **Include in minimum tip declaration** sit here too.
- **Cover charge** — which cover the type applies, if any.

Workflow

The workflow is the list of steps the register runs at each stage of an order's life: **When The Order Starts**, **Before The Order Is Sent**, **After The Order Is Sent** and **At Payment**. It is why Dine-In asks for a table and Delivery for an address: the type says so.

- Workflow steps, stage by stage — every step, what it does, and the Block or Warn Only choice.
- Start prompts and their order — what the register asks when an order starts, and in which order.
- Recommended workflows, reset and copy — the starting steps for each kind, and copying a workflow from another type.

Adding and deleting a type

A new type is saved at once as Kind **Other / custom**, at the end of the list, available in the call center and included in the minimum tip declaration, with the recommended steps for Other. The **×** on a row deletes the type after you confirm. Save before picking another type: the editor does not warn about unsaved changes on General and Tax & Charges. The **Id** under Reporting is the type's fixed identifier for exports.

> When a prompt appears (or doesn't) at order start, the order type's workflow is always the answer — read the summary line before assuming a bug. Workflow changes reach every register within moments, without signing in again.

Tax on an order type

Non-taxable exempts every order of the type — wholesale, staff meals, or take-out where the law exempts it; the return lists those sales under *non-taxable order types*. **Bar menu tax included** treats bar prices as tax-inclusive, and the surcharge rate taxes the type's surcharge. The separate *Tax Inclusive* toggle was removed: inclusive pricing is the store-wide VAT setting on Sales tax setup.

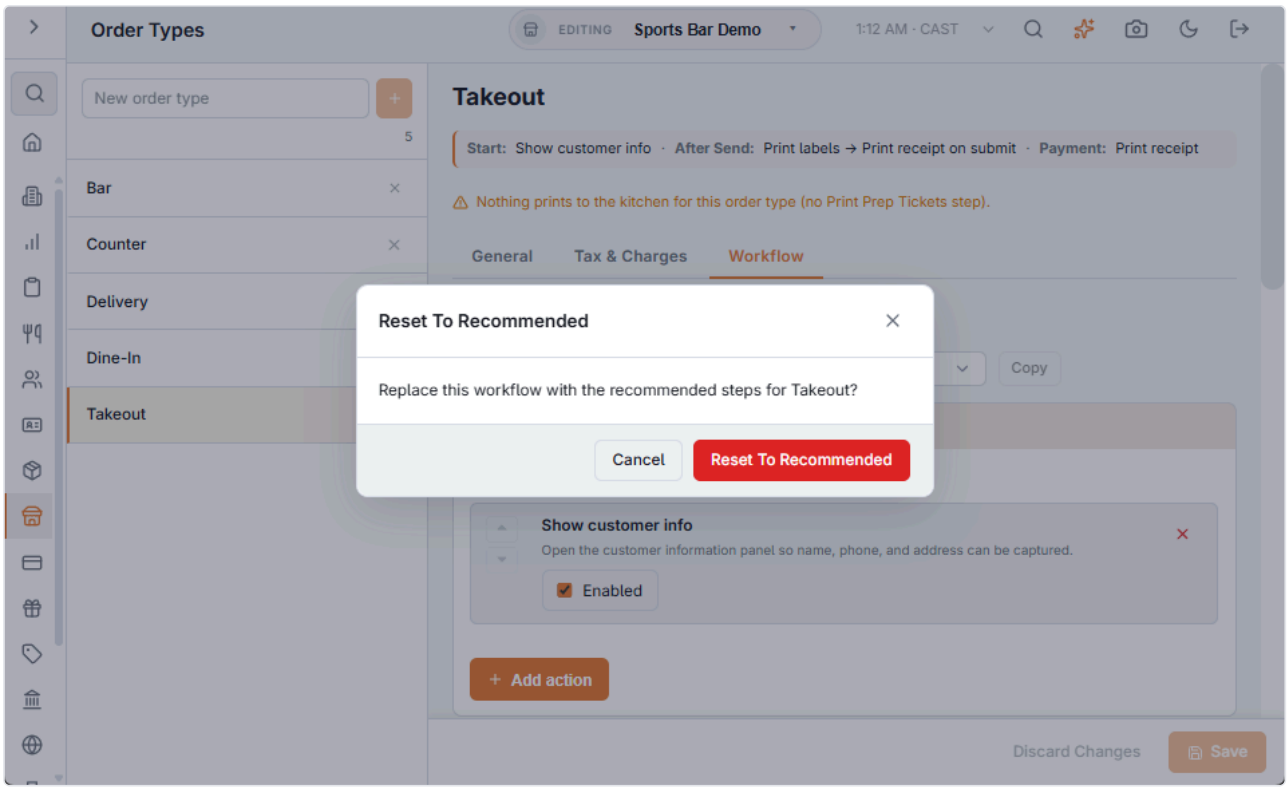
Workflow steps, stage by stage

Store Setup › Store and workflow

View online ↗

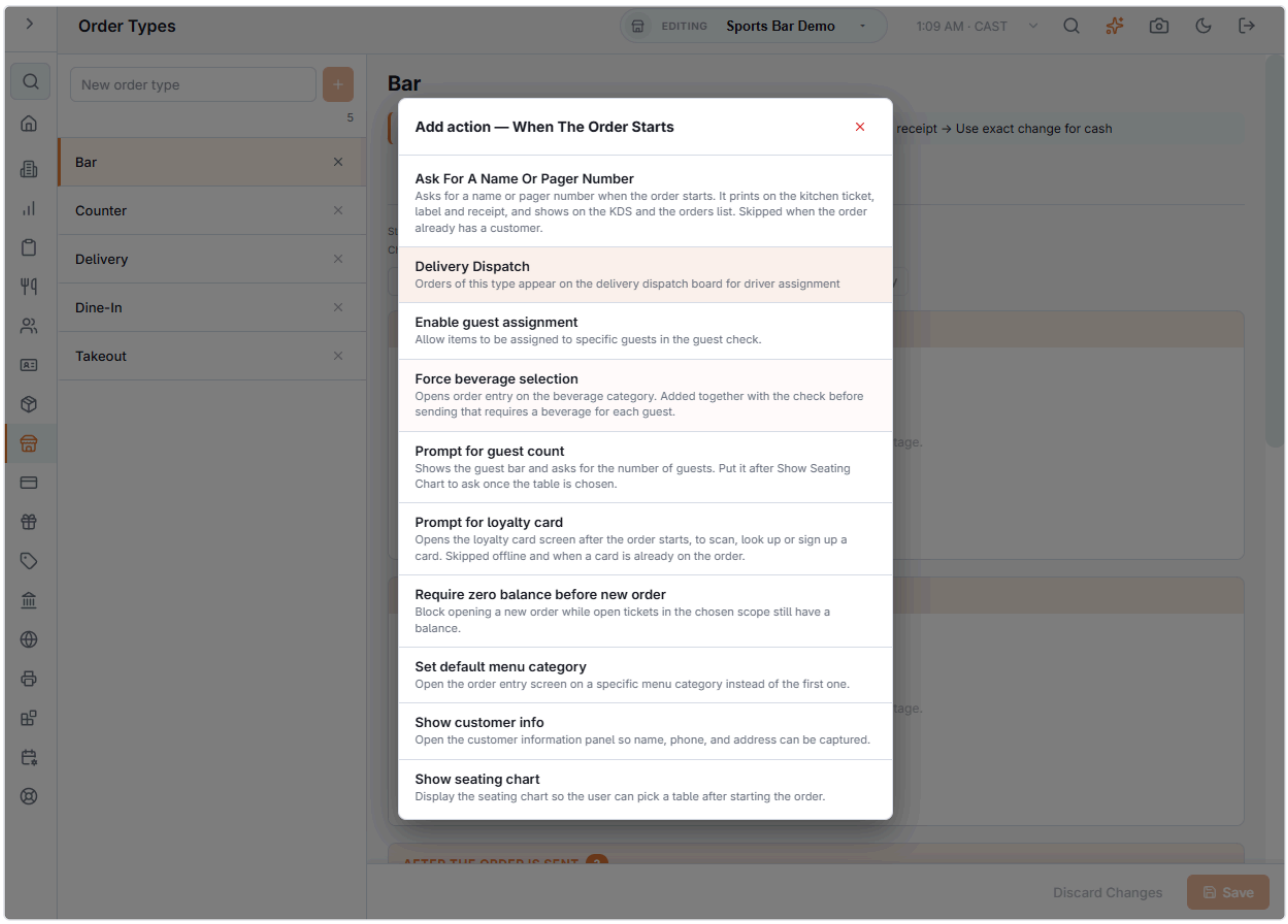
Every order-type workflow step, what it does, and the Block or Warn Only choice.

Each order type's **Workflow** tab (**Back Office › Store Setup › Order Types**) lists its steps stage by stage. Within a stage the steps run from top to bottom; the arrows on the left move a step up or down. Changes on this tab are saved as you make them — if one can't be saved the screen says so and shows what is actually stored.



Working with steps

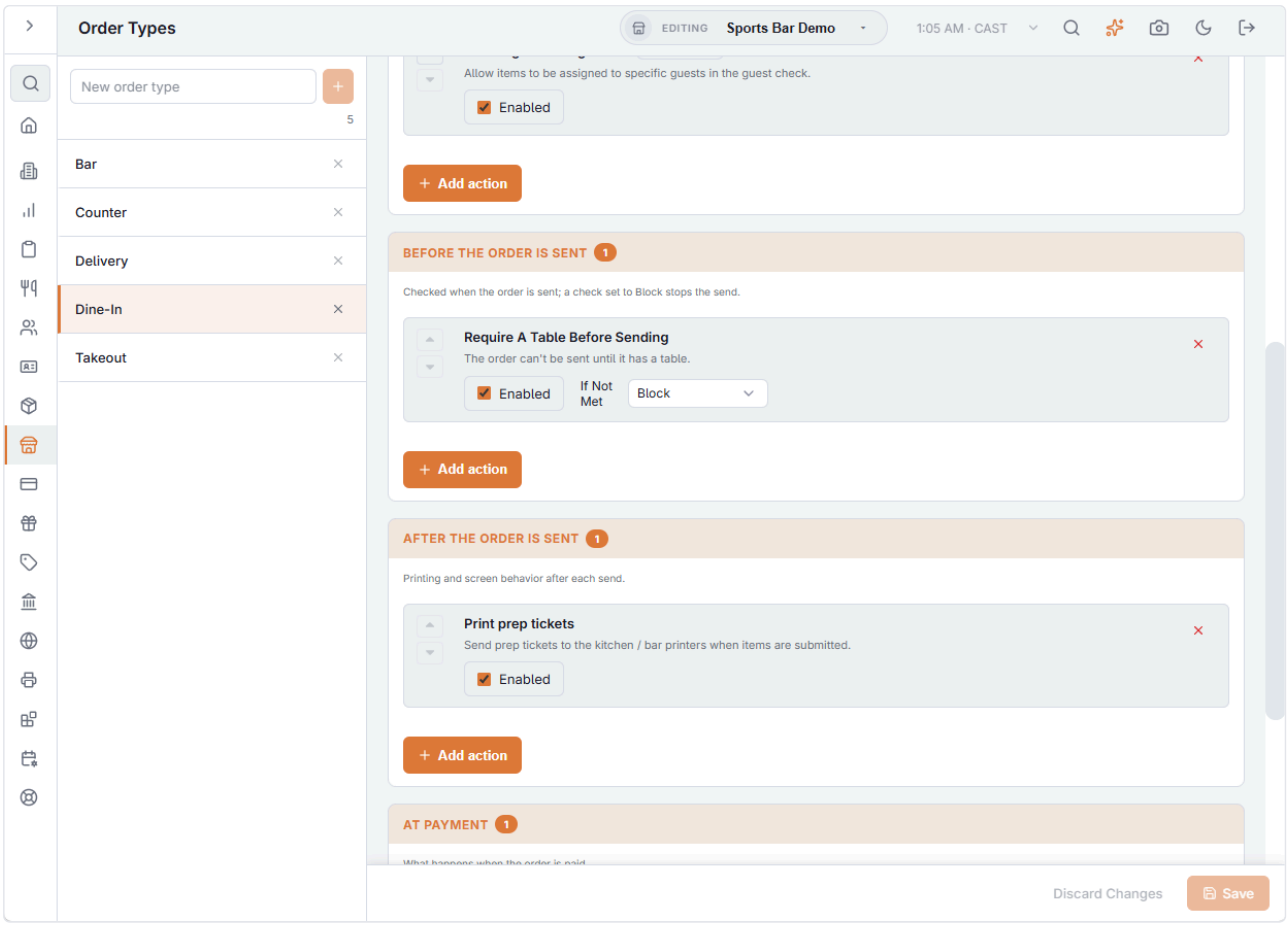
- **Add action** under a stage opens the steps that stage can take and that the type doesn't have yet, each with a one-line description. A stage with nothing left to add hides the button.
- **Enabled** switches a step off without removing it — handy to try a type without a prompt for a shift.
- **×** removes the step after you confirm.
- A step you add goes to the bottom of its stage, switched on and set to Block; the list of steps to add is alphabetical.
- Steps marked **Also On Recall** are applied again when an existing order of the type is recalled (the guest bar, guest assignment, the opening category). Prompts never reopen on recall.



Block or Warn Only

Only the steps that can stop an order have an **If Not Met** choice:

- **Block** — the message shows and the order doesn't go ahead (it doesn't start, or isn't sent) until it is fixed.
- **Warn Only** — the message shows, then the order goes ahead.



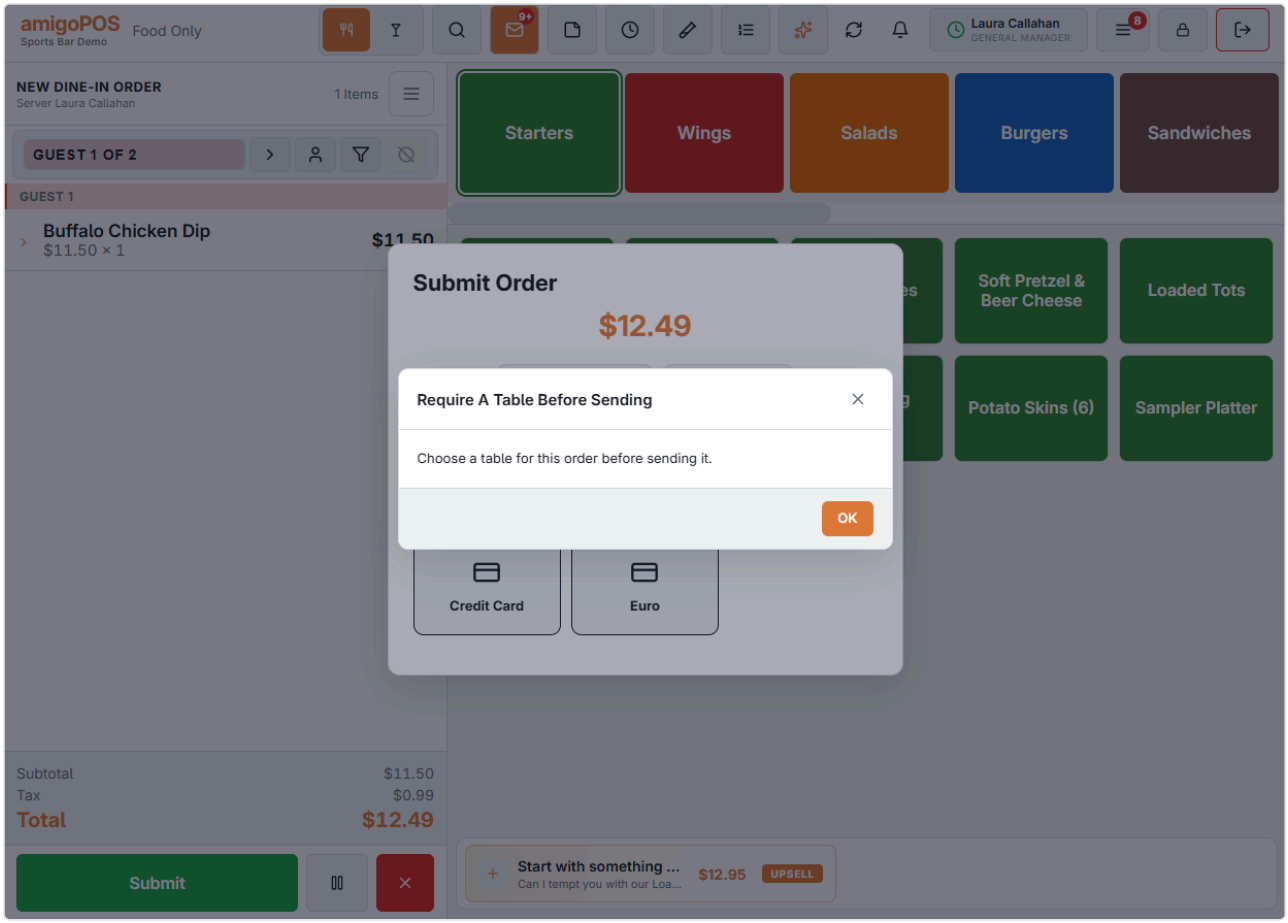
When The Order Starts

Step	What it does
Require zero balance before new order	Refuses a new order while open orders still owe money. **Scope**: the same user, the same terminal, or any open ticket; **Minimum balance to count** ignores pennies. Scope starts at the same user only. When it blocks, the orders list opens so one can be settled. Changing an order's type never counts that order itself. Can Block or Warn Only.
Show seating chart	Opens the floor plan to pick a table. Skipped when the table was picked first from the floor plan.
Show customer info	Opens customer lookup — phone, name, address and delivery zone. Skipped when a customer record is already on the order. Offline it asks for a name and phone instead.
Prompt for guest count	Shows the guest bar and asks for the number of guests. Put it after *Show seating chart* to ask once the table is chosen.
Prompt for loyalty card	Opens the loyalty card screen to scan, look up or sign up a card. Skipped offline, in training mode and when a card is already on the order.
Ask For A Name Or Pager Number	Asks for the guest's name or a pager number; it prints on the kitchen ticket, label and receipt and shows on the KDS and the orders list. Skipped when the order already has a customer or a name.
Enable guest assignment	Shows the guest bar so items can be assigned to guests (seats).
Set default menu category	Opens the order on the menu category chosen on the step. With no category chosen the step does nothing. If this and *Force beverage selection* are both on, the lower one in the list wins.
Force beverage selection	Opens the order on the beverage category: the one chosen on the step, or else the store's **Mandatory Beverage Category** (Order Entry Screen › Settings). With neither set, it does nothing. Adding it also adds *Validate beverage rule* below, which is what actually requires the beverage.
Delivery Dispatch	Puts the type's orders on the delivery board and shows the Deliveries button.

The prompts in this stage open one after another, in the order listed — see Start prompts and their order.

Before The Order Is Sent

Step	What it does
Validate beverage rule	Each guest with items must have a beverage (a bar item, or an item from the beverage category chosen on the step or set as the Mandatory Beverage Category). Removed items don't count. Can Block or Warn Only.
Require A Table Before Sending	The order can't be sent until it has a table — for when the seating chart was closed without picking one. Can Block or Warn Only.
Require A Customer Before Sending	The order can't be sent until it has a customer or a name. Can Block or Warn Only.



After The Order Is Sent

Step	What it does
Print prep tickets	Sends the new items to the kitchen printers and displays. Without it nothing reaches the kitchen.
Print labels	Prints item labels (takeout and delivery bags).
Print guest Wi-Fi slip	Prints the Wi-Fi slip with the food, on the order's first send only (Printing guest Wi-Fi details).
Print receipt on submit	Turns the Receipt option on by default in the Send screen, so a guest check prints when the order is sent. The server can still switch it off for one order.
Stay on order entry after submit	After sending (or paying) the screen starts the next order of the same type instead of returning to the orders list, running the type's start steps again. Typical for bars and counters.

At Payment

Step	What it does
Print receipt	Prints the receipt when the order is paid.
Print coupons	Prints the coupons the order earned.
Print Guest Survey Slip	After payment, prints the guest survey QR code on its own slip, and the receipts of this order type leave the survey out. Nothing prints when the survey is off or the check gets no survey.
Use exact change for cash	A cash payment opens with the amount due already entered; the first key typed replaces it (Cash payments and change due).

> Back to the editor: Order types and workflow.

Start prompts and their order

View online ↗

What the register asks when an order starts, in which order, and when a prompt is skipped.

When an order starts, the register asks for whatever the order type's **When The Order Starts** stage lists — a table, the number of guests, a customer, a loyalty card, a name — **one after another, in the order the Workflow tab shows them**. Change the order with the arrows on the Workflow tab (Workflow steps, stage by stage).

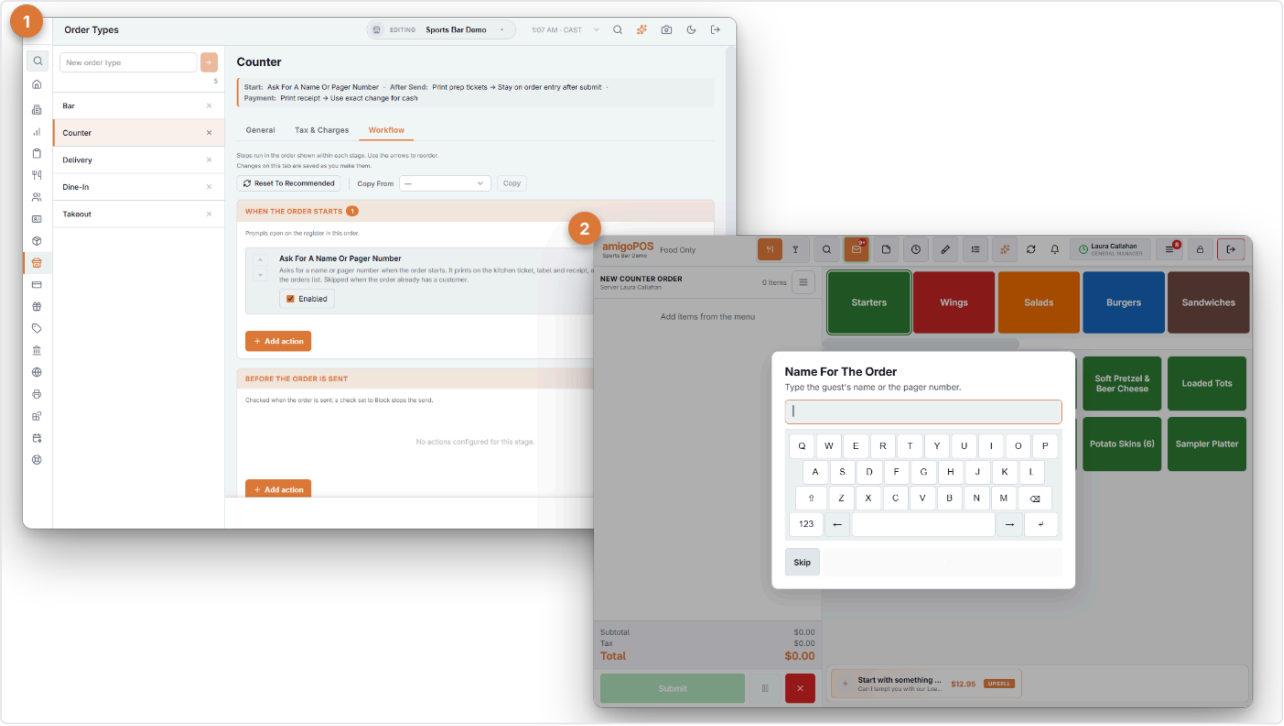
How the prompts run

- Each prompt opens when the previous one closes, whether it was answered, skipped or cancelled. Cancelling a prompt doesn't cancel the order.
- A prompt that is already answered is skipped: no seating chart when the table was picked first, no customer lookup when a customer record is on the order, no loyalty screen when a card is on it, no name prompt when the order has a customer or a name.
- The menu is ready behind the prompts, on the type's opening category.

> For table service, put **Show seating chart** above **Prompt for guest count**: the server picks the table, then says how many are sitting. Swap them to ask the count first.

Counter service

Ask For A Name Or Pager Number asks for the guest's name or the buzzer number as the order starts. **Skip** leaves the order without one. The name prints on the kitchen ticket, label and receipt, and shows on the kitchen display and the orders list.



To make sure no order leaves without a table or a name, add **Require A Table Before Sending** or **Require A Customer Before Sending** in the Before The Order Is Sent stage.

Changing an order's type

On an order already started, this needs the **Change Order Type** permission; without it, a manager approves first. Choosing the type of a new order needs none, and while the register is offline it is not asked.

More › Change Order Type runs the new type's start stage for the open order and asks only what it still needs, in the type's order: a customer when none is attached, a table (then the guest count) when it has none, a name when it carries none. The loyalty prompt isn't asked mid-order. A **Require zero balance before new order** step never counts the order being changed.

Staying on order entry

With **Stay on order entry after submit**, each new order of the type runs its start steps too — the balance check, the prompts and the opening category — once the payment screen (if any) has closed. The server stays on the category they were using unless the type names one.

Recalled orders

Recalling an order doesn't ask anything again. Steps marked **Also On Recall** restore the screen: the guest bar, guest assignment and the opening category.

Offline

Each register keeps a copy of the workflow, so start prompts, checks and kitchen printing keep working through an outage. Customer lookup becomes a name-and-phone prompt, and the loyalty prompt is skipped (Working offline).

Recommended workflows, reset and copy

Store Setup › Store and workflow

View online ↗

The starting workflow for each kind of order type, Reset To Recommended and Copy From.

A new order type starts with the **recommended steps** for its kind, so it prints to the kitchen and receipts from its first order. The Workflow tab can also start a type over from those steps, or copy another type's workflow.

The recommended steps

Kind	When The Order Starts	After The Order Is Sent	At Payment
Dine-in	Show seating chart, Prompt for guest count, Enable guest assignment	Print prep tickets	Print receipt
Takeout	Show customer info	Print prep tickets, Print labels, Print receipt on submit	Print receipt
Delivery	Show customer info, Delivery Dispatch	Print prep tickets, Print labels, Print receipt on submit	Print receipt
Bar	—	Print prep tickets, Stay on order entry after submit	Print receipt
Other / custom	—	Print prep tickets	Print receipt

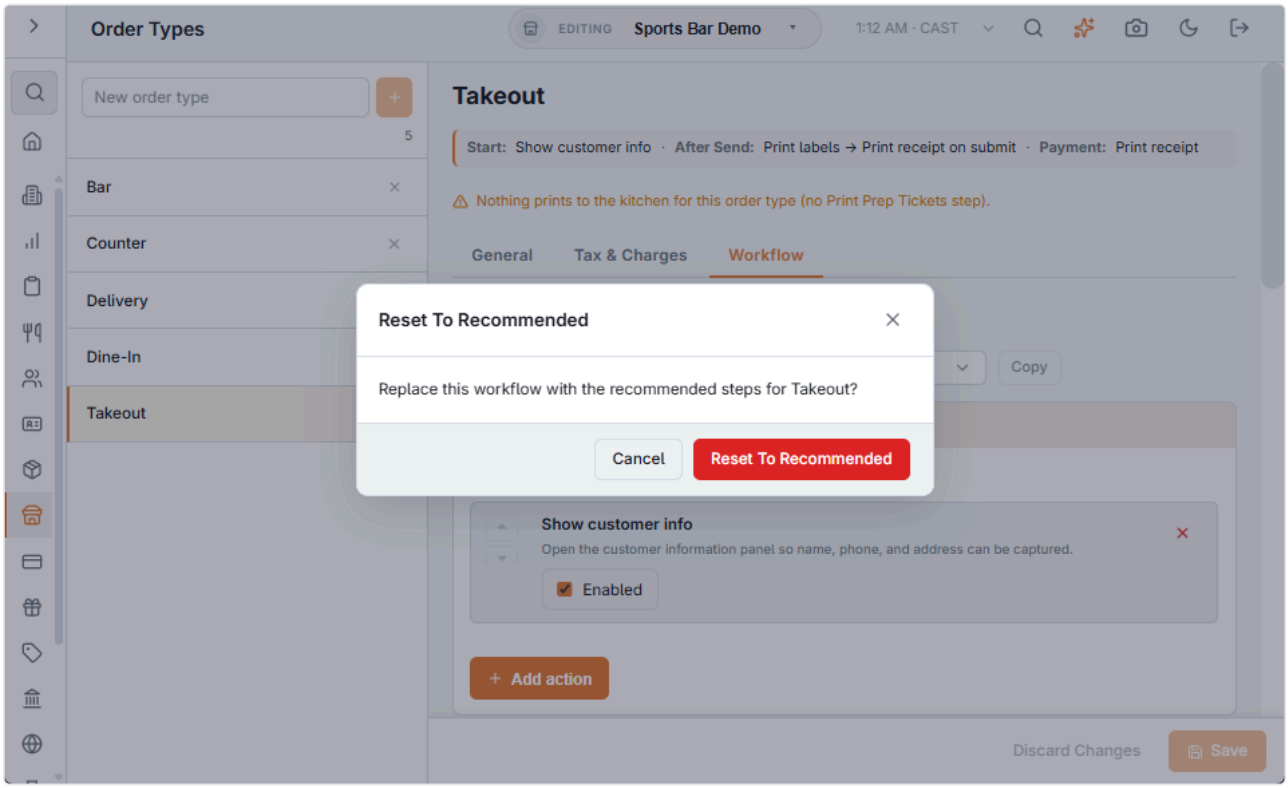
A new type is created with the kind **Other / custom**. Set its **Kind** on the General tab, then use **Reset To Recommended** to switch to that kind's steps; it uses the Kind shown in the editor. Recommended steps start switched on and set to Block.

Reset To Recommended

On the Workflow tab, **Reset To Recommended** replaces the type's workflow with the steps above for its current kind, after a confirmation. Steps you added are removed; settings on the other tabs are not touched.

Copy From

Pick a type in the **Copy From** list (every other type, disabled ones included) and press **Copy** to replace this type's workflow with that one's — same steps, same order, same on/off and Block or Warn Only choices, same parameters. Useful for a second dine-in type (Patio, Bar Dining) or a Phone type that should behave like Takeout.



> Both replace the whole workflow and save immediately; there is no undo. Read the summary line under the type's name afterwards to confirm the result.

Back to Order types and workflow.

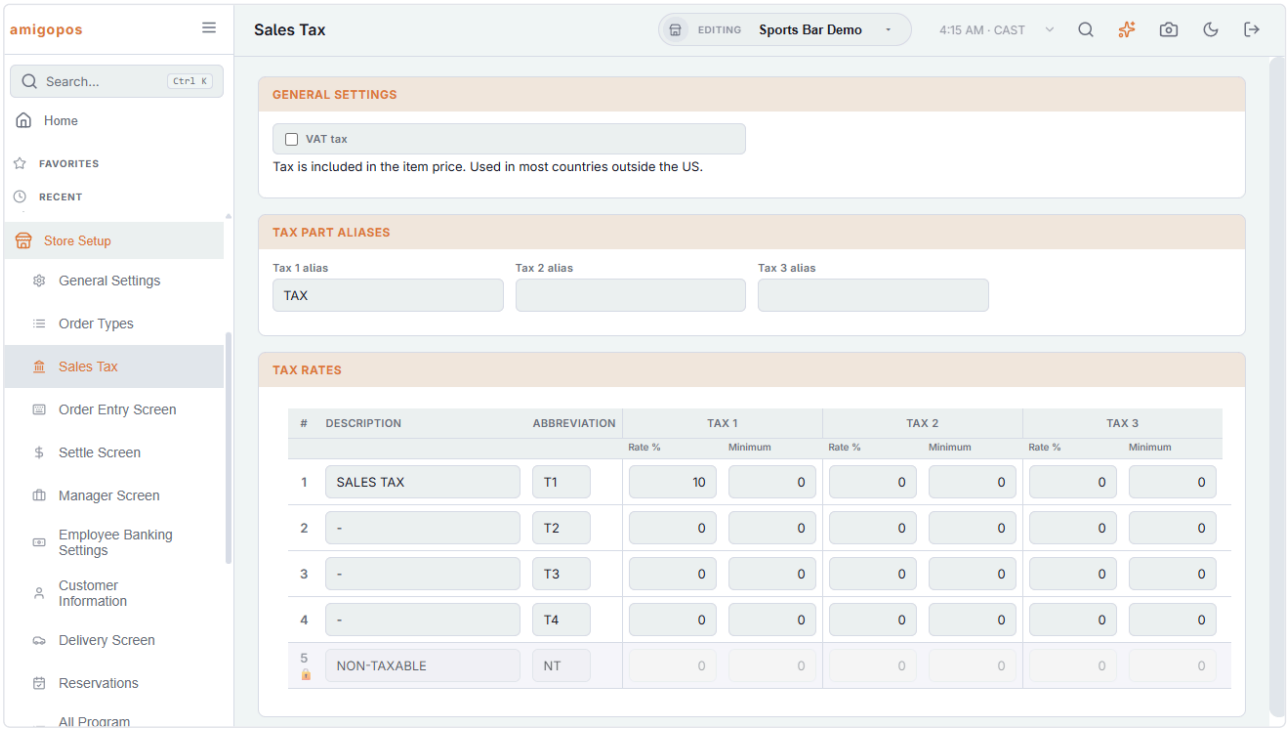
Sales tax setup

Store Setup › Store and workflow

View online ↗

Rates in percent with up to three components, minimums, VAT pricing, non-taxable items and order types, takeout exemptions and who may exempt an order.

Back Office › Store Setup › Sales Tax holds the store's tax rates and the store-wide tax behaviors. Items and categories pick a rate by its number; the rate's values live here, per store. The page shows the store chosen in the Back Office store picker.



There is no Save button: each field saves as you change it or leave it, with a tick (✓) to confirm or a cross (✗) if it failed.

General Settings

- **VAT tax** — prices include the tax; the tax inside is worked out for the receipt and the reports. The setting for VAT and GST markets (El Salvador, the UAE, Sint Maarten).
- **Deduct fixed discounts after tax** — appears only while VAT tax is on. On, a fixed-amount discount comes off the order total after tax; off, it comes off the subtotal and tax is worked out on what is left. The example under it shows the effect on a $50 order with a $10 discount, using Rate 1.

Tax part aliases

Tax 1 alias, **Tax 2 alias** and **Tax 3 alias** name the three parts a rate can have (State, County, City; or just IVA), up to 20 characters each. One set of names applies to every rate. They head the columns of the Filing your sales tax return, the tax analytics and the End of Day report.

Tax Rates

The table lists the store's rates by number. Rows cannot be added or removed; every store has the same numbered rates. For each rate:

- **Description** and **Abbreviation** — the rate's name.
- **Tax 1**, **Tax 2**, **Tax 3**, each with **Rate %** and **Minimum**. The parts add up: a 6.25% state tax plus a 2% city tax is one rate with two parts, and the register, the receipt and every report keep them apart.
- **Rate %** is typed as a percent, *8.875* for 8.875%, from 0 to 100.
- **Minimum** — a part is charged only when the order's taxable amount at that rate, after discounts, is at least this figure. Leave 0 where there is no threshold.

Rate 5, with the lock, is **Non-taxable**: its rates and minimums are fixed at 0, though its name can be changed. Assign it to items that carry no tax.

Where else tax is decided

- **Items and categories** pick the rate; a category sets the default and an item can override it. An item or category marked *Takeout Non-taxable* carries no tax on an order type with *Charge for takeout containers* switched on — the way some states exempt food to go.
- **Order types** (Order types and workflow): *Non-taxable* exempts every order of the type (wholesale, staff meals, or take-out where the law exempts it); *Bar menu tax included* treats bar prices as inclusive; the surcharge rate and the delivery zone rate tax those charges.
- **Tax-exempt orders**: the register's Tax Exempt function asks for the customer's certificate or tax id, which the Tax analytics exempt list and the return show. Who may use it is the *Tax Exempt Orders* permission (Jobs, roles, and permissions).

Chains

Rates are stored per store, but items reference a rate by its number everywhere. Keep **Rate 1** meaning the same class of item (standard food, say) in every store and give it each store's own values; the all-stores return then lines the parts up across locations.

> Other registers pick up a rate change when they tap the "Data updated" notice or next sign in. Change rates at a day boundary so one business day does not straddle two rates; tickets keep the tax they were saved with, so the reports stay right either way.

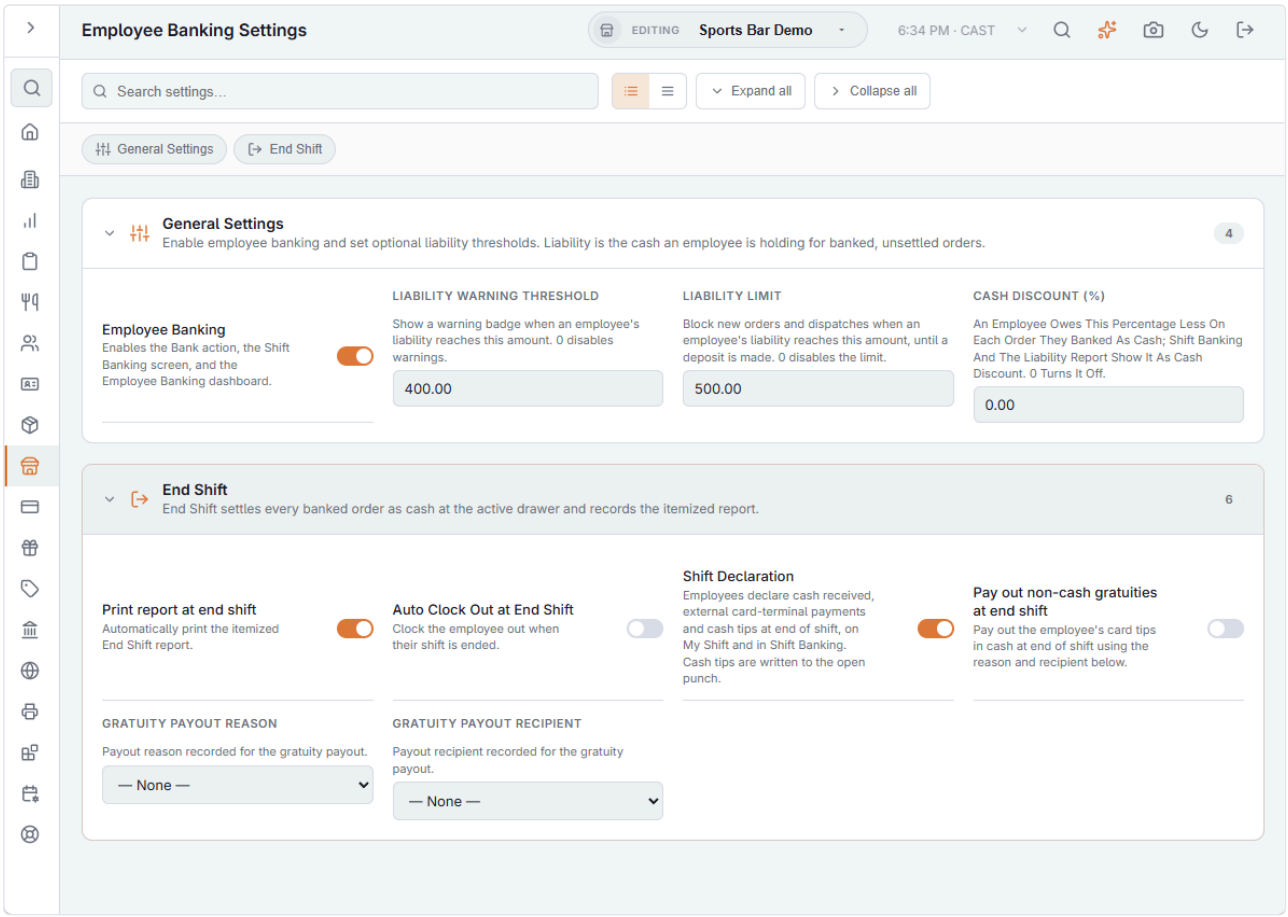
Employee Banking Settings

Store Setup › Store and workflow

View online ↗

Turning employee banking on, the liability warning and limit, and the End Shift options: report, clock-out, shift declaration and gratuity payout.

Back Office › Store Setup › Employee Banking Settings turns employee banking on for the store and sets how a banked employee's shift ends. How banking itself works is explained in Server banking vs. driver banking.



There is no Save button: each setting saves as you change it, with a tick to confirm.

General Settings

- **Employee Banking** — off to start. On, the orders list gets the **Bank** action, the time clock gets the **Bank Report** button, and the Shift Banking screen and the Employee Banking dashboard (**Cash Management › Employee Banking**) come into use. Jobs that can both take cash and settle can bank. While banking is on, nobody is asked to claim a cash drawer at clock-in.
- **Liability warning threshold** — when an employee is holding this much cash for banked orders, they are flagged in Shift Banking and on the dashboard. 0 turns the warning off.
- **Liability limit** — a driver holding this much cannot be sent out on another delivery until they make a deposit. 0 turns the limit off.
- **Cash Discount (%)** — an employee owes this percentage less on each order they banked as cash. Shift Banking, the Employee Banking dashboard and the liability report show it as **Cash Discount**. 0 turns it off. This setting used to be on Store Setup › Settle Screen.

End Shift

End Shift settles every order the employee banked as cash at the active drawer and records an itemized report.

- **Print report at end shift** — prints that report automatically. On to start.
- **Auto Clock Out at End Shift** — clocks the employee out when their shift is ended. Off to start.
- **Shift Declaration** — employees declare the cash they received, payments taken on an external card terminal, and their cash tips, on My Shift and in Shift Banking. Cash due is the POS cash minus the external card payments; over/short is the cash declared minus the cash due. There is one declaration per employee per business day, and saving again replaces it. Cash tips are written to the employee's open punch. Turning this on also adds **Activity › Shifts & End of Day › Shift Declaration**.
- **Pay out non-cash gratuities at end shift** — pays the employee's card tips in cash when the shift ends, recorded as a cash payout with the **Gratuity payout reason** and **Gratuity payout recipient** chosen below it. The reasons and recipients are the payout lists on **Store Setup › Settle Screen › Cash Payouts**.

Related: Employee banking and deposits, Shift banking overlay.

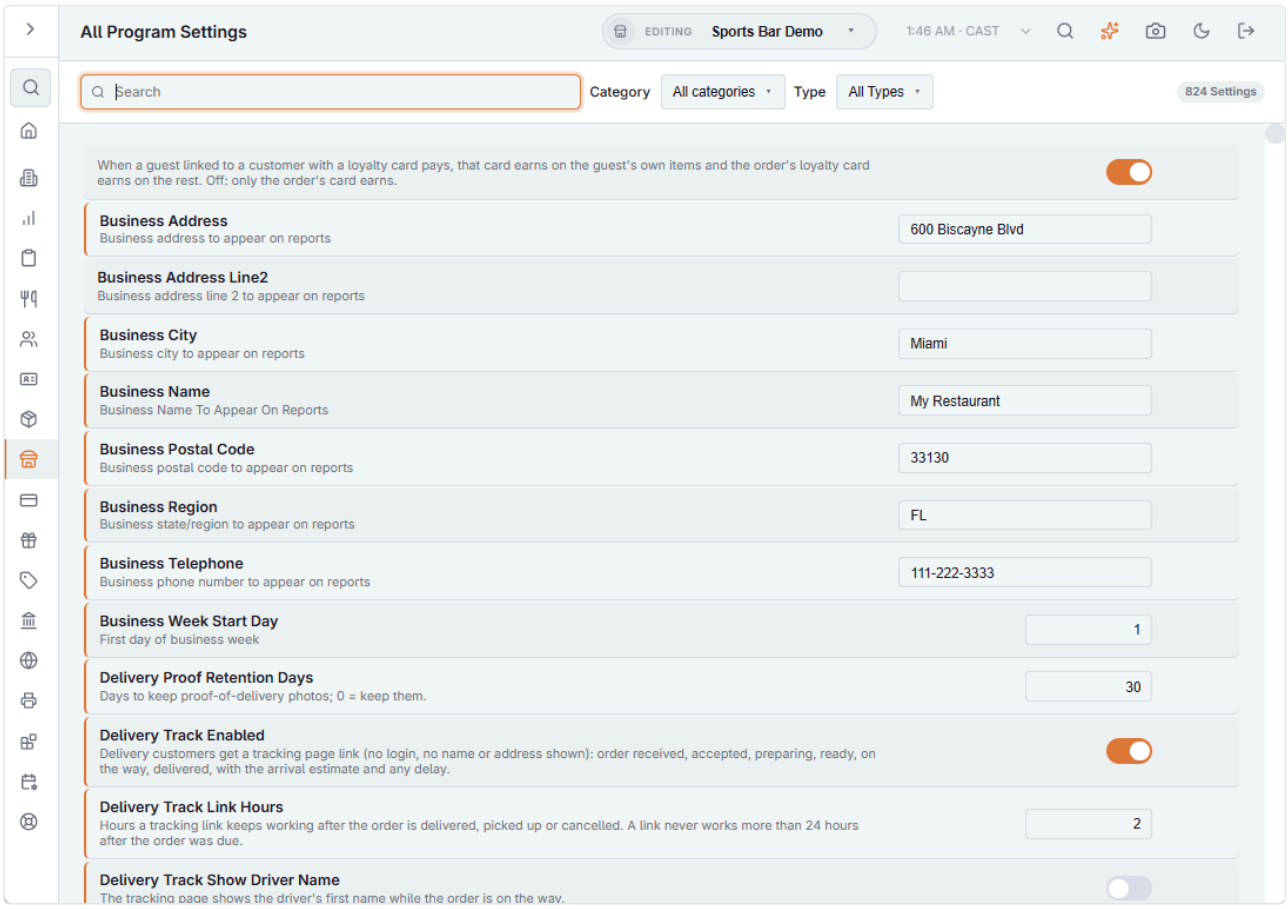
All program settings (search)

Store Setup › Store and workflow

View online ↗

Finding any setting by typing what you remember.

Back Office › Store Setup › All Program Settings is one list of the store's program settings, for finding a setting by keyword and changing it where you find it. To jump to a Back Office *page* instead, press Ctrl+K (Cmd+K on a Mac) anywhere in Back Office.



Finding a setting

- **Search** matches the text you type against the setting's internal name and its description, as one phrase. Names and descriptions are in English, so search with English words ("gratuity", "drawer", "prompt").
- **Category** and **Type** (Yes / No, Integer, Decimal, Date, Time, Text, Guid) narrow the list. The count beside them shows how many settings match.

Each row shows the setting's name, written from its internal name with spaces added ("Guest Wifi Ssid"), its description and its value.

Changing a value

A switch saves as you flip it; other fields save when you leave them, with a tick to confirm. If a save fails, a red message names the setting. It is the same setting, with the same value, as on its home page — but this list has none of the home page's limits or choice lists, so any value is accepted. Where a setting has a home page, change it there.

What is not here

System settings, passwords, keys and other secrets, and the store's language, time zone and base currency (on General settings).

When to use it

- You know roughly what a behavior is called but not where it is configured.
- Auditing a policy: a keyword such as "gratuity" lists every setting that touches it.
- Support conversations: "search settings for X and read me the value" beats navigating anyone through menus.

> Edits here are real edits. Other registers pick them up when they tap the "Data updated" notice or next sign in.

Reason lists and word filters

Store Setup › Store and workflow

View online ↗

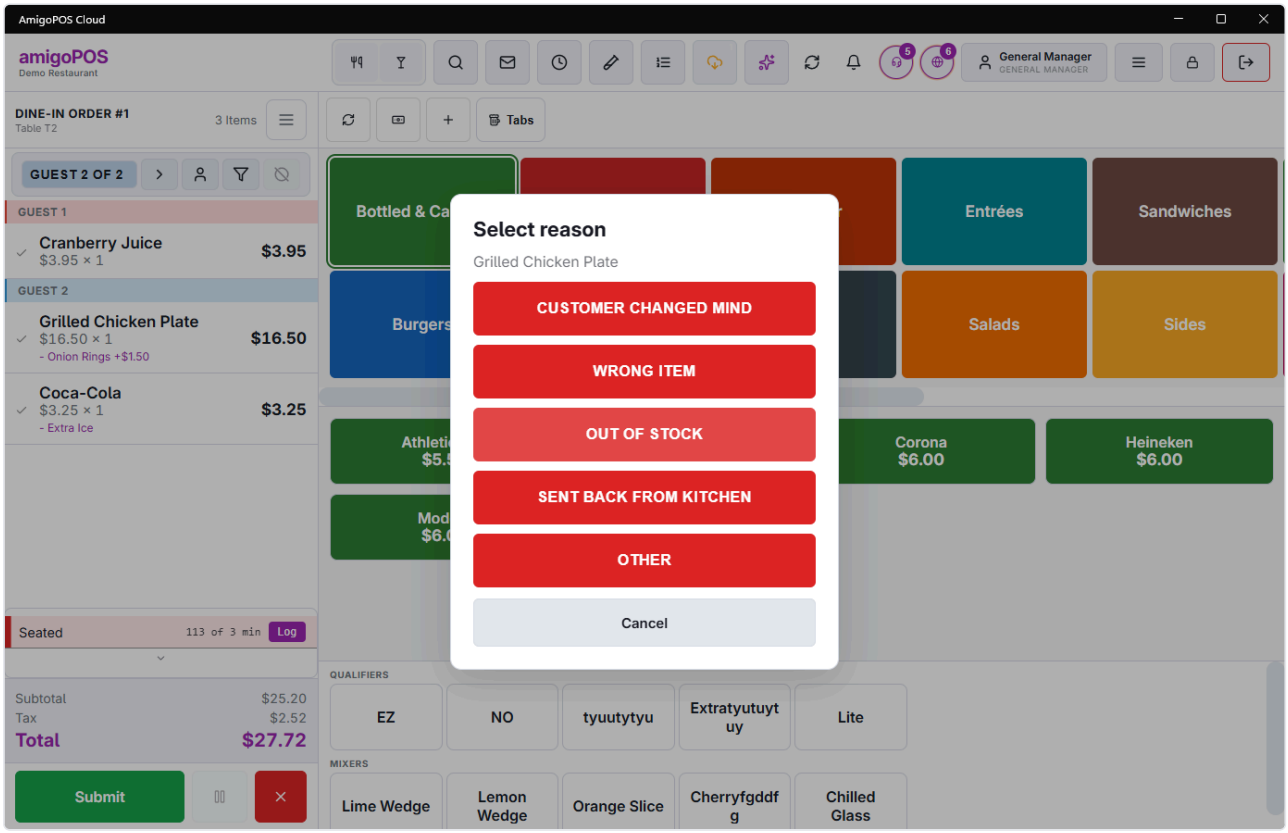
The three reason/filter lists under order-entry settings: refund reasons, removed-item reasons, and word filters — what each list does and where it prompts at the register.

Five lists on **Back Office › Store Setup › Order Entry Screen** set the reasons staff pick at the register and the text filters applied to what they type: the **Removed Items**, **Void Reasons**, **Refund Reasons**, **Age Verification** and **Word Filters** tabs. Each is an editable grid: click the add row to create an entry (it is saved at once), edit a cell and it saves when you leave it, and use the delete button — after a confirmation — to remove one. Age Verification has its own topic: Age verification and ID-required items.

Removed Items

The reasons shown when someone removes an item that was **already sent** to the kitchen or bar. Items not sent yet are removed without a prompt — nothing was made. Columns: **Remove item reason** (up to 50 characters), **Button position** (the order of the buttons at the register) and **Hide**.

After the reason is chosen, if inventory has already recorded the item's usage, the register also asks whether to **return the ingredients to inventory** — yes for a mistake caught before anything was made, no if the food was prepared and wasted. Usage is recorded shortly after sending, so an item removed within a few seconds may skip this question; nothing needs reversing.



> Keep at least one reason visible. With every reason hidden or deleted, the prompt offers only Cancel and a sent item cannot be removed.

Void Reasons

The reasons offered when voiding an order; a reason is required. Columns: **Void reason** (up to 50 characters), **Button position** and **Hide**. See Voids and the void reason prompt.

Refund Reasons

The reasons shown when a manager processes a refund from the orders list. The chosen reason is stored on the refund and appears in refund history and transaction reports, so keep the list short and specific — *Wrong order*, *Food quality*, *Guest complaint*, *Duplicate*

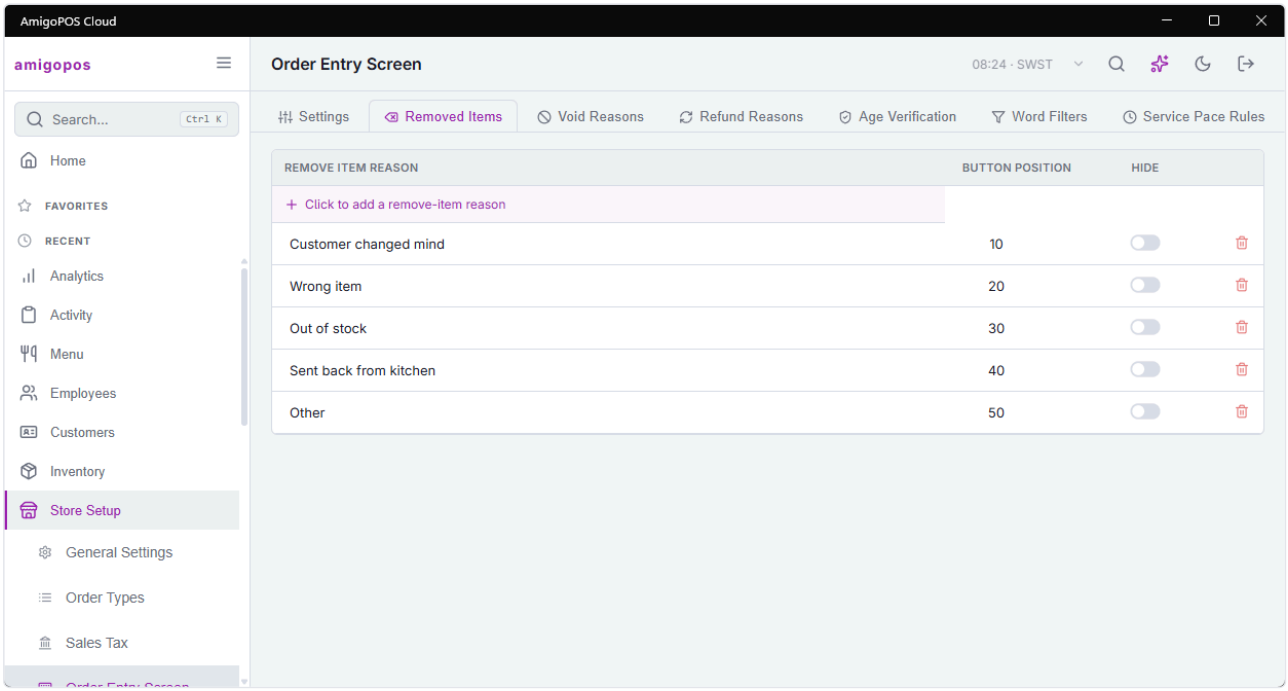
charge. Columns: **Refund reason** (up to 50 characters) and **Hide**. A refund cannot be completed without a reason; with none visible the refund screen says “No refund reasons are configured.”

In every list, **Hide** takes a reason off the register without deleting it, so past orders still show it.

Word Filters

Search-and-replace rules applied as staff type item notes, order notes, guest names on items, misc item names, guest-check names and customer notes. Each rule has a **Search text** and a **Replace text** (up to 200 characters each). The classic use is keeping profanity or shorthand off prep tickets and receipts.

- Matching ignores upper and lower case and also matches inside longer words — a rule for “ass” changes “class” too. Use longer search text, or add spaces around a word.
- Left empty, Replace text becomes **XXX**; it does not remove the word.
- A rule with an empty Search text is ignored.



Common questions

- **Removing an item didn’t ask for a reason.** The item hadn’t been sent yet — only sent items prompt.
- **The refund screen has no reasons to pick.** Every reason is deleted or hidden — add one, or untick Hide.
- **Can I change the order of the buttons?** Yes, for removed-item and void reasons: change **Button position**. Refund reasons are listed by name.

Screens

Order-entry screen layout

Store Setup › Screens

View online ↗

Tuning the POS screen per store and form factor.

Back Office › Store Setup › Order Entry Screen gathers what shapes order taking at the register, across eight tabs. The store needs the Back Office **Configuration** permission to open it.

The tabs

- **Settings** — the order-entry settings described below.
- **Removed Items**, **Void Reasons**, **Refund Reasons** and **Word Filters** — see Reason lists and word filters.

- **Age Verification** — see Age verification and ID-required items.
- **Service Pace Rules** — see Service-pace rules.
- **Kitchen Display** — ticket timers, timer colours and scheduled-order lead times: see Aging and late thresholds and Scheduled orders on the KDS.

How the Settings tab saves

There is no Save button. A switch saves the moment you flip it; a box saves when you leave it, with a tick (✓) to confirm or a cross (✗) if it failed. Numbers outside the allowed range are brought back into range, and nothing can be changed while the station is offline. **Search settings** at the top finds a setting on this tab; the chips jump to a section.

The Settings tab

Customer Receipt

Print Receipt button enabled — a setting for this station only: on it, the **Receipt** option in the Send screen starts switched on for every order, whatever the order type's workflow says.

Select Order Type

Ask For The Order Type Automatically — on to start with: after sign-in and after each order, the register opens the order type picker, with **Recall Open Order**, by itself. Off, the register waits: the picker opens when the server presses **New Order** or taps the menu, and **Recall** finds an open order. Phones never open it by themselves.

Suggestive Selling

Prompt Before Parking — a new suggestion opens in a dialog as soon as it fires; closing the dialog parks it on the suggestion bar as usual.

Regular Menu

- **Display price on menu item buttons** — shows the price under the item name on the menu buttons.
- **Display modifiers only if mandatory** — an item whose modifier groups are all optional is added at once, with its default modifiers, instead of opening the modifier screen. Items with a required group still open it.
- **Menu item counters enabled** and **Delete menu item counters at end of day** — see Menu item counters overlay (86 from the register).
- **Order menu items alphabetically** — the item buttons are in name order instead of their button positions. It is the same switch as on the Menu Items page.
- **Order modifiers alphabetically** — the same for modifiers.
- **Mandatory Beverage Category** — the category the beverage steps of an order type's workflow use when the step has none of its own. See Workflow steps, stage by stage.

Discounts

- **Manual discount text** — the name a manual discount gets on the check.
- **Line item discount maximum %** — the largest discount on one line: a percentage up to this figure, or a fixed amount up to this share of the line. 100 means no limit.
- **Discount order minimum uses subtotal only** — off, tax counts toward a discount's order minimum. No effect under VAT.
- **Allow fractional percentage discounts** — allows percentages like 12.5%; off, only whole percentages are accepted.
- **Line item discount includes modifiers** — modifier prices count in a line discount.
- **Reset coupon redemption status on order void** — a printed coupon used on an order that is then voided can be used again.

Misc Items

- **Show Misc button** — offers **Misc Item** in the More menu, for ringing up something that is not on the menu.
- **Default misc item name** and **Use default misc item name** — with the second on, the misc item screen opens with this name filled in.
- **Default Misc Item Tax Rate** — the tax rate misc items get. None uses rate 1.
- **Send misc items to prep printer 1 by default** — misc items print on prep printer 1; off, they do not print in the kitchen.

See Miscellaneous and open-price items.

Fractional Quantity Buttons

Enable fractional quantity buttons shows the partial-quantity buttons on the item screen at the register, and the four switches below it choose which: ½, ⅓, ¼ and ⅕. Each one multiplies the line's quantity.

Gratuities

Fixed gratuity 1–4 are the percentage buttons on the gratuity screen, for example 18. A box left at 0 hides its button. See Gratuity and cover charges.

Price Rules

Display price rule message — when a price rule changes an item's price, the rule's name and the regular price show under the item on the guest check.

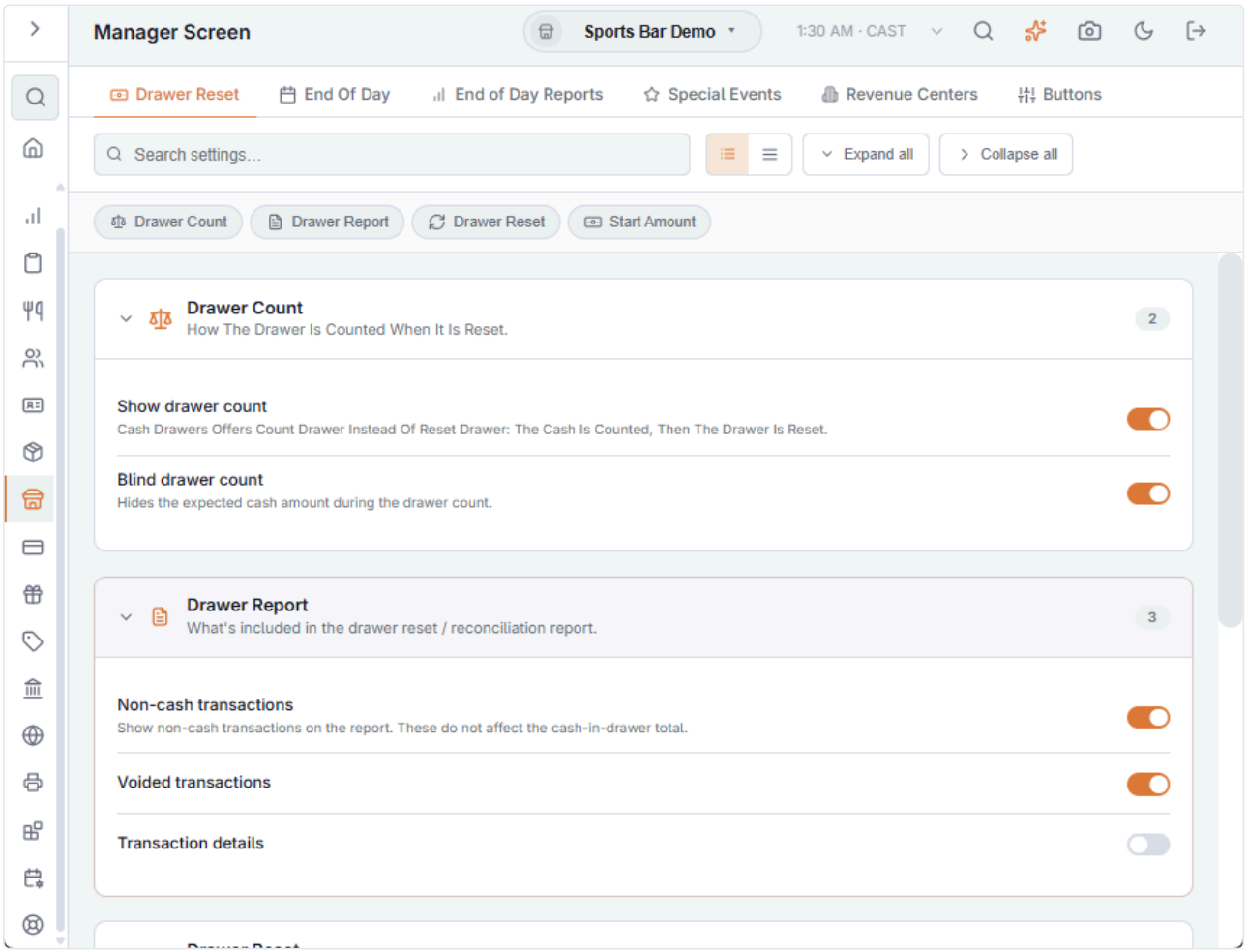
Manager screen and buttons

Store Setup › Screens

View online ↗

Drawer reset, End of Day and report settings, and which manager buttons each station shows.

Back Office › Store Setup › Manager Screen holds the settings behind the manager tools in **More** at the register: drawer resets, End of Day, the reports End of Day prints, special events, revenue centers, and which manager buttons each station shows. Switches save the moment you flip them, with a tick to confirm.



Drawer Reset

What **More › Cash Drawers** shows and does when a drawer is reset. The reset itself is explained in Drawer reset at end of shift.

Setting	What it does
Show drawer count	Cash Drawers offers **Count Drawer** instead of **Reset Drawer**: the cash is counted per currency, and saving the count resets the drawer. Off, the drawer is reset without a count.

Setting	What it does
Blind drawer count	Count screens show only the boxes to type the count in, with no expected amount. The same switch is on **Cash Management › Cash Drawers**; see Creating and editing cash drawers.
Non-cash transactions, **Voided transactions**, **Transaction details**	Optional sections of the drawer report.
Hide totals	Cash Drawers shows no **Cash in Drawer** and no drawer report, to anyone, managers included. The report printed after the reset is unchanged.
Open drawer after reset	The drawer opens when the reset is saved. Only a drawer whose home is this station opens; a drawer reset from another station, for example with **Reset Here** at End of Day, stays shut.
Print report after reset	Prints the drawer report when the reset is saved. The report is kept in **Activity › Cash Logs › Drawer Reset Log** either way.
Show prompt (Start Amount)	After the reset, Cash Drawers asks for the drawer's start amount, filled in with the drawer's default float. The amount entered becomes the drawer's new default float. Off, there is no prompt. Each drawer's default float is also on **Cash Management › Cash Drawers**.

End Of Day

How End of Day runs: hiding totals, voiding open orders, the checks it makes before it runs (drawers not reset, open pre-authorizations, open orders), emailing the report, and which sections the End of Day report includes. See Running end of day and The end-of-day report.

End of Day Reports

The manager reports in **More › Reports**, one row each: **Button position**, **Auto Print** and **Auto Email** (printed or emailed when End of Day completes), and **Hide** (takes the report's button away). See Reports overlay (mini reports).

Special Events and Revenue Centers

- **Special Events** — the named events event pricing uses. See Special and event pricing.
- **Revenue Centers** — the areas sales are grouped by, such as dining room, bar and patio. See Revenue centers.

Buttons

Which buttons the Manager section of **More** shows **on this station**: **Cash Drawers**, **End Of Day**, **Reports**, **Cash Drops**, **Employee Banking** (Shift Banking) and **Shut Down**. A button that is off is also not offered by the assistant.

- The switches are kept on the station itself, so change them in Back Office on the register you want to change. Other stations are not affected.
- A switch never changed is on. The More menu picks up a change the next time it opens.
- The other manager buttons are always there for anyone allowed to use them.

> Who may use a manager button is a permission on the employee's job; see Jobs, roles, and permissions. These switches only decide whether the button is on this station.

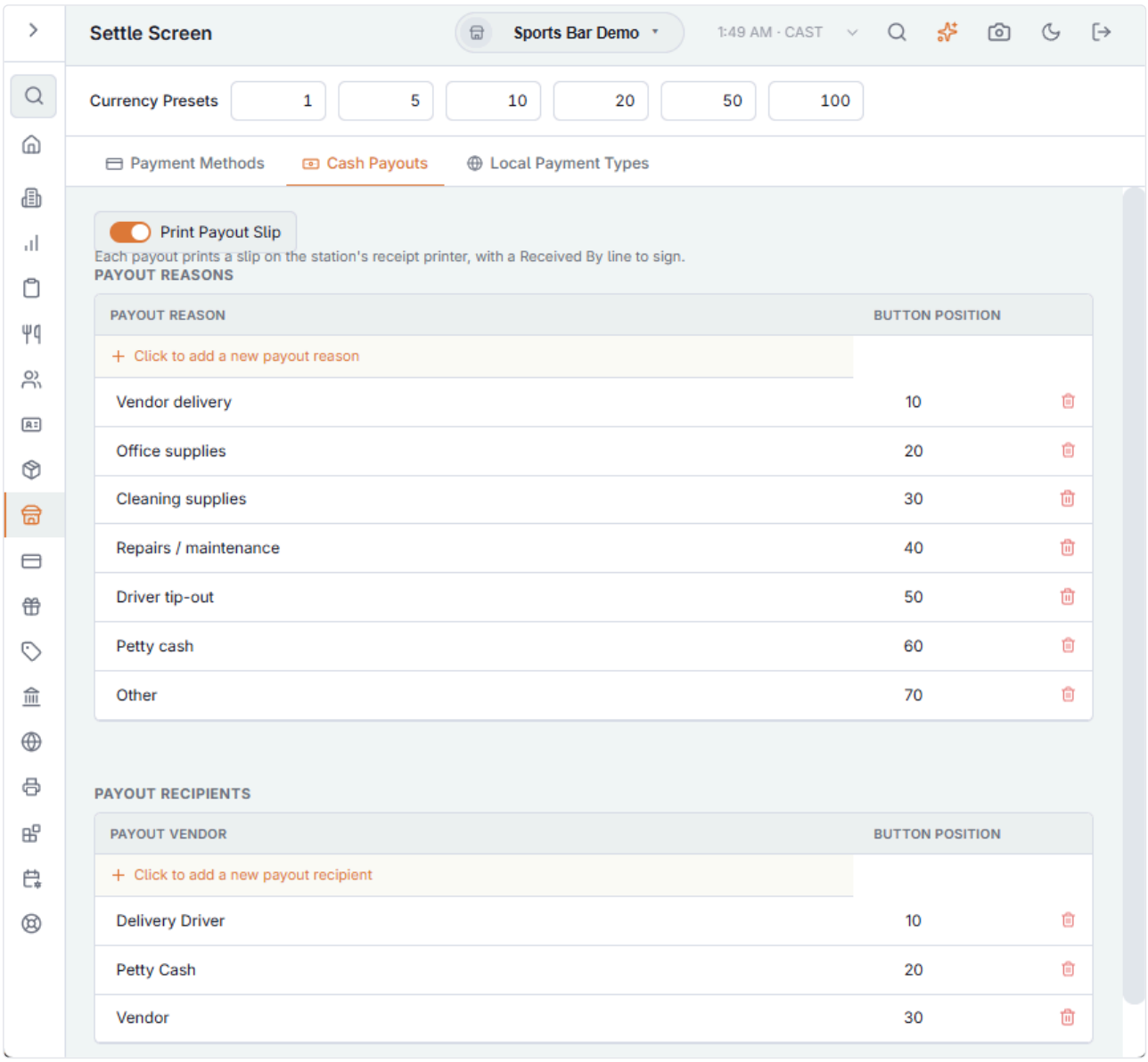
Settle screen

Store Setup › Screens

View online ↗

Back Office › Store Setup › Settle Screen: the quick-cash amounts, the three tabs, and where every button the cashier sees at settle is configured.

Back Office › Store Setup › Settle Screen sets up the register's payment screen: the quick-cash amounts in the bar at the top, and three tabs. This topic is also the map of everything a cashier sees at settle, and where each piece is configured.



Currency Presets

The six boxes are the quick-cash buttons beside the numpad when a cashier takes cash (see Cash payments and change due). A box saves when you leave it, and a tick confirms the save.

- Whole amounts only, shown on the buttons in the order of the boxes.
- 0 leaves that button out. With all six at 0, the buttons are 1, 5, 10, 20, 50 and 100.
- A cash method in another currency uses the same figures in its own currency.

The tabs

- **Payment Methods** — **Open Payment Methods** takes you to **Back Office › Payments › Payment Methods**, where the methods are set up. See Payment methods.
- **Cash Payouts** — the **Payout Reasons** and **Payout Recipients** offered when cash is paid out of a drawer. See Cash paid-out and reasons.
- **Local Payment Types** — which payment methods the payment screen shows on this station. See Local payment types.

> The **Cash Discount** that used to be on this page applies only to cash that employees bank, so it is now on **Store Setup › Employee Banking Settings**. See Employee Banking Settings.

What's on the settle screen, and where it's configured

- **Payment buttons** — one per enabled payment method, in their configured order with their icons → Payment methods.
- **Quick-cash buttons** → the Currency Presets above.
- **Which methods this station shows** → Local payment types.
- **Card brand buttons** for manual entry → Credit card types.
- **Terminal selection** for integrated card payments → Payment terminals.
- **Surcharges and tax display** → Surcharges and tax on the settle screen.
- **Split controls** → Split by item and the other splitting topics.

> If a button is missing at settle, work backwards: is the method enabled and available for tender, is it switched off for this station under Local Payment Types, is it available for this channel (store vs. call center/web), and does the station have the needed hardware selected?

What the cashier sees and does — tendering, change, receipts — is in The settle screen explained.

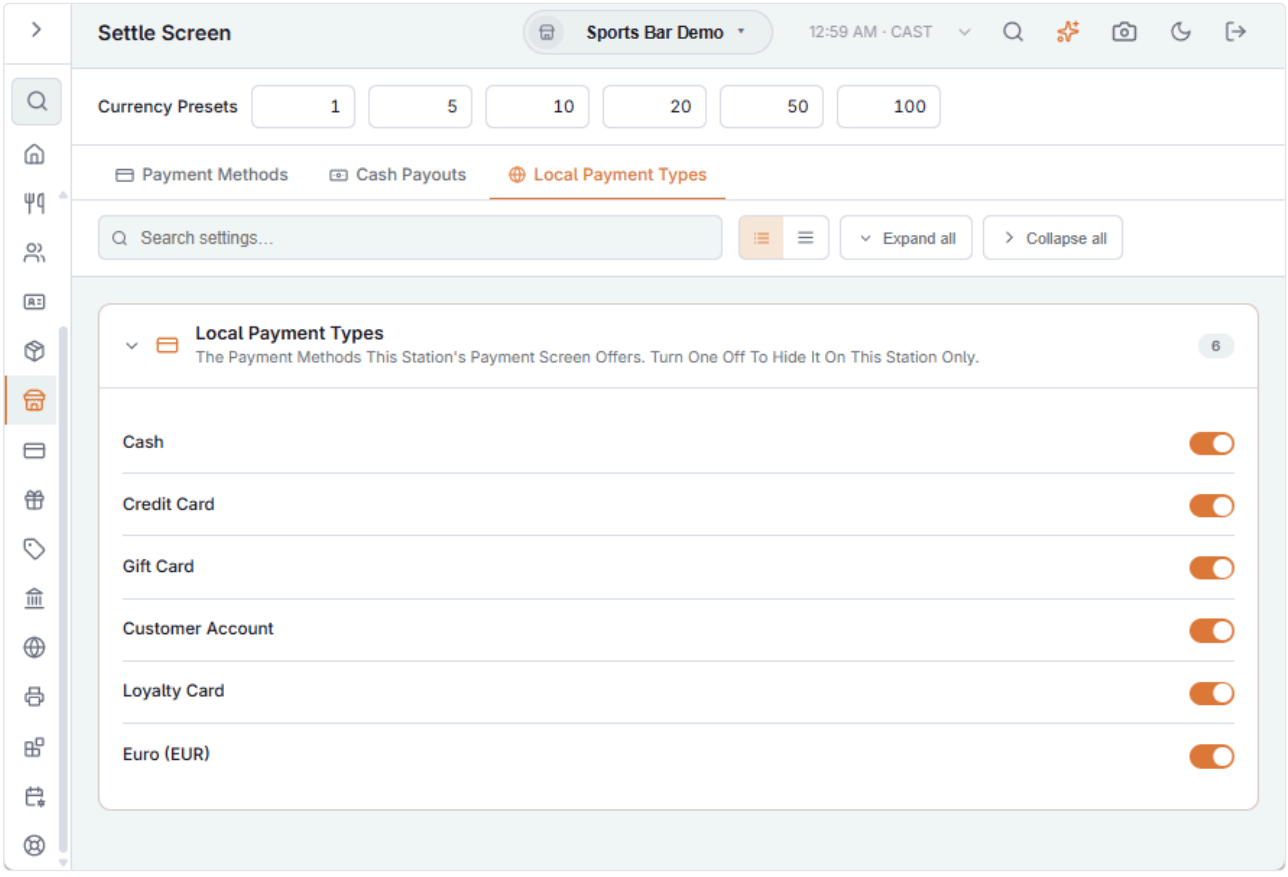
Local payment types

Store Setup › Screens

View online ↗

Which payment methods the payment screen shows on each station.

Back Office › Store Setup › Settle Screen › Local Payment Types chooses which payment methods the payment screen offers *on this station*. Use it when one register should not take a tender the store takes elsewhere: no cash at a card-only counter, or room charges only at the hotel bar.



How it works

- The tab lists the store's payment methods that can take a payment, in their button order, each with a switch. A method in another currency shows its currency code.

- Turn a switch off and that method disappears from the payment screen on this station. Other stations keep it.
- A switch saves the moment you flip it and applies the next time the payment screen opens. A method added later starts on.

> The switches are kept on the station itself, not with the store. Change them in Back Office on the register you want to change. Resetting the app's data on a station turns all its switches back on.

What it does not change

- The methods themselves — name, icon, whether they open the drawer, where they can be used — are set up under **Back Office › Payments › Payment Methods**. See Payment methods.
- Only the payment screen follows these switches. Quick Cash and Quick Card on the orders list, and the speed bar's cash button, still work.

Related: Settle-screen layout.

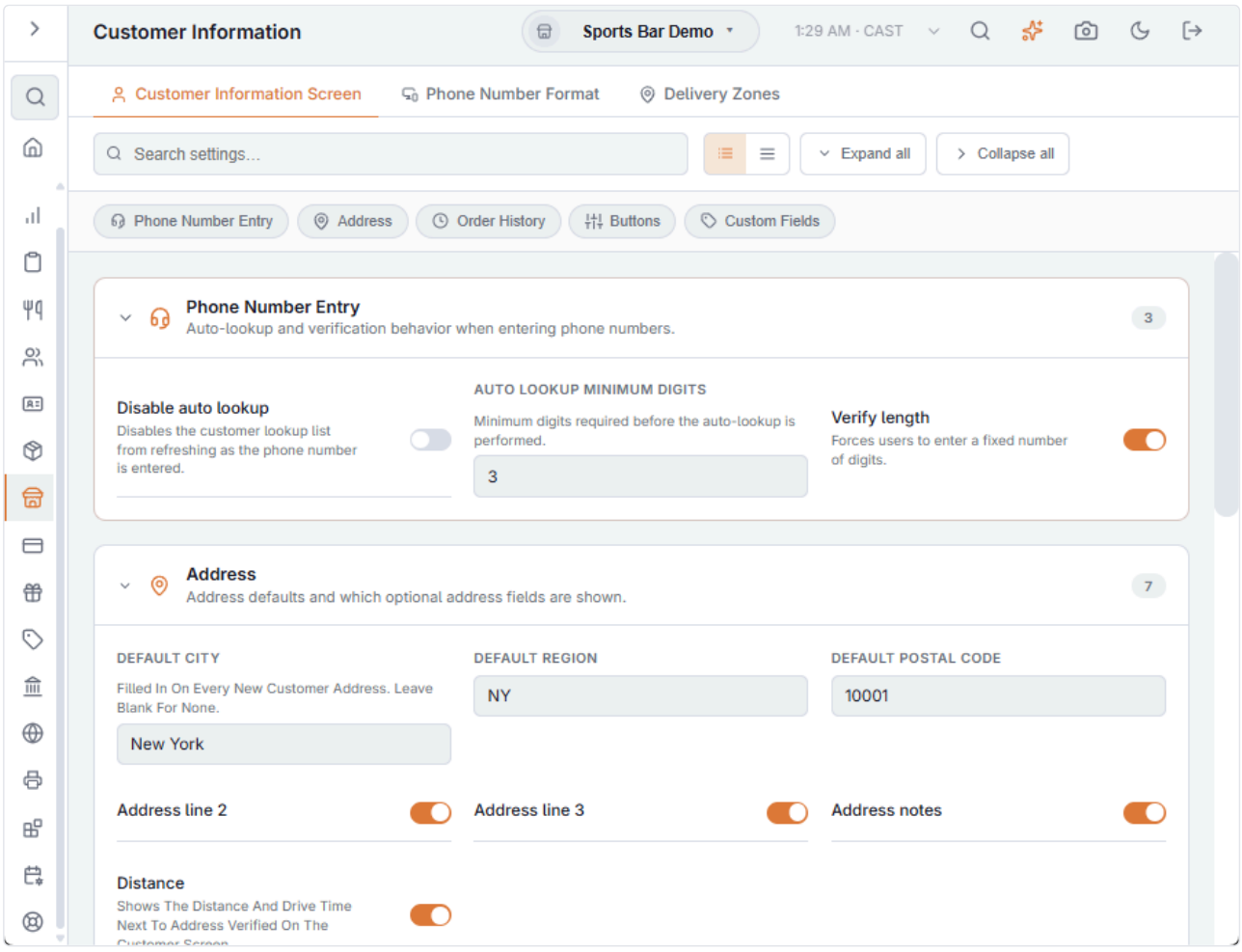
Customer-information screen

Store Setup › Screens

View online ↗

What the customer screen asks for and shows, the default address values, the phone number format, and delivery zones.

Back Office › Store Setup › Customer Information sets up the customer screen used by phone, delivery and call-center orders — where staff look up or enter the customer before the order — and the store's delivery zones. It has three tabs.



Customer Information Screen

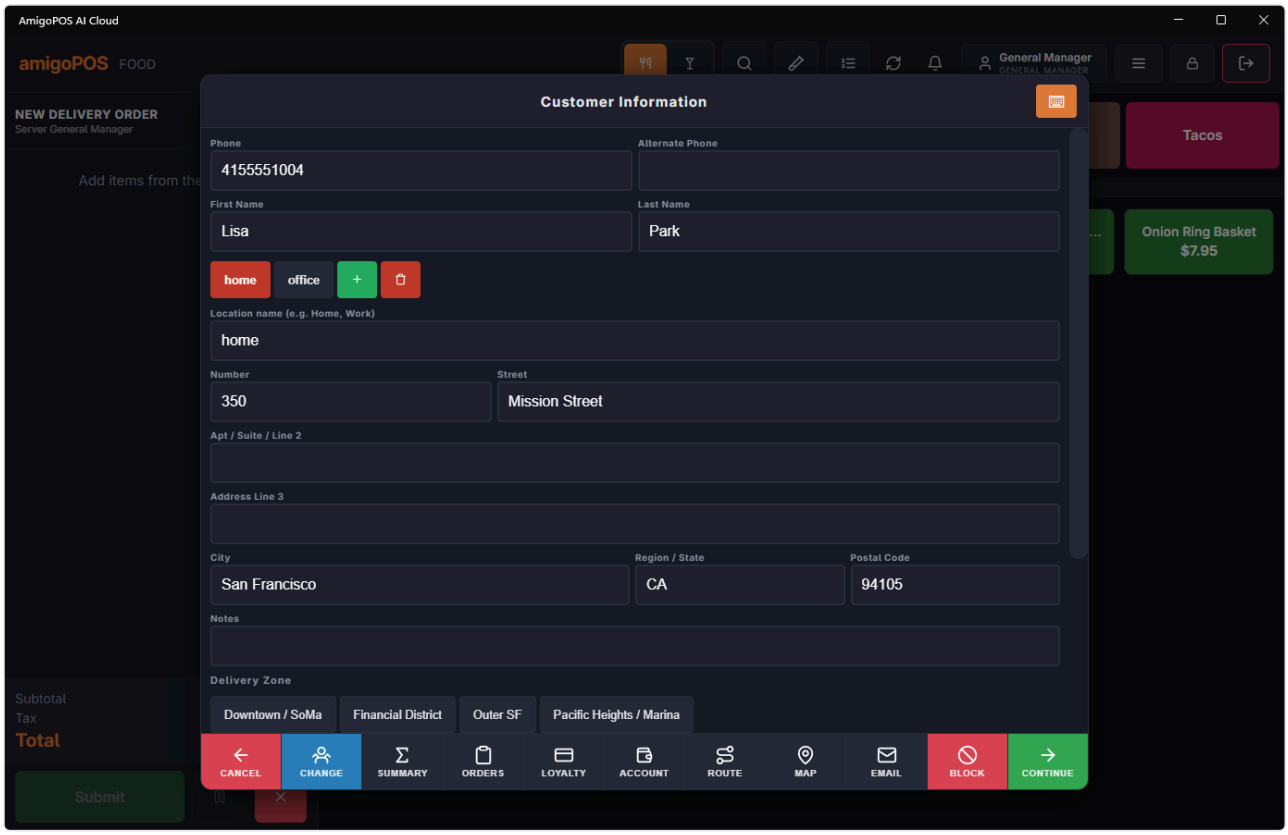
Each setting saves as you change it, with a tick to confirm; there is no Save button.

- **Phone Number Entry** — **Disable auto lookup** stops the screen searching for customers as digits are typed; **Auto lookup minimum digits** sets how many digits start the search (3 if left blank); **Verify length** refuses a new customer whose number is shorter than the shortest pattern in Phone Number Format (7 digits when no pattern is set).
- **Address** — **Default city**, **Default region** and **Default postal code** are filled in on every new customer address, at the register and in Back Office; leave them blank for none. **Address line 2**, **Address line 3** and **Address notes** show or hide those fields on the customer screen. **Distance** shows the distance and drive time beside **Address Verified**.
- **Order History** — **Order count** is how many past orders the customer screen lists (10 if left blank).
- **Buttons** — show or hide **Block customer**, **Loyalty card**, **Map**, **Order History** and **Reorder** on the customer screen. The customer account button is always shown.
- **Custom Fields** — up to three extra fields of your own. Switch each on with **User-defined field 1–3 enabled** and give it a label; without a label it shows as “Field 1”, “Field 2”, “Field 3”.

Name, phone and email are always on the customer screen, and no field can be made mandatory.

Phone Number Format

This tab holds one setting, **Phone number format**: the pattern of the local phone numbers. The field saves when you leave it.



Writing the pattern

- Each `#` stands for one digit; anything else (a dash, a space, brackets) is shown as written.
- Separate several patterns with commas. The pattern with as many digits as the number is used, so `###-###-####,###-####` (the starting value) shows ten-digit and seven-digit numbers each their own way.
- Left empty, numbers are shown as plain digits.

What it is used for

- **Display** — phone numbers show the same way on the customer screen, in lists, tickets and reports.
- **Length check** — with **Verify length** on (Customer Information Screen tab, Phone Number Entry), a new customer needs at least as many digits as the shortest pattern.
- **Caller ID** — incoming calls are matched to customers using the longest pattern. See How caller ID works.

Numbers are saved as digits only, so changing the pattern later changes only how they are shown; nothing has to be re-entered. The format is set per store, so each store uses its own numbering plan.

Delivery Zones

The zone list with each zone's fees, and the map for drawing its boundary. See Delivery zones and the zone map.

> Whether the customer screen appears at all for an order type — and when in the flow — is part of the order type's workflow: see Order types and workflow.

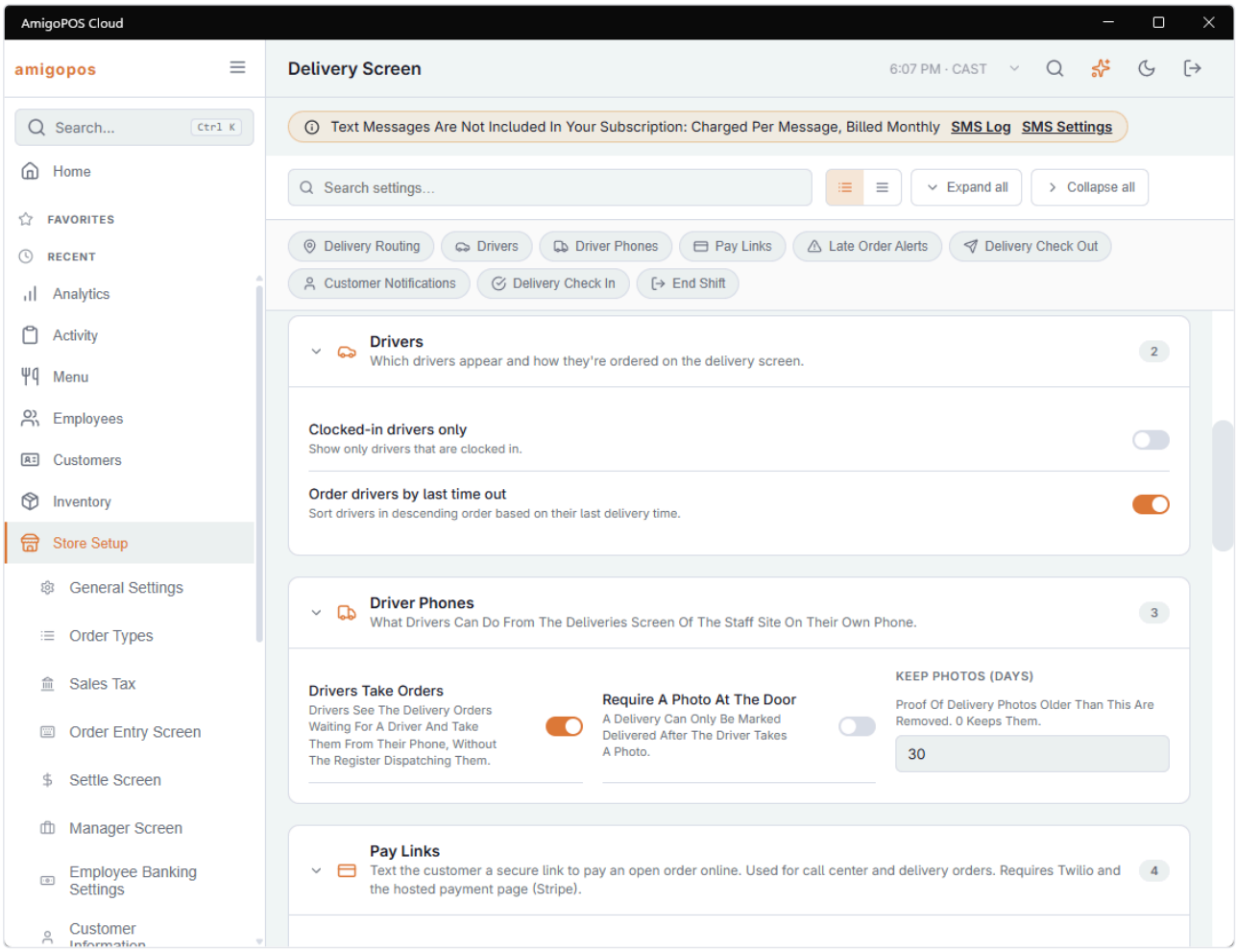
Delivery Screen settings

Store Setup › Screens

View online ↗

The switches in Back Office › Delivery Screen that shape the delivery board and what drivers can do on their phones.

Back Office › Store Setup › Delivery Screen holds the store's delivery settings: how the delivery board and driver rail behave, what drivers can do from their phone, pay links, late alerts, customer messages and order tracking. The page appears only when the store's plan includes delivery.



How the page saves

There is no Save button. A switch or drop-down saves the moment you change it; a number saves when you leave the box. A tick (✓) next to the setting confirms the save, a cross (✗) means it failed. Numbers outside the allowed range are brought back into range. Use **Search settings** at the top to find a setting, or the chips to jump to a section.

The banner at the top is a reminder that text messages are charged per message; **SMS Log** and **SMS Settings** open the text-message pages.

Delivery Routing

- **Verify delivery addresses** — finds each customer address on the map and picks the delivery zone automatically. Off, the zone is chosen by hand. This one setting applies to every store of the business. Starts off.
- **Store Location (lat,lng)** — shown for reference only; it is set with the store's address by support.
- **Travel Mode** — Car, Scooter / Moped, Walking or Truck: how routes and drive times are worked out.
- **Optimize route by default** — where the **Optimize route** switch starts when the dispatch screen opens. On, the selected stops are put in the shortest driving order; moving a stop by hand turns it off. Starts off.

Maps and addresses are covered in Maps, geocoding, and address verification.

Drivers

Setting	On	Off
Clocked-in drivers only (starts on)	The driver rail lists only drivers clocked in at this store on a driver job. The same rule decides who can take orders from the phone.	Drivers of this store who are not clocked in are listed too.
Order drivers by last time out (starts off)	Drivers who are in come first, the one who has waited longest at the top; drivers who are out come after them.	The rail is in name order.

Driver Phones

Setting	What it does	Starts as
Drivers Take Orders	Drivers see the orders waiting for a driver and take them from their phone. See Drivers taking orders from their phone.	On
Require A Photo At The Door	A stop cannot be marked delivered until the driver has taken a photo. See Photo at the door.	Off
Keep Photos (Days)	Photos older than this are removed; 0 keeps them. 0–365.	30

Pay Links

Five switches decide how pay links are sent and whether call center orders wait for payment, and **WhatsApp Templates** opens the message templates. See Setting up pay links.

Late Order Alerts

With **Enabled** on (it starts on), the board marks an order late:

- a scheduled order, once its scheduled time has passed;
- an order with a promised time, once that time has passed;
- any other order, once the minutes since it was placed reach **Late minutes** (1–240, starts at 30).

Delivered and banked orders are never marked late. With Enabled off, nothing is marked late.

Delivery Check Out

What happens when orders are dispatched to a driver:

- **Print trip ticket** — prints a trip ticket when the delivery is sent out.
- **Print turn-by-turn directions** — adds driving directions to the trip ticket.
- **Reprint customer receipts** — prints a customer receipt for each order when the delivery is sent out.
- **Transfer order to driver** — the orders move to the driver when they are sent out, so the money is the driver's in employee banking.

All four start off.

Customer Notifications

- **Email customer on dispatch** — when the order leaves, the customer gets an email with the expected arrival time and the tracking link. Starts off.
- **Text customer on dispatch** — the same message by text. Starts off. Texts are charged per message.
- **Default promise time (minutes)** — the delivery time promised when nothing else sets one. 5–240, starts at 45.

- **Quote: base prep time (minutes)** and **Quote: minutes per open order** — the time quoted to a customer is the base prep time plus these minutes for every order already open. They start at 15 and 2, and are used for pickup quotes too.

Order Tracking

The customer's tracking page: on or off, a text with the link when the order arrives, the driver's first name, and how long the link works. See Setting up order tracking.

Delivery Check In

Setting	On	Off
Settle button (starts on)	Unpaid orders in the **Out for Delivery** tab have a **Settle** button, which opens the payment screen.	The button is not shown.
Settle cash button (starts on)	Unpaid orders in the Out for Delivery tab have **Settle Cash**, which pays the order in cash in one tap.	The button is not shown.

> If a button your drivers or cashiers used is missing from the board, its switch is off: turn it on here.

Security

Security alerts

Store Setup › Security

View online ↗

Managers get a quick alert in the register inbox when the Security Log records something that needs a look: a locked account, a new device, guessing and more.

The Security Log records everything; a **security alert** tells the managers about the events that need a look, without anyone opening the page. The alert arrives as a **quick alert** in the register inbox, marked important, and stays for 24 hours.

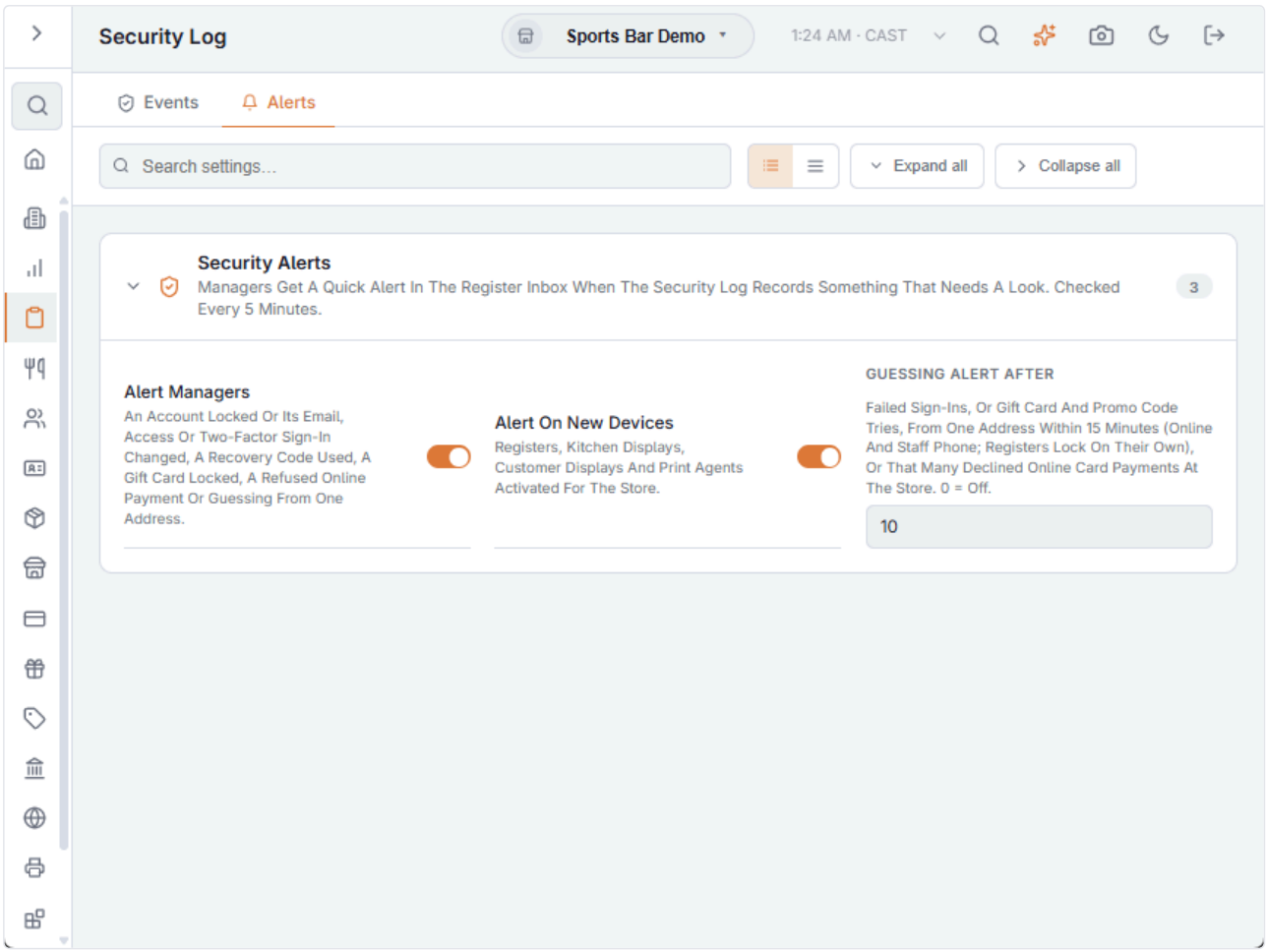
What raises an alert

- An account locked after failed sign-ins on the website, the apps, online ordering or a staff phone. (Registers and Back Office PIN pauses already alert managers on their own.)
- A sign-in with a recovery code, two-factor sign-in turned off, a sign-in email changed, account access changed, or a password set by an administrator.
- A new device activated for the store (optional), or a device asking for something its role does not allow.
- A gift card locked after wrong PINs, or a refused online payment confirmation.
- **Guessing** — many failed sign-ins, or gift card and promo code tries, from one address in 15 minutes.
- **Many declined online card payments** at the store in 15 minutes — the usual sign of someone testing stolen cards.

The log is checked every 5 minutes. Everything found in one check arrives as one message per store, in the store's language, with the time of each event. A burst of guessing from the same address is reported once an hour, not every 5 minutes.

Settings

In **Back Office › Activity › Audit › Security Log**, open the **Alerts** tab. The settings are per store and all start on.



- **Alert Managers** — security alerts on or off for the store. The Security Log keeps recording either way.
- **Alert On New Devices** — an alert each time a register, kitchen display, customer display or Print Agent is activated for the store. Turn it off while setting up many devices.
- **Guessing Alert After** — how many tries in 15 minutes count as guessing (10 to start). It also sets how many declined online card payments raise the card-testing alert. **0** turns both off.

When an alert arrives

- Open the Security Log and search for the name or address in the alert.
- If an account change was not made by its owner, change the password and sign the account out everywhere: Signing out everywhere.
- If a device is not yours, deactivate it in Registered Devices.
- For guessing or declined payments, the protections already slow it down; keep an eye on the log, and call AmigoPOS support if it keeps going.

> Security alerts are separate from Manager alerts (sales, labor and loss prevention on the staff site).

Account security emails

Store Setup › Security

View online ↗

The email an account owner gets when the password, sign-in email or two-factor sign-in of their AmigoPOS account changes, and what to do if it was not them.

The account you use to sign in to the AmigoPOS website, the web Back Office and the apps gets an email for every security change: **Security Notice For Your AmigoPOS Cloud Account**. If someone else made the change, the email is how you find out.

When it is sent

- The password was changed, reset from an emailed link, or set by an administrator.
- The sign-in email was changed — sent to the **old** address, the one that was replaced.
- Two-factor sign-in was turned on or off.
- New recovery codes were made (the old ones stop working), or someone signed in with a recovery code.

Each email says what changed, when (in UTC) and from which internet address. It comes in the account's language. A new account choosing its first password from an invitation does not get one.

If it was not you

1. Press **Reset My Password** in the email and choose a new password.
2. On the website, open **Profile › Login Activity** and press **Sign Out Everywhere Else** (Signing out everywhere).
3. Turn on two-factor sign-in if it is off, or make new recovery codes if one was used.
4. Tell your administrator. Managers can see what happened in the Security Log.

> Employee PINs are not covered by these emails: PIN changes and lockouts show in the Security Log.

Signing out everywhere

Store Setup › Security

View online ↗

End every other session of your AmigoPOS account at once, what ends sessions automatically, and why changing the sign-in email asks for your password.

If you think someone else knows your password, or you signed in on a computer that is not yours, you can end every other session of your AmigoPOS account in one step.

Sign Out Everywhere Else

1. Sign in to the AmigoPOS website and open **Profile › Login Activity**.
2. Under **Signed-In Devices**, press **Sign Out Everywhere Else**.

The browser you are using stays signed in. Every other browser, the apps signed in with your email, the web Back Office and the help site are signed out within a few minutes and have to sign in again.

- **Registers keep working.** A register's access comes from its registration in Registered Devices, not from your password, even if it was set up by signing in with your email. To take a register away, deactivate it there.
- If someone may know your password, change it too: signing out does not stop them signing in again with it.

What also ends your other sessions

- Changing or resetting your password.
- Changing your sign-in email.
- Turning two-factor sign-in on or off.
- An administrator locking the account.

Changing your name or phone number does not sign you out anywhere.

Changing your sign-in email

In **Profile › Edit Profile**, a new email needs your **Current Password**. It protects the account if someone finds it signed in on a shared computer: without the password they cannot move it to their own email. A wrong password counts toward the account lockout, like a wrong sign-in.

The old address gets an email saying the sign-in email changed (Account security emails).

CHAPTER 19

Discounts & Promotions

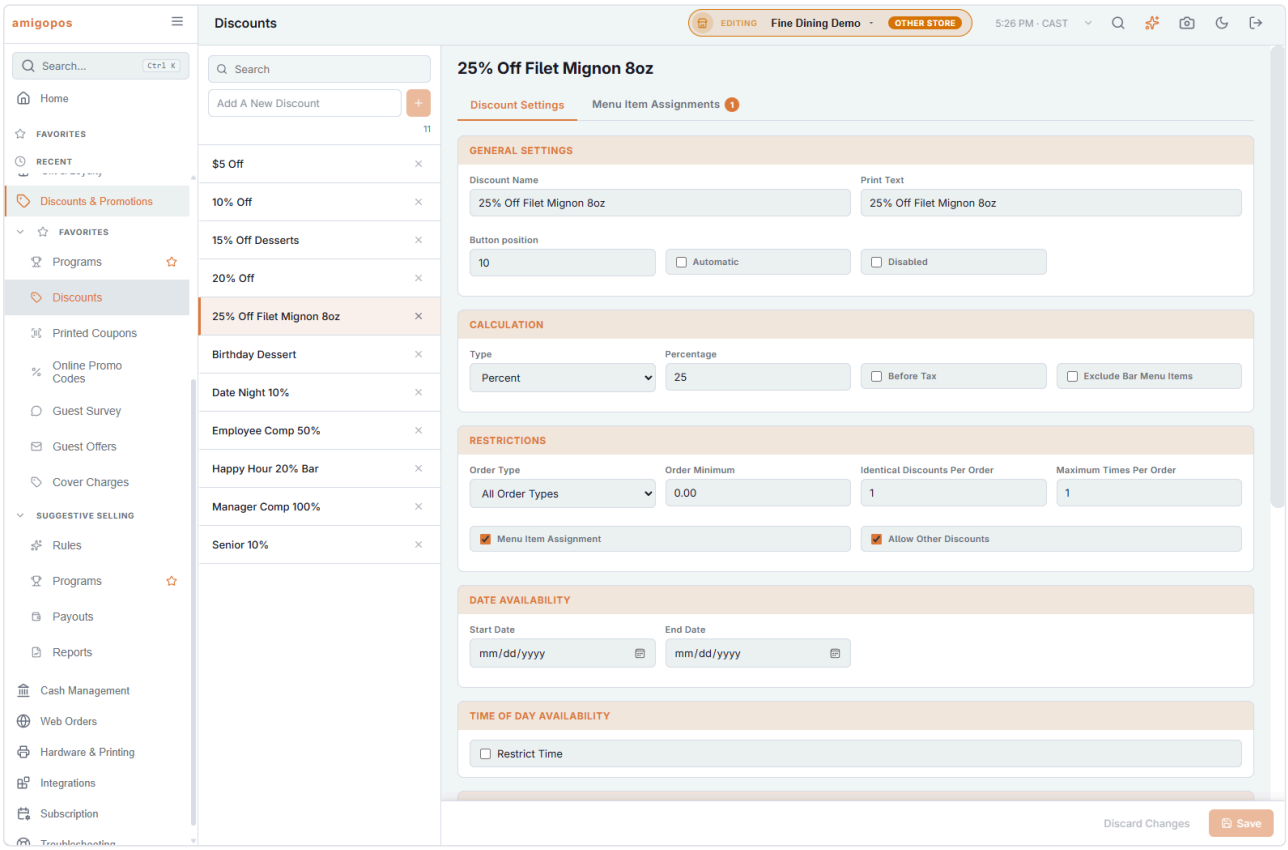
Discounts (types and rules)

Discounts & Promotions

View online ↗

Creating the discounts staff can apply, with their amounts and limits.

Back Office › Discounts & Promotions › Discounts defines every discount the register can apply, and the discounts behind coupons and offers: how much it takes off, on what, and when it can be used.



The list

Search by name or SKU. A barcode badge marks discounts with a SKU or set to **Coupon Only**, and disabled discounts are greyed out. To add one, type its name in **Add A New Discount** and press + or Enter: it starts as a fixed discount of 0, valid every day from today for five years. The × on a row deletes the discount after you confirm.

The **Discount Settings** tab is saved with **Save**; **Discard Changes** puts it back. If you pick another discount with unsaved changes, you are asked whether to discard them.

General Settings

- **Discount Name** — the name on the register's discount list and in reports.
- **Print Text** — the text printed on checks and receipts.
- **Button position** — the order of the discount on the register's list; ties are sorted by name.
- **Automatic** — the discount is put on the order by itself whenever its conditions match, without anyone choosing it.
- **Disabled** — the discount can't be used and is hidden from the register.

Calculation

- **Type** — **Fixed** (an **Amount** off) or **Percent** (a **Percentage** off).

- **Before Tax** — on: the discount comes off the items, so tax is charged on the lower prices. Off: it is taken off the order as a whole, and tax stays on the full prices.
- **Exclude Bar Menu Items** — bar menu items are not discounted.

Restrictions

- **Order Type** — one order type, or **All Order Types**.
- **Order Minimum** — the order must reach this amount. Tax counts toward it unless **Discount order minimum uses subtotal only** is on in the store's order entry settings (or the store uses VAT).
- **Identical Discounts Per Order** — how many times the same discount can be on one order.
- **Maximum Times Per Order** — for a menu item assignment discount, how many sets of items it covers on one order.
- **Menu Item Assignment** — limits the discount to the items on the **Menu Item Assignments** tab (see below).
- **Allow Other Discounts** — off: the discount can't be combined with other discounts on the order, and none can be added while it is on. Loyalty rewards are not counted.

When it can be used

- **Date Availability** — **Start Date** and **End Date**. The same date in both means no date limit.
- **Time of Day Availability** — tick **Restrict Time** and set **Start Time** and **End Time**. An end before the start runs past midnight, so 22:00 to 02:00 is a late-night discount.
- **Day of Week Availability** — the days it can be used.

Outside these limits the register refuses the discount and says why, for example that it isn't valid on that day or has expired.

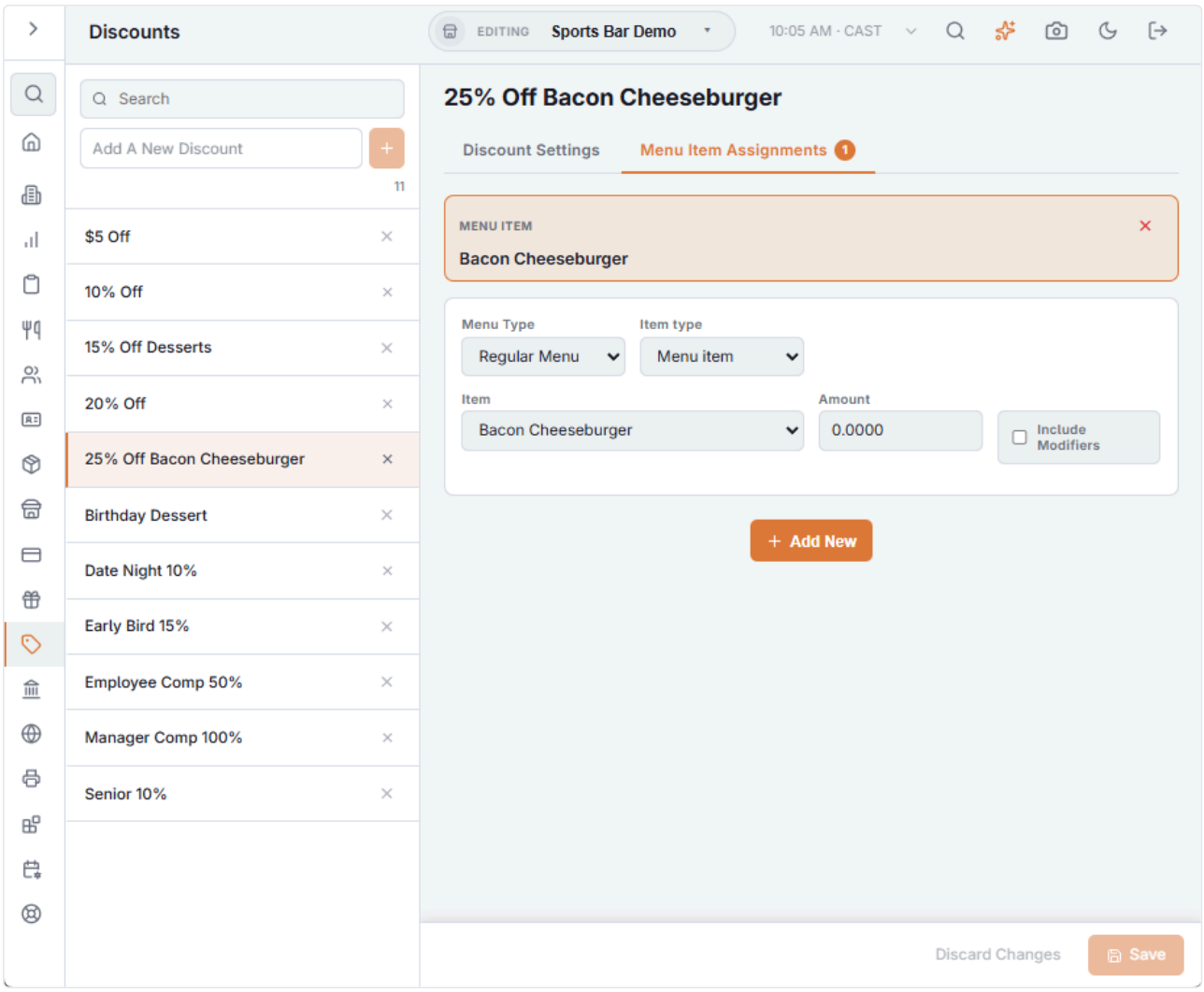
Coupon

- **SKU (Barcode)** — a barcode that applies the discount when it is scanned at the register, for example one printed on a flyer. It doesn't work for a Coupon Only discount.
- **Max Coupons Per Order** — how many printed coupons for this discount one order can produce; 0 means no limit. See Printed and scannable coupons.
- **Coupon Only** — the discount is hidden from the register's discount list and can only be applied with a one-time coupon code: a printed coupon, an offer email or a guest survey reward. Use it for every discount behind a coupon, so staff can't give it without one.

Reporting shows the discount's **Id**, read-only, for support and exports.

Menu Item Assignments

With **Menu Item Assignment** on, the second tab lists the parts the discount applies to. **Add New** adds a part; each part saves as soon as you change it, and the bin icon removes it.



- **Menu Type** — **Regular Menu** or **Bar Menu**.
- **Item type** — a whole **Category** or one **Menu item**; **Item** picks which.
- **Amount** — for a fixed discount, the amount off each item (never more than its price); for a percent discount, this part's own percentage, or 0 to use the discount's.
- **Include Modifiers** — the item's paid modifiers are discounted with it.

With several parts, the order needs one of each to make a set — a burger and a drink, for example — and **Maximum Times Per Order** caps the sets. The cheapest matching items are discounted first. Items marked to be left out of discounts never are.

> Give every promotion its own discount; one "Manager 10%" used for everything makes Discounts analytics useless. Applying discounts at the register is covered in Comps, line discounts and order discounts.

Printed and scannable coupons

Discounts & Promotions

View online ↗

Creating coupons with codes, barcodes, and redemption rules.

Back Office › Discounts & Promotions › Printed Coupons turns receipts into a promotion: when a qualifying order is paid, the register prints a one-time coupon after the receipt, and the guest brings it back on a later visit. Each row on the page is a **trigger** — the conditions for printing, and the discount the coupon gives. The page is in the menu unless the job has **Manage Coupons** switched off.

How a coupon is issued

When an order is paid, the enabled triggers are checked in **Priority** order, lowest number first. Each trigger whose conditions the order meets issues a coupon with its own code (starting `DC-`) and barcode, printed on the station's receipt printer after the receipt. The coupon carries the trigger's discount, so set the discount up first in Discounts (types and rules) — usually as **Coupon Only**, so it can't be given without a coupon.

> Coupons are printed only for order types whose workflow has **Print coupons** in the **At Payment** stage. Add it on the order type's **Workflow** tab in **Back Office › Store Setup › Order Types** (Order types and workflow).

Adding a trigger

Type a description in **New trigger…** above the list and press + or Enter. The trigger starts enabled, with priority 100 and the first discount in the list; change them and press **Save**. The × on a row deletes a trigger after you confirm.

General Settings

- **Description** — the name in the list.
- **Priority** — the order triggers are checked in; lower first.
- **Discount** — what the coupon gives. The line under the section shows when its coupons expire — the discount's **End Date** — and the discount's **Max Coupons Per Order**.
- **Print Template** — **Default coupon template**, or a coupon template from the template editor (Receipt and prep-ticket templates).
- **Enabled** — off, the trigger issues nothing.
- **Stop after this** — when this trigger issues a coupon, the triggers after it are not checked for that order.

Conditions

The order must meet every condition that is filled in:

- **Order Type** — one order type, or **All Order Types**.
- **Min Order Total** and **Max Order Total** — the order total must fall between them; leave the maximum blank for no maximum.
- **Min Guests** — the guest count must reach it.
- **Requires loyalty card** — only orders with a loyalty card.
- **Menu category** and **Menu item** — the order must have an item from that category, or that item; **Any** for no limit.

Days & Time

- **Start Date** and **End Date** — the store days the trigger works; blank for no limit.
- The weekday boxes — all ticked means every day. At least one day must be ticked: with none, **Save** is refused with a message.
- **Restrict time** with **From** and **To** — the time of day; a window that ends before it starts runs past midnight.

Limits

- **Max Total Issued** — the most coupons this trigger issues in all, for example the first 500.
- **Max Per Customer / Day** — for orders with a customer on them.

The **Gift Card Bonus** section makes a trigger give coupons for gift cards sold; see Gift card bonus coupons.

Redeeming a coupon

On a later order, scan the coupon's barcode or type its code (Applying a coupon). Each coupon works once. An expired or used coupon is refused, and the discount's own days, hours, minimum and limits still apply.

Tracking

Every print and redemption is logged: the Coupons log shows the activity, redeemed coupons count under their discount in Discounts analytics, and the **Printed Receipt Coupons** row on the Guest Offers Results tab compares them with your other promotions (Guest offers results: every promotion side by side).

Online promo codes

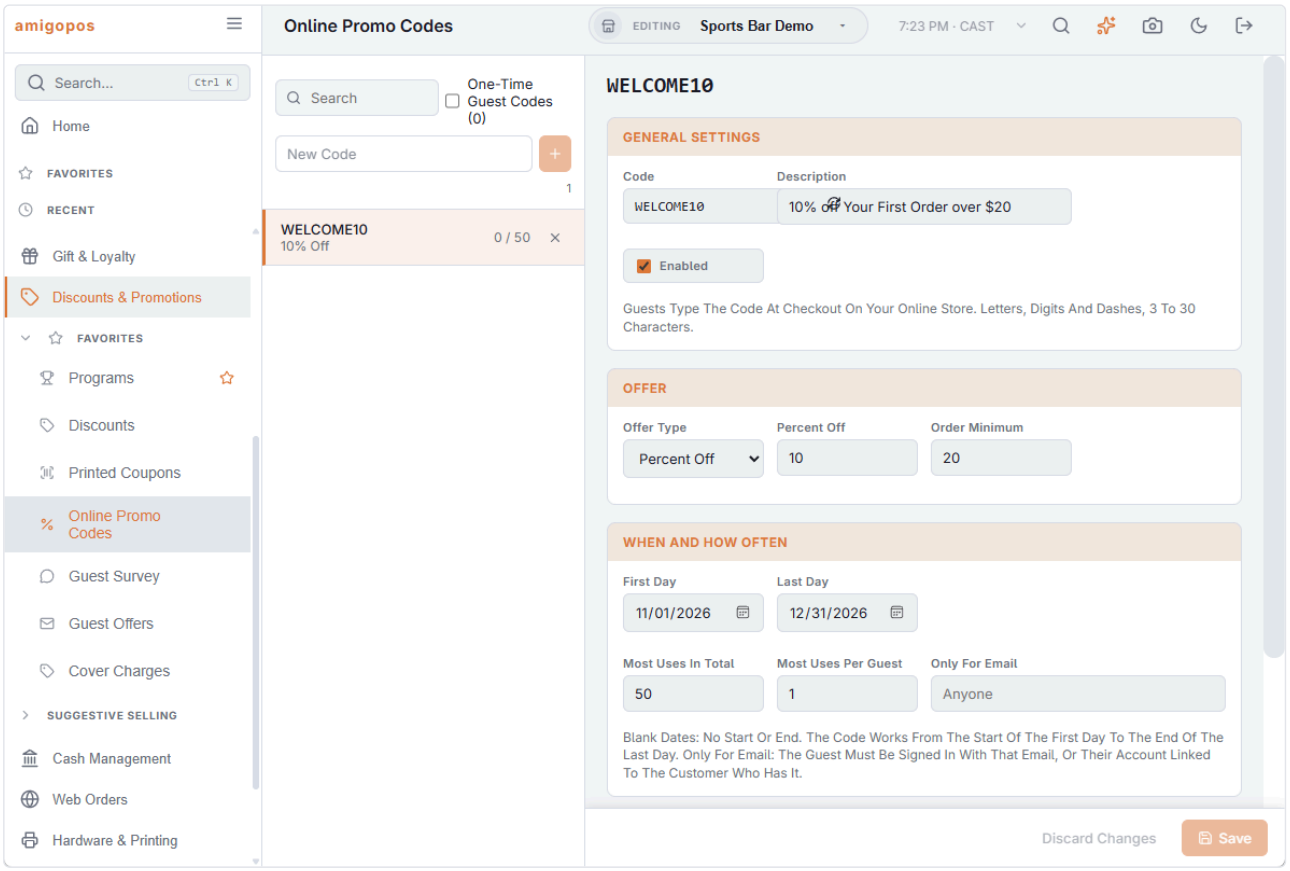
Discounts & Promotions

View online ↗

The codes guests type at checkout on your online store: amount off, percent off or free delivery, with dates, an order minimum, use limits and an email restriction, plus the one-time codes made by the order again email.

Online promo codes are the codes guests type at checkout on your online store, such as **WELCOME5** for 5 off a first order. Each store has its own codes. They work only on the online store; for codes scanned or typed at the register, use printed coupons.

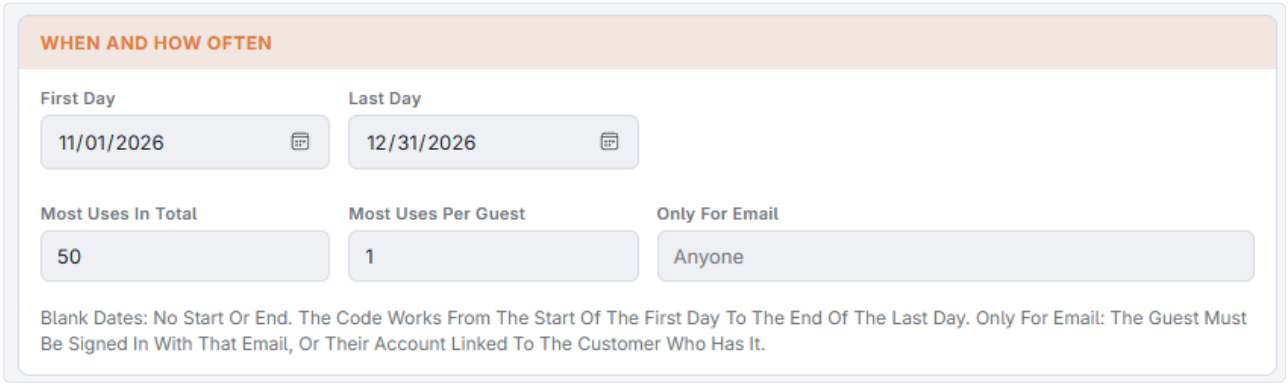
Go to **Back Office › Discounts & Promotions › Online Promo Codes**.



Add a code

1. Type the code in the box at the top of the list (letters, digits and dashes, 3 to 30 characters), or press **Generate A Code** in the new code for a random one.
2. Write a **Description**. Guests see it at checkout, for example “5 off your order”.
3. Choose the **Offer Type**: **Amount Off**, **Percent Off** or **Free Delivery**, and the amount.
4. Add an **Order Minimum** if the code should only work on bigger orders.
5. Press **Save**. Switch the code off at any time to stop it without deleting it.

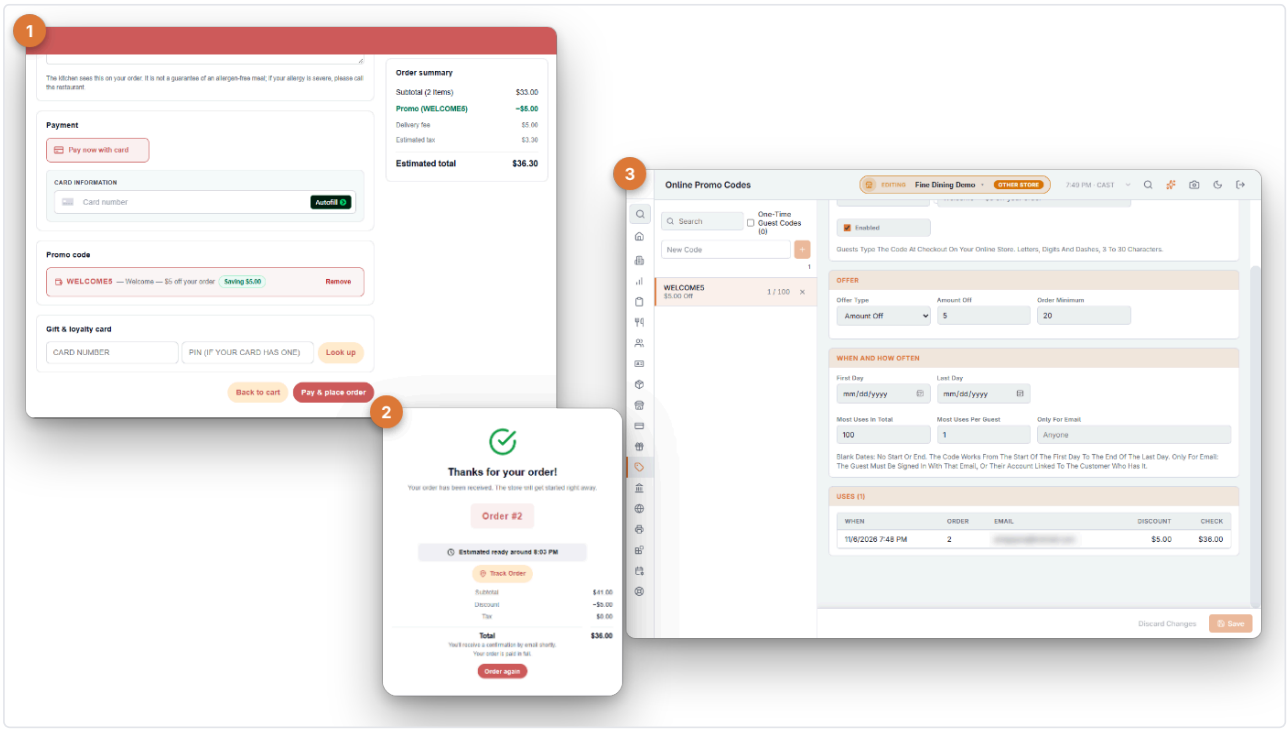
When and how often



- **First Day** and **Last Day** — the code works from the start of the first day to the end of the last day, in your store's time. Leave them blank for no start or end.
- **Most Uses In Total** — for example the first 100 orders. Blank is unlimited.
- **Most Uses Per Guest** — 1 makes it a once-per-guest offer.
- **Only For Email** — the code works only for the guest with this email: signed in to the online store with it, or with an account linked to the customer who has it.

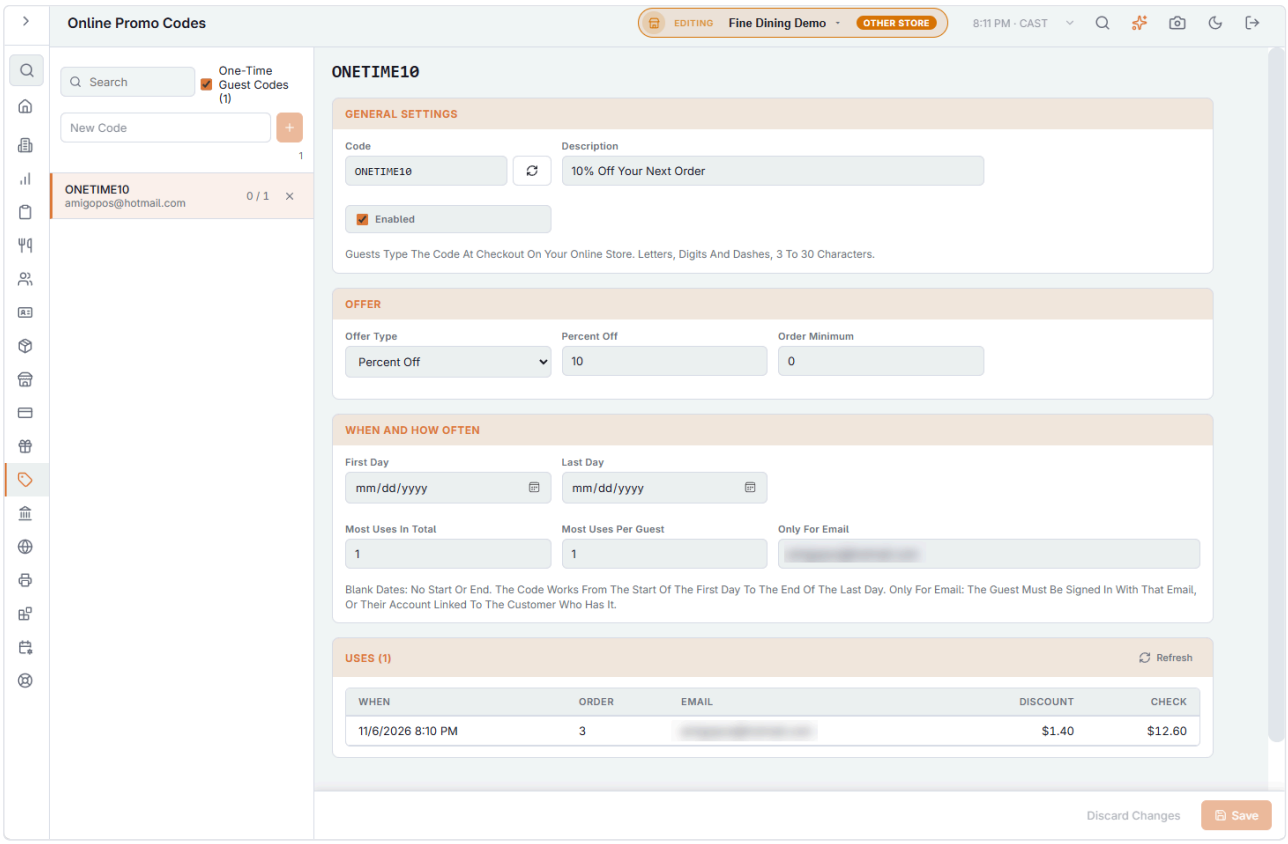
Who used it

Open a code to see its **Uses**: when, the order number, the guest's email, the discount and the check total.



One-time guest codes

The order again email makes a one-time code for each guest it goes to. They are kept out of the list so your own codes stay easy to find; switch on **One-Time Guest Codes** to see them and search by code, description or email.



Deleting a code

A deleted code stops working at checkout right away. The same code can't be used again later, so choose a new one for the next promotion.

Related: Order again emails · Offer results

Gift card bonus coupons

Discounts & Promotions

View online ↗

Run a "buy $50 in gift cards, get a $10 bonus" promotion: a printed coupon trigger that gives one bonus coupon for every amount of gift cards sold, between two dates.

A gift card bonus is a trigger on **Back Office › Discounts & Promotions › Printed Coupons**. A classic holiday promotion: *buy $50 in gift cards, get a $10 bonus*. The bonus is a printed coupon the buyer gets with the receipt, valid later (for example January to March), so the gift card sale brings a second visit.

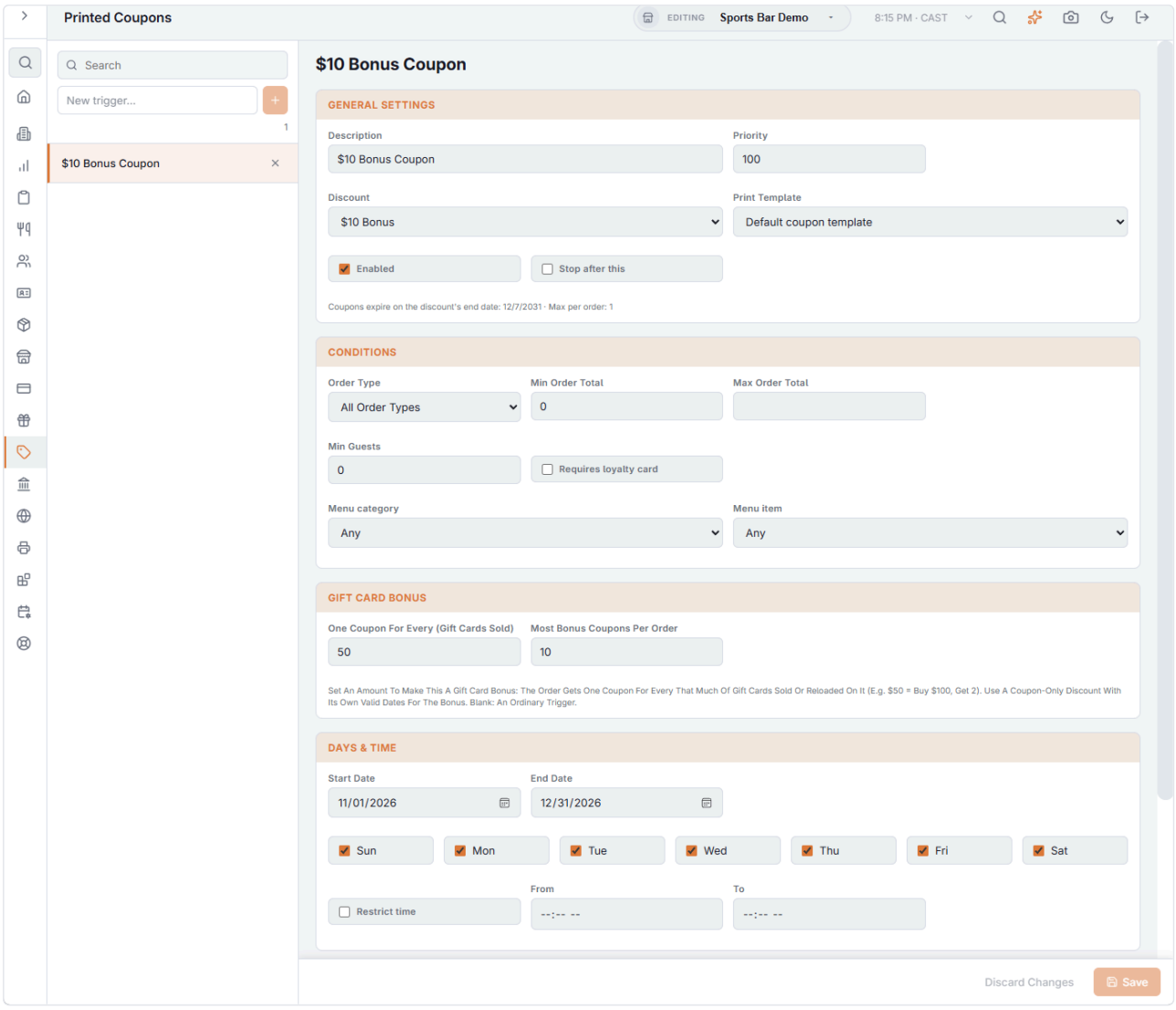
1. Create the bonus discount

In Discounts (types and rules), create the bonus as a **Coupon Only** discount, for example *$10 Bonus*, with the dates it can be used (Start and End Date, for example January 1 to March 31) and any minimum spend.

> Check that the bonus discount can't be spent on buying another gift card.

2. Create the trigger

On **Printed Coupons**, add a trigger (Printed and scannable coupons):



- **Discount** — the bonus discount from step 1, and the print template you want.
- **Gift Card Bonus › One Coupon For Every (Gift Cards Sold)** — for example 50. Filling this in makes the trigger a gift card bonus.
- **Most Bonus Coupons Per Order** — 10 by default.
- **Days & Time › Start Date / End Date** — when the promotion runs, for example November 20 to December 31.
- **Limits** — a total for the whole campaign and per customer per day, if you want them.

At the register

When an order with gift cards sold or reloaded is paid, it gets one bonus coupon for every full amount: $100 in gift cards with “every 50” gives 2 coupons, $99 gives 1. Line discounts on the gift card are taken off first. The coupons print after the receipt, like any trigger coupon, for order types whose workflow has **Print coupons**.



- The bonus discount's own **Max Coupons Per Order** is about using coupons, so it doesn't limit how many are given.
- Only gift cards sold at the register count; e-gifts sent online or from Back Office don't print a receipt.

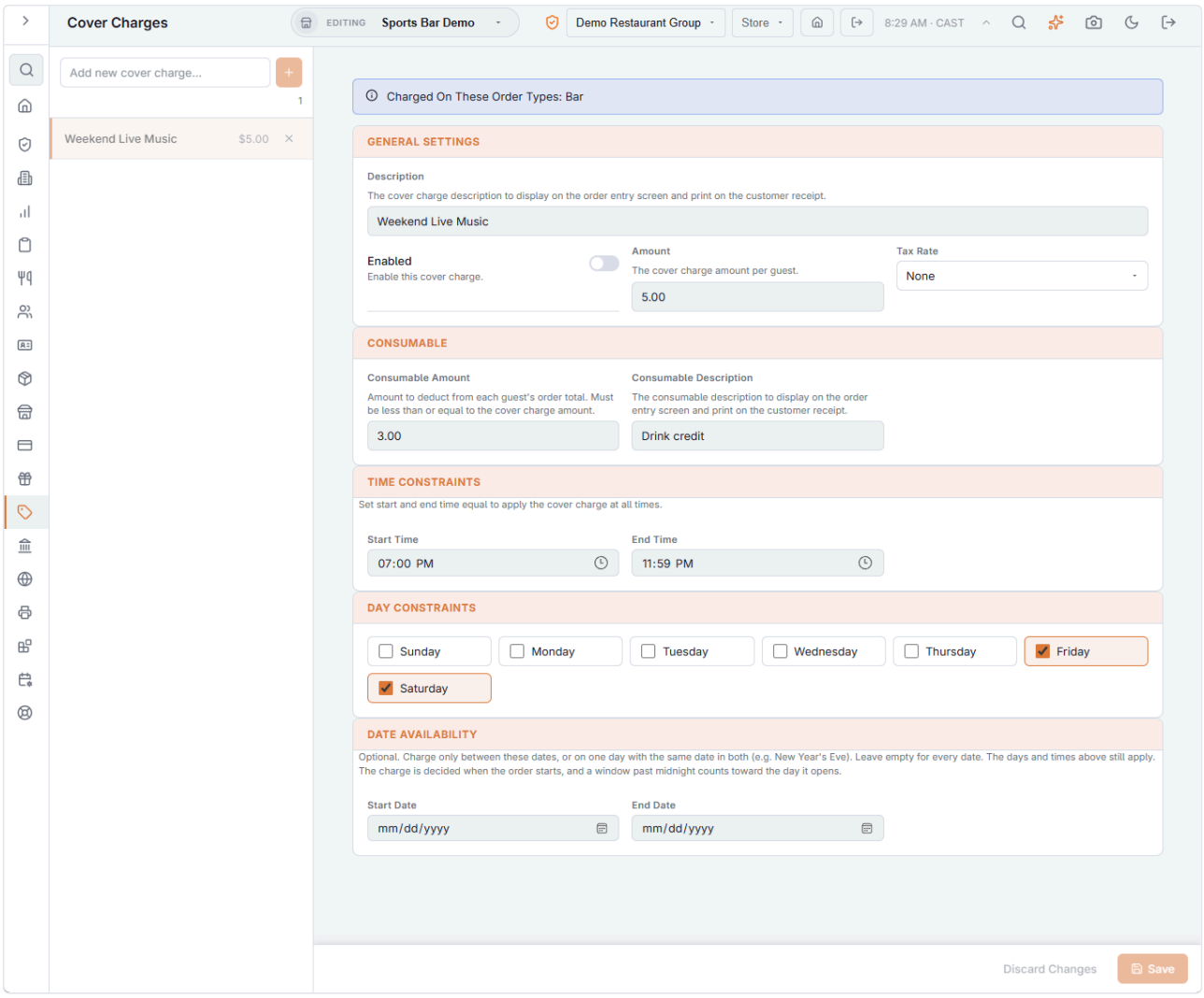
Cover charges

Discounts & Promotions

View online ↗

Per-guest charges, when they apply, and excluding individual guests from them.

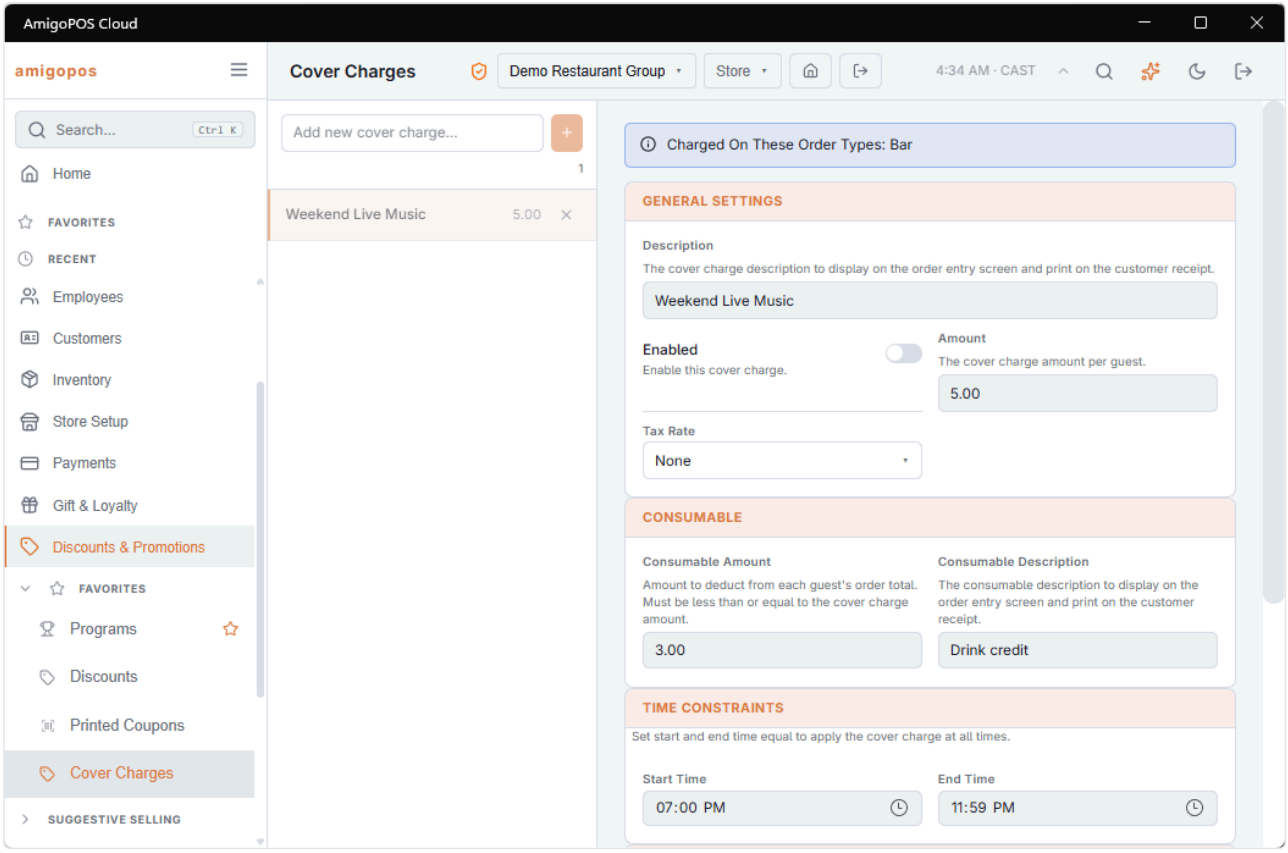
Back Office › Discounts & Promotions › Cover Charges sets up per-guest fees, such as a music cover on Friday and Saturday nights or a New Year's Eve seat charge. The register adds the cover by itself, from the order's guest count, on the order types that use it.



Adding a cover charge

Type its name in **Add new cover charge…** and press + or Enter. It starts enabled, at 0, every day at all times; fill in the fields and press **Save** (or **Discard Changes**). If you pick another cover charge with unsaved changes, you are asked whether to discard them. The × on a row deletes it after you confirm.

At the top of the editor, a note says which order types charge it — **Charged On These Order Types** — or warns **Not Charged On Any Order Yet** when none does.



General Settings

- **Description** — shown on the order screen and printed on the receipt.
- **Enabled** — the switch, so a seasonal cover keeps its setup between seasons.
- **Amount** — the charge per guest.
- **Tax Rate** — how the cover is taxed, or **None**.

Consumable

A cover can double as credit toward what the guest orders. Set **Consumable Amount** and a **Consumable Description**: the cover line gets a discount equal to what the guest has ordered, up to that amount per guest. With a 10.00 cover and 10.00 consumable, a guest who orders 8.00 of drinks pays 10.00 in all; one who orders nothing pays the 10.00 cover. Keep the consumable amount no higher than the cover.

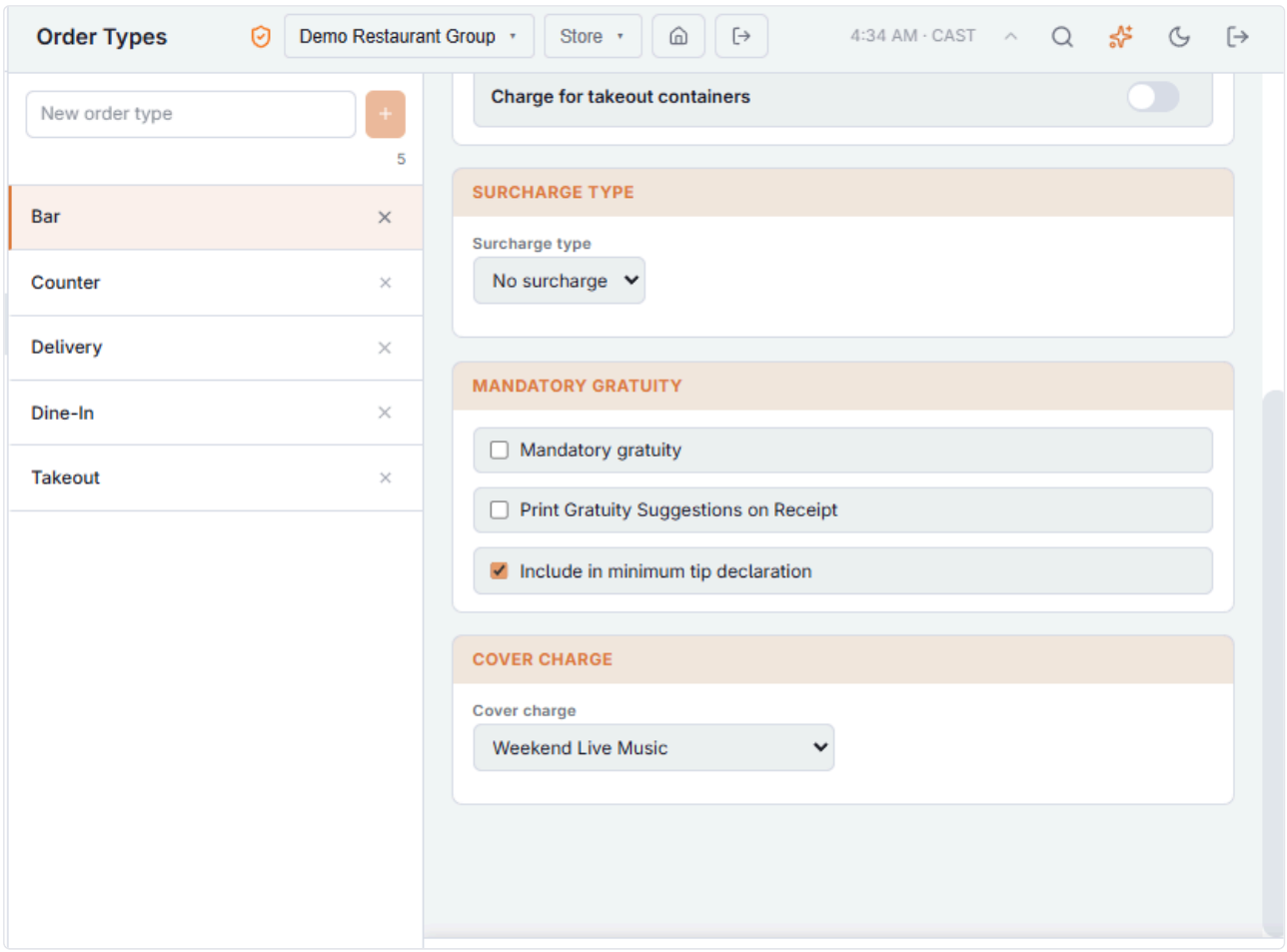
When it charges

- **Time Constraints** — **Start Time** and **End Time**. The same time in both charges at all times; an end before the start runs past midnight, so 21:00 to 02:00 is a late-night cover.
- **Day Constraints** — the weekdays it charges; a new cover charge starts with every day on.
- **Date Availability** — optional **Start Date** and **End Date**: charge only between those dates, or on one day with the same date in both. **Clear** removes them. The days and times still apply.

The cover is decided when the order starts, so it doesn't drop off a check paid after the window closes, nor land on one opened before it. A window past midnight counts toward the day it opens: 21:00 Friday to 02:00 belongs to Friday.

Attaching it to an order type

A cover charge only charges on the order types that use it. Open **Back Office › Store Setup › Order Types**, choose the order type — the dining room, the terrace, the event room — and on the **Tax & Charges** tab pick it under **Cover Charge**. See Order types and workflow.



At the register

The cover appears as its own line once the first item is rung, charged for the order's guest count. Guests can be excluded from it on the guest bar when your policy exempts them, such as performers or comps. When guests are tracked separately, each guest gets their own cover line and their own consumable credit.

> A cover charge is per *guest*. Per-*order* fees are surcharges, and fees by time are time-based items.

Not the same as a reservation table fee

A table fee or deposit under Reservations is taken when a guest books online. A cover charge rings at the register. A booked guest who already paid a table fee would also get the cover, so exclude them from it on the guest bar. See Deposits, table fees and extras.

On the end-of-day report

A cover charge is a line the register adds, not a menu item, so it has no category or revenue center. The end-of-day report lists it under *Cover Charges* in category sales and revenue-center sales, and under its own type in item-type sales — see The end-of-day report.

Guest Survey

Guest survey: feedback and rewards from the receipt

Discounts & Promotions › Guest Survey

View online ↗

A QR code on paid receipts opens a short anonymous survey; guests who finish it get a one-time coupon. Setup, rewards, privacy, redeeming and low-rating alerts.

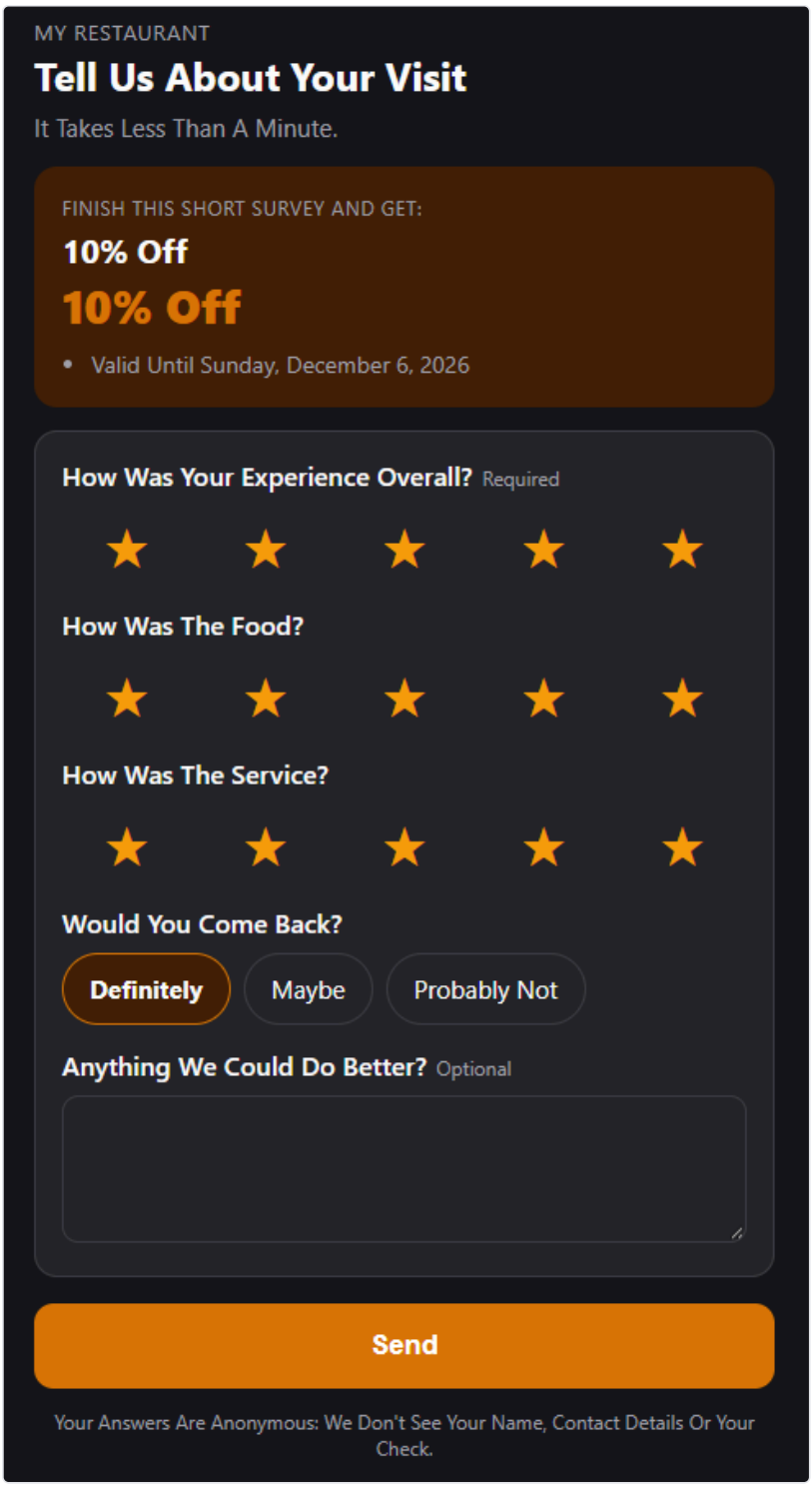
The **guest survey**, set up in **Back Office › Discounts & Promotions › Guest Survey**, puts a QR code on paid receipts. The guest scans it, answers a few short questions on their phone and, if you choose, gets a one-time coupon for a later visit. You see the answers in Back

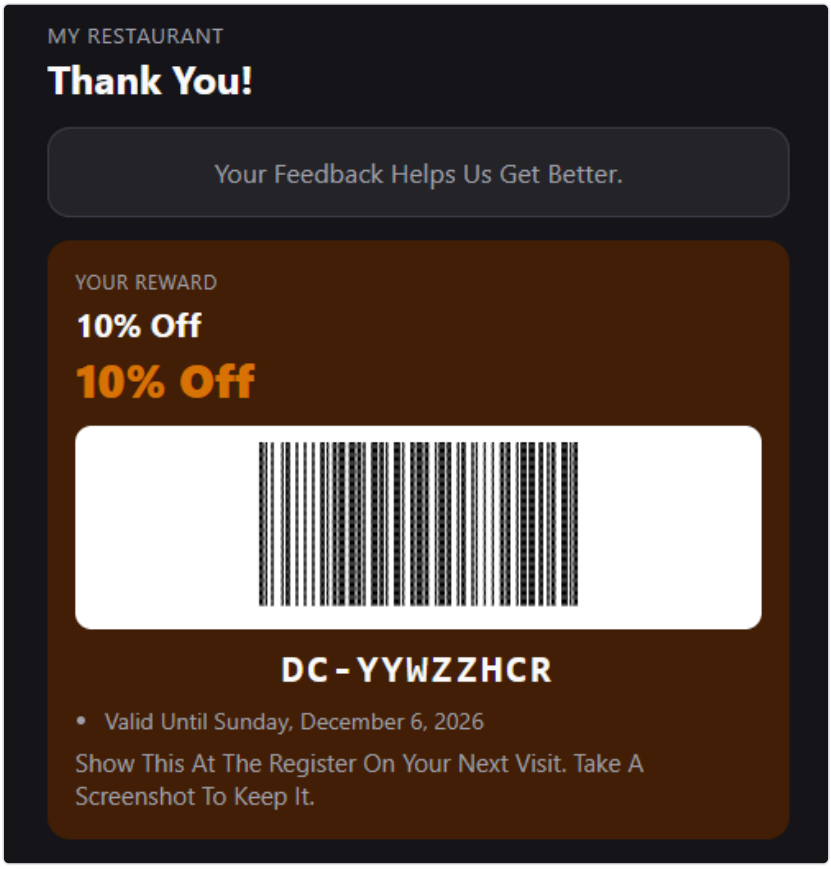
Office, and managers get an alert when a guest is unhappy.



How it works

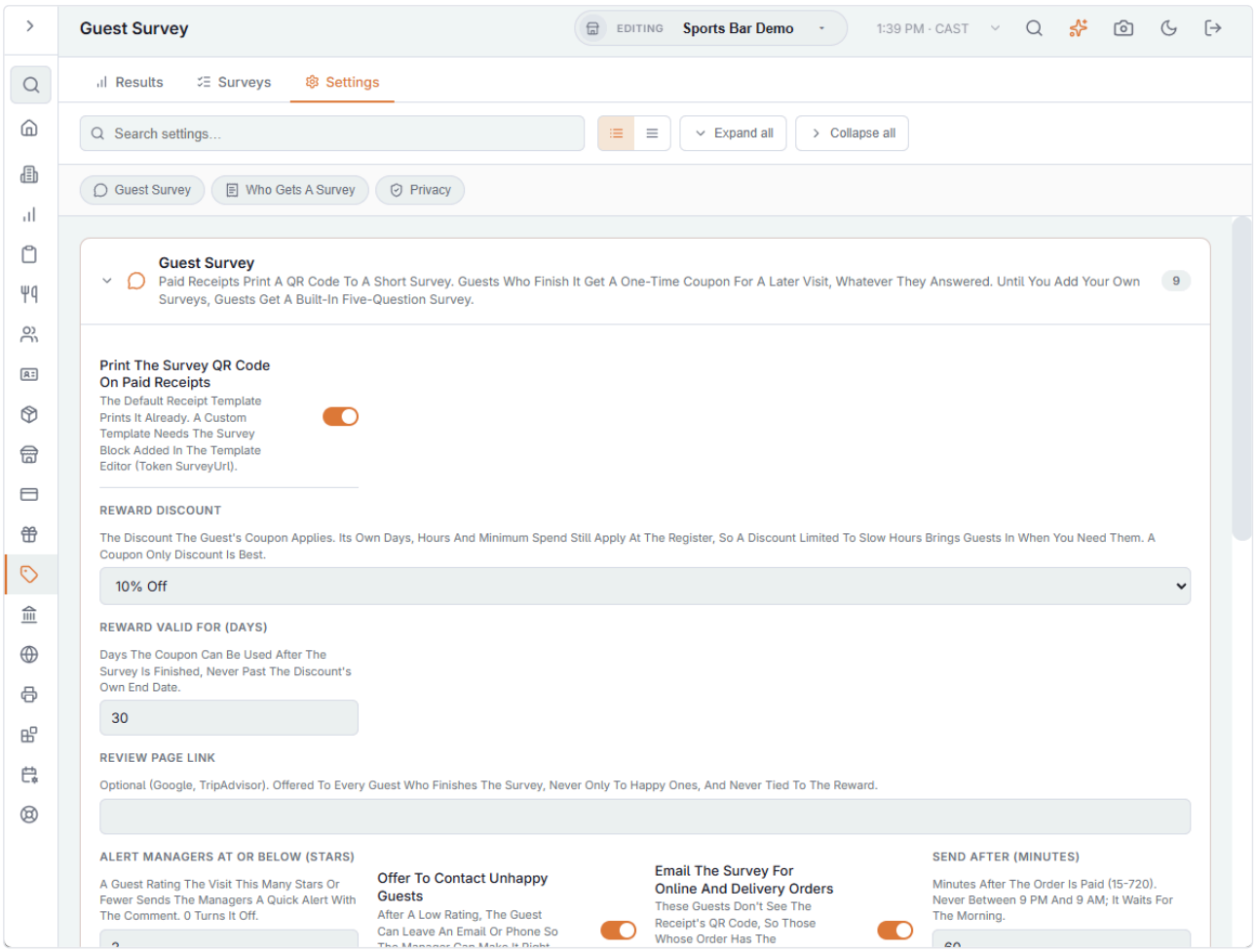
1. A check is paid and the receipt prints with a QR code. Each receipt gets its own link; a reprint shows the same link.
2. The guest scans the code. The survey opens in their phone's language (English, Spanish or Arabic) — no app and no sign-in.
3. They answer. Only the overall rating is required; everything else is optional.
4. When they press **Send**, the reward coupon appears on screen with a barcode. They show it at the register on their next visit.


MY RESTAURANT
Tell Us About Your Visit
It Takes Less Than A Minute.
FINISH THIS SHORT SURVEY AND GET:
10% Off
10% Off
Valid Until Sunday, December 6, 2026
How Was Your Experience Overall? Required
How Was The Food?
How Was The Service?
Would You Come Back?
Definitely
Maybe
Probably Not
Anything We Could Do Better? Optional
Send
Your Answers Are Anonymous: We Don't See Your Name, Contact Details Or Your Check.



Turning it on

Go to **Back Office › Discounts & Promotions › Guest Survey** and open the **Settings** tab.



- **Print The Survey QR Code On Paid Receipts** — the main switch. It is off until you turn it on.
- **Reward Discount** — the discount the guest's coupon applies. Choose *No Reward (Thank You Only)* to run the survey without one.
- **Reward Valid For (Days)** — how long the coupon can be used after the survey is finished (30 by default). It never runs past the discount's own end date.
- **Review Page Link** — optional. A link to your Google or TripAdvisor page, offered to every guest who finishes.
- **Alert Managers At Or Below (Stars)** — see Low-rating alerts below.
- **Offer To Contact Unhappy Guests** — on by default. After a low rating the guest can leave an email or phone so a manager can make it right (Guest survey: making it right after a low rating).
- **Email The Survey For Online And Delivery Orders** and **Send After (Minutes)** — see Guest survey: by email for online and delivery orders.
- **Print The Survey On The Check Before Payment** — on by default; see On the check below.

Until you add your own surveys on the **Surveys** tab, guests get a built-in five-question survey (Survey library and Generate With AI).

Choosing the reward

Create the reward in **Discounts** first. A **Coupon Only** discount is best, so staff can't apply it without a coupon. The discount's own days, hours and minimum spend still apply at the register — so a discount valid only Monday to Thursday afternoons brings guests back at your quiet times.

> **The reward is for finishing the survey, never for a good answer.** Every guest who sends the survey gets it, whatever they rated. Offering rewards only for positive feedback, or sending only happy guests to your review page, breaks consumer-protection rules and review-site policies.

Who gets a survey

- **Survey One Check In Every** — 1 surveys every paid check; 5 surveys about one in five.
- **Minimum Check Total** — checks under this total don't get a survey (0 = any paid check).
- **Survey Link Valid For (Days)** — how long the QR code keeps working (3 days by default).
- **Receipt Text** — the line printed above the code. Leave it blank for the built-in line in the store's language.

Only paid, non-void checks get a survey, and a reprint shows the same link.

On the check

With **Print The Survey On The Check Before Payment** on, the check printed before payment carries the same QR code as the receipt, for servers who bank their orders and hand over the check. A guest who answers before paying gets the reward once the check is paid, and never on a check that is voided. The reward is for a later visit, so it can't be used on the check being paid.

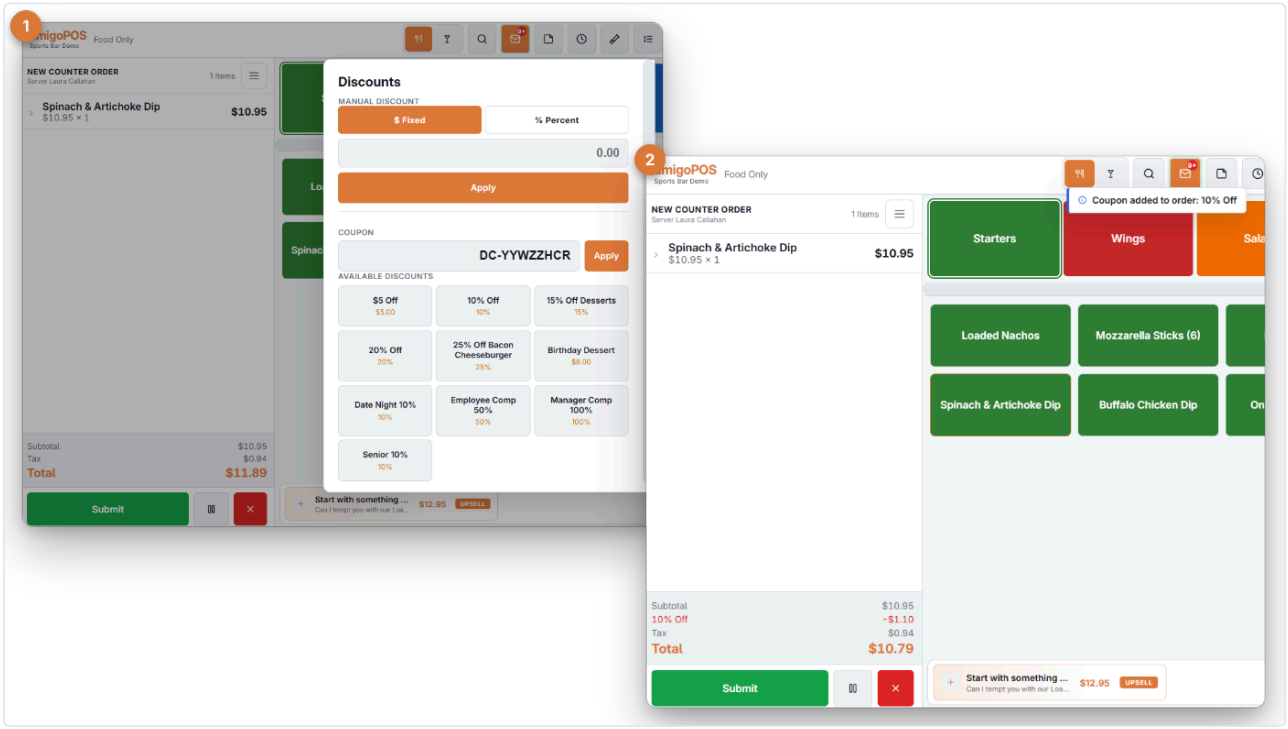
Privacy

Answers never keep the guest's name, phone or card. With both privacy options off, they are anonymous: only the business day, part of the day, order kind, party size and a check-size range are kept, and the survey tells guests their answers are anonymous.

- **Keep The Order With Each Response** — keeps the check number and table so a complaint can be traced. The survey then stops telling guests it is anonymous.
- **Keep The Server With Each Response** — keeps the server, for results by server.

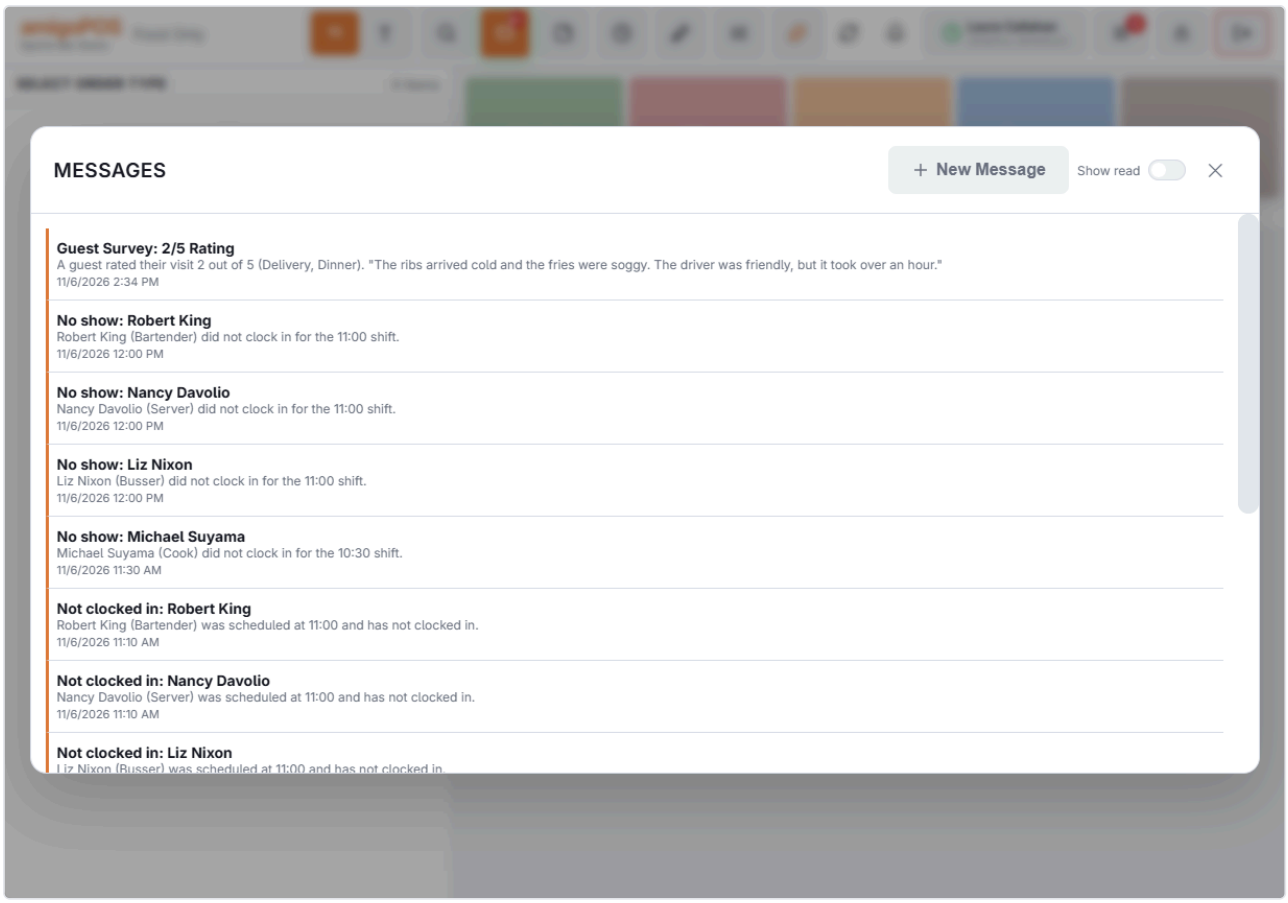
Redeeming the reward

The coupon is a normal printed coupon (a **DC-** code). Scan the barcode on the guest's phone or type the code into the coupon entry on the register, the same as any printed coupon. It works once.



Low-rating alerts

When a guest rates the visit at or below **Alert Managers At Or Below (Stars)** (2 by default), the managers get a quick alert in the register's message inbox with the rating, order kind, part of the day and the guest's comment. Set it to 0 to turn the alerts off.



Receipt templates

The default receipt template already prints the survey block. If your store uses its own receipt template, add this block in the template editor where you want the code:

```
{BlockIf=SurveyUrl}
{Space}
{Center}{SurveyText}
{Center}{QRCode=SurveyUrl}
{EndIf}
```

Emailed receipts built from the same template carry the link too. To print the code on its own slip instead, see Survey slip and customer display.

Related: Survey library and Generate With AI · Survey results and AI summary

Email sign-up on the thank-you page

The thank-you page can also offer guests your offers by email, kept apart from their answers. Turn it on in **Discounts & Promotions › Guest Offers › Settings › Offer Email Sign-Up After The Survey**. See Guest offers: building your email list.

Online and delivery orders

Guests who order online or for delivery get the survey link by email. See Guest survey: by email for online and delivery orders.

Survey library and Generate With AI

Discounts & Promotions › Guest Survey

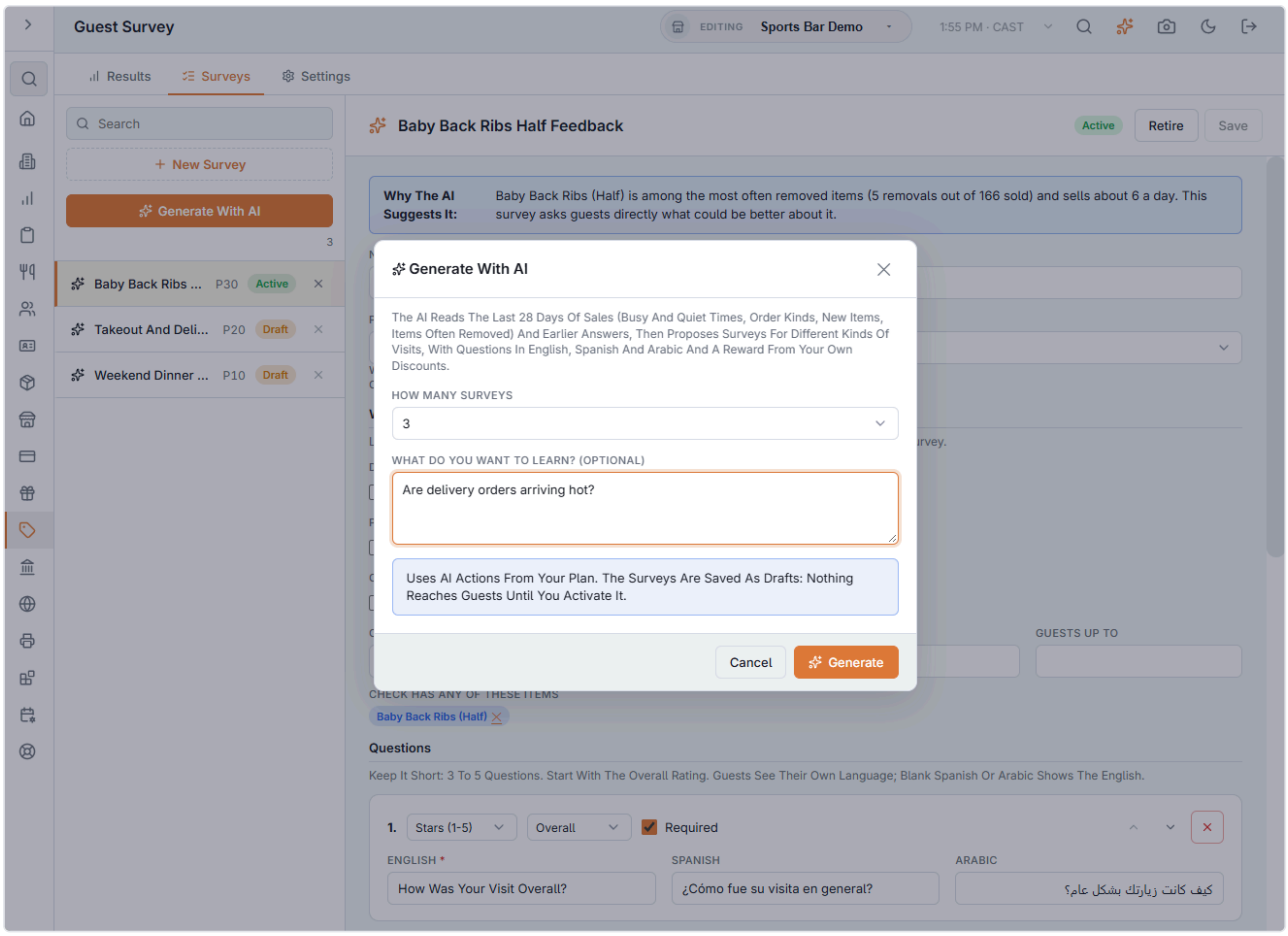
View online ↗

Let the AI propose surveys from your sales, review the drafts, set which visits each survey is for, and edit the questions in English, Spanish and Arabic.

Until you add your own surveys, every receipt gets the **built-in survey**: five short questions about the visit, the food, the service (or, for takeout and delivery, whether the order was right and the wait), whether they would come back, and a comment. The **Surveys** tab lets you add surveys for particular kinds of visits — and have the AI write them for you.

Generate With AI

On **Back Office › Discounts & Promotions › Guest Survey › Surveys**, press **Generate With AI**.



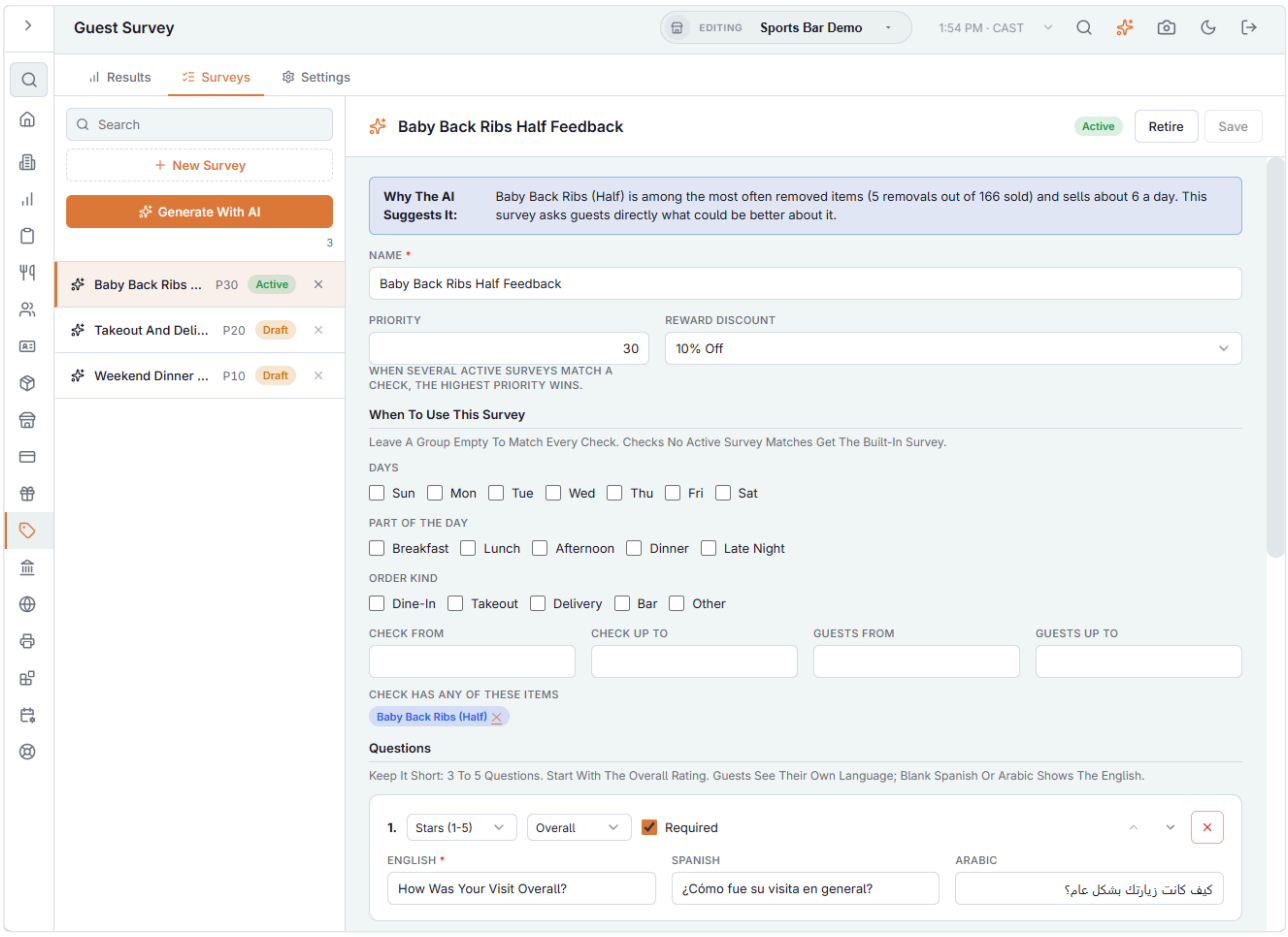
- **How Many Surveys** — one to four.
- **What Do You Want To Learn?** — optional, for example “Are delivery orders arriving hot?” The AI puts your question first.

The AI reads the last 28 days of sales — busy and quiet days and times, the mix of dine-in, takeout and delivery, your top items, new items and items often removed from orders — plus earlier survey answers and comments. It proposes surveys for different kinds of visits, writes the questions in English, Spanish and Arabic, and picks a reward from your own discounts, preferring Coupon Only discounts valid at your quiet times.

It needs at least 20 paid checks in the last 28 days. Each run uses AI actions from your plan; it only runs when you press the button.

Drafts and activating

Everything the AI writes is saved as a **Draft**, with a note explaining why it suggests it. **Drafts never reach guests.** Read the questions and the rules, change anything you like, then press **Activate**.

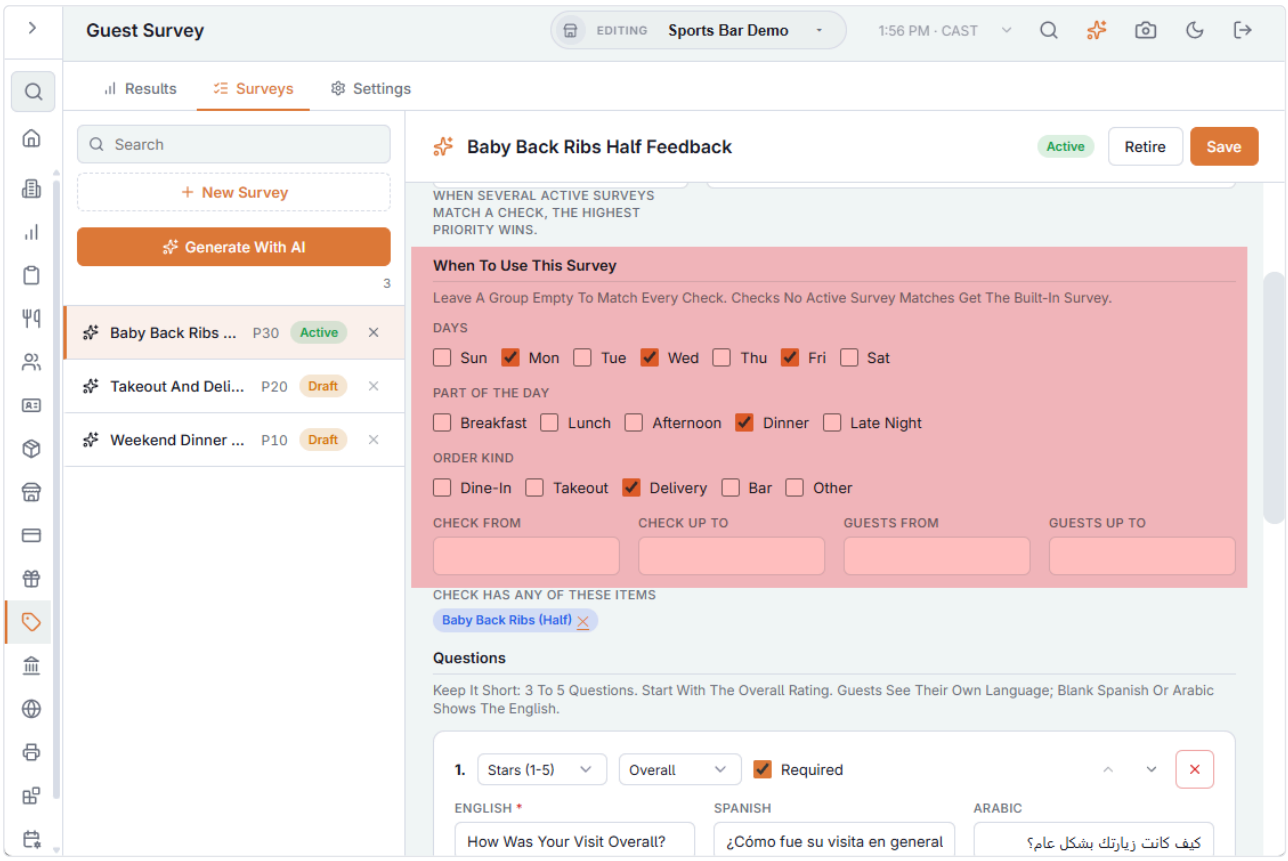


- **Activate** — the survey goes live from the next receipt.
- **Retire** — stops it; it stays in the list.
- The **×** on a row deletes it. Receipts already printed with it show the built-in survey.

Press **New Survey** to write one yourself; it starts from the built-in questions.

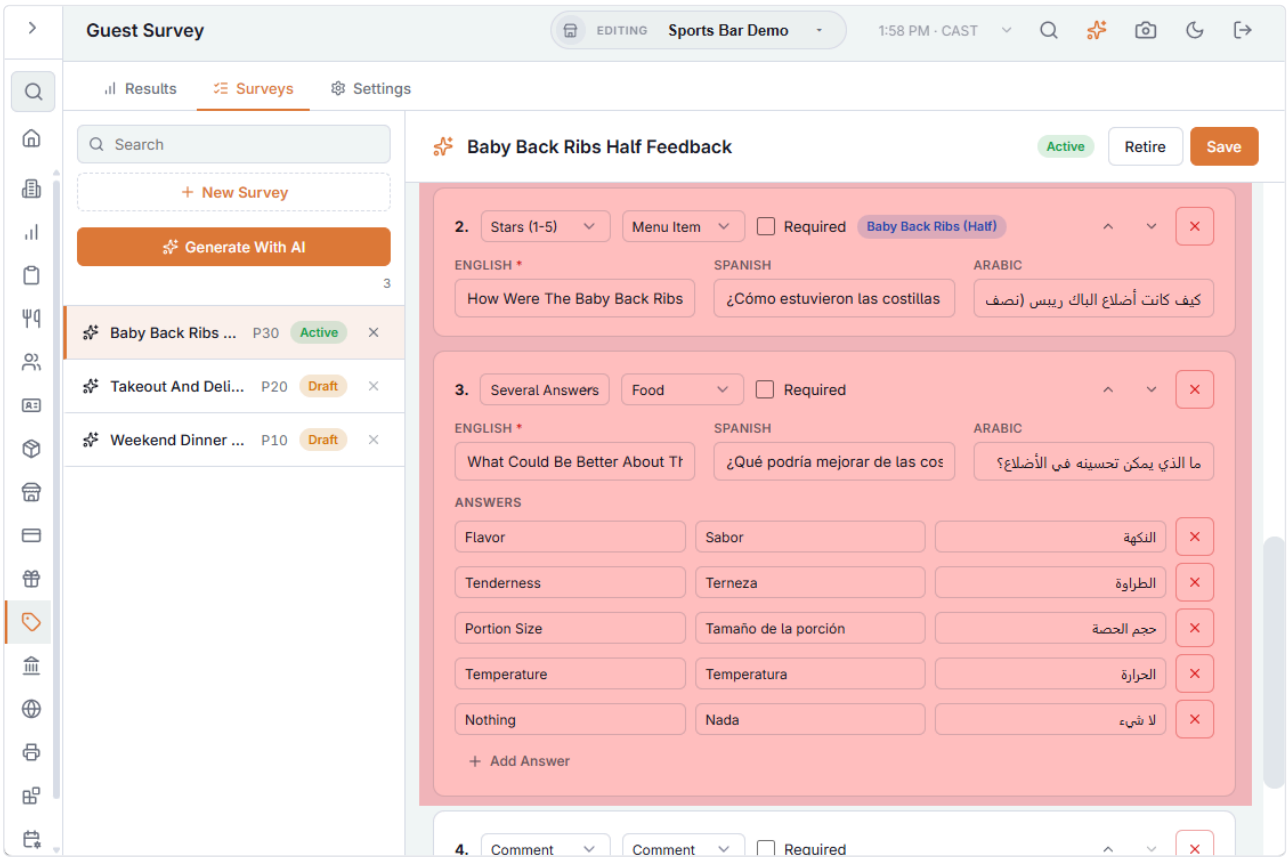
When a survey is used

Under **When To Use This Survey**, tick the days, parts of the day and order kinds it is for, and set a check range or party size if you want. A group left empty matches every check. The AI may also tie a survey to menu items (“the check has any of these items”), shown as chips you can remove.



When several active surveys match a check, the one with the highest **Priority** wins. Checks no active survey matches get the built-in survey. Each survey can have its own **Reward**, or use the store default from the Settings tab.

Questions



- **Stars (1-5)**, **Yes / No**, **One Answer**, **Several Answers** and **Comment**.
- The **topic** (Food, Service, Speed, Order Accuracy…) groups answers in the results, whatever the wording.
- Write each question in English; Spanish and Arabic are optional — a blank one shows the English.
- Keep it short: three to five questions. Start with the overall rating, the one required question.

> **Tip:** after editing the English wording, check the Spanish and Arabic too — they are not translated again automatically.

Related: Guest survey · Survey results and AI summary

Survey slip and customer display

Discounts & Promotions › Guest Survey

View online ↗

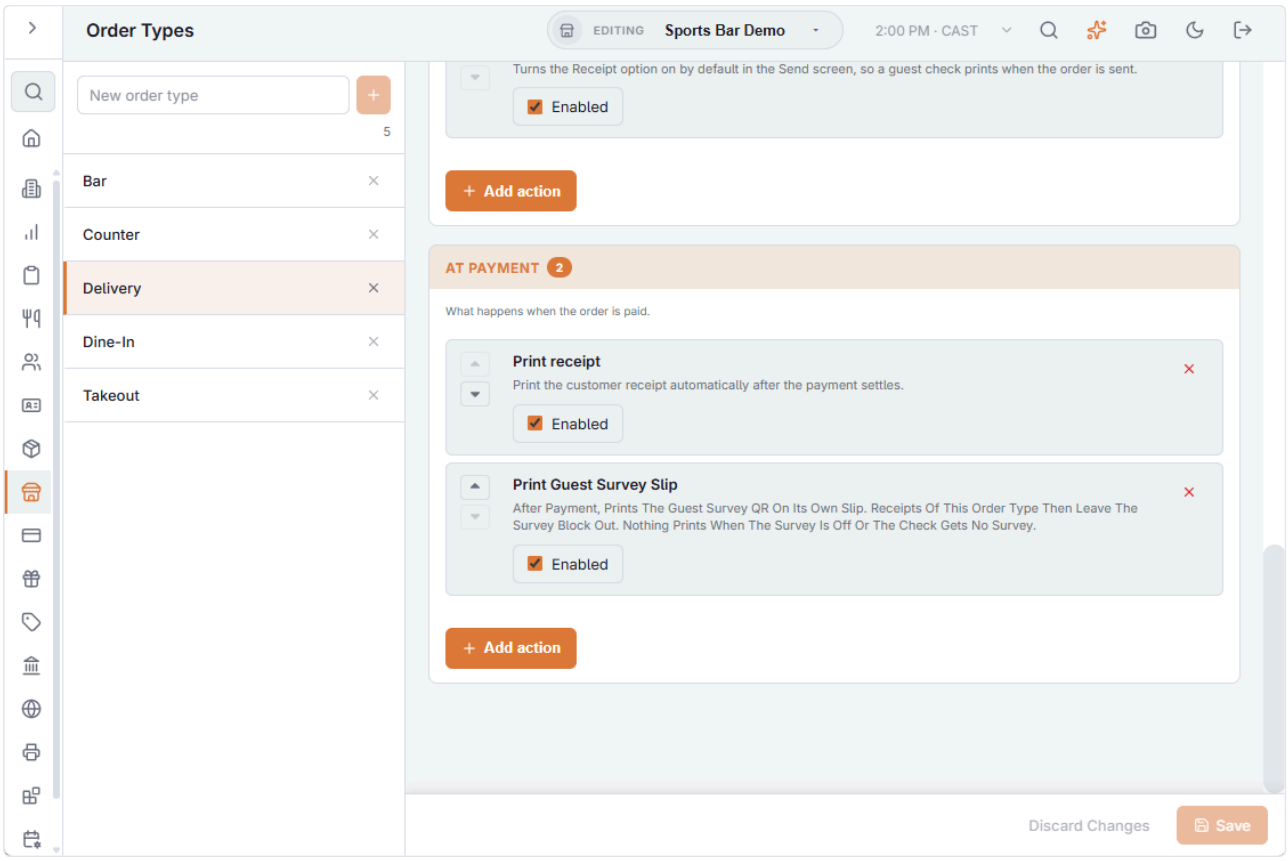
Print the survey QR on its own slip after the receipt for chosen order types, and show it on the customer display after payment.

Besides the QR code on the receipt, the survey can print on its own slip and show on the customer display.

A separate survey slip

Use the slip when you want the survey to stand out, or when the receipt is crowded. It is set per order type:

1. Go to **Back Office › Store Setup › Order Types** and open the order type.
2. On its **Workflow** tab, add **Print Guest Survey Slip** to the Settle stage.



After payment the slip prints on the receipt printer, after the receipt and any coupons. Receipts of that order type then leave the survey block out, so the guest gets one code. Nothing prints when the survey is off or the check doesn't get one, so the action is safe to leave on.



The slip has its own template, **Guest Survey Slip**, in the template editor. Replace “Our Restaurant” with your store name; the survey line, reward and “Please Answer By” date print in the store’s language.

On the customer display

After payment, the customer display’s Thank You screen shows the survey QR next to the receipt QR, and stays up at least 30 seconds so the guest has time to scan. It is on by default; to hide it, turn off **Show Survey QR Code** on the Thank You widget in the customer display designer.

The display shows the same link as the receipt or slip, so the guest can answer from either.

Related: Guest survey

Guest survey: by email for online and delivery orders

Discounts & Promotions › Guest Survey

View online ↗

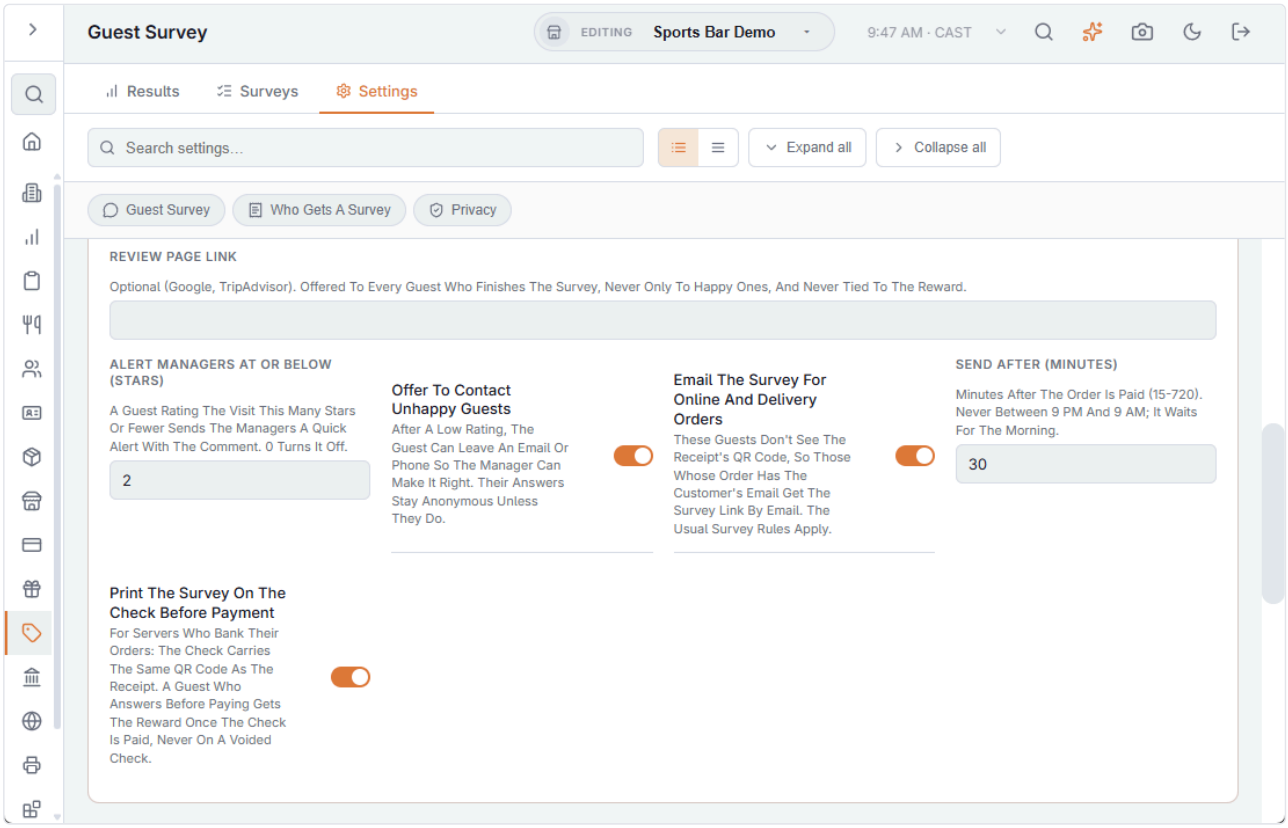
Guests who order online or for delivery never see the receipt's QR code, so they get the survey link by email a little after their order.

The guest survey's link is printed on the receipt as a QR code. Guests who order online or for delivery rarely see it, so their opinion was missing. Now they get the same link by email.

Turn it on

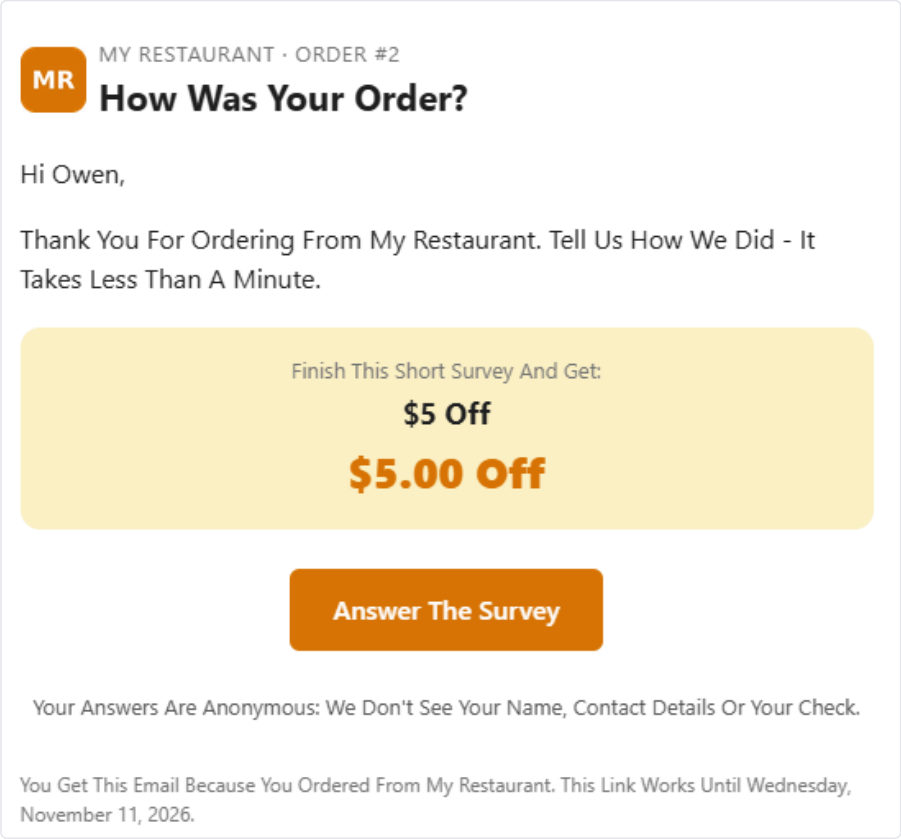
In **Back Office › Discounts & Promotions › Guest Survey › Settings**:

- **Email The Survey For Online And Delivery Orders** — on by default.
- **Send After (Minutes)** — how long after the order is paid, 60 by default. Emails wait between 9 pm and 9 am.



Who gets it

Online orders, and orders of a delivery order type, whose customer has an email. The survey's own rules still decide: the survey must be on, and every Nth order and the minimum total apply. The email shows the reward when the survey has one, and goes once per order; a link already answered isn't emailed. Customers marked Do Not Contact are left out.



The answers stay as anonymous as from the receipt. The email goes out in the store's language from your gift card sender address.

Related: Guest survey

Guest survey: making it right after a low rating

Discounts & Promotions › Guest Survey

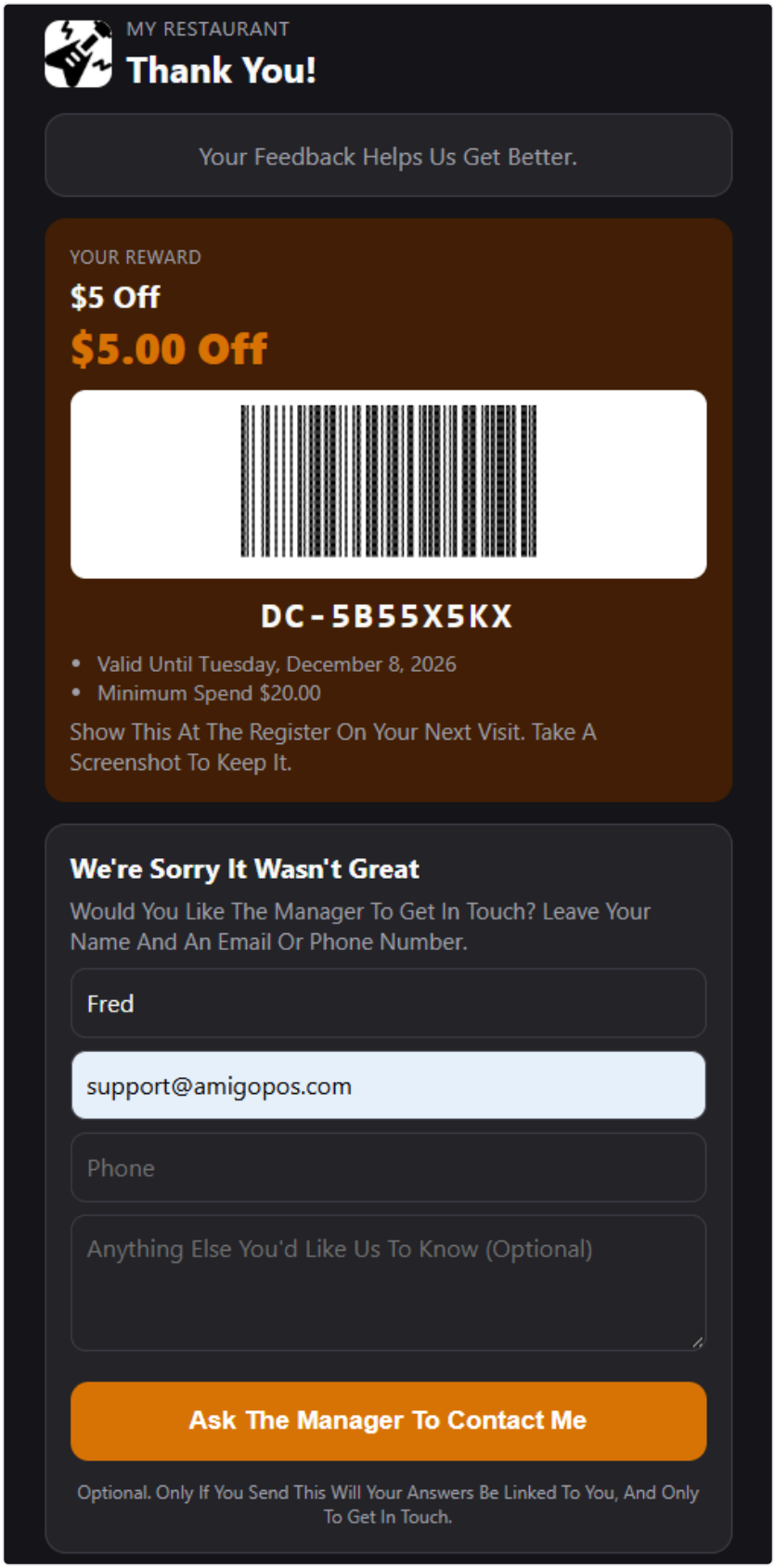
View online ↗

After a low rating the guest can ask the manager to get in touch; managers are alerted, see the guest in Results and send an apology email with a one-time coupon or mark the guest handled.

An unhappy guest who hears back from the manager often becomes a loyal one. The guest survey gives you that chance without giving up the survey's anonymity.

What the guest sees

When a guest rates the visit at or below **Alert Managers At Or Below (Stars)**, the thank-you page asks whether the manager may get in touch. The guest can leave a name, an email or a phone number, and a note.

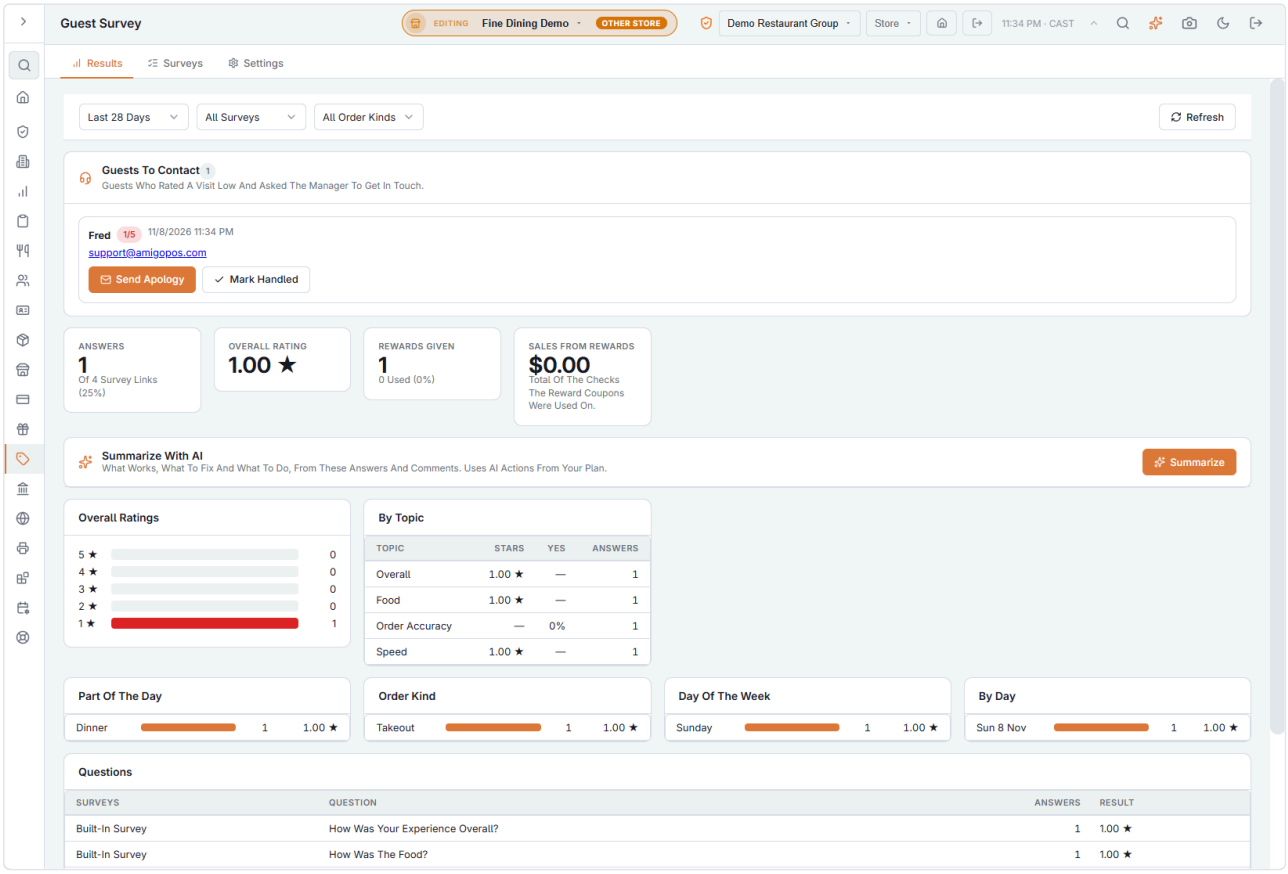


- It is optional. Answers stay anonymous unless the guest sends this card, and then only so you can get in touch.
- The card shows only right after answering, and works for 24 hours.

- When the guest sends it, the managers get an alert in the register's messages.

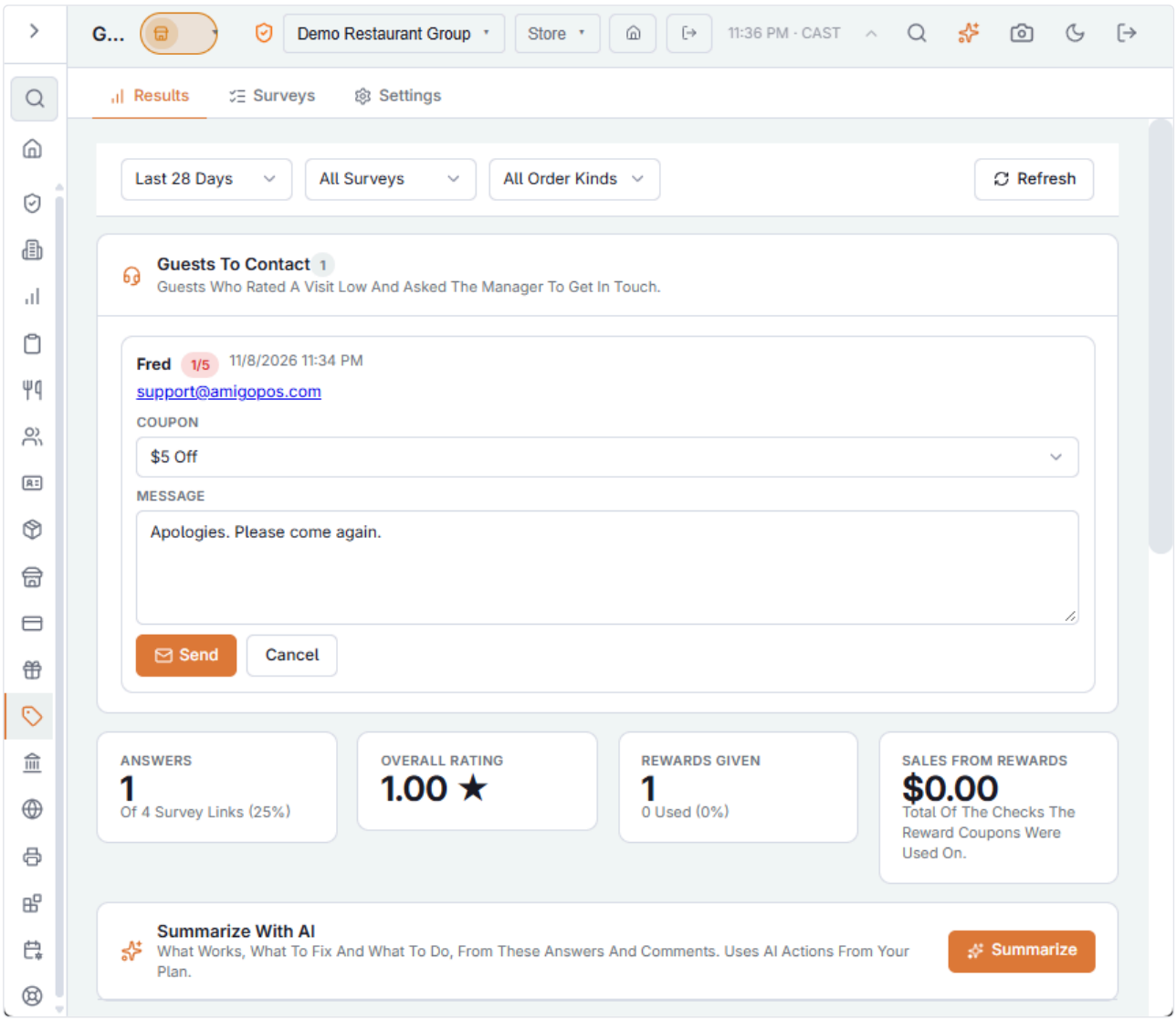
Guests to contact

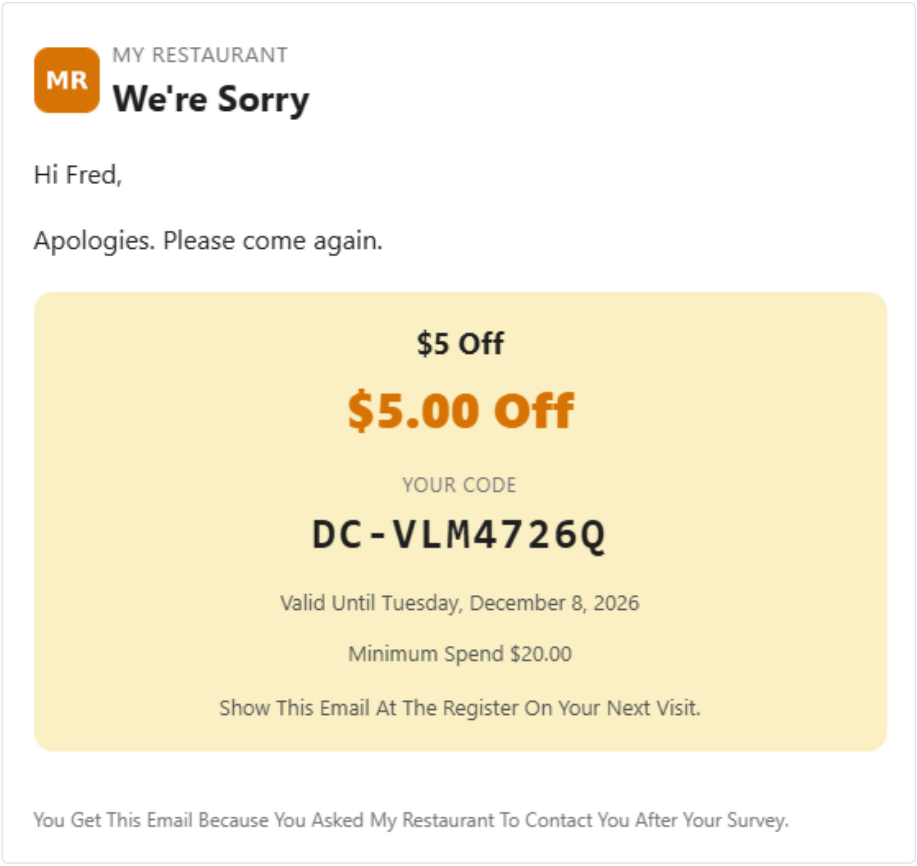
In **Back Office › Discounts & Promotions › Guest Survey › Results**, the **Guests To Contact** card lists the guests who asked, newest first: their rating, when they asked, their email or phone, their comment and their note. The card only shows when someone has asked.



For each guest:

- **Send Apology** — emails the guest. Choose a **Coupon** (or No Coupon) and write a **Message**; left blank, a short apology goes out in the guest's language (English, Spanish or Arabic). The coupon is a one-time code valid for the survey's **Reward Valid For (Days)**; when the email belongs to one of your customers, the register shows it as a coupon waiting for that guest.
- **Mark Handled** — for a phone call or any other follow-up.


G...
Demo Restaurant Group
Store
11:36 PM · CAST
Results
Surveys
Settings
Last 28 Days
All Surveys
All Order Kinds
Refresh
Guests To Contact 1
Guests Who Rated A Visit Low And Asked The Manager To Get In Touch.
Fred 1/5 11/8/2026 11:34 PM
support@amigopos.com
COUPON
$5 Off
MESSAGE
Apologies. Please come again.
Send
Cancel
ANSWERS
1
Of 4 Survey Links (25%)
OVERALL RATING
1.00 ★
REWARDS GIVEN
1
0 Used (0%)
SALES FROM REWARDS
$0.00
Total Of The Checks The Reward Coupons Were Used On.
Summarize With AI
What Works, What To Fix And What To Do, From These Answers And Comments. Uses AI Actions From Your Plan.
Summarize



Handled guests stay on the card, greyed out, for 30 days. Apology coupons are counted as **Apology Coupon** on the Guest Offers Results tab.

Turning it off

In **Discounts & Promotions › Guest Survey › Settings**, switch off **Offer To Contact Unhappy Guests**. It is on by default.

> The review link on the thank-you page is shown to every guest, whatever their rating. Asking only happy guests for reviews is against Google's review rules, so it stays that way.

Related: Guest survey · Survey results and AI summary

Survey results and AI summary

Discounts & Promotions › Guest Survey

View online ↗

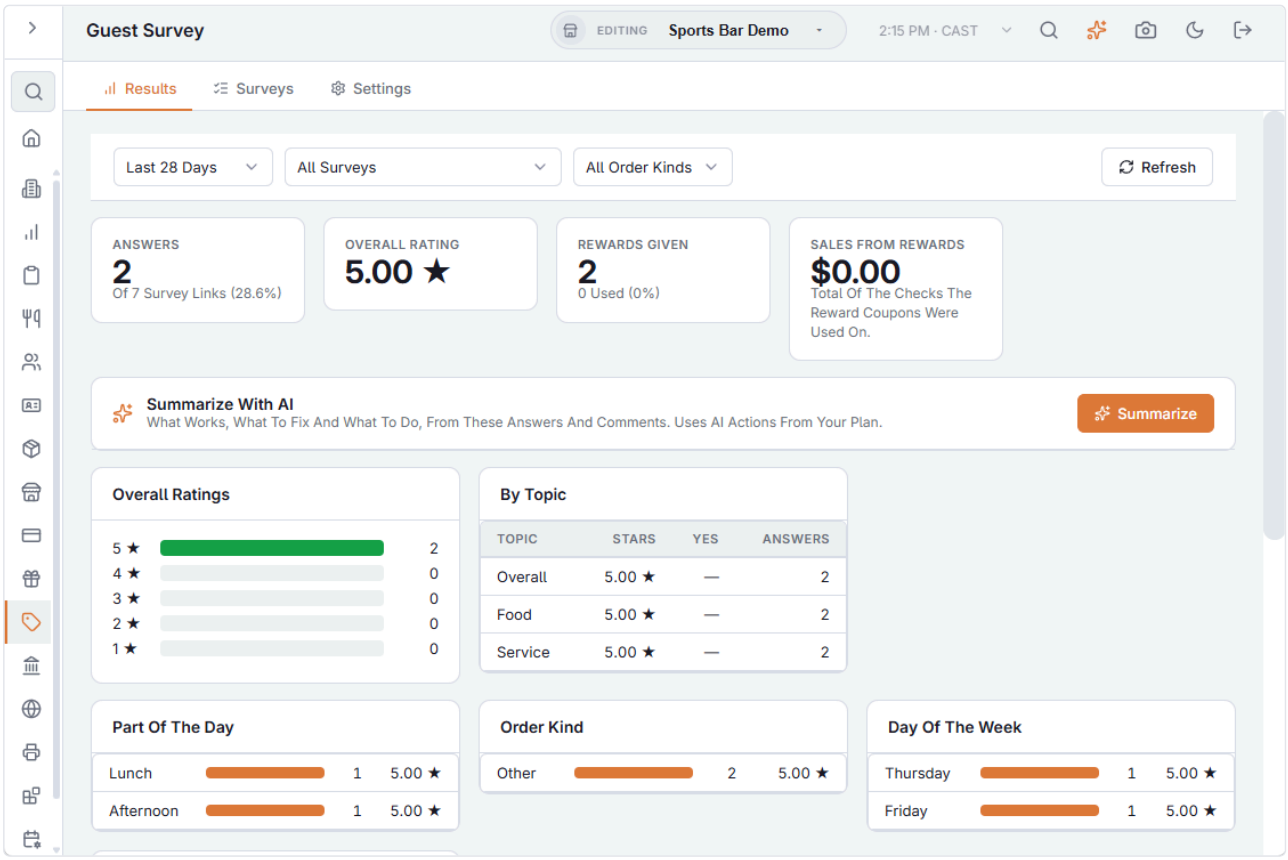
Read the guest survey answers by topic, part of the day, order kind and question, see the rewards that came back, and get an AI summary of what to fix.

The **Results** tab (the first tab of **Back Office › Discounts & Promotions › Guest Survey**) shows what guests answered.

Filters

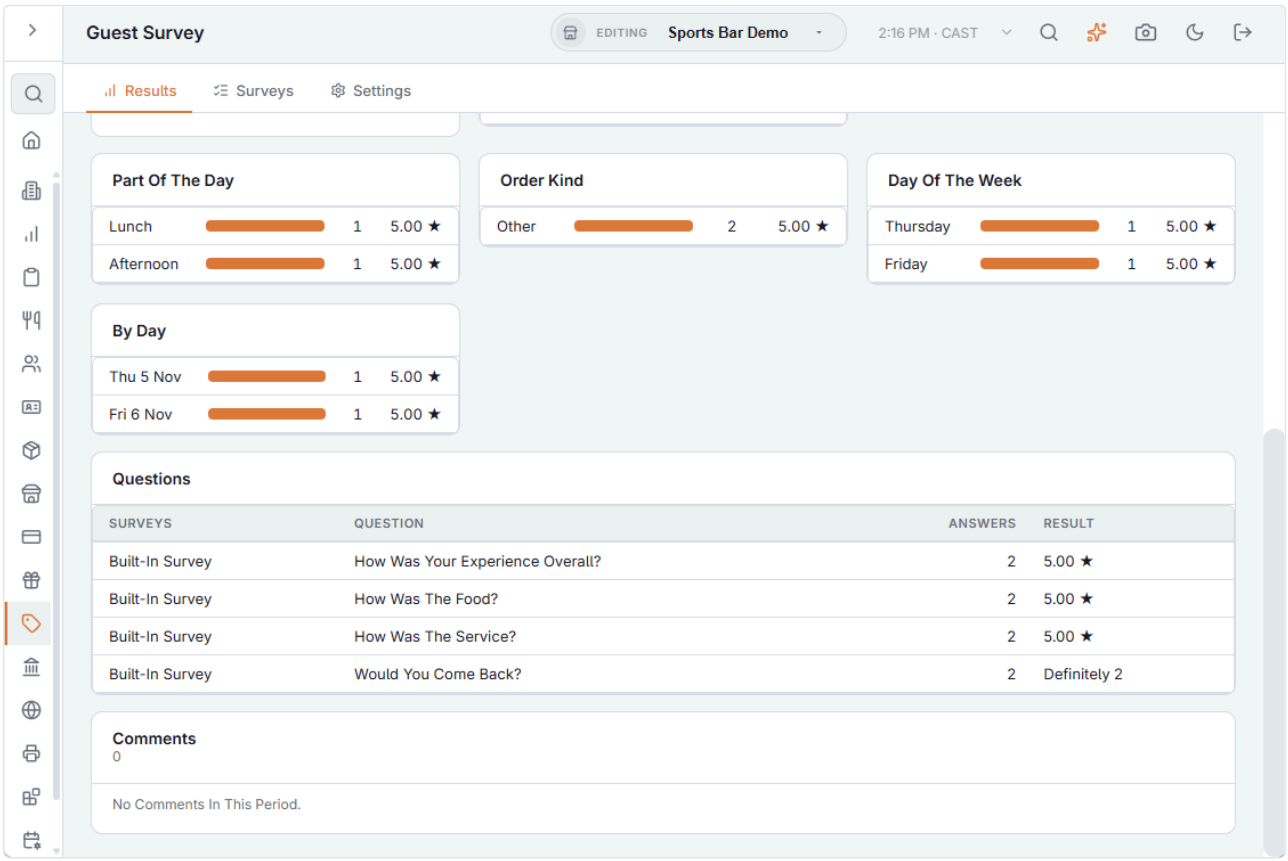
Choose the period (last 7, 28 or 90 days, or 12 months), one survey or all, and one order kind or all.

The headline numbers



- **Answers** — surveys sent, out of the survey links printed, with the response rate.
- **Overall Rating** — the average of the overall question, 1 to 5 stars.
- **Rewards Given** — and how many were used at the register.
- **Sales From Rewards** — the total of the checks the reward coupons were used on: what the survey brought back.

The breakdowns



- **Overall Ratings** — how many guests gave one to five stars.
- **By Topic** — average stars and % yes for food, service, speed, order accuracy and the rest, whatever the question's wording.
- **Part Of The Day**, **Order Kind**, **Day Of The Week** and **By Day** — where the good and bad ratings cluster.
- **Server** — only when *Keep The Server With Each Response* is on.
- **Questions** — every question with its result: average stars, % yes, or how many picked each answer.
- **Comments** — the 200 newest, with date, part of the day, order kind and rating. The check number and table show only when *Keep The Order With Each Response* is on.

Summarize With AI

Press **Summarize** for a one-line headline plus **What Works**, **What To Fix** and **What To Do**, written from the numbers and comments in the period you chose. It needs at least five answers, quotes the numbers it relies on, and never names your staff — server names are not sent to the AI. Each summary uses AI actions from your plan, and only runs when you press the button.

> **Tip:** look at a few weeks together before acting on a number; a handful of answers can swing an average.

Related: Guest survey · Survey library and Generate With AI

Guests to contact

Guests who rated a visit low and asked the manager to get in touch show at the top of the Results tab, with Send Apology and Mark Handled. See Guest survey: making it right after a low rating.

Guest Offers

Guest offers: building your email list

View online ↗

Guests who ask for your offers by email: where they join, double opt-in, unsubscribing, the consent record and the Audience tab.

Back Office › Discounts & Promotions › Guest Offers is where you run guest offers, the emails you send to guests who asked for them, such as a welcome back after a long absence, a birthday gift, an offer for your quiet hours. It all starts with the list of guests who said yes. This topic covers how guests join the list, how they leave it, and how you can prove they agreed.

Who is on the list

A guest is on the list when their customer record has an email and accepts offers. Guests with the **Do Not Contact** flag are never emailed, and a guest with two customer records under the same email gets one email, not two. The list is shared by all the stores of your business.

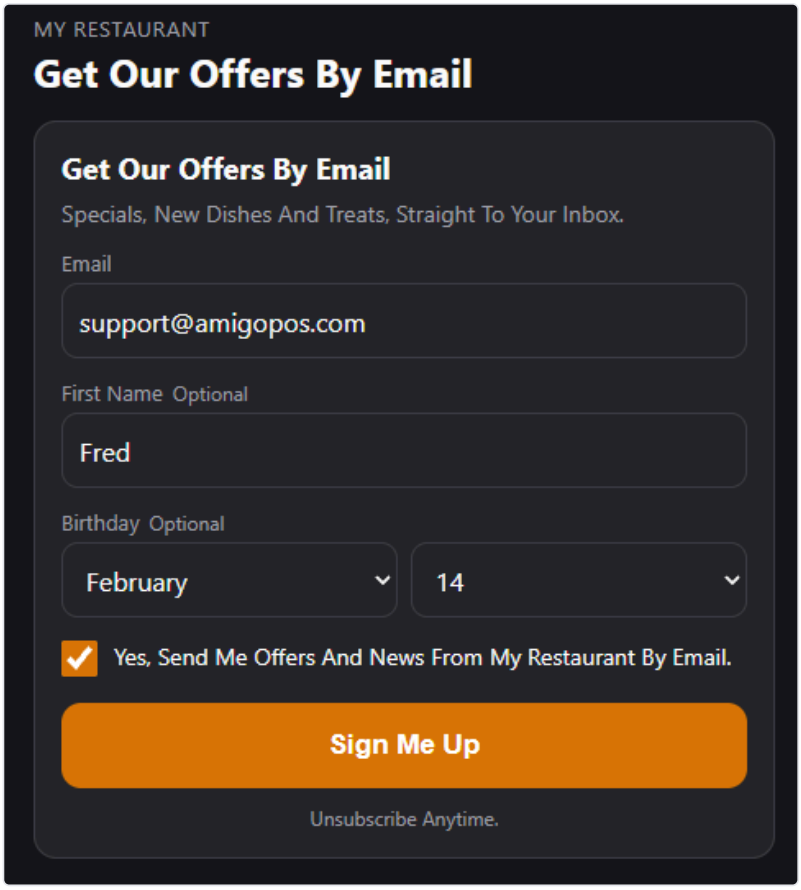
Guests join the list in these ways:

- **After the guest survey** — an optional sign-up card on the survey's thank-you page (see below).
- **Online** — the offers box at web checkout and in the guest's web account.
- **Your Join Our List page** — the store's own sign-up page, with a printable poster and table cards (Guest offers: Join Our List page, poster and table cards).
- **By staff** — when a guest asks, tick **Send Special Offers And News By Email** on their record in **Back Office › Customers › Customers** (Customers list, types, and merge). It is recorded as **Staff** in the Consent Record.
- **A friend's invite** — see Invite a friend.

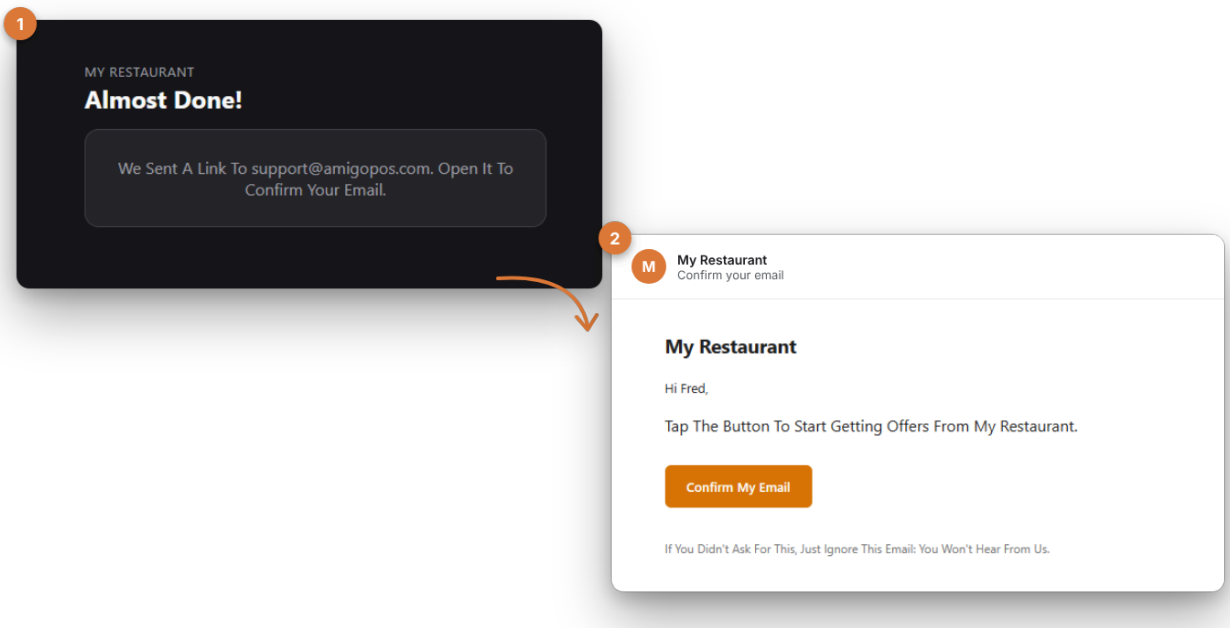
The sign-up after the survey

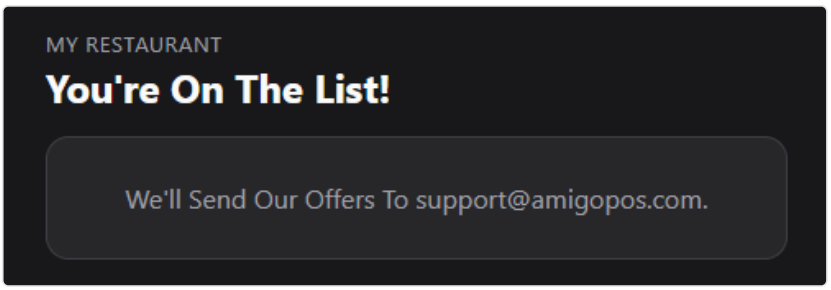
Go to **Back Office › Discounts & Promotions › Guest Offers**, open **Settings** and find **Email Sign-Up**.

- **Offer Email Sign-Up After The Survey** — shows the sign-up card on the survey's thank-you page. Off by default; the guest survey must be on.
- **Confirm By Email (Double Opt-In)** — on by default and recommended. The guest gets an email with a link and joins the list only after clicking it, which keeps typos and other people's addresses off your list.
- **Ask For The Birthday** — asks for the day and month (never the year). Optional for the guest.
- **Sign-Up Line** — your own line above the form; blank uses the built-in line in the guest's language.



The guest types their email, optionally their first name and birthday, ticks the box agreeing to receive offers and presses **Sign Me Up**. The email is kept apart from their survey answers and is never linked to them.

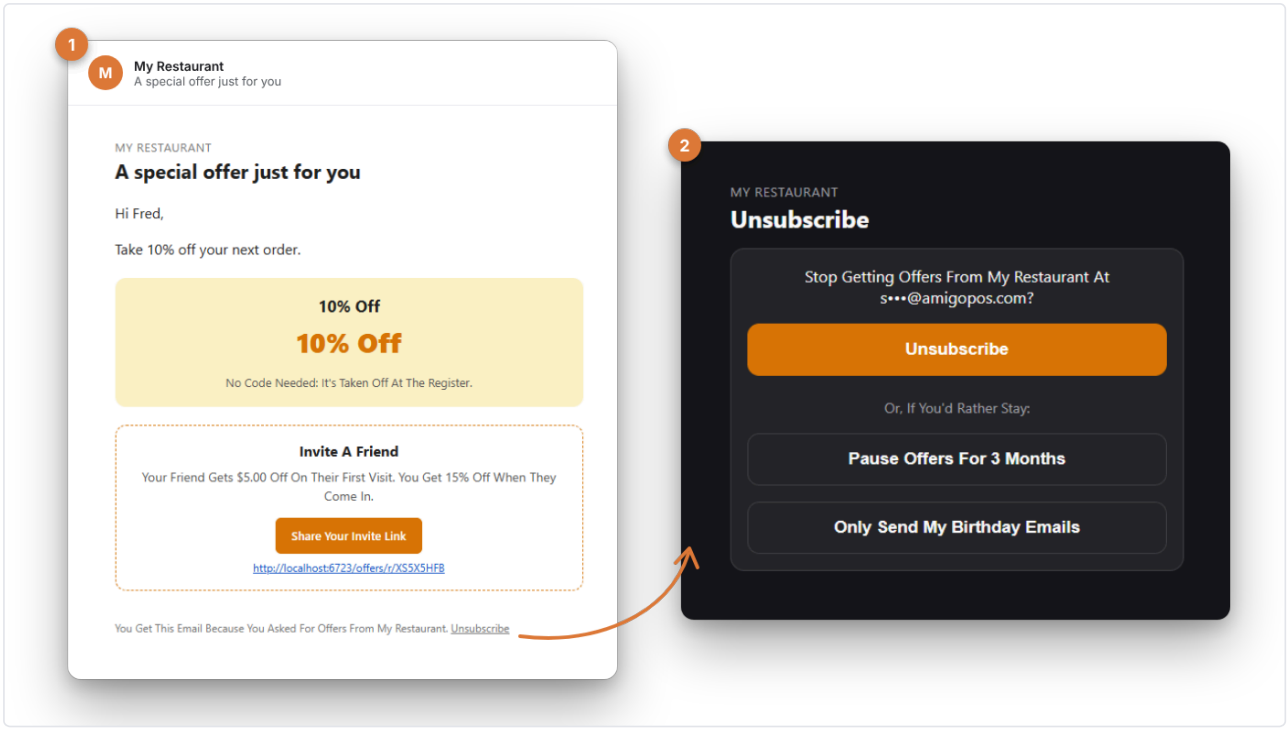




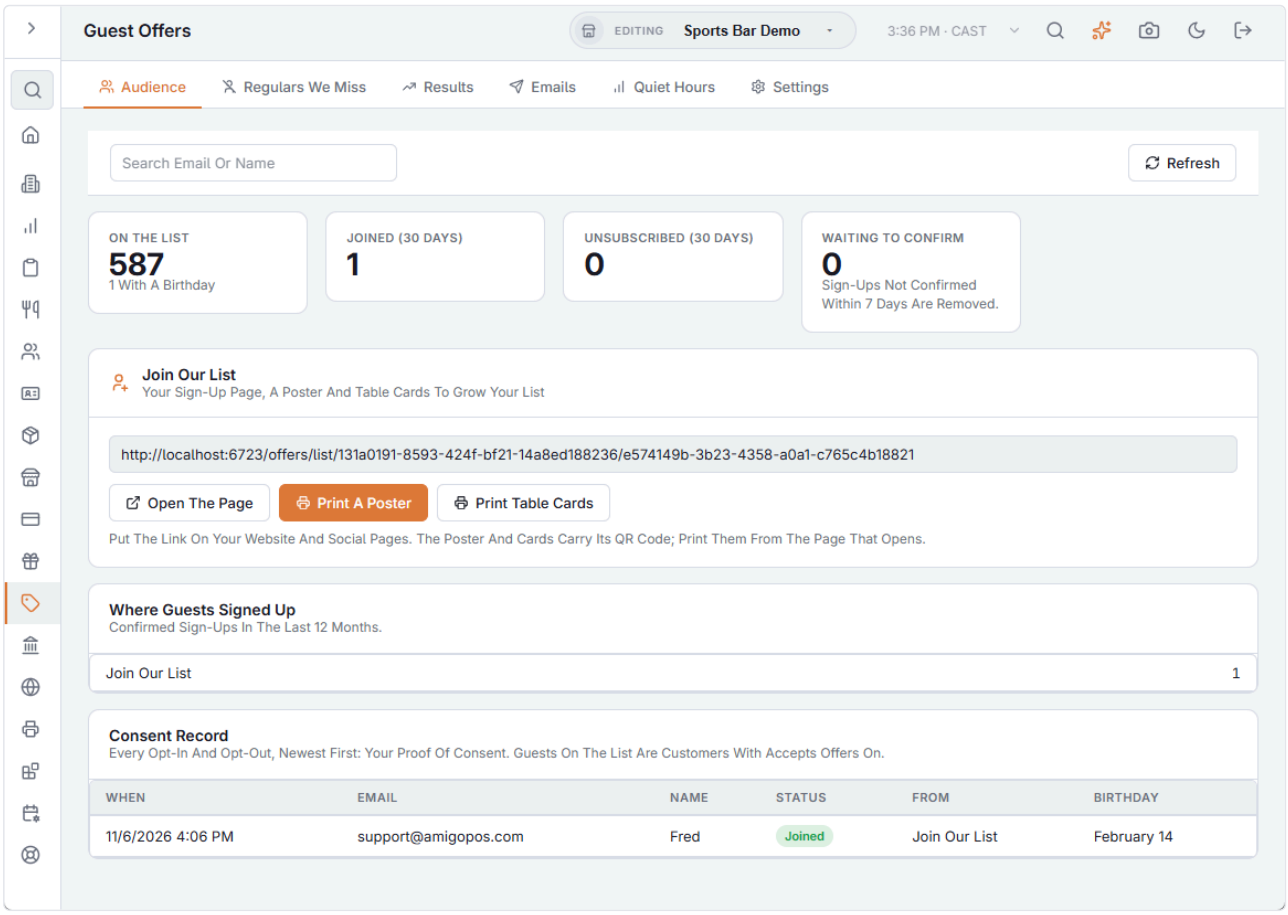
Confirmation links last 7 days. Sign-ups nobody confirms are removed after that. The confirmation email comes from your gift card sender address with your store's name.

Unsubscribing

Every offer email ends with an **Unsubscribe** link. It opens a page that asks first (mail programs open links on their own, so only a person pressing the button unsubscribes). Unsubscribing turns offers off for every customer record of your business with that email. Staff can also untick **Send Special Offers And News By Email** on the customer's record when a guest asks in person.



The Audience tab



- **On The List** — guests who take offers by email (one per address), and how many gave a birthday.
- **Joined (30 Days)** and **Unsubscribed (30 Days)**.
- **Waiting To Confirm** — sign-ups whose confirmation link hasn't been clicked yet.
- **Where Guests Signed Up** — confirmed sign-ups of the last 12 months by source, such as Guest Survey, Web Sign-Up, Web Profile, Join Our List, Staff and Friend's Invite.
- **Join Our List** — the link to your sign-up page, with **Open The Page**, **Print A Poster** and **Print Table Cards**, while **Join Our List Page And Poster** is on in Settings.
- **Consent Record** — the newest 200 opt-ins and opt-outs, with date, email, name, status, where it came from and the birthday. **Search Email Or Name** finds older ones. This is your proof that each guest agreed.

Next: Win-back and birthday emails · Filling your quiet hours

Unsubscribes, bounces and spam complaints

Guests can also unsubscribe with one tap from their mail app, and guests whose email bounces or who mark an offer as spam are taken off the list automatically (shown as **Email Bounced** or **Marked As Spam** in the Consent Record). See Guest offers: how your emails are delivered.

More ways to grow your list

Your store has its own sign-up page with a printable poster and table cards (Guest offers: Join Our List page, poster and table cards), and guests can also ask for offers by WhatsApp (Guest offers by WhatsApp).

Guest offers: Join Our List page, poster and table cards

Discounts & Promotions › Guest Offers

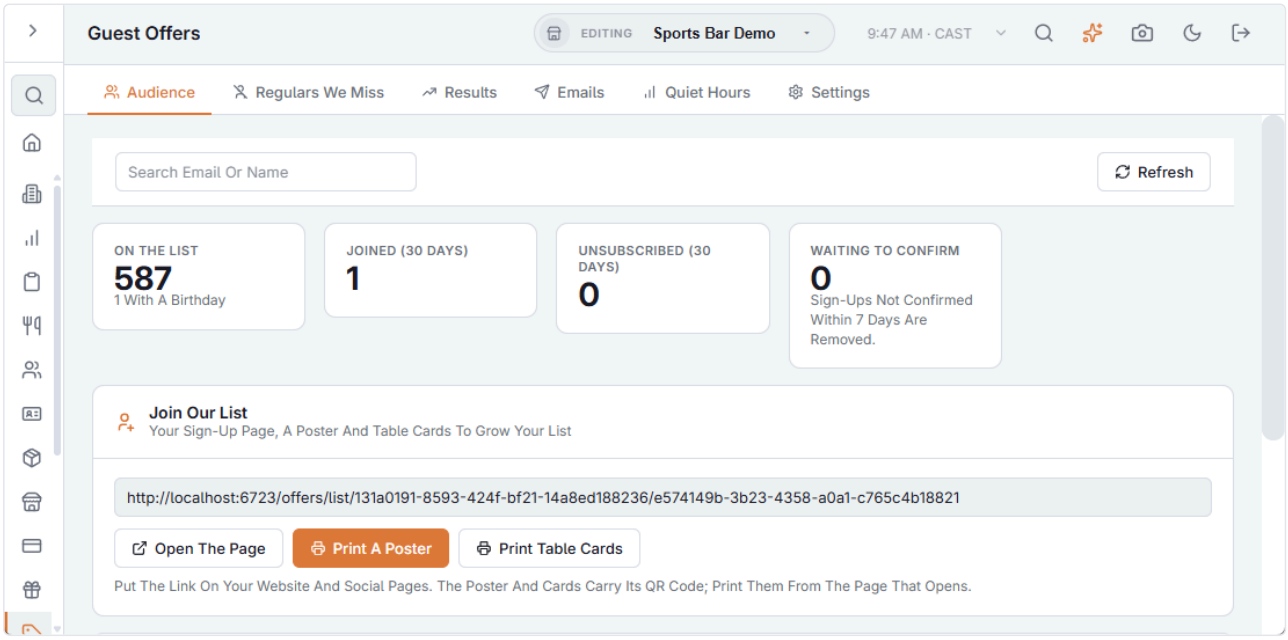
View online ↗

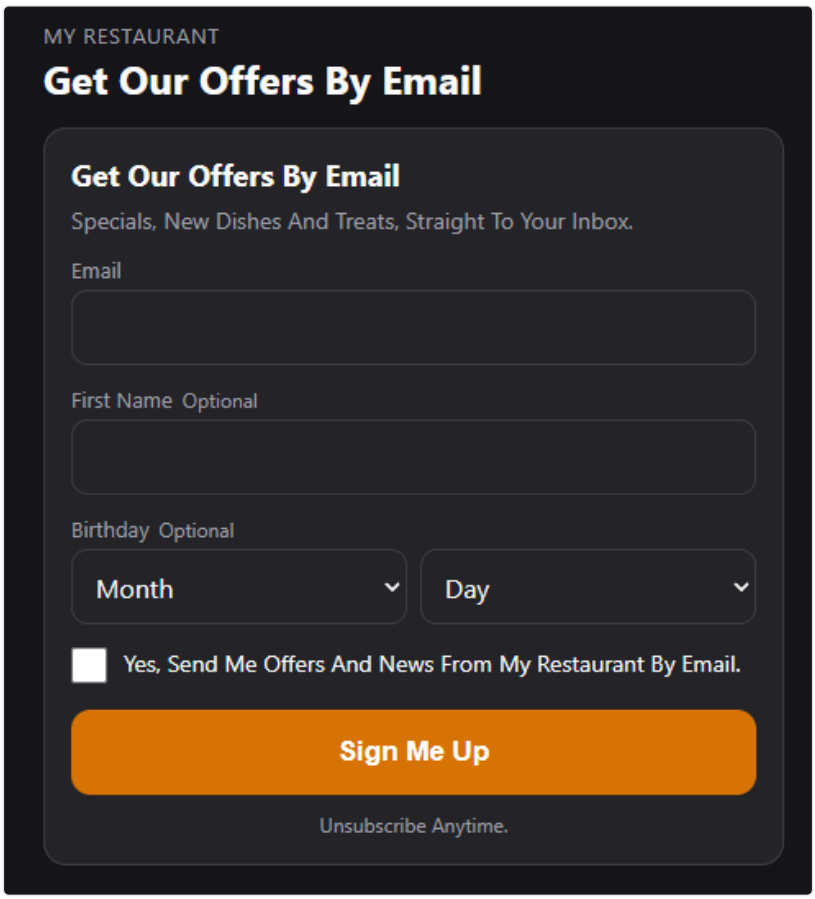
Your store's own sign-up page for offers, to link from your website and social pages, and a printable poster and table cards with its QR code.

More guests on your list means more guests you can bring back. Besides the survey and the online store, guests can join from a page of your own.

Your sign-up page

Open **Back Office › Discounts & Promotions › Guest Offers › Audience**. The **Join Our List** card shows the page's link: put it on your website, your social pages or a newsletter. **Open The Page** shows it.





The page uses your sign-up text and the usual sign-up rules: the confirmation email when double opt-in is on, and the optional birthday. Sign-ups show in the Consent Record with the source **Join Our List**.

Poster and table cards

- **Print A Poster** — one per page, with your logo, the text and a large QR code, for the door, the counter or the restroom.
- **Print Table Cards** — four per page to cut out, for tables and table tents.

Print

MY RESTAURANT

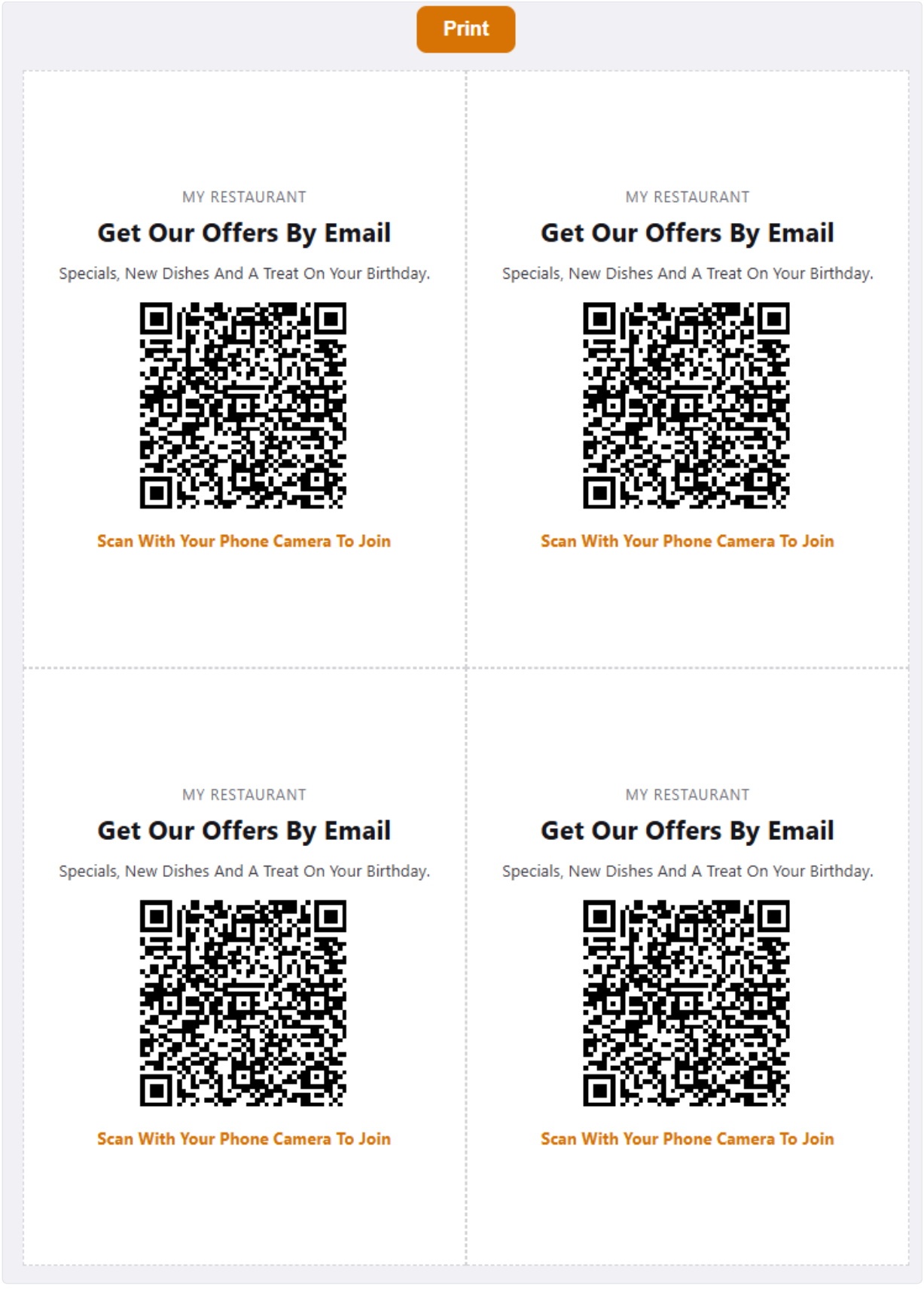
Get Our Offers By Email

Specials, New Dishes And A Treat On Your Birthday.



Scan With Your Phone Camera To Join

http://localhost:6723/offers/list/131a0191-8593-424f-bf21-14a8ed188236/e574149b-3b23-4358-a0a1-c765c4b18821



Each opens in the browser with a **Print** button; the button doesn't print. Guests scan the QR code with their phone camera and land on the sign-up page.

To turn the page and the poster off, switch off **Join Our List Page And Poster** in **Settings › Email Sign-Up**.

Related: Guest offers: building your email list

Win-back and birthday emails

Discounts & Promotions › Guest Offers

View online ↗

Automatic emails with a one-time coupon: to guests who haven't visited for a while and before their birthday. Setup, rules, test emails, results and Plan With AI.

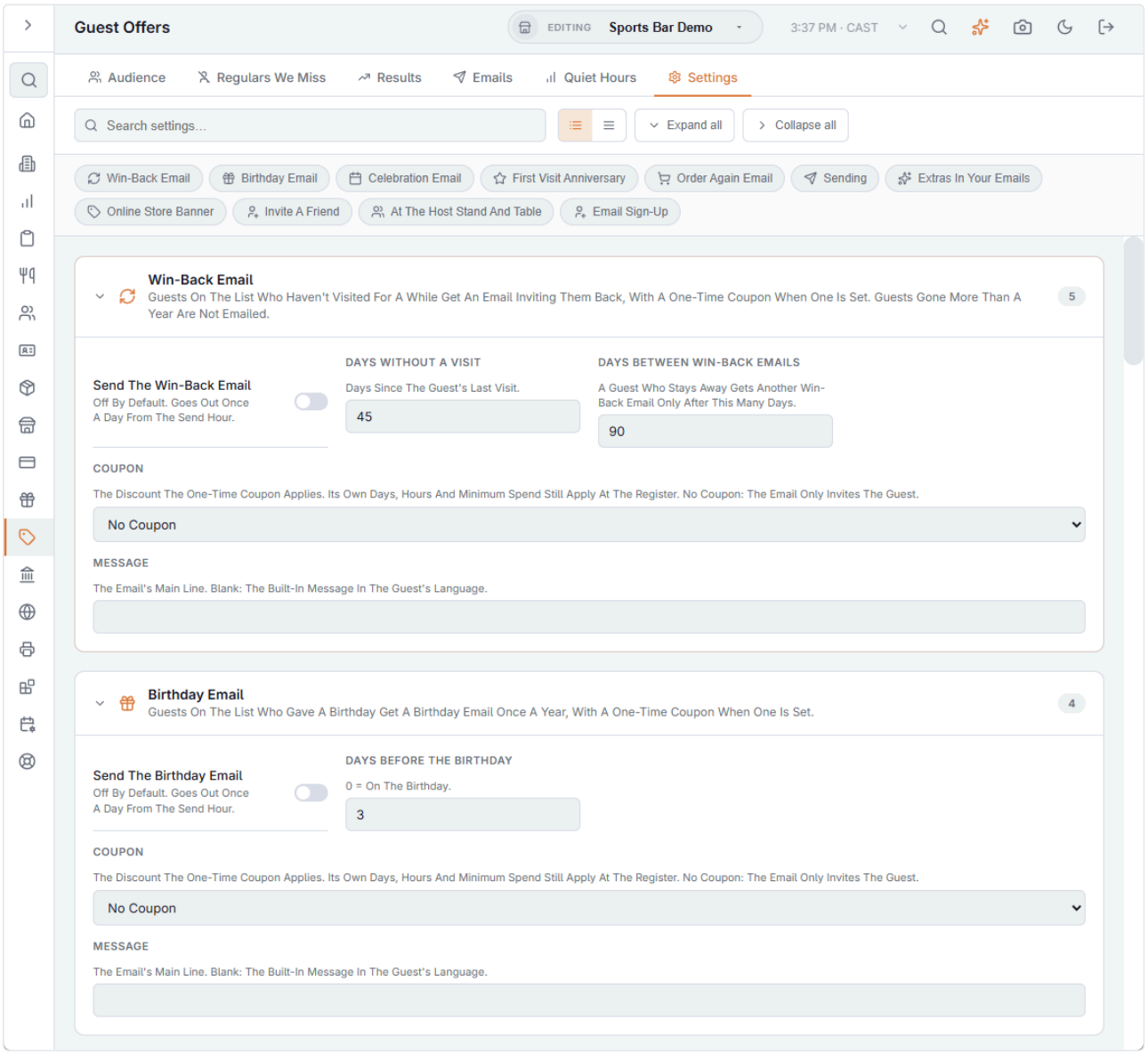
Two emails go out on their own, once a day, to the guests on your offers list:

- **Win-back email** — to guests whose last visit was a while ago (45 days by default), inviting them back.
- **Birthday email** — a few days before the birthday of guests who gave one (3 days by default), once a year.

Each can carry a **one-time coupon** for that guest, and every email has the unsubscribe link.

Turning them on

Go to **Back Office › Discounts & Promotions › Guest Offers › Settings**. Both emails are off until you turn them on.



Win-Back Email

- **Send The Win-Back Email** — the switch.
- **Days Without A Visit** — how long since the last visit (45 by default). Guests gone more than a year are not emailed.
- **Days Between Win-Back Emails** — a guest who stays away gets another one only after this many days (90 by default).
- **Coupon** — the discount the coupon applies, or *No Coupon* for a plain invitation.
- **Message** — your own main line; blank uses the built-in line in the guest's language.

Birthday Email

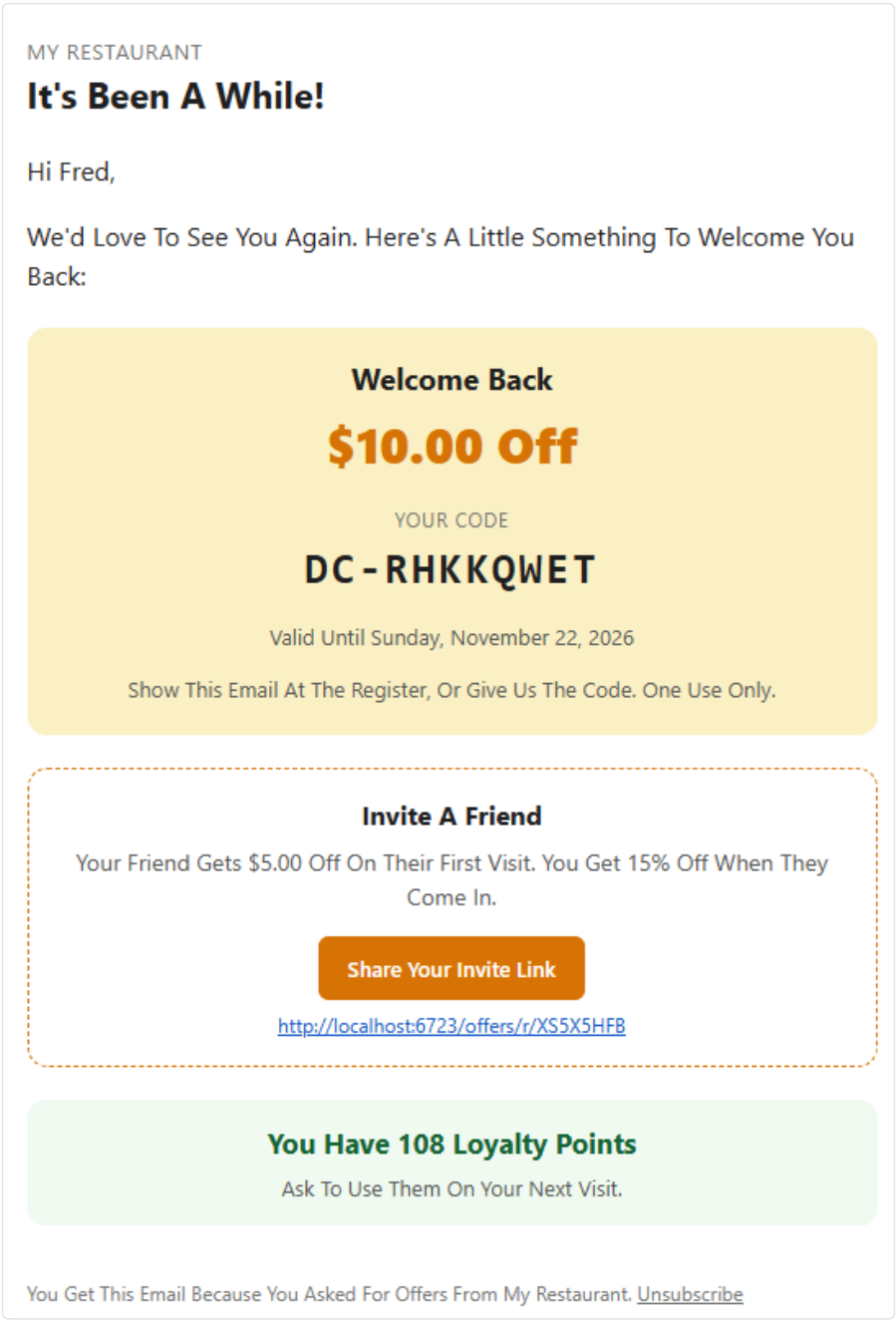
- **Send The Birthday Email**, **Days Before The Birthday** (0 = on the day), **Coupon** and **Message**, as above. Birthdays on 29 February are celebrated on the 28th in other years.

Sending

- **Coupon Valid For (Days)** — 14 by default, never past the discount's own end date.
- **Send Hour (0-23)** — the store hour from which the day's emails go out (10 by default).
- **Most Emails Per Day** — 200 by default; the rest go the next day. Birthdays go first.

> **Choosing the coupon:** a **Coupon Only** discount is best. Its own days, hours and minimum spend still apply at the register, so a discount valid only at quiet times brings guests back when you have room.

What the guest gets



The email comes from your store's name with your logo, in the guest's language. The coupon box shows the amount, the code and when it expires. The guest shows the email at the register or gives the code; it works once, like any printed coupon.

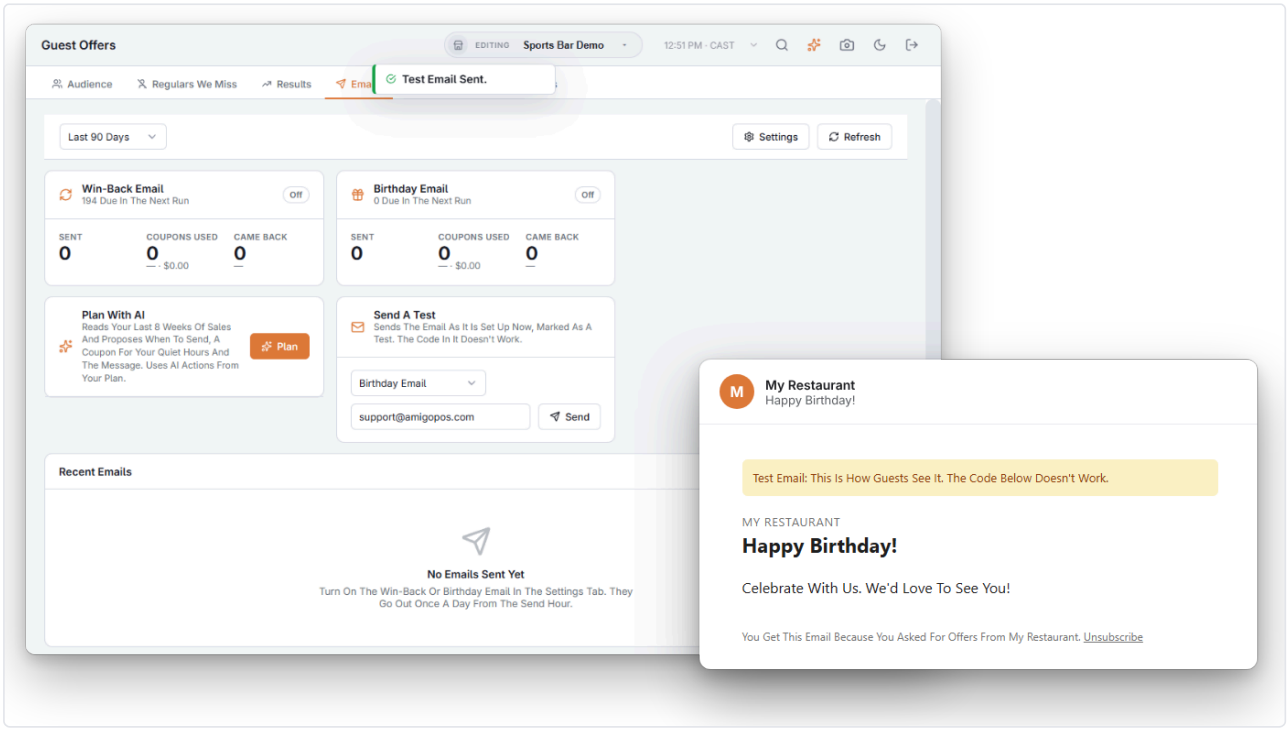
The rules

- One email per address, even if the guest has two customer records.
- A guest belongs to the store of their last visit (else the store where they signed up, else your first store), so each guest hears from one store.
- No win-back email within 7 days of any other offer email.
- Guests with **Do Not Contact** or who unsubscribed are never emailed.

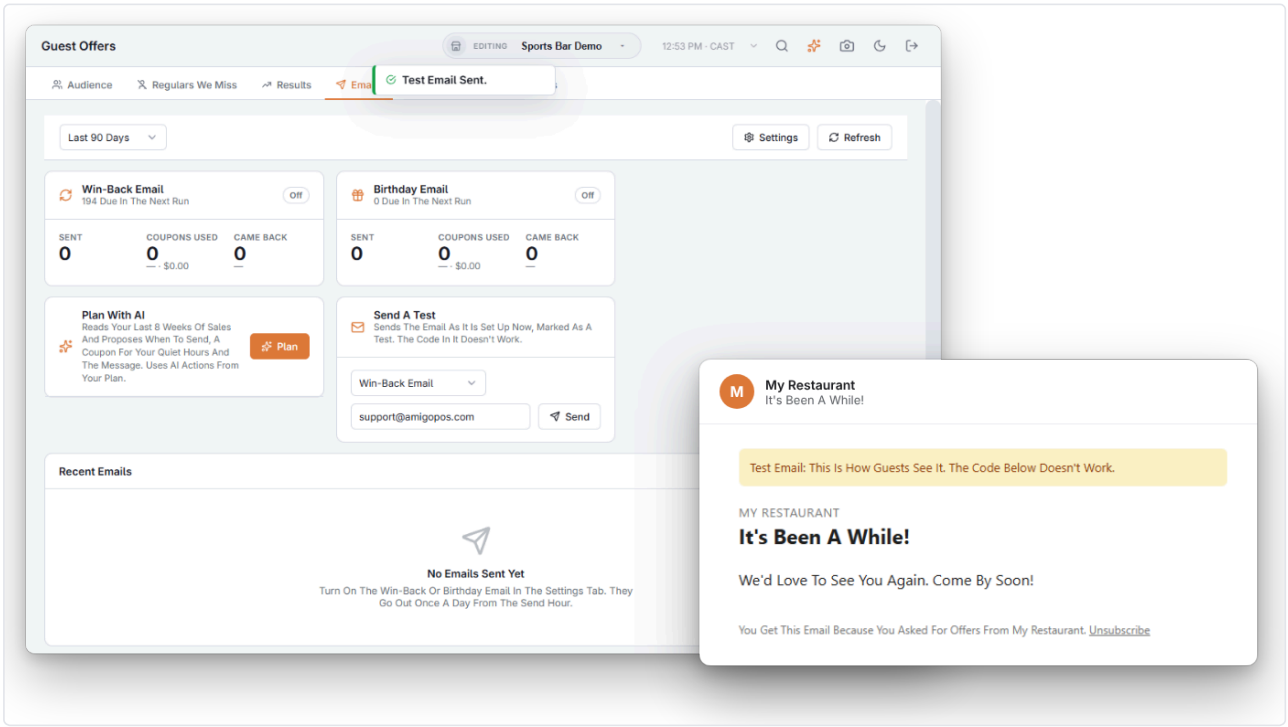
> **Loyalty birthday rewards are separate.** If your loyalty program already gives a birthday reward, a guest with a card gets both. Leave the birthday coupon blank if you don't want that.

Send a test

On the **Emails** tab, **Send A Test** sends either email, as it is set up now, to any address. It is marked *[TEST]* and its code doesn't work.



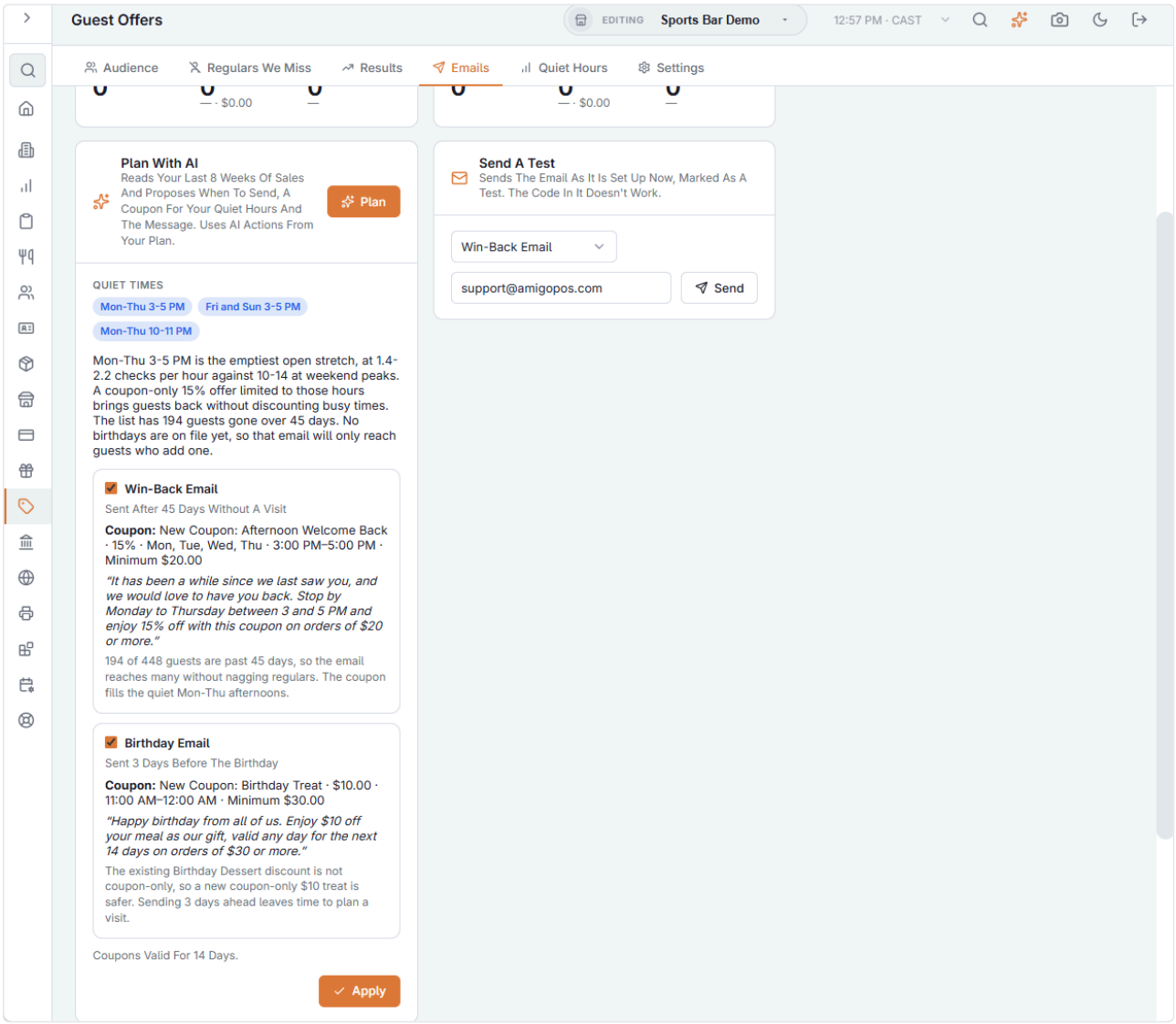
Results



- **Sent** (and any that failed), **Coupons Used** with the sales on those checks, and **Came Back** — guests who ordered again after the email, with or without the coupon.
- Under each title: how many guests the next daily run would email.
- **Recent Emails** — the newest 100, with the coupon code and whether it was used.

Plan With AI

Not sure what to offer? Press **Plan**. The AI reads your last 8 weeks of paid checks by day and hour, your discounts and your list, then proposes when to send each email, a coupon for your quiet hours (one of your discounts, or a new coupon-only one limited to those days and hours) and the message.



Untick what you don't want and press **Apply**: new discounts are created and the settings filled in. The emails are not turned on for you — check the **Settings** tab and switch them on when ready. Each plan uses AI actions from your plan and runs only when you press the button.

More automatic emails

Besides win-back and birthday, you can turn on the celebration and first visit anniversary emails and the order again email for online guests. Each gets its own card here once it is on, and Send A Test can send any of them. To compare every promotion, open the Results tab.

Celebrations and first visit anniversaries

Discounts & Promotions › Guest Offers

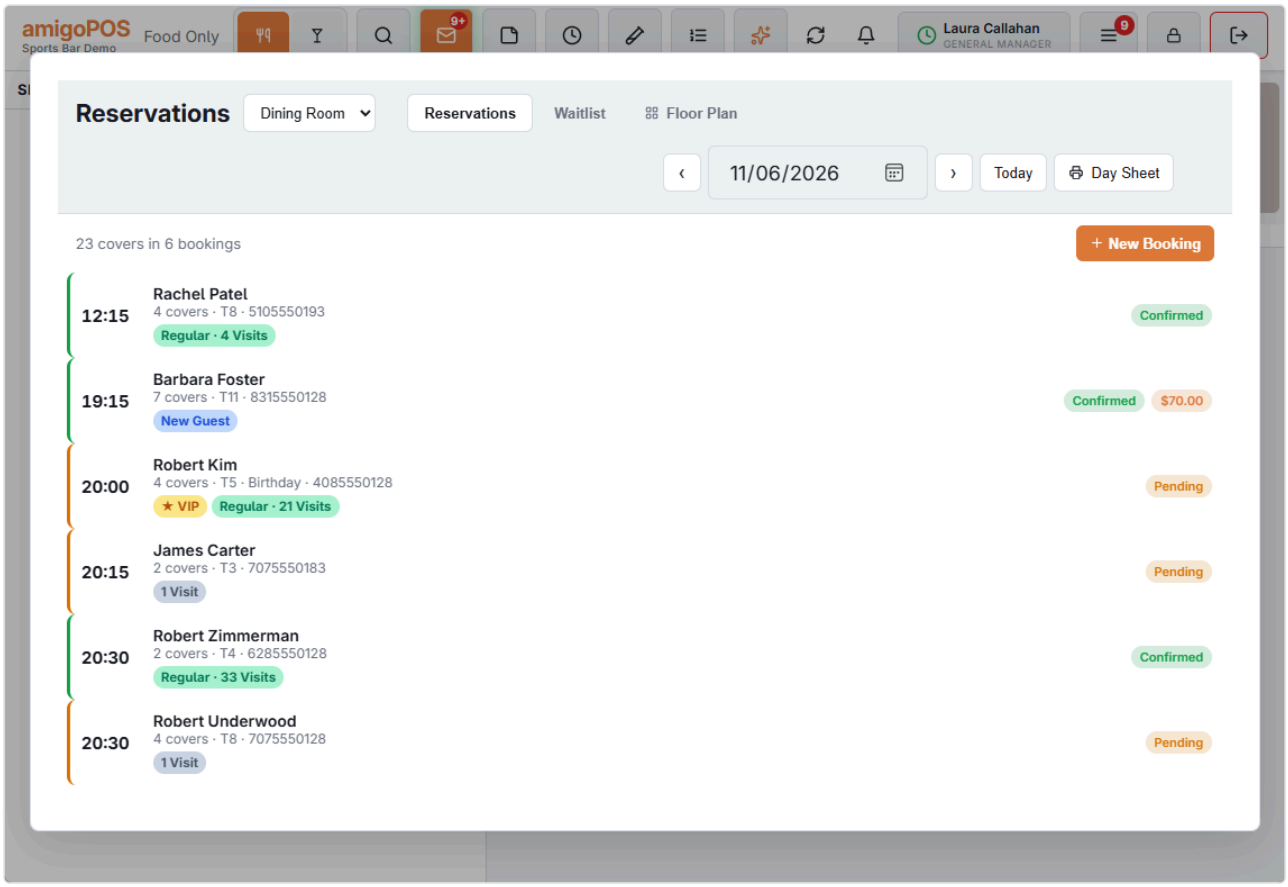
View online ↗

Birthdays and anniversaries recorded on reservations, the celebration email that invites guests to book again before the date, and the thank-you on the anniversary of a guest's first visit.

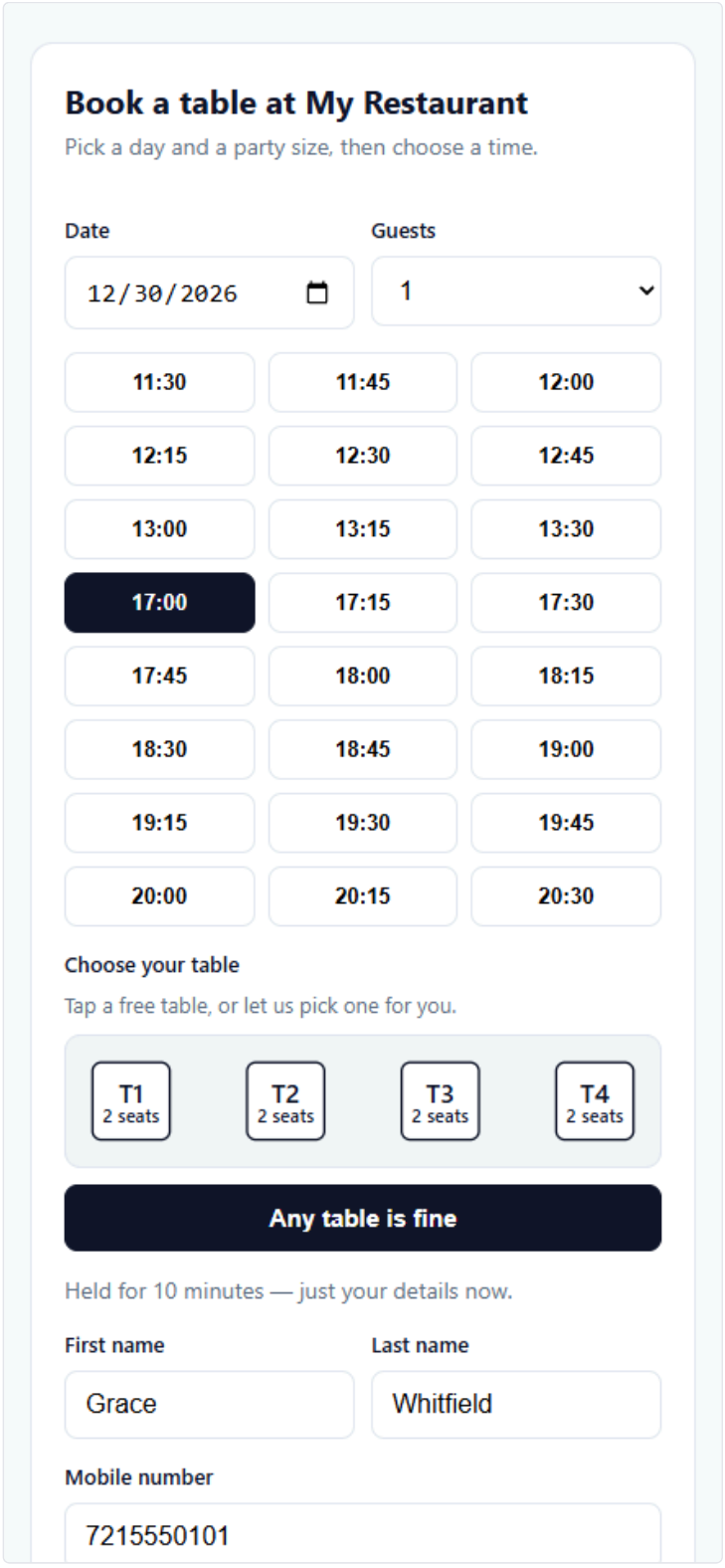
A party that celebrated a birthday or an anniversary with you is likely to celebrate again next year. Record the occasion when they book, and a year later the **celebration email** invites them back in time to reserve. A second email thanks guests on the anniversary of their first visit.

Record the occasion on the booking

On the register's reservation book, the booking form has **No Occasion**, **Birthday** or **Anniversary** next to the occasion text. When you pick one, a month and a day appear: fill them in when the celebration isn't on the day of the booking, or leave them blank to use the booking's day. The text box is still there for details (*grandma's 80th*), and the booking shows *Birthday* or *Anniversary* when you leave it blank.



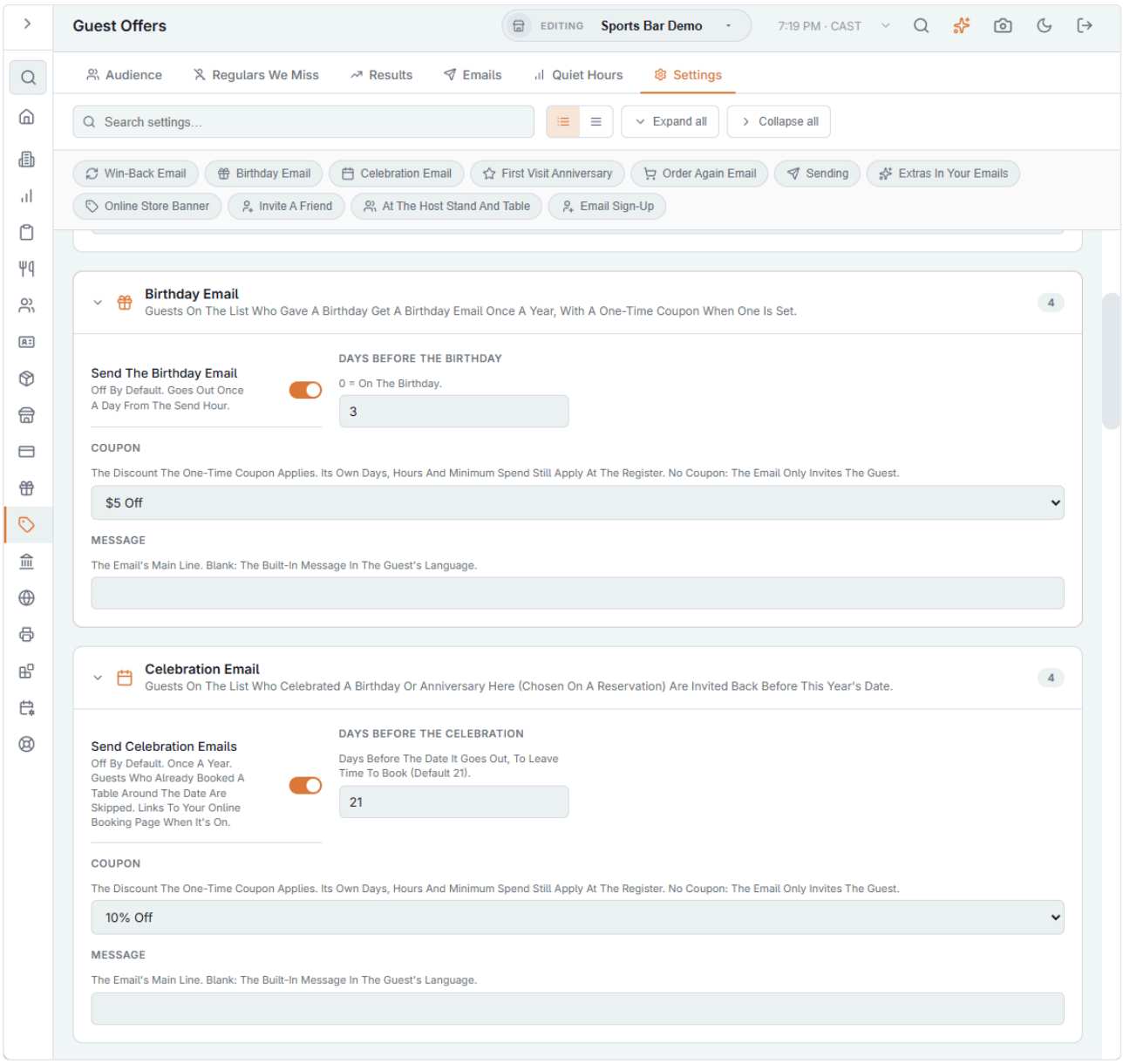
Guests booking online get the same choice, with an optional date, under **Occasion (optional)**.



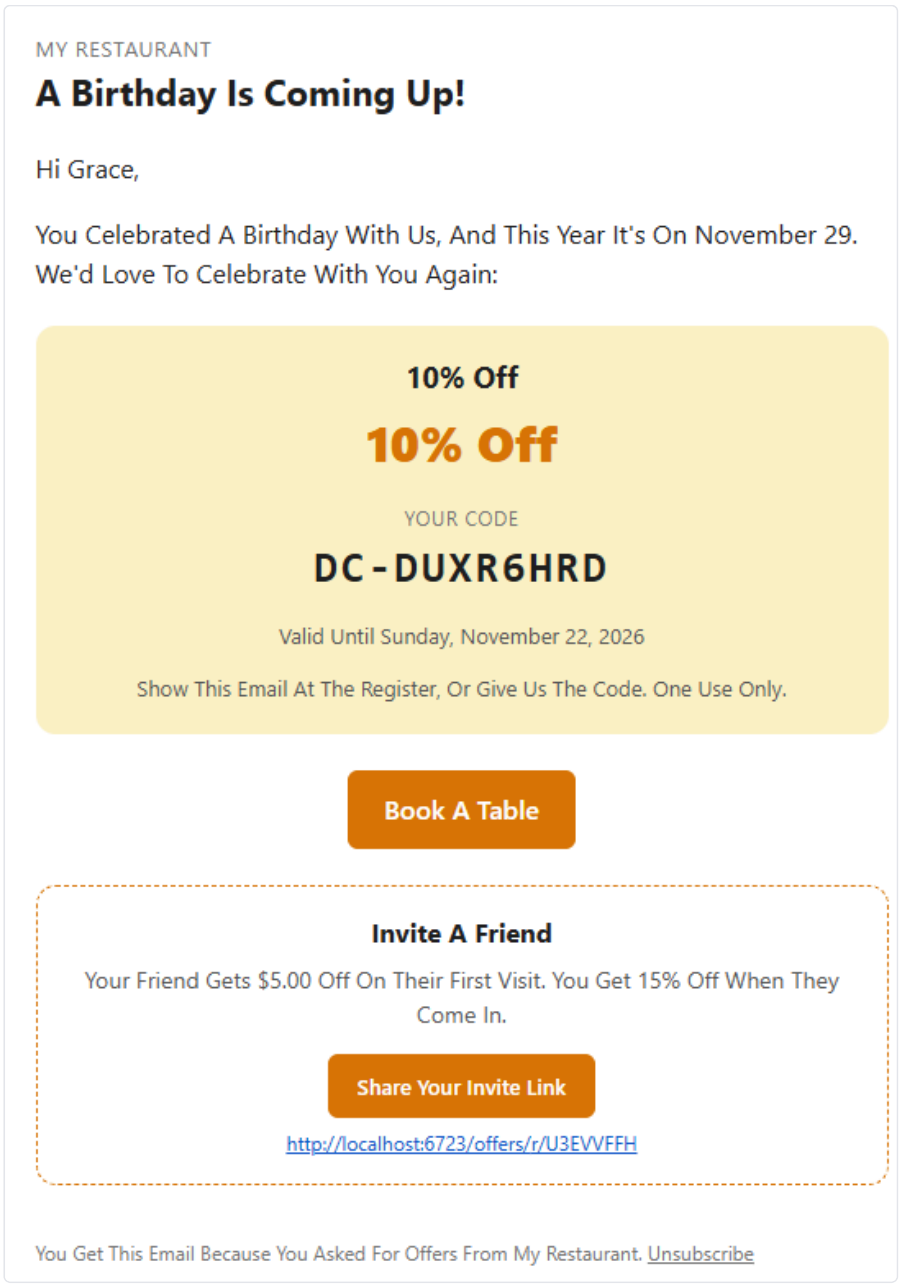
The occasion is kept for the guest who booked — their customer record, or their email or phone — and a later booking updates it. It never changes the guest's own birthday on file, because the party may be celebrating someone else.

The celebration email

Go to **Back Office › Discounts & Promotions › Guest Offers › Settings**, find **Celebration Email** and switch on **Send Celebration Emails**. Off by default.

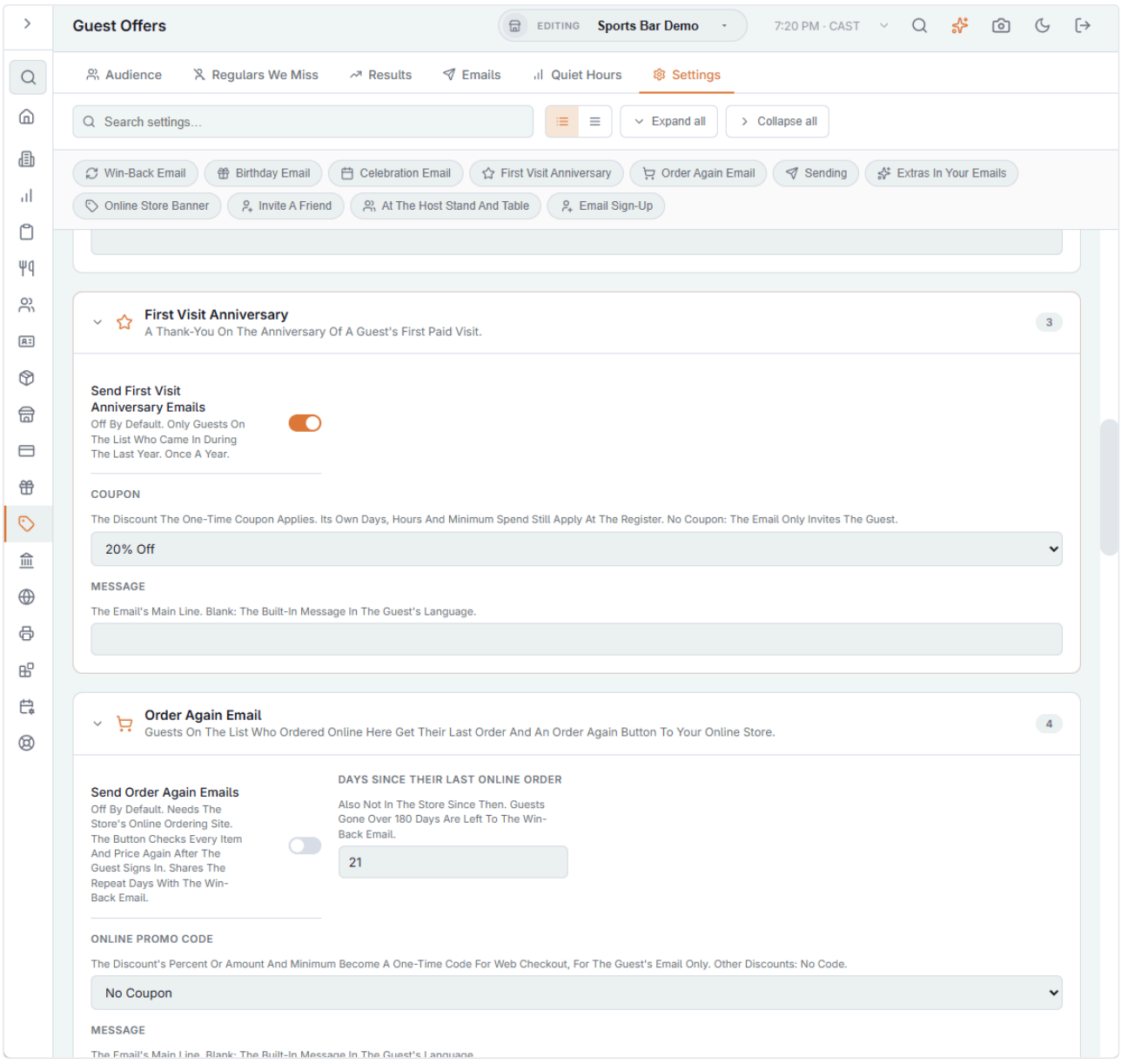


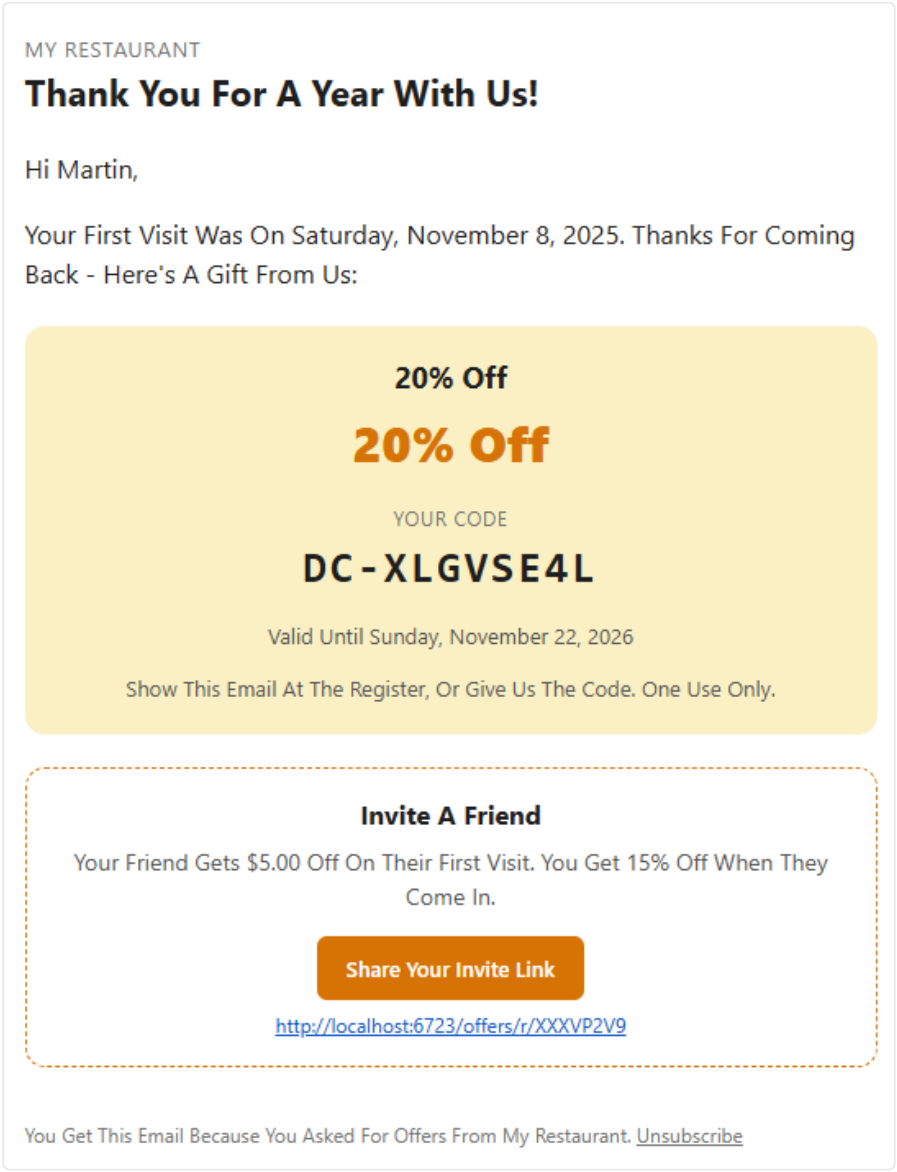
- Guests on your offers list with a recorded birthday or anniversary get the email a number of days before this year's date (21 by default), to leave time to book. Once a year.
- It reads "A Birthday Is Coming Up!" or "Your Anniversary Is Coming Up!" with the date, an optional one-time coupon, and a **Book A Table** button when your online booking is on.
- Guests who already have a booking from today until a few days after the date are skipped.
- Write your own message, or leave it blank for the built-in one in the guest's language.



The first visit anniversary

Switch on **Send First Visit Anniversary Emails** in the **First Visit Anniversary** section. On the anniversary of a guest's first paid visit, guests on your list who came in during the last year get "Thank You For A Year With Us!" (or for 2, 3… years), with an optional coupon. Once a year.


Guest Offers
EDITING
Sports Bar Demo
7:20 PM · CAST
Audience
Regulars We Miss
Results
Emails
Quiet Hours
Settings
Search settings...
Expand all
Collapse all
Win-Back Email
Birthday Email
Celebration Email
First Visit Anniversary
Order Again Email
Sending
Extras In Your Emails
Online Store Banner
Invite A Friend
At The Host Stand And Table
Email Sign-Up
First Visit Anniversary
A Thank-You On The Anniversary Of A Guest's First Paid Visit.
3
Send First Visit Anniversary Emails
Off By Default. Only Guests On The List Who Came In During The Last Year. Once A Year.
COUPON
The Discount The One-Time Coupon Applies. Its Own Days, Hours And Minimum Spend Still Apply At The Register. No Coupon: The Email Only Invites The Guest.
20% Off
MESSAGE
The Email's Main Line. Blank: The Built-In Message In The Guest's Language.
Order Again Email
Guests On The List Who Ordered Online Here Get Their Last Order And An Order Again Button To Your Online Store.
4
Send Order Again Emails
Off By Default. Needs The Store's Online Ordering Site. The Button Checks Every Item And Price Again After The Guest Signs In. Shares The Repeat Days With The Win-Back Email.
DAYS SINCE THEIR LAST ONLINE ORDER
Also Not In The Store Since Then. Guests Gone Over 180 Days Are Left To The Win-Back Email.
21
ONLINE PROMO CODE
The Discount's Percent Or Amount And Minimum Become A One-Time Code For Web Checkout, For The Guest's Email Only. Other Discounts: No Code.
No Coupon
MESSAGE



Results and tests

Both emails get their own card on the **Emails** tab once they are on, and **Send A Test** can send either one to you. They go out in the daily run within your daily limit. See Win-back and birthday emails for coupons, the send hour and the daily limit.

Order again emails for online guests

Discounts & Promotions › Guest Offers

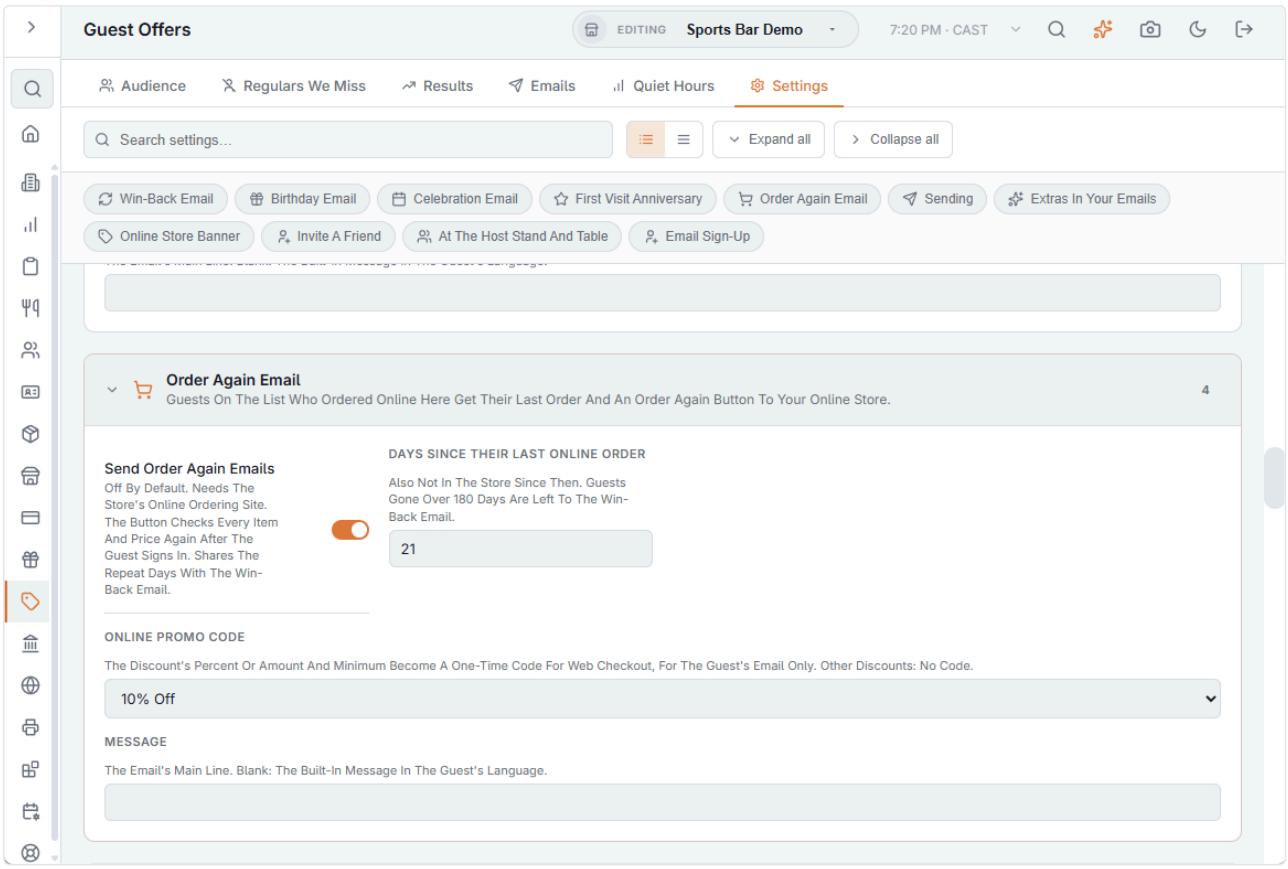
View online ↗

Guests who ordered online and haven't been back get their last order with an Order Again button to your online store, and an optional one-time promo code for web checkout.

A guest who ordered online and liked it is one tap away from ordering again. The **order again** email reminds them with their last order and a button that rebuilds it on your online store.

Turn it on

Go to **Back Office › Discounts & Promotions › Guest Offers › Settings** and find **Order Again Email**. Off by default, and it needs your store's online ordering site.

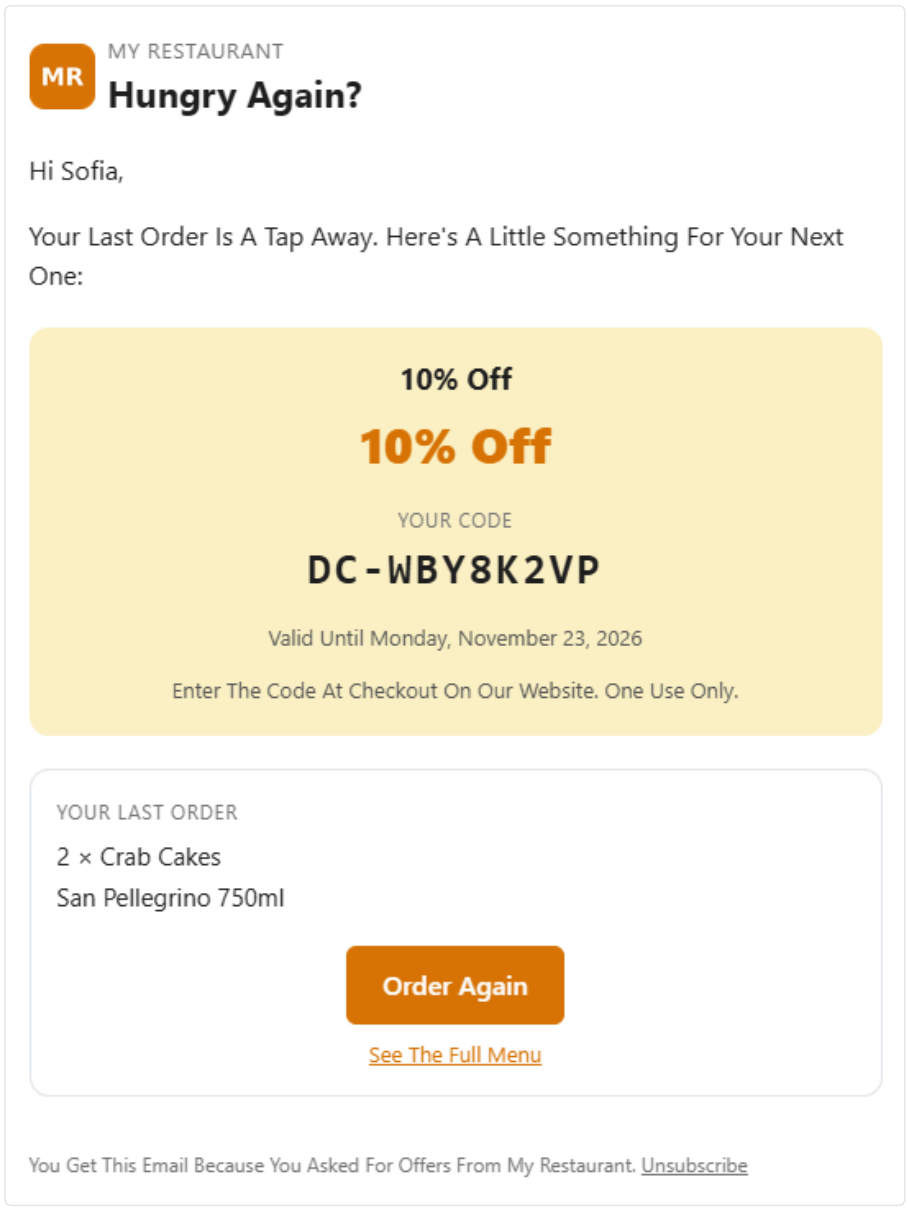


- **Send Order Again Emails** — turns it on.
- **Days Since Their Last Online Order** — 21 by default. Guests who came into the store since then aren't emailed, and guests gone longer than 180 days are left to the win-back email.
- **Online Promo Code** — optional. The discount's percent or amount off (and its order minimum) becomes a one-time code for web checkout, for that guest's email only, valid for **Coupon Valid For (Days)**. Discounts that aren't a plain percent or amount off send no code.
- **Message** — your own text, or blank for the built-in one in the guest's language.

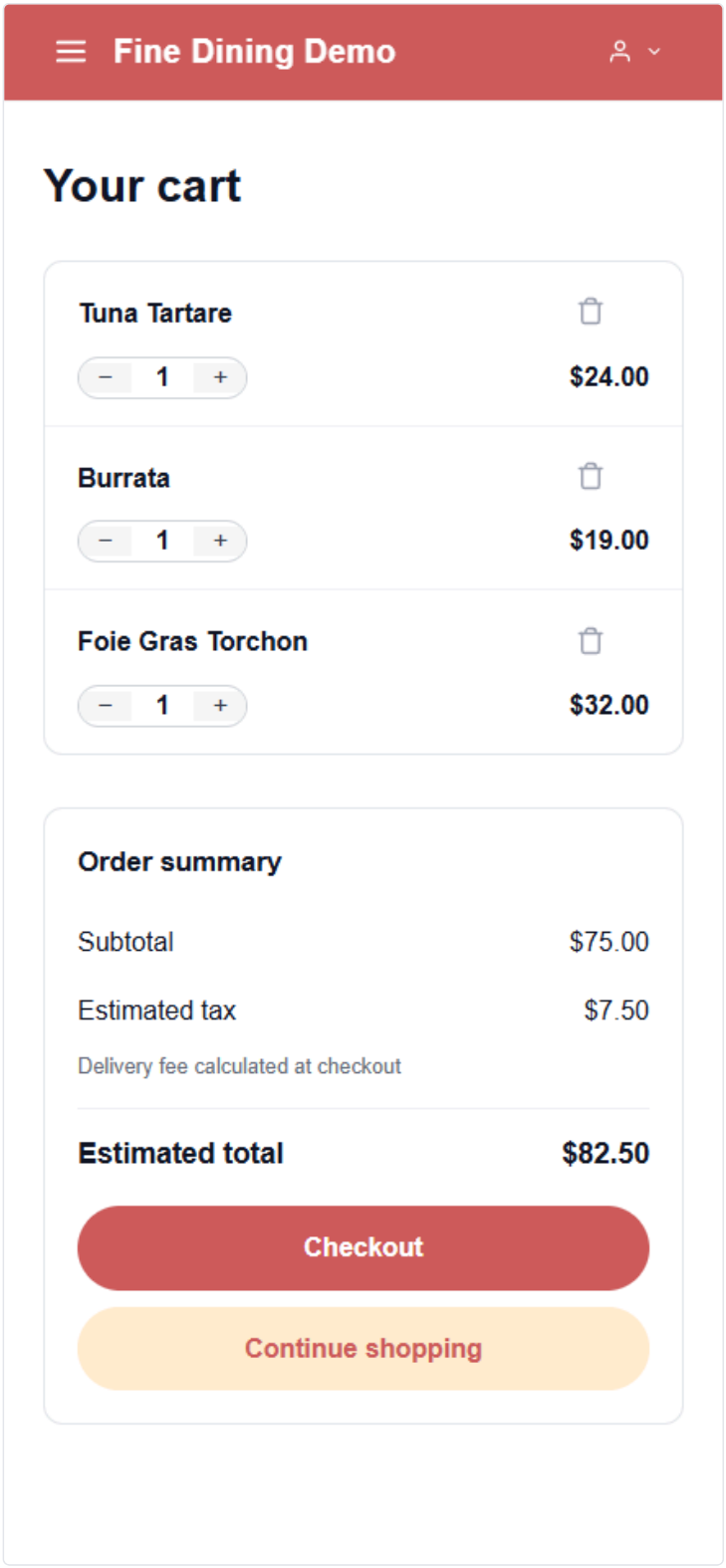
Guests on your list who got an order again email don't also get a win-back email within **Days Between Win-Back Emails**, and the other way round.

What the guest gets

"Hungry Again?", their last online order at your store (up to five items), an **Order Again** button, a link to the full menu and, when you chose one, the code with "Enter The Code At Checkout On Our Website".



Order Again opens your online store; the guest signs in and sees every item checked again against today's menu and prices before adding them to the cart. Items no longer available are marked.



The code only works for the guest signed in with the same email the offer was sent to.

Results

The **Order Again Email** card on the **Emails** tab shows emails sent, codes used at web checkout with the sales of those orders, and guests who came back. Use **Send A Test** to see it with your store's latest online order.

Finding a guest's code

The one-time codes the order again email makes are listed under **Online Promo Codes** with **One-Time Guest Codes** switched on, with who used them and when. See Online promo codes.

Guests who left a cart

For guests who added items online but didn't finish, there is the cart reminder.

Cart reminder for online guests

Discounts & Promotions › Guest Offers

View online ↗

Guests on your list who signed in to your online store and left items in the cart get one email with their cart and a Finish Your Order button. Off by default.

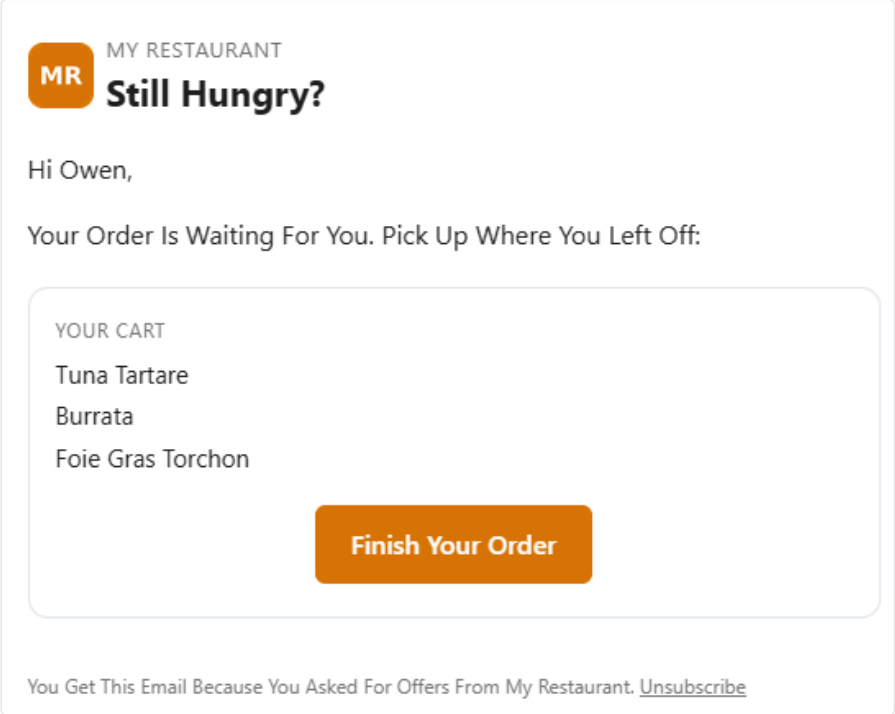
Guests often add a few items on your online store and get interrupted. A friendly reminder brings many of them back to finish the order.

Turn it on

In **Discounts & Promotions › Guest Offers › Settings › Extras In Your Emails**, switch on **Cart Reminder For Online Guests** (it is off by default) and set **Send After (Hours)**, 2 by default.

Who gets it

A guest on your offers list who signed in to your online store, added items to the cart and then left. Once the hours have passed since their last change to the cart, they get one email listing the items, with a **Finish Your Order** button that opens their cart (it is kept with their account) and their loyalty points when they have any.



When it isn't sent

- The guest isn't signed in, isn't on your offers list, or paused offers or chose birthday only.
- The guest has ordered since, in the store or online.
- The cart is more than 2 days old.
- The guest already had a cart reminder in the last week.
- Between 9 pm and 9 am store time (it waits for the morning), or after the day's email limit.

> The reminder has no coupon on purpose: guests who learn that a discount follows an abandoned cart start leaving carts on purpose. Cart reminders show as their own row on the Results tab.

Related: Order again emails · Guest offers: extras in your emails

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Filling your quiet hours

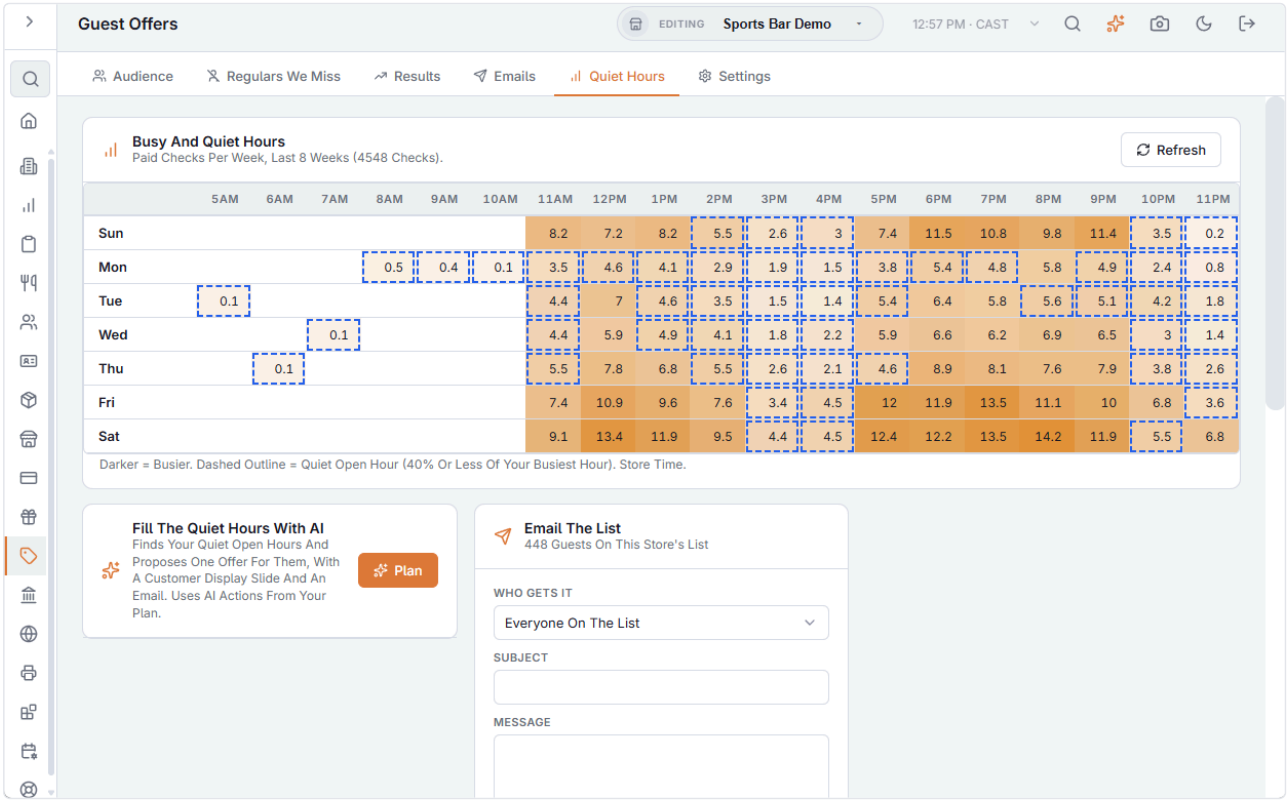
Discounts & Promotions › Guest Offers

View online ↗

See your busy and quiet hours, let AI propose an offer for the quiet ones, and show it on the customer display, the online store and in an email to your list.

The **Quiet Hours** tab in **Back Office › Discounts & Promotions › Guest Offers** helps you bring guests in when you have empty tables: it shows when you are quiet, proposes an offer for those hours, and puts it where guests will see it.

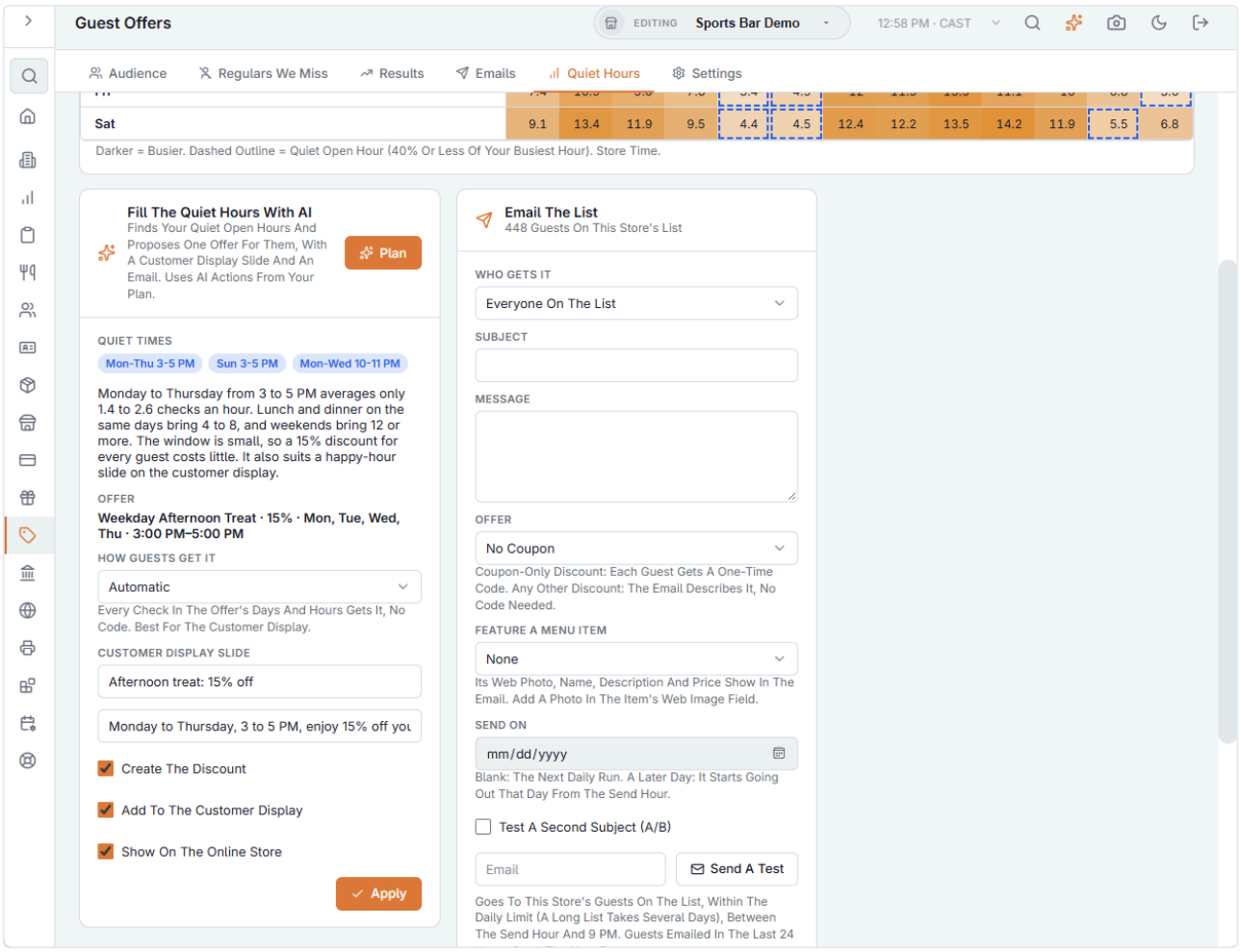
Busy and quiet hours



The heat map shows paid checks per week for each day and hour over the last 8 weeks, in store time. Darker cells are busier. Cells with a **dashed outline** are quiet open hours: you were open, but with 40% or less of your busiest hour. Tap or hover a cell for the checks and sales per week.

Fill The Quiet Hours With AI

Press **Plan**. The AI reads the same 8 weeks, your discounts and your list, and proposes one offer for your quiet times, with the words for a customer display slide and an email.

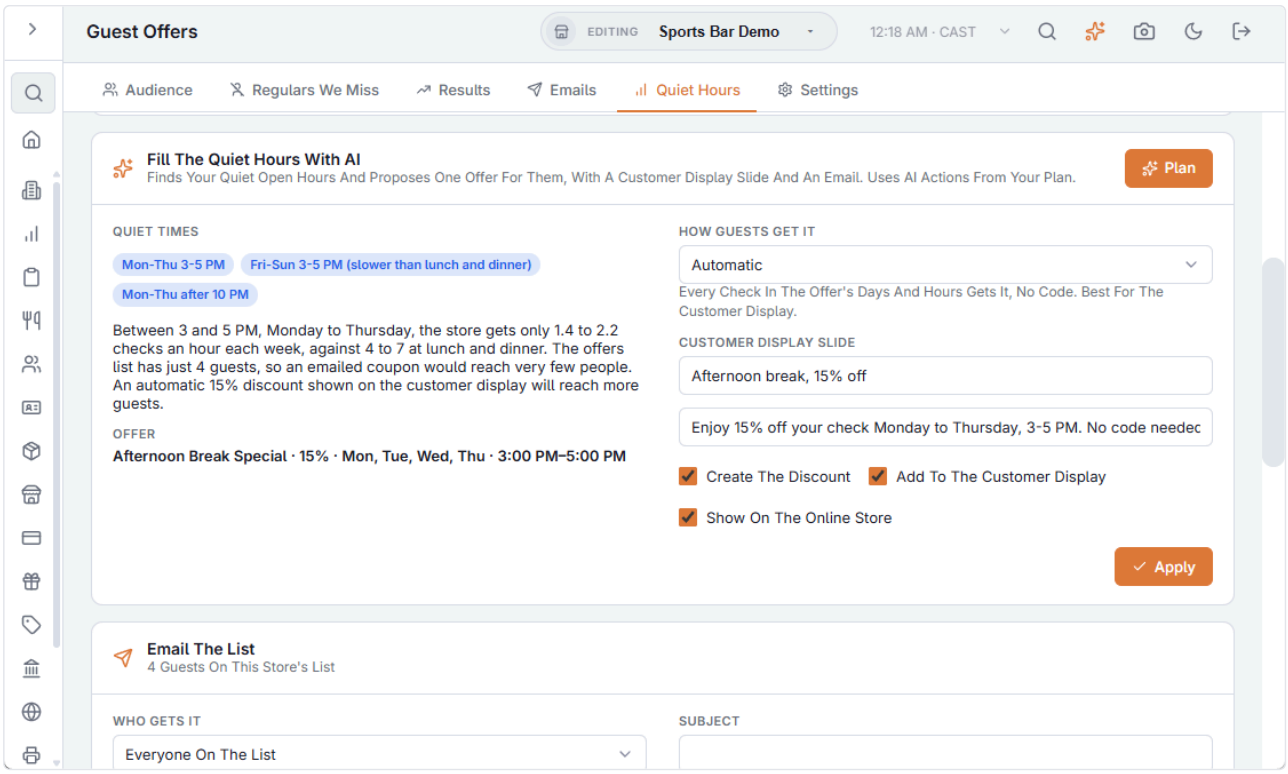


- **Offer** — the discount it suggests, limited to the quiet days and hours (for example 15% off, Monday to Thursday, 3–5 PM).
- **How Guests Get It**:
  - **Automatic** — every check in those days and hours gets it, no code. Best for an offer you show on the customer display or online.
  - **Coupon Only** — only guests with a code get it; each guest on your list gets one by email.
- **Customer Display Slide** — the slide's title and line. Edit them before applying.

Choose what **Apply** does:

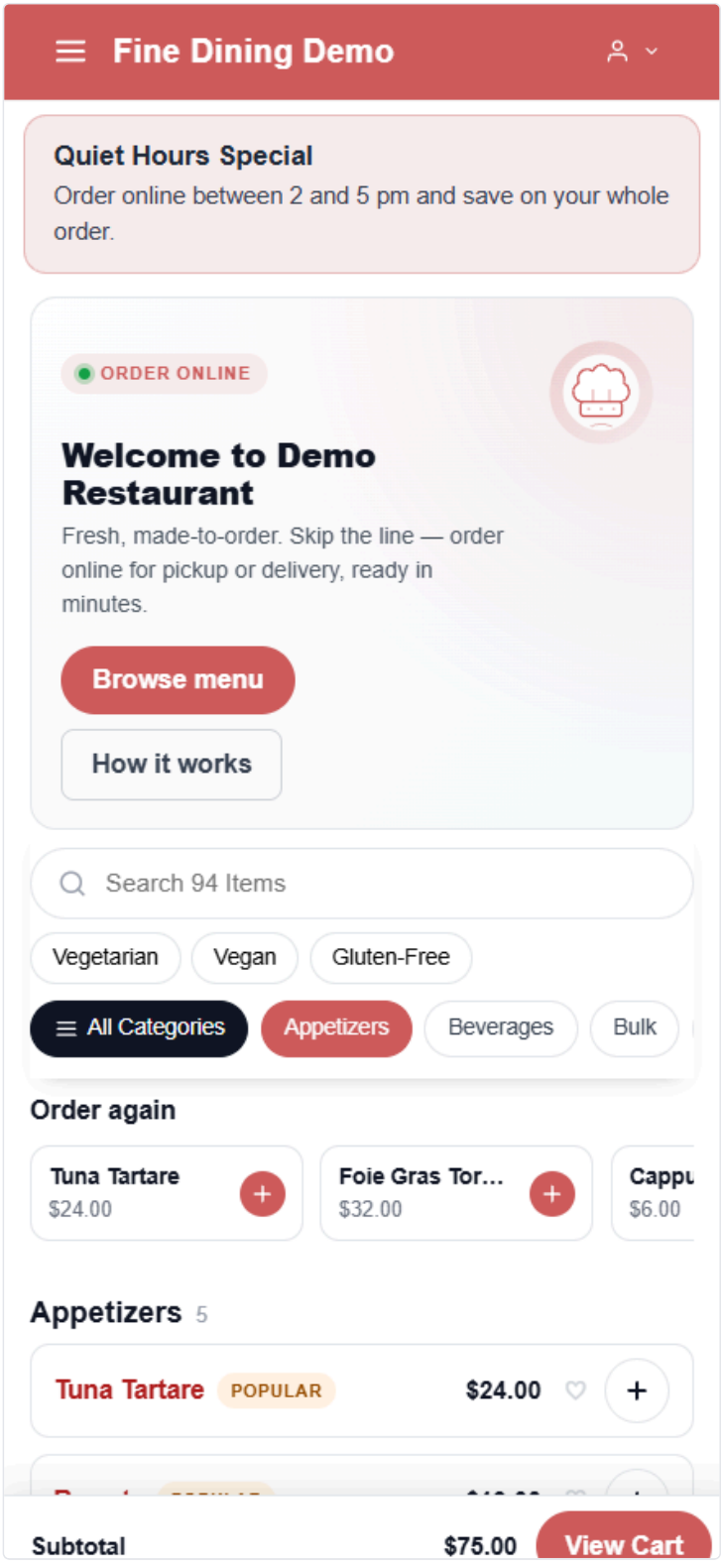
- **Create The Discount** — creates the offer as a discount limited to its days and hours.
- **Add To The Customer Display** — puts the slide at the top of every customer display design of the store (tag *offers*). Applying again replaces it. The displays reload on their own.
- **Show On The Online Store** — turns on the offer banner on your online store's menu page with the slide's words and the new discount.

After applying, the **Email The List** form is filled in with the AI's email and the new discount, ready to check and send.



No slide on the display? The slide plays in a **Slideshow** widget. If a design has none, the message after Apply tells you how many; add one in the customer display designer. A slideshow set to play only some tags must include *offers*.

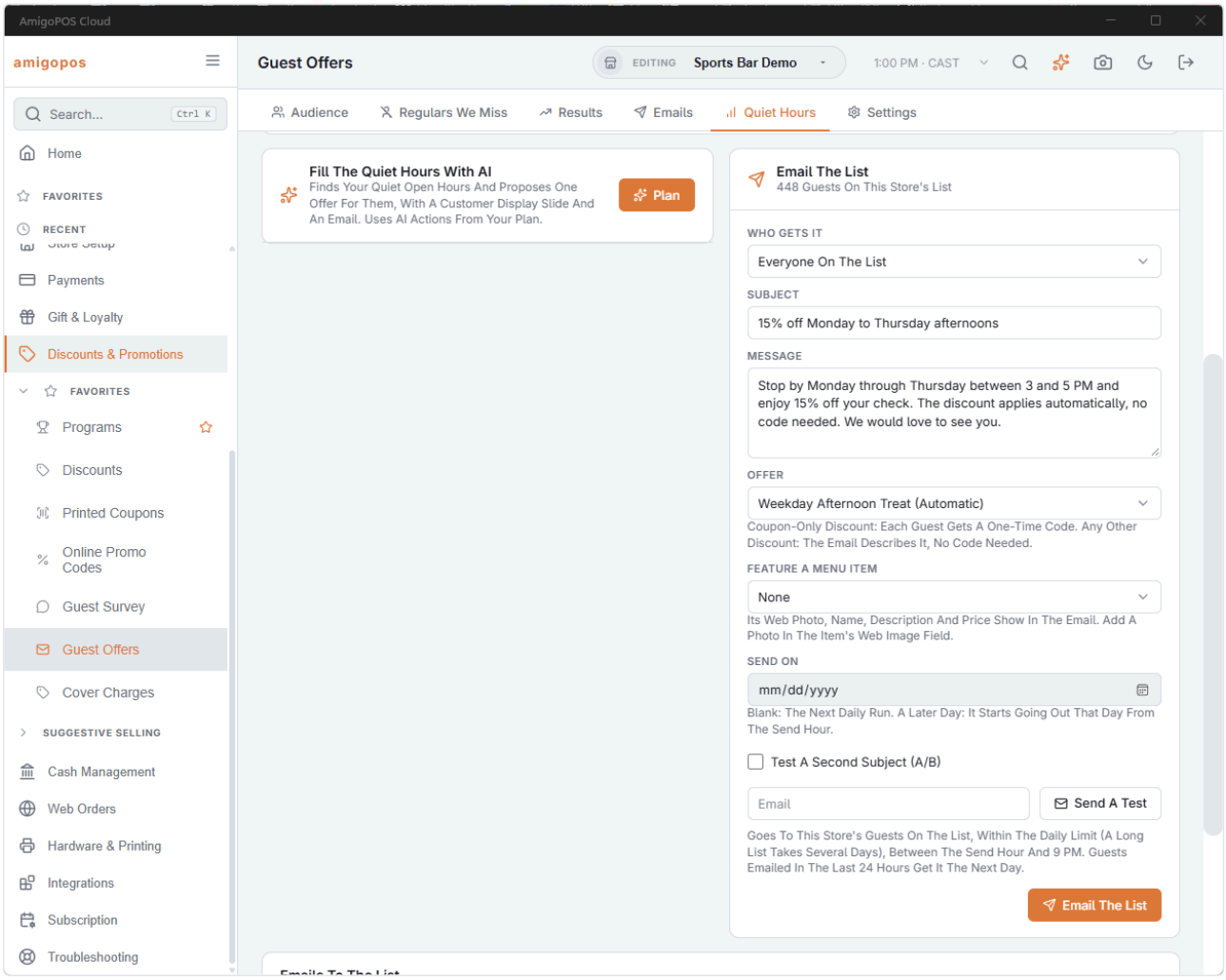
The online store banner



The banner sits above the top of your online store's menu page and shows the title, the line and, with a discount, its amount, days, hours and minimum spend in the guest's language. Change it or turn it off in **Settings › Online Store Banner** (**Show The Banner**, **Banner Title**, **Banner Text**, **Offer**). It hides itself once its discount is deleted, disabled or past its end date. Changes show online within 5 minutes.

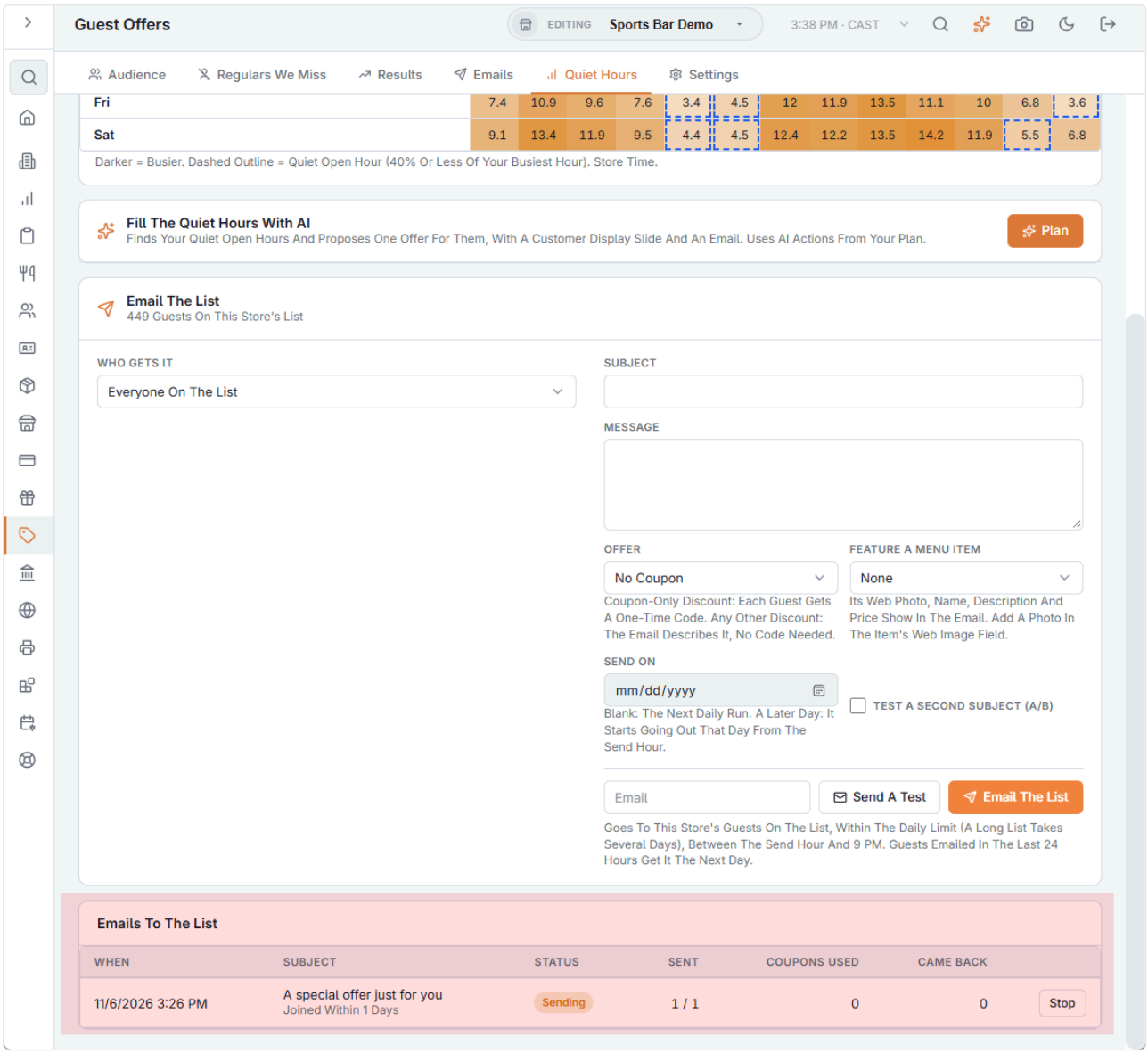
Email The List

Send one email to every guest on this store's list: an offer, news, an event.



1. Write the **Subject** and the **Message**.
2. Choose an **Offer** (optional). With a **Coupon Only** discount, each guest gets a one-time code. With any other discount, the email describes the offer and says no code is needed.
3. Type your own address and press **Send A Test** to see it first.
4. Press **Email The List** and confirm.

The email goes out with the daily emails, from the send hour until 9 PM store time, within **Most Emails Per Day** (the win-back and birthday emails go first), so a long list takes several days. Guests emailed in the last 24 hours get it the next day. Only one can be going out at a time; press **Stop** to cancel one that is still sending.



The table shows each email with how many went out, coupons used with their sales, and guests who came back afterwards.

Sending to only some guests

Email The List can go to only some of your guests — regulars, guests who haven't been in for a while, a birthday month, what they order — set by hand or described in your own words with Find With AI. See Email the list: choosing who gets it.

Sending later and testing two subjects

Email The List can be scheduled for a later day with **Send On**, and can test two subject lines before sending to everyone. See Email the list: sending later and testing two subjects.

Featuring a menu item

Email The List can show a menu item's photo, name, description and price — handy for a new dish. See Guest offers: extras in your emails.

Invite a friend

Discounts & Promotions › Guest Offers

View online ↗

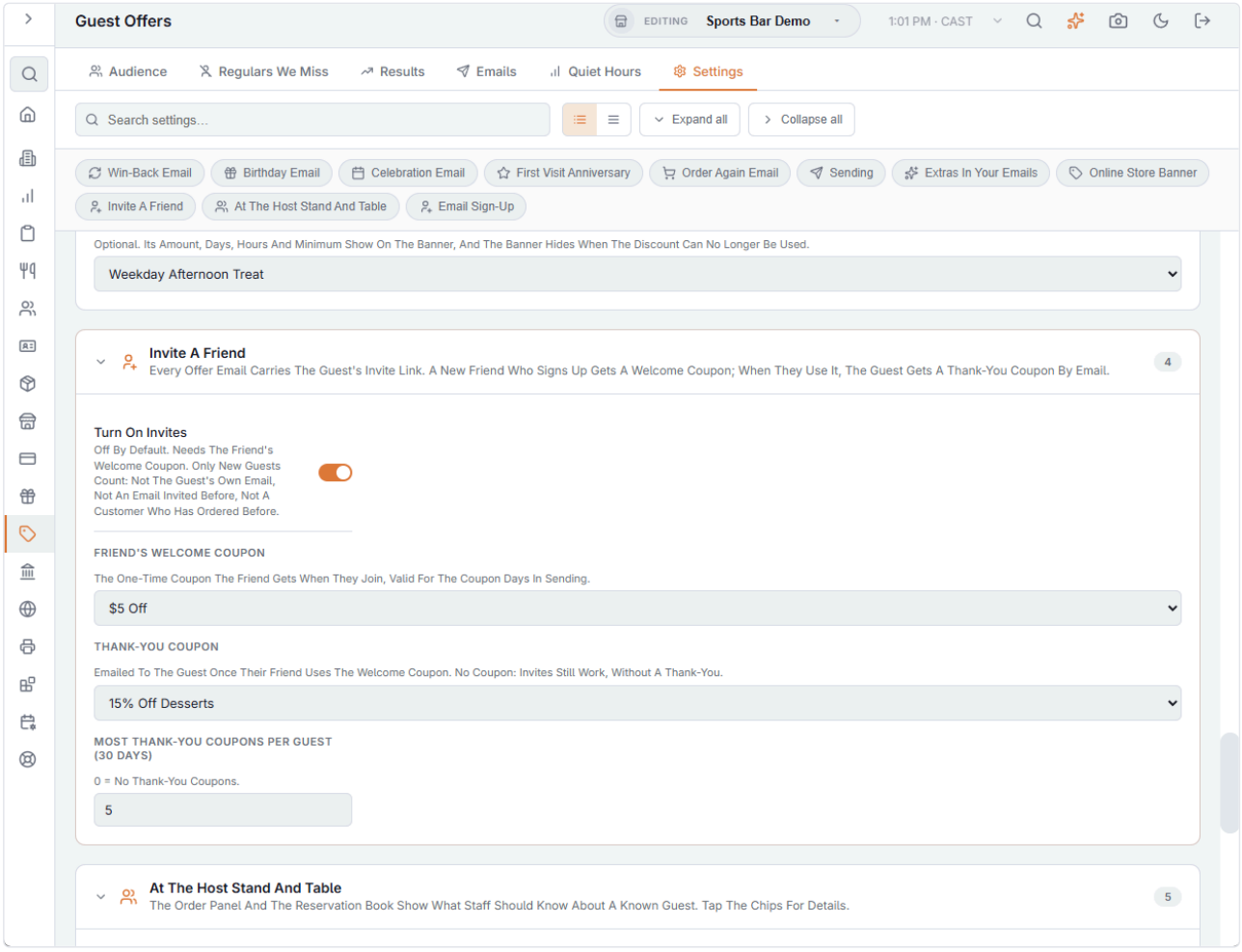
Every offer email carries the guest's invite link: a new friend who signs up gets a welcome coupon, and the guest gets a thank-you coupon when the friend comes in.

Your best new guests are your regulars' friends. With **Invite A Friend**, every offer email carries the guest's own invite link.

1. The guest shares their link (from any offer email).
2. The friend opens it, sees who invited them and the welcome gift, and signs up for your offers.
3. Once the friend confirms their email, the page shows their one-time **welcome coupon**.
4. When the friend uses it at the register, the next daily run emails the guest a **thank-you coupon**.

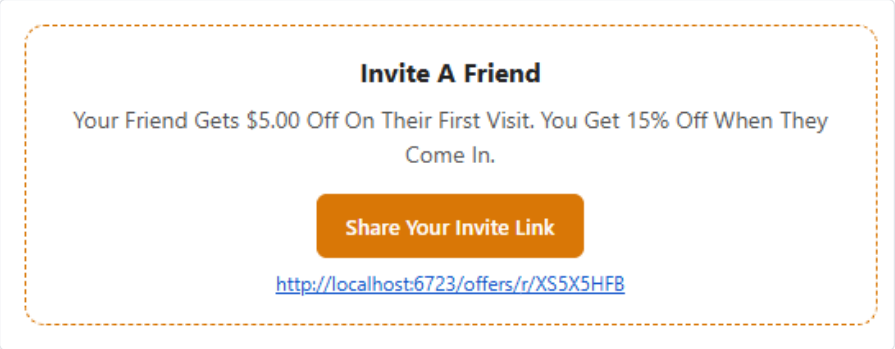
Turning it on

Go to **Back Office › Discounts & Promotions › Guest Offers › Settings › Invite A Friend**.

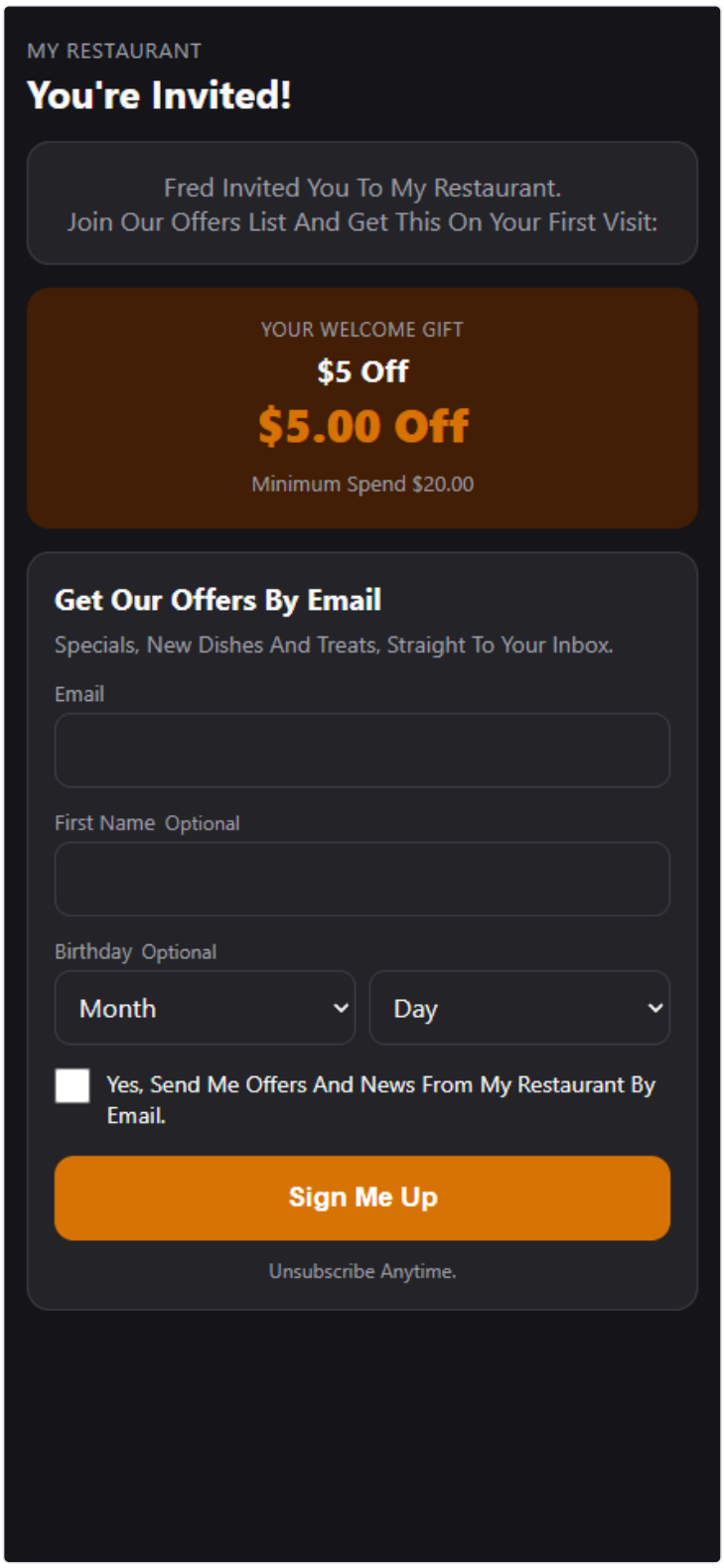


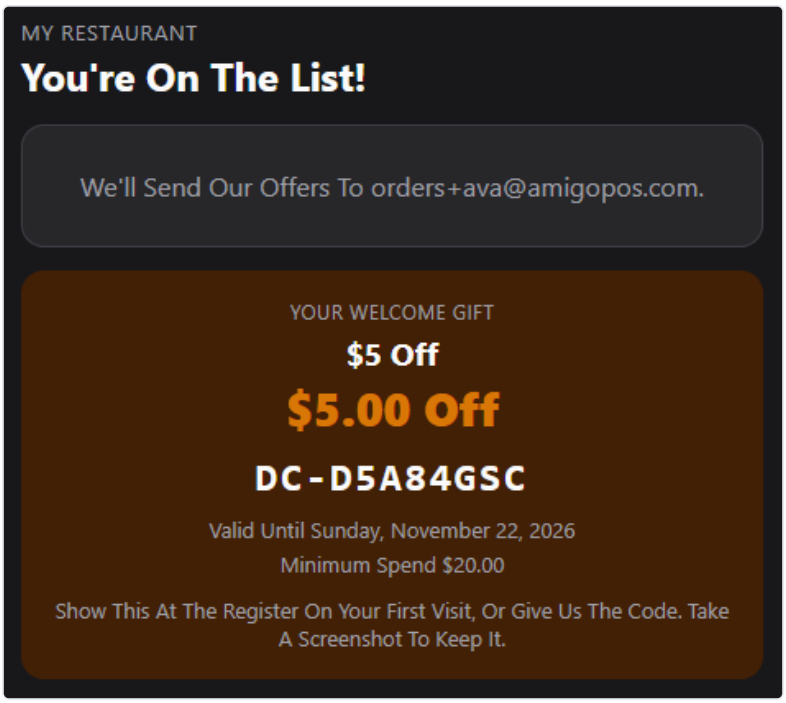
- **Turn On Invites** — off by default.
- **Friend's Welcome Coupon** — the discount of the friend's coupon. Required: without it there are no invites. It is valid for **Coupon Valid For (Days)** in Sending.
- **Thank-You Coupon** — the discount emailed to the guest when their friend comes in. Optional: without it, invites still work, without a thank-you.
- **Most Thank-You Coupons Per Guest (30 Days)** — 5 by default; 0 = no thank-you coupons.

What guests see



The invite box tells the guest what their friend gets and what they get, with a **Share Your Invite Link** button and the link itself to copy. Each guest has one link that never changes.


MY RESTAURANT
You're Invited!
Fred Invited You To My Restaurant.
Join Our Offers List And Get This On Your First Visit:
YOUR WELCOME GIFT
$5 Off
$5.00 Off
Minimum Spend $20.00
Get Our Offers By Email
Specials, New Dishes And Treats, Straight To Your Inbox.
Email
First Name Optional
Birthday Optional
Month
Day
Yes, Send Me Offers And News From My Restaurant By Email.
Sign Me Up
Unsubscribe Anytime.



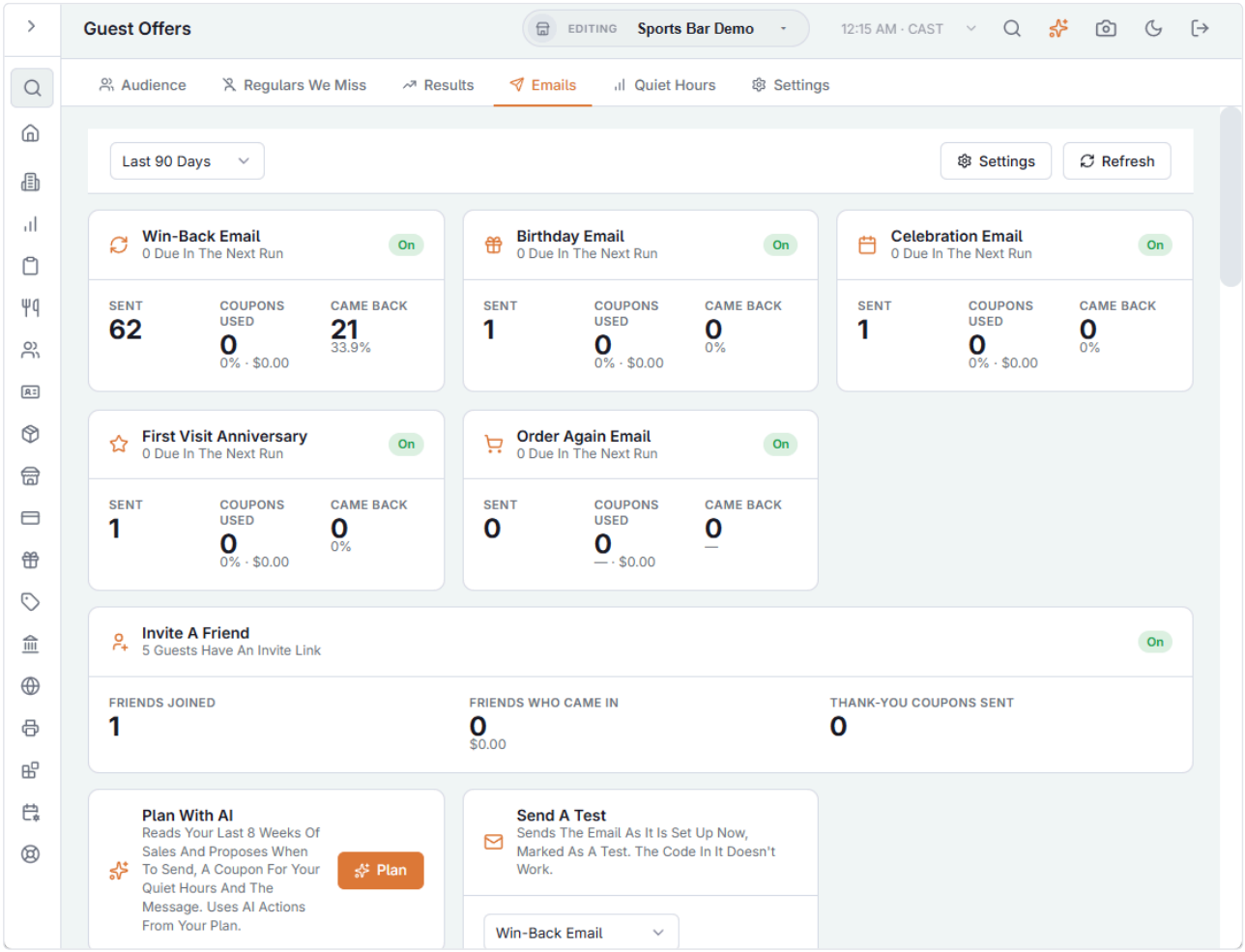
Who counts

Invites are for new guests. The welcome coupon is not given to:

- the guest's own email,
- an email that was invited before, by anyone,
- a customer who has ordered from you before.

Those people see a message saying the invitation is for new guests. A guest who left your list, is marked **Do Not Contact** or reached the monthly limit gets no thank-you coupon.

Results



The **Invite A Friend** card on the **Emails** tab shows how many guests have a link, the friends who joined, the friends who came in (with the sales on those first visits) and the thank-you coupons sent, for the period you choose.

Email the list: choosing who gets it

Discounts & Promotions › Guest Offers

View online ↗

Send Email The List to only some guests: recent or lapsed guests, regulars, big spenders, birthdays, new subscribers, what they order, VIPs or online guests, set by hand or with Find With AI.

Email The List (on the **Quiet Hours** tab of Guest Offers) sends a one-off email to the guests on your store's list. With **Who Gets It** you can send it to only some of them: a brunch offer to guests who order brunch, a "we miss you" to guests who haven't been in for two months, a thank-you to your regulars.

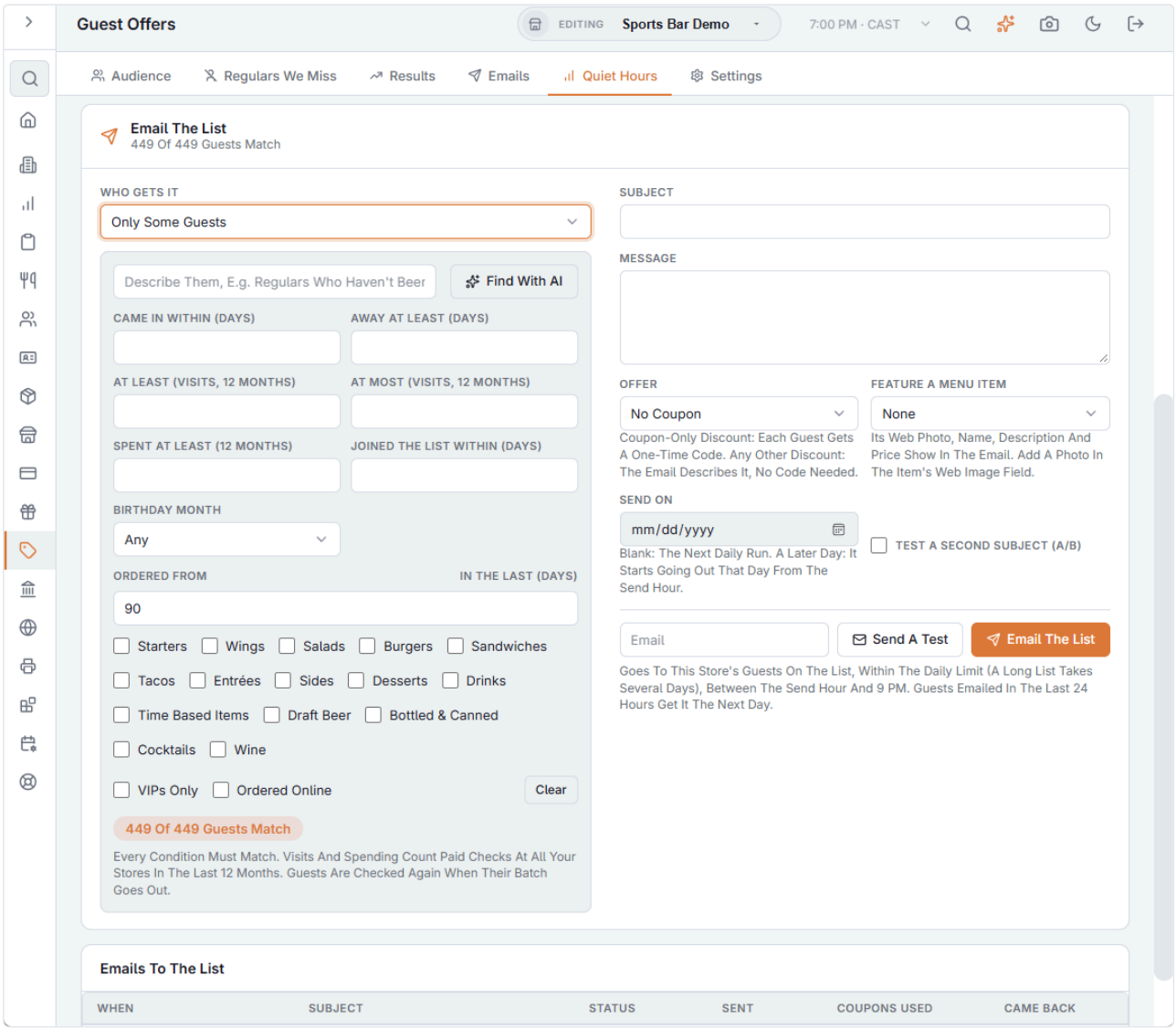
Choose the guests

Set **Who Gets It** to **Only Some Guests**. Fill in any of these; a guest must match every one you fill in:

- **Came In Within (Days)** — recent guests.
- **Away At Least (Days)** — guests who haven't been back for a while.
- **At Least / At Most (Visits, 12 Months)** — regulars, or first-timers (at most 1). At most 0 means they joined the list but never came in.
- **Spent At Least (12 Months)** — your best guests.
- **Birthday Month**.
- **Joined The List Within (Days)** — new subscribers.
- **Ordered From** — menu categories they ordered from, **In The Last (Days)**.

- **VIPs Only** and **Ordered Online**.

Visits and spending count paid checks at all your stores in the last 12 months. The line under the conditions shows how many guests match right now, and **Clear** starts over.



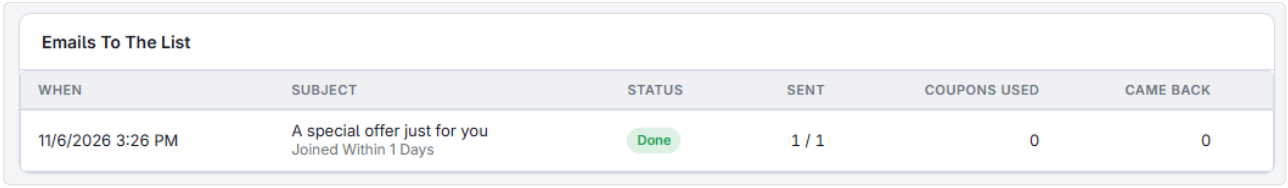
Find With AI

Instead of filling the boxes, describe the guests in your own words — for example *regulars who haven't been in for a month* or *wine lovers with a birthday next month* — and press **Find With AI**. The conditions are filled in for you, with the count, and you can change them before sending. If part of your description can't be turned into a condition (where guests live, their age), a note under the box says what was left out. Each search counts as one AI action.

Sending

Write the subject and message, choose an offer if you want one and send yourself a test. **Email The List** asks you to confirm how many guests it goes to. The email is sent by the daily run within your daily limit, so a long list goes out over several days; every guest is checked again when their batch goes out, so someone who stopped matching is skipped.

The **Emails To The List** table shows who each email went to under its subject, with how many were sent, coupons used and guests who came back.



See also Filling your quiet hours.

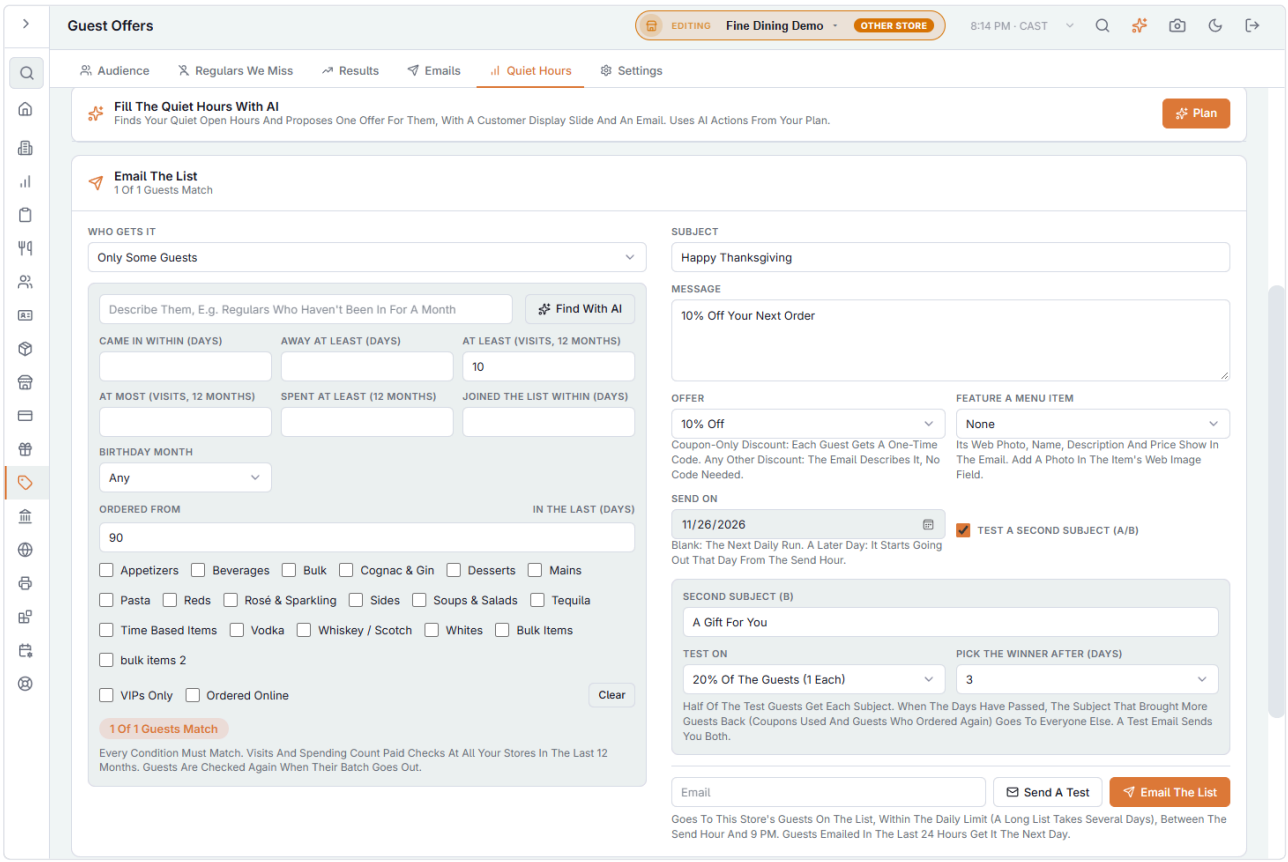
Email the list: sending later and testing two subjects

Discounts & Promotions › Guest Offers

View online ↗

Schedule Email The List for a day up to a year ahead, and test two subject lines on part of the list so the one that brings more guests back goes to everyone else.

Two options in the **Email The List** card (Back Office › Discounts & Promotions › Guest Offers › **Quiet Hours**) help you send at the right moment and with the right words.



Send on a later day

- Pick a day in **Send On**, up to a year ahead. The email starts going out that day from your **Send Hour** (Settings › Sending). Leave it blank to send from the next daily run, as before.
- When you press Send you're asked to confirm the number of guests and the day; the email then shows **Scheduled** with its date in the Emails To The List table.
- One email can be scheduled per day. A scheduled email doesn't stop you sending another one to the list in the meantime.
- The guests are chosen on the day it goes out, so guests who join or leave before then are counted correctly.

Test a second subject (A/B)

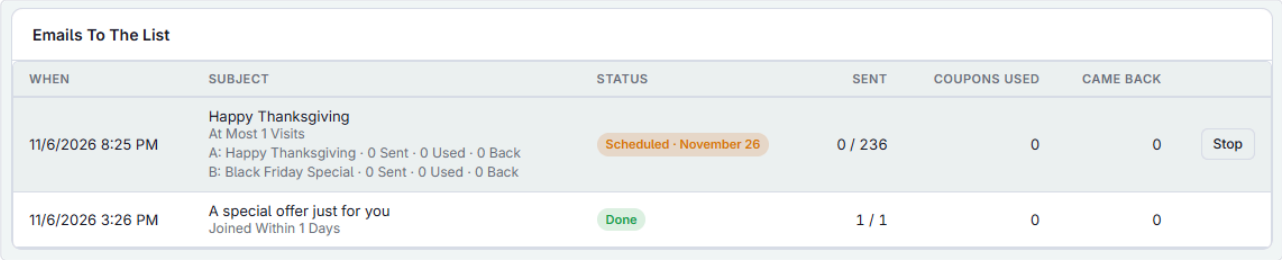
The subject line decides whether an email gets opened. Switch on **Test A Second Subject (A/B)** to let your guests choose:

1. Write the **Second Subject (B)**. The first subject is A; everything else in the email is the same.

2. Choose **Test On**: 10 to 50% of the guests. Half of them get A and half get B.
3. Choose **Pick The Winner After**: 1 to 7 days.

The test guests get their email first. When the days have passed, the subject that brought more guests back — coupons used plus guests who ordered again, for each email sent — goes to everyone else. If both did equally well, A goes out.

- An A/B test needs at least 40 guests.
- **Send A Test** sends you both versions, marked (A) and (B).
- While it runs the email shows **Testing**; each subject then has its own line (sent, used, back) and the one that won is marked **Winner**.



> Give the test enough days for guests to come in. A short test on a small list often ends in a tie; the bigger the list, the clearer the winner.

Related: Quiet hours · Email the list: choosing who gets it

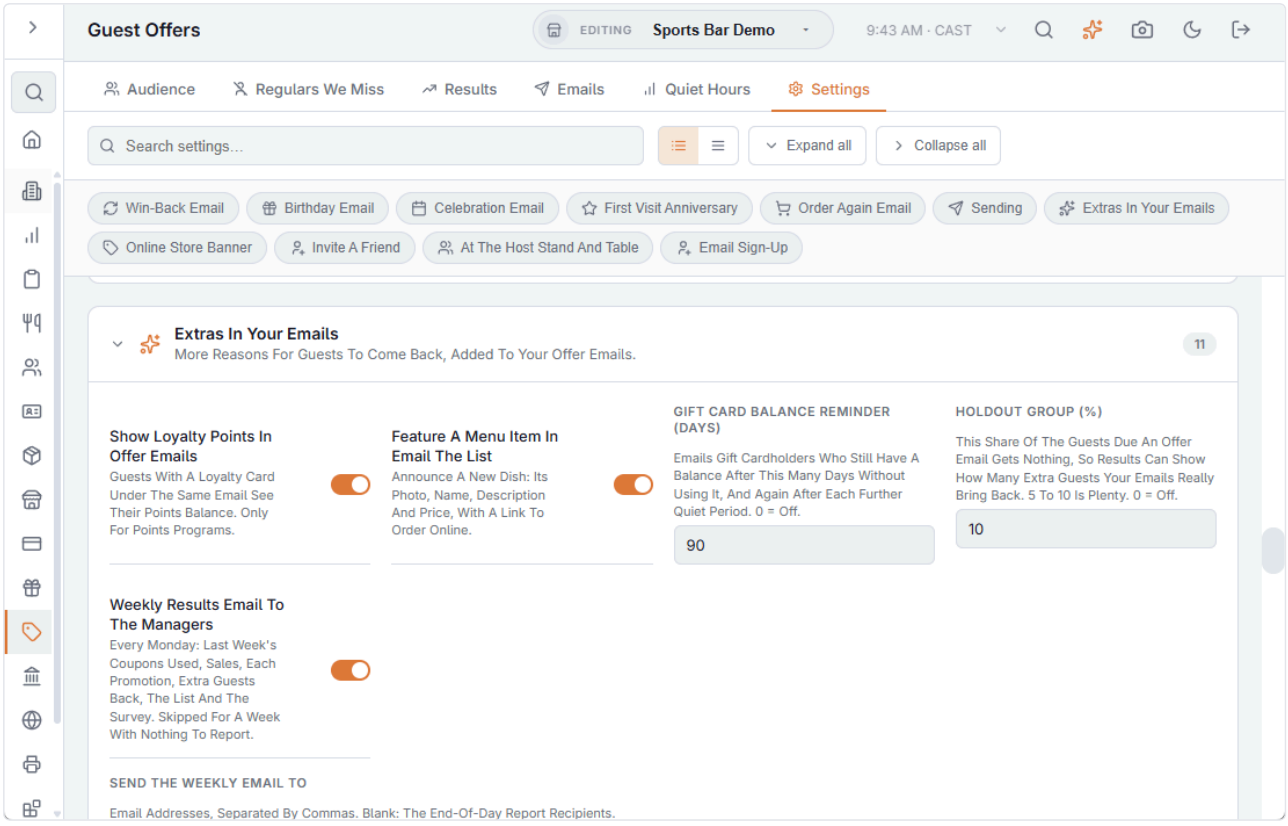
Guest offers: extras in your emails

Discounts & Promotions › Guest Offers

View online ↗

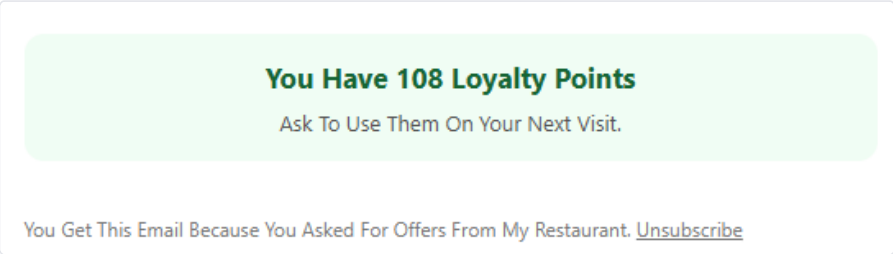
Loyalty points in every offer email, a featured menu item in Email The List, and the gift card balance reminder, each with its own switch.

Small additions give guests more reasons to come back. Each one has a switch in **Back Office › Discounts & Promotions › Guest Offers › Settings › Extras In Your Emails**, so you use only the ones you want.



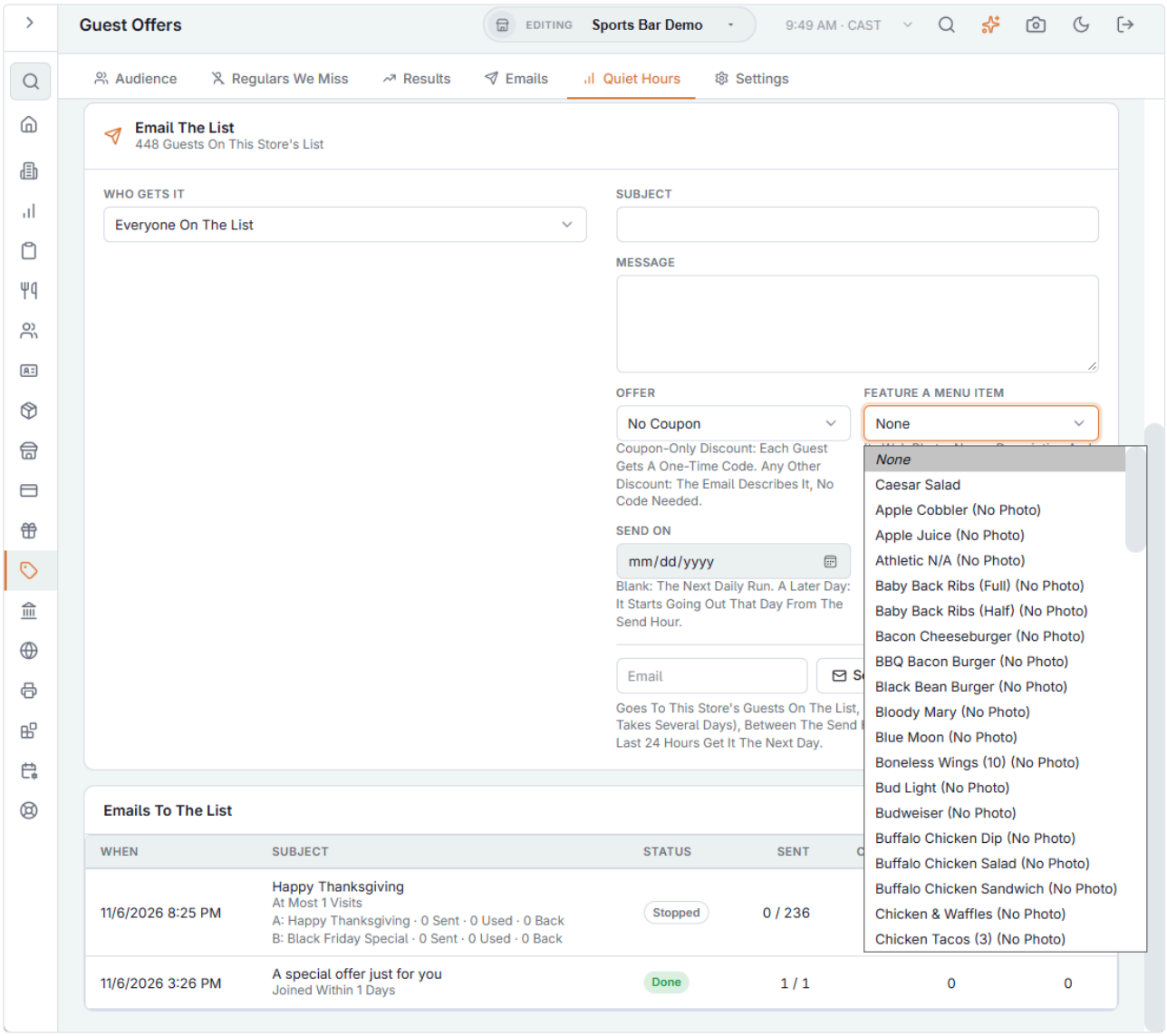
Loyalty points in offer emails

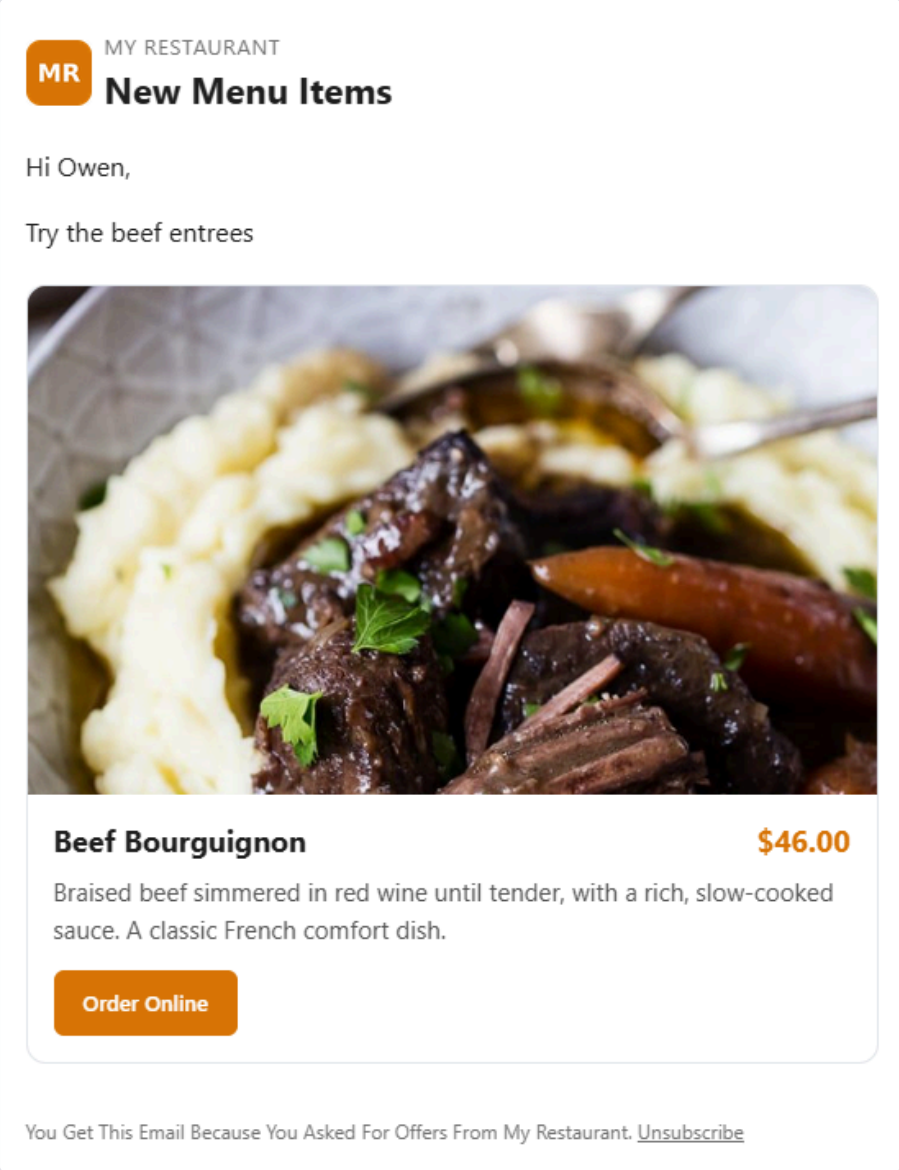
With **Show Loyalty Points In Offer Emails** on (the default), guests who have a loyalty card under the same email see their points balance in every offer email: “You Have 1,250 Loyalty Points”. Nothing shows for guests without a card, or when your loyalty program isn’t a points program.



Feature a menu item

Announce a new dish or a seasonal special. With **Feature A Menu Item In Email The List** on (the default), the Email The List card on the **Quiet Hours** tab has a **Feature A Menu Item** list. Pick an item and the email shows its photo, name, description and price, with an **Order Online** button when you have an online store.





- The photo is the item's web image; items with one are listed first, and the others are marked **No Photo**.
- The description and price are the item's web description and web price, when it has them.
- **Send A Test** shows the item too, so you can check it before sending.

Gift card balance reminder

Gift Card Balance Reminder (Days) emails gift cardholders who still have money on their card after that many days without using it, and again after each further quiet period. It uses the card's email or the e-gift recipient's. 0 turns it off.

The same section also holds the holdout group, the weekly results email and the cart reminder.

Coupon reminders and the best send time

The same section also reminds guests before an unused coupon ends and can send each automatic email at the guest's best time. See Guest offers: coupon reminders and the best send time.

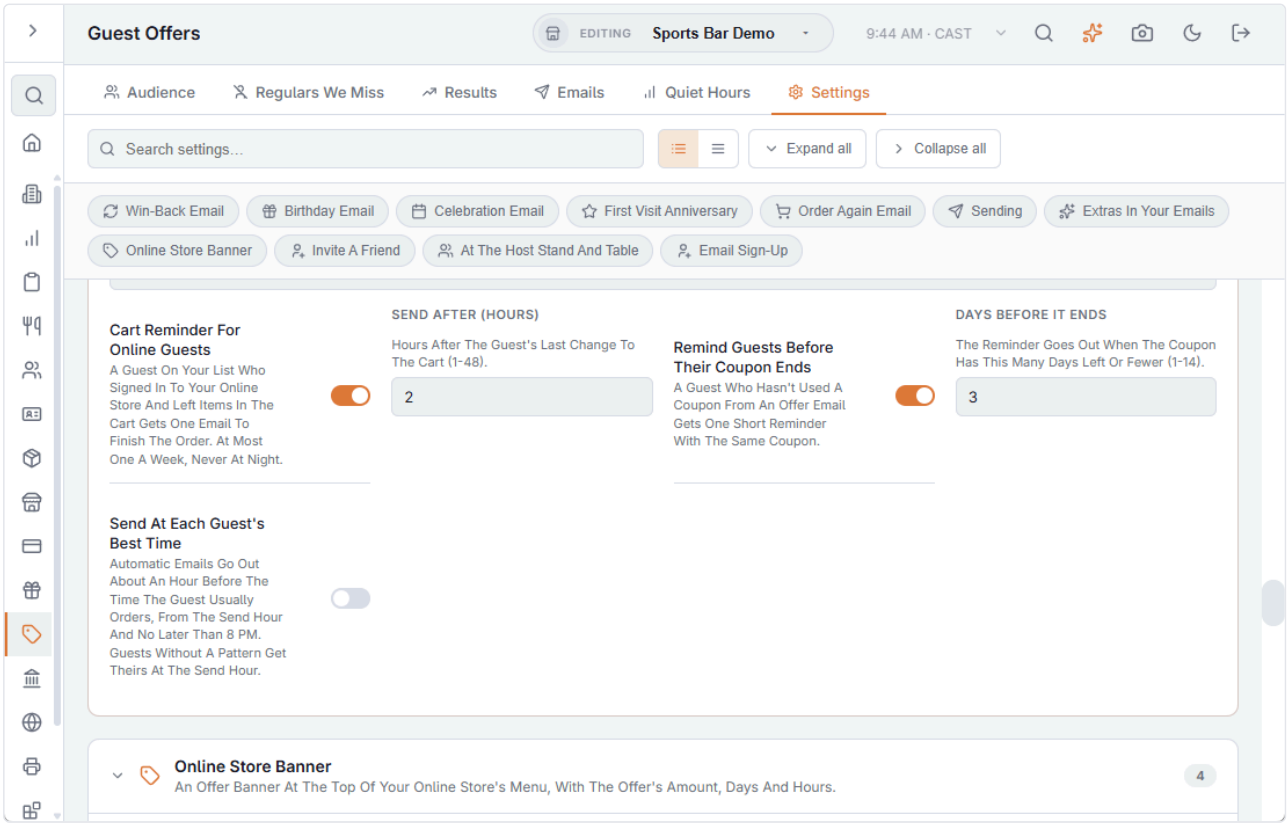
Guest offers: coupon reminders and the best send time

Discounts & Promotions › Guest Offers

View online ↗

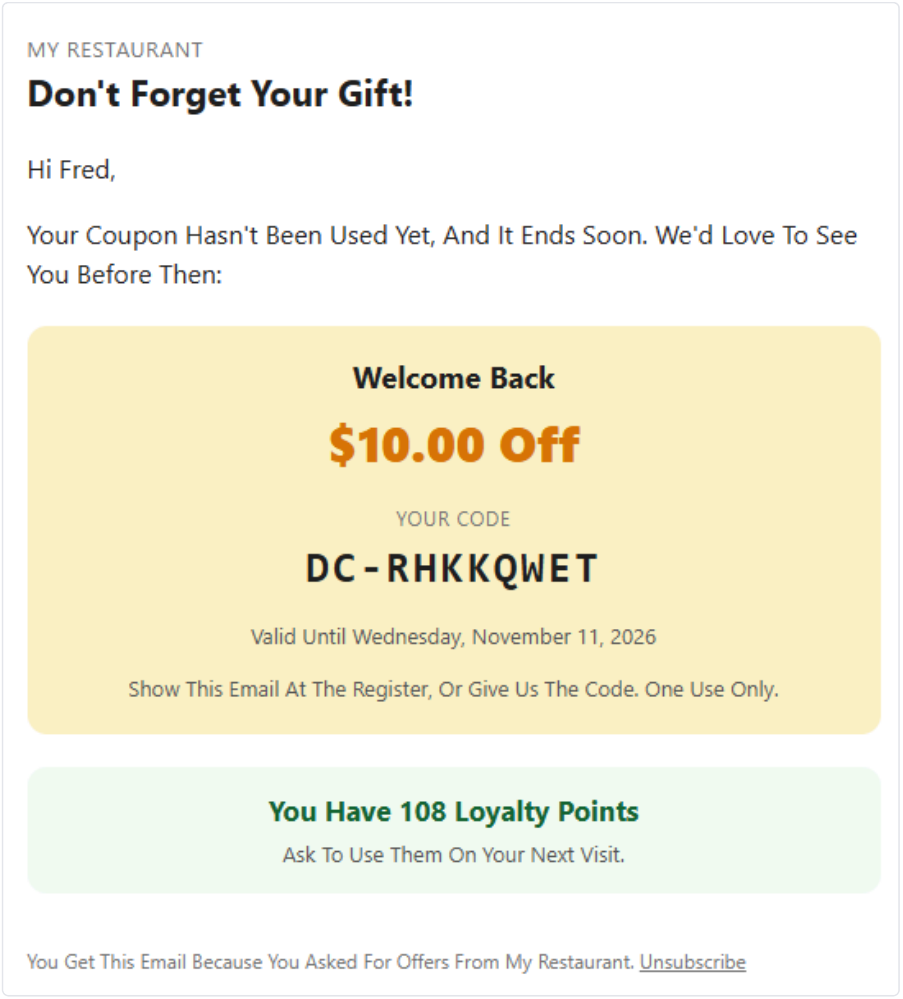
A short reminder before an unused coupon ends, and automatic emails sent around the hour each guest usually orders.

Two settings in **Back Office › Discounts & Promotions › Guest Offers › Settings › Extras In Your Emails** help your coupons get used.



Remind guests before their coupon ends

Many coupons are simply forgotten. With **Remind Guests Before Their Coupon Ends** on (the default), a guest who hasn't used a coupon from an offer email gets one short reminder with the same coupon when it has **Days Before It Ends** (3) or fewer days left.



- It covers the win-back, birthday, Email The List, thank-you, celebration and first visit anniversary coupons. Order again codes are left out.
- Once per coupon, never for a coupon sent in the last 3 days, and never on a day the guest got another offer email.
- Only guests still on your list get it; guests who paused offers or chose birthday only don't.
- Reminders show as **Coupon Reminder** on the Results tab. When the coupon is used it still counts for the email that gave it.

Send at each guest's best time

With **Send At Each Guest's Best Time** on (off by default), each automatic email (win-back, birthday, celebration, first visit anniversary, order again) goes out about an hour before the time of day that guest usually orders, from your send hour and no later than 8 pm. Guests without a pattern get theirs at the send hour. Email The List and cart reminders are not affected.

Related: Guest offers: extras in your emails

Guest offers by WhatsApp

Discounts & Promotions › Guest Offers

View online ↗

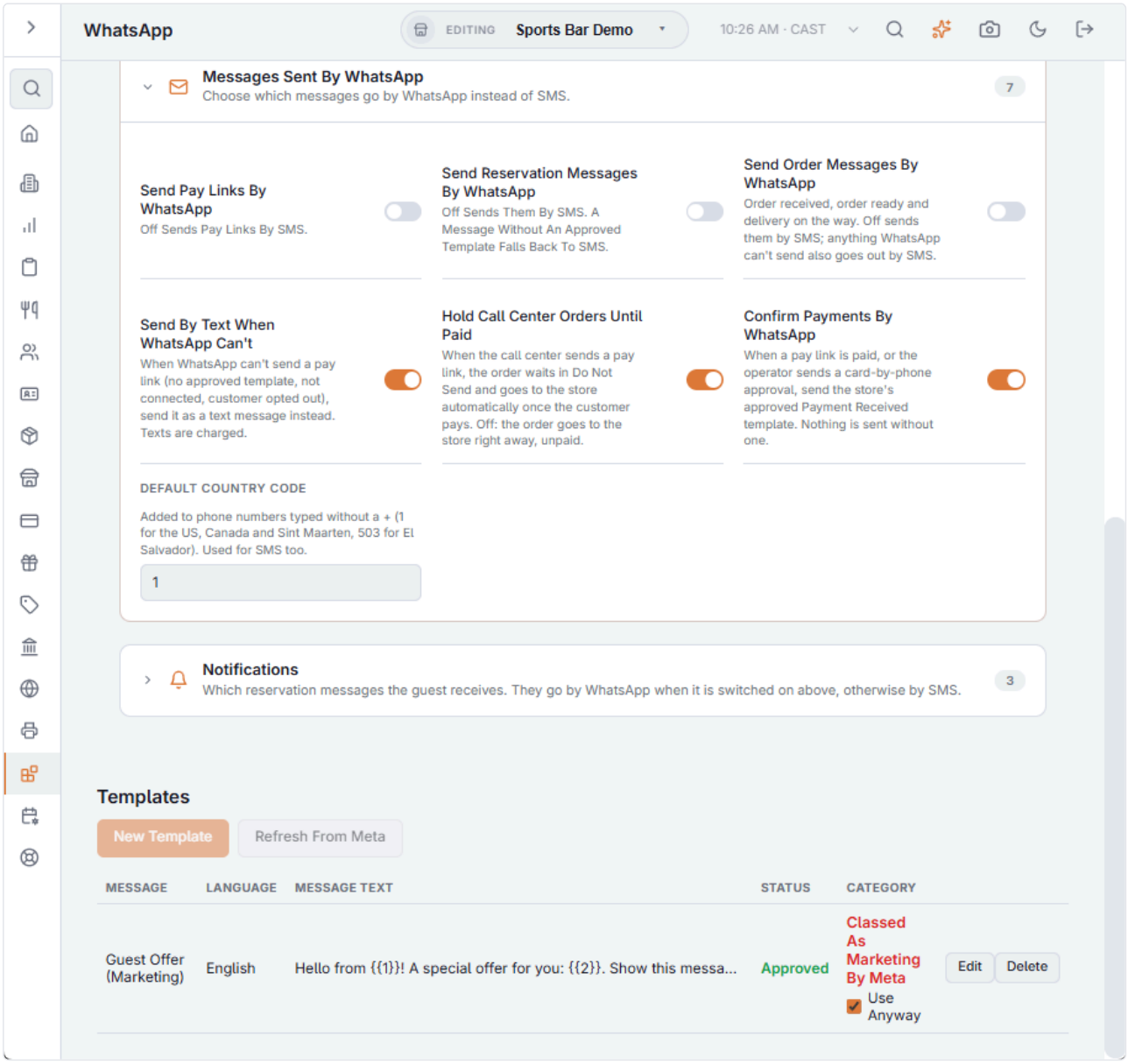
Guests can also ask for offers by WhatsApp on the sign-up forms, and Email The List can send the same offer there through your Guest Offer template.

Many guests read WhatsApp before email. If your store's WhatsApp is connected, guests can ask for your offers there too.

Set it up

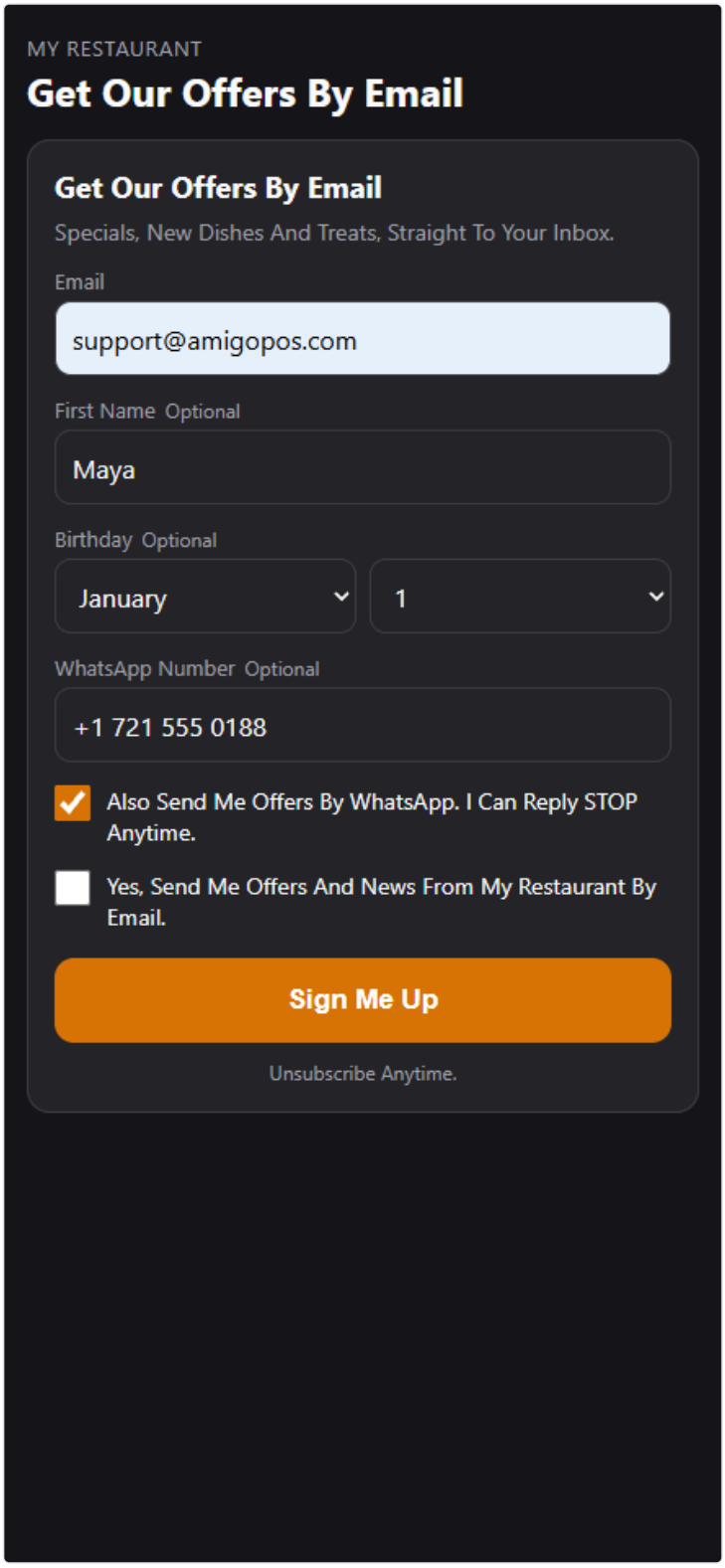
1. In **Back Office › Integrations › WhatsApp**, write the **Guest Offer (Marketing)** template ({{1}} your business, {{2}} the offer) and submit it. Meta classes it as marketing: once it is approved, tick **Use Anyway**, or nothing is sent.

2. In **Discounts & Promotions › Guest Offers › Settings › Email Sign-Up**, switch on **Offers By WhatsApp**.



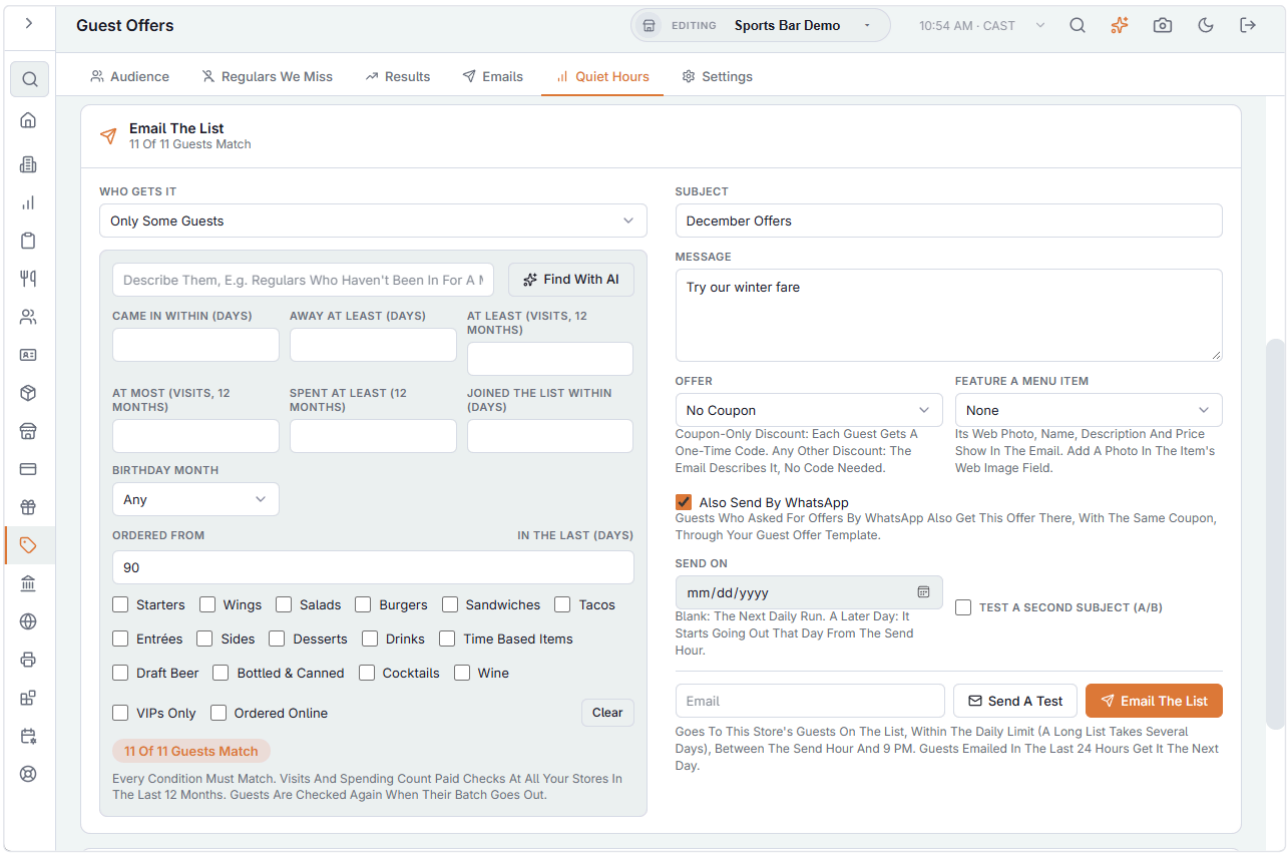
Guests opt in

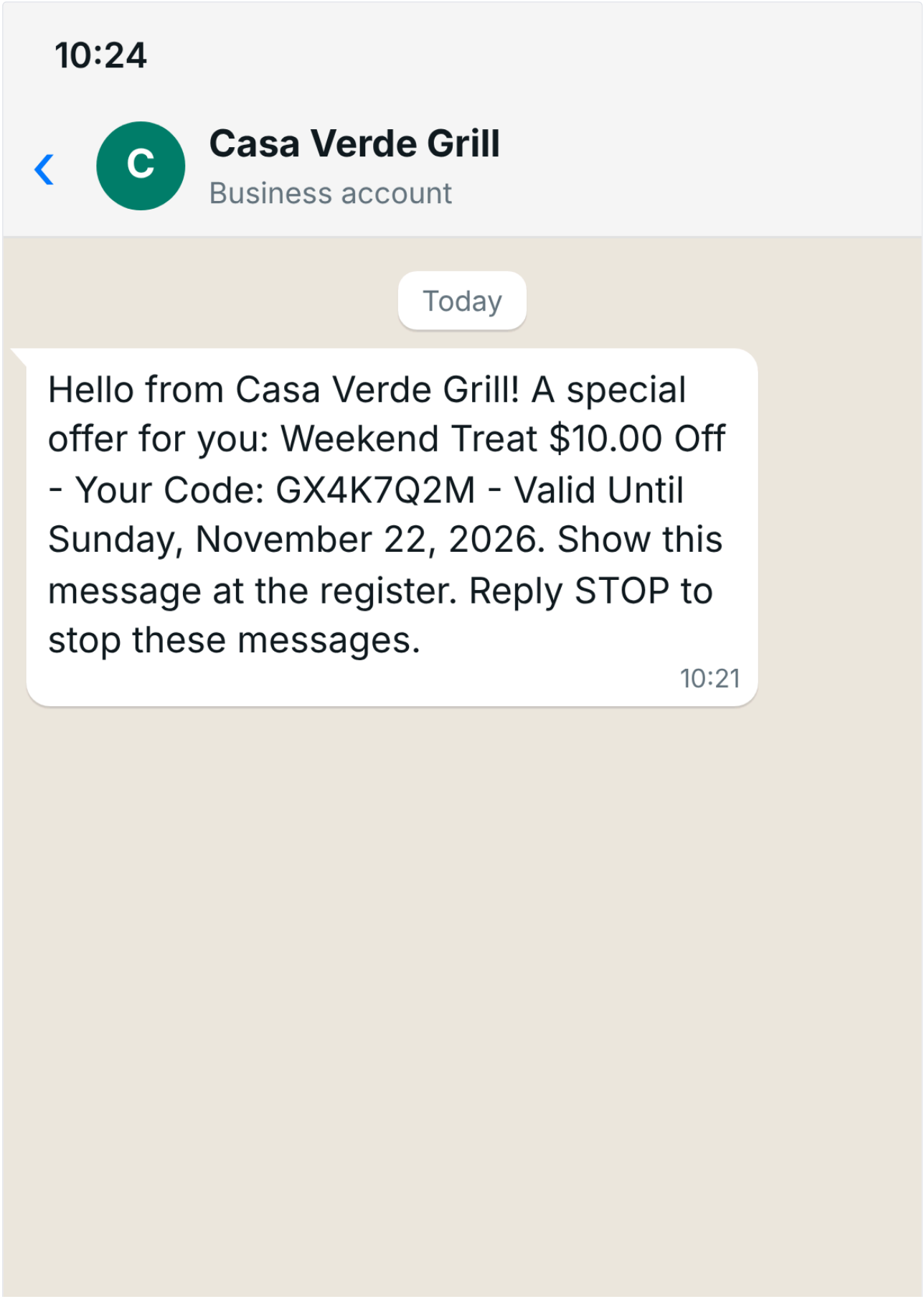
The survey's sign-up card and the Join Our List page then show an optional **WhatsApp Number** with its own box: "Also send me offers by WhatsApp". It is confirmed together with the email.

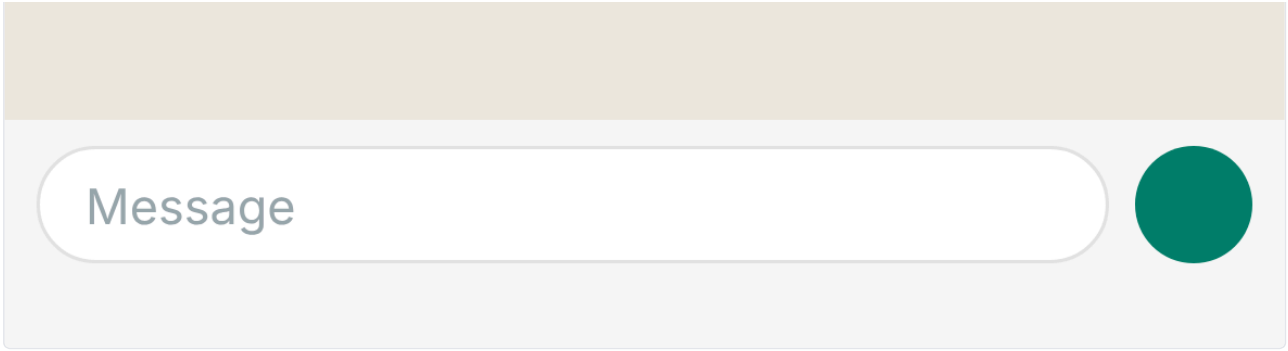


Send an offer

In **Email The List**, tick **Also Send By WhatsApp**. Each guest on the list who opted in also gets the offer on WhatsApp, with the same coupon, right after their email.


Guest Offers
EDITING
Sports Bar Demo
10:54 AM - CAST
Audience
Regulars We Miss
Results
Emails
Quiet Hours
Settings
Email The List
11 Of 11 Guests Match
WHO GETS IT
Only Some Guests
Describe Them, E.g. Regulars Who Haven't Been In For A M
Find With AI
CAME IN WITHIN (DAYS)
AWAY AT LEAST (DAYS)
AT LEAST (VISITS, 12 MONTHS)
AT MOST (VISITS, 12 MONTHS)
SPENT AT LEAST (12 MONTHS)
JOINED THE LIST WITHIN (DAYS)
BIRTHDAY MONTH
Any
ORDERED FROM
IN THE LAST (DAYS)
90
Starters
Wings
Salads
Burgers
Sandwiches
Tacos
Entrées
Sides
Desserts
Drinks
Time Based Items
Draft Beer
Bottled & Canned
Cocktails
Wine
VIPs Only
Ordered Online
Clear
11 Of 11 Guests Match
Every Condition Must Match. Visits And Spending Count Paid Checks At All Your Stores In The Last 12 Months. Guests Are Checked Again When Their Batch Goes Out.
SUBJECT
December Offers
MESSAGE
Try our winter fare
OFFER
No Coupon
Coupon-Only Discount: Each Guest Gets A One-Time Code. Any Other Discount: The Email Describes It, No Code Needed.
FEATURE A MENU ITEM
None
Its Web Photo, Name, Description And Price Show In The Email. Add A Photo In The Item's Web Image Field.
Also Send By WhatsApp
Guests Who Asked For Offers By WhatsApp Also Get This Offer There, With The Same Coupon, Through Your Guest Offer Template.
SEND ON
mm/dd/yyyy
Blank: The Next Daily Run. A Later Day: It Starts Going Out That Day From The Send Hour.
TEST A SECOND SUBJECT (A/B)
Email
Send A Test
Email The List
Goes To This Store's Guests On The List, Within The Daily Limit (A Long List Takes Several Days), Between The Send Hour And 9 PM. Guests Emailed In The Last 24 Hours Get It The Next Day.


10:24
C
Casa Verde Grill
Business account
Today
Hello from Casa Verde Grill! A special offer for you: Weekend Treat $10.00 Off - Your Code: GX4K7Q2M - Valid Until Sunday, November 22, 2026. Show this message at the register. Reply STOP to stop these messages.
10:21



- Offers never go by text message.
- Guests who unsubscribe from the offer emails get no WhatsApp offers either; a guest who replies **STOP** on WhatsApp gets no more WhatsApp messages from the store.
- Each message shows in the SMS Log.

> Meta charges marketing messages to your WhatsApp account at its marketing rate, and doesn't deliver marketing messages to US phone numbers.

Related: Quiet hours and Email The List

Guest offers: how your emails are delivered

Discounts & Promotions › Guest Offers

View online ↗

One-tap unsubscribe in mail apps, guests removed when an email bounces or is marked as spam, and the address offers are sent from.

Offer emails only work when they reach the inbox. Mail providers such as Gmail, Yahoo and Outlook trust senders who make leaving easy and who stop writing to addresses that don't work. Your offer emails do both on their own.

Unsubscribe in one tap

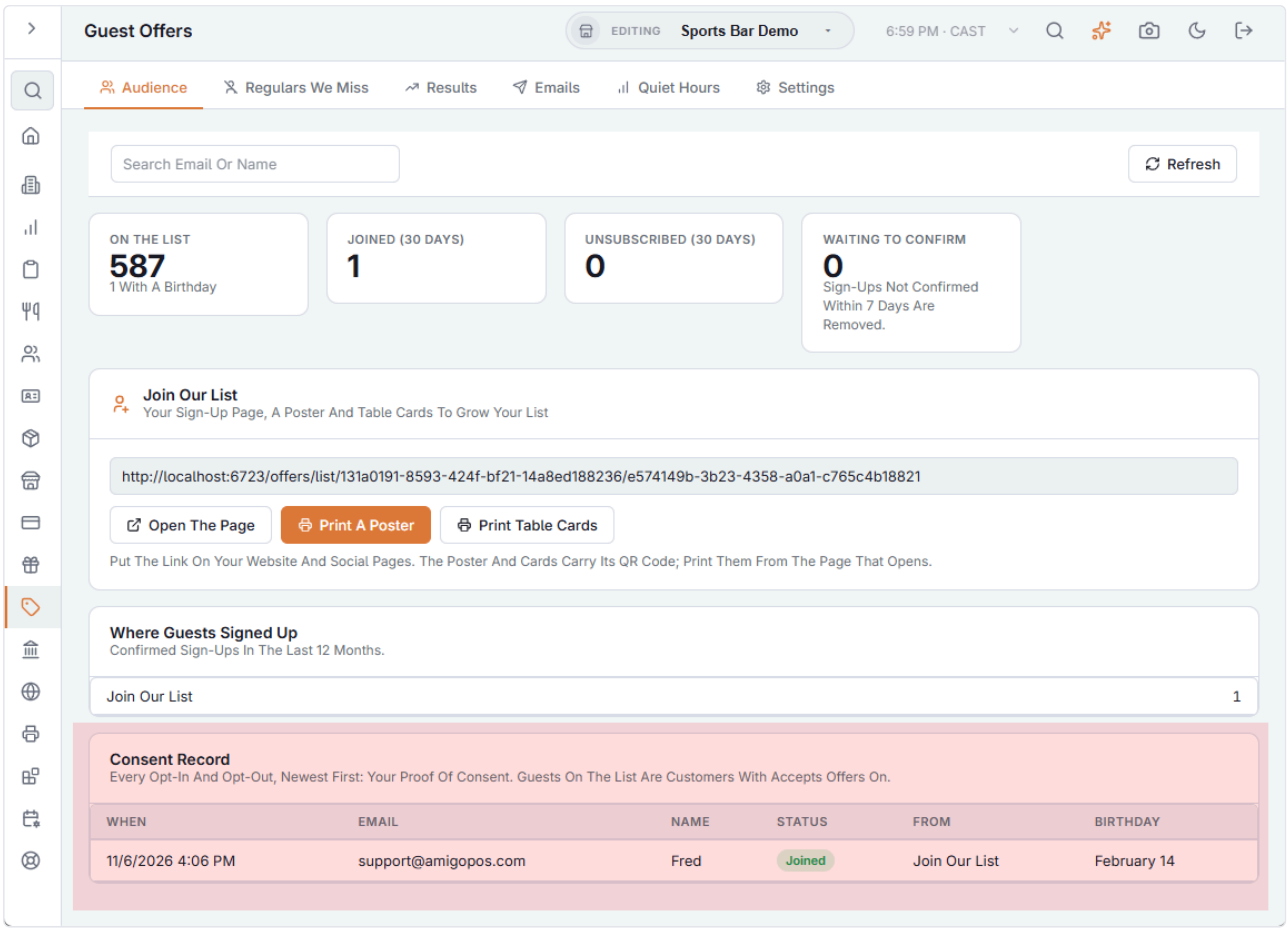
Every offer email (win-back, birthday, celebration, first visit, order again, Email The List, thank-you) tells the guest's mail app how to unsubscribe. Gmail, Yahoo and Apple Mail show their own **Unsubscribe** link next to your name, and one tap takes the guest off your list at once. The **Unsubscribe** link at the bottom of the email still works too.

Every email also carries a plain-text version for mail apps that don't show pictures and formatting.

Addresses that bounce or complain

When an offer email can't be delivered because the address doesn't exist, or the guest marks it as spam, the guest is taken off your list automatically: every customer of your business with that email stops getting offers. Mailboxes that are only full or busy for a while are left alone.

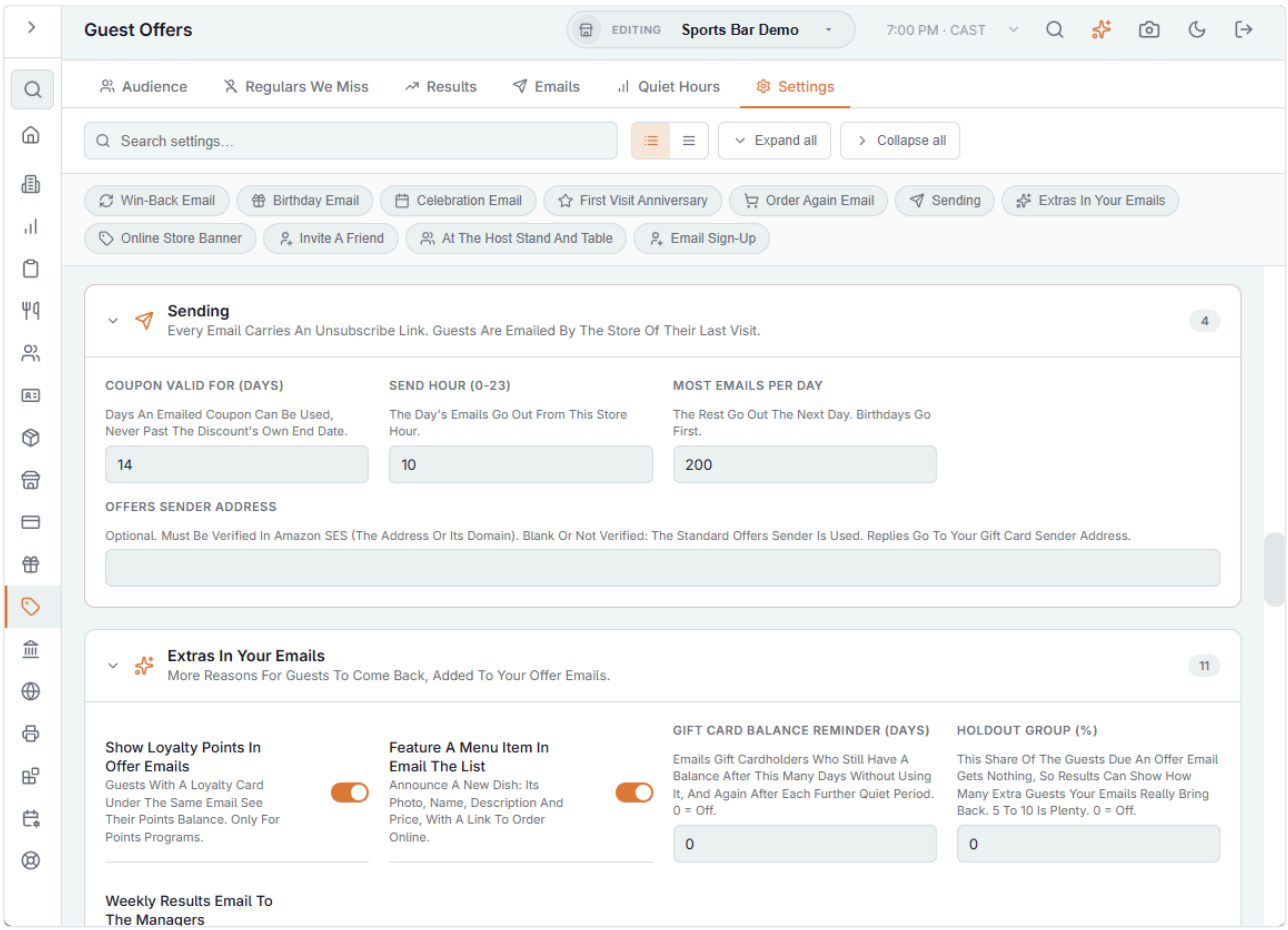
These show in the Consent Record on the **Audience** tab with the source **Email Bounced** or **Marked As Spam**, next to the guests who unsubscribed themselves.



The address offers come from

Offer emails go out under your store's name from a sending address set up for offers, kept apart from receipts and gift card emails so that one never affects how the other is delivered. Replies from guests go to your gift card sender address when you have one.

To send offers from your own address instead, go to **Back Office › Discounts & Promotions › Guest Offers › Settings › Sending** and fill in **Offers Sender Address**.



Your own address must first be verified for sending (the address, or better its whole domain). Until it is, offers keep going out from the standard address, so nothing stops. Ask support to set up the verification.

Good habits

- Send a test to yourself before turning an email on, and read it on a phone.
- Keep **Most Emails Per Day** in Settings › Sending sensible; a long list goes out over several days.
- Only add guests who asked for offers. See Guest offers: building your email list.

Pause or birthday only

The unsubscribe page also offers to pause offers for 3 months or keep only the birthday emails. See Guest offers: pause or birthday only instead of unsubscribing.

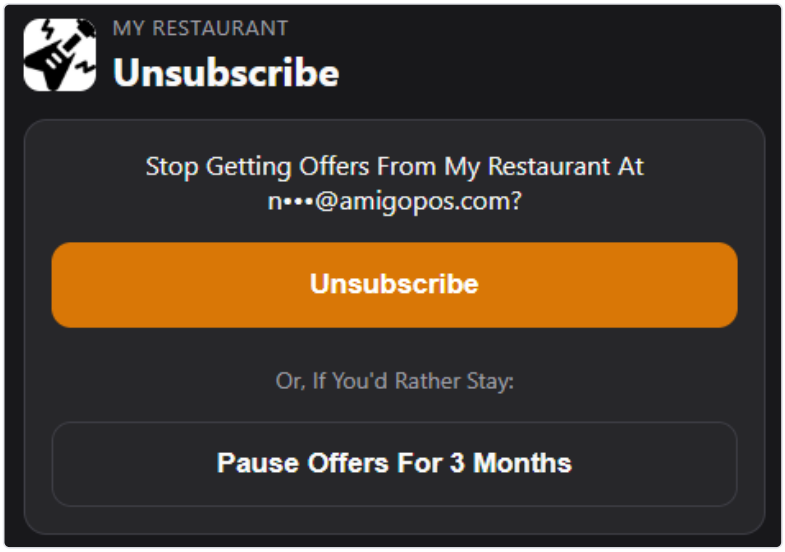
Guest offers: pause or birthday only instead of unsubscribing

Discounts & Promotions › Guest Offers

View online ↗

The unsubscribe page lets guests pause offers for 3 months or keep only their birthday emails, so fewer guests leave your list for good.

Many guests who unsubscribe only want fewer emails for a while. The page the **Unsubscribe** link at the bottom of every offer email opens gives them two softer choices.

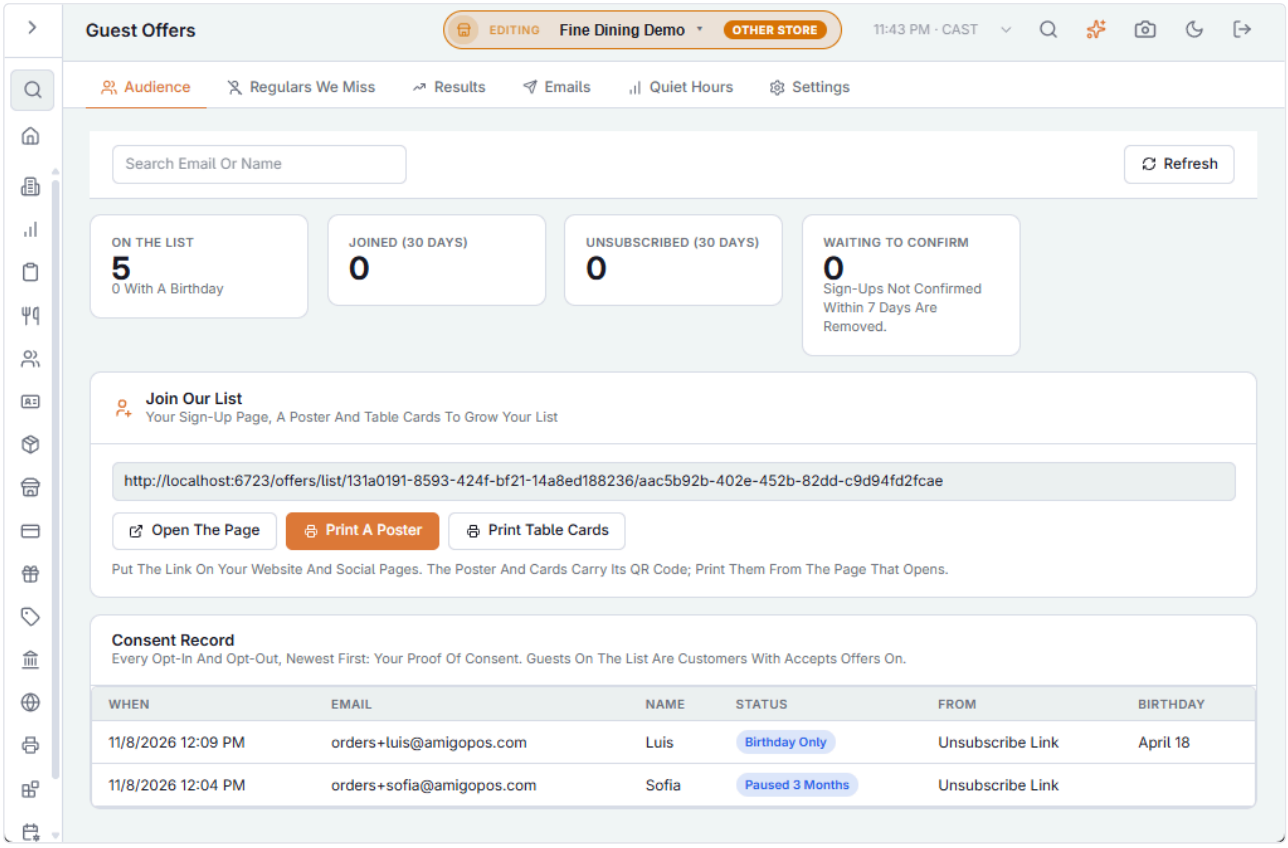


- **Unsubscribe** — comes first, as before: the guest stops getting offers.
- **Pause Offers For 3 Months** — no offer emails for 3 months, then everything starts again on its own.
- **Only Send My Birthday Emails** — only the birthday and celebration emails. Offered only when the guest's birthday is known.

A guest who paused or chose birthday only sees it on the same page later, with **Get All Offers Again**.

What it means for your emails

- These guests stay on your list, but the win-back, first visit, order again and Email The List emails leave them out, and so do the guest counts on the Quiet Hours tab.
- Each choice is kept in the Consent Record on the **Audience** tab as **Paused 3 Months**, **Birthday Only** or **Back To All Offers**. The guest's latest choice counts.
- Unsubscribing with one tap from the mail app still unsubscribes the guest completely.



Related: Guest offers: how your emails are delivered · Guest offers: building your email list

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Regulars we miss

Discounts & Promotions › Guest Offers

View online ↗

Regulars and VIPs who haven't been in for a while, most loyal first, for managers to call or send a personal offer, in Back Office and on the staff app.

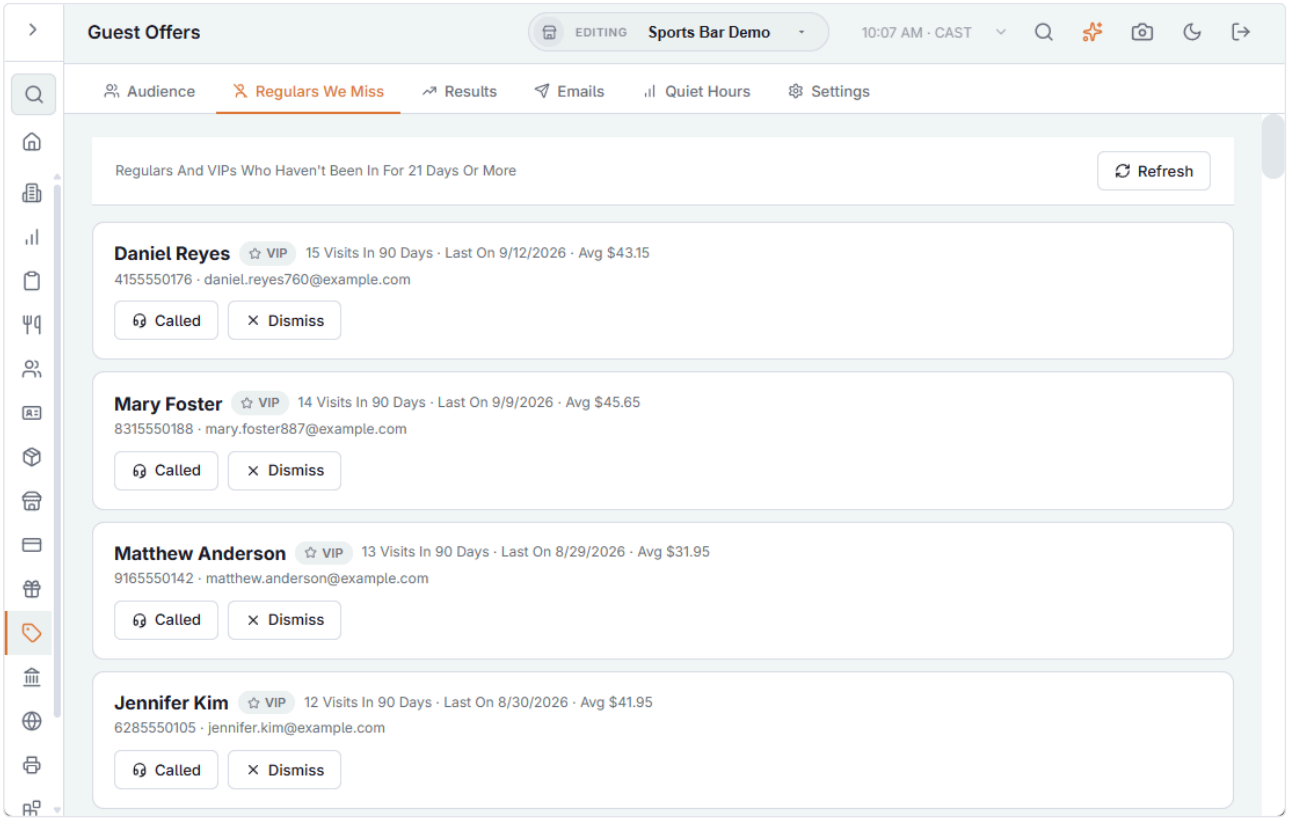
A call from the manager means more to a regular than any email. **Regulars We Miss** lists the guests worth that call.

Who shows

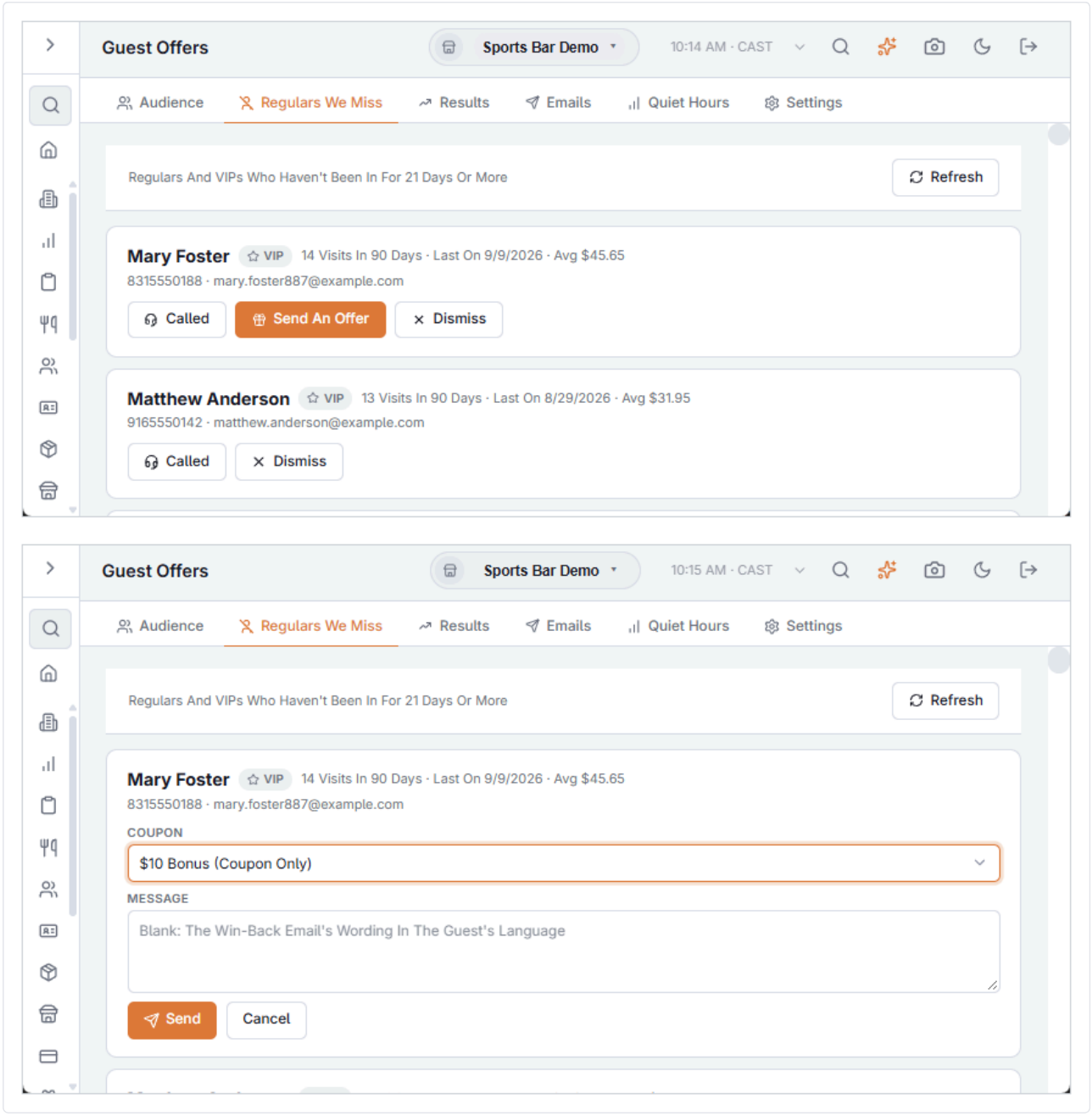
Customers who were regulars at this store (**Regular After (Visits In 90 Days)** visits in the 90 days up to their last visit) or are VIPs, and haven't been in for **Not In For (Days)** (21), up to 180 days. VIPs first, then the most visits. Do Not Contact and blocked customers never show.

In Back Office

Open **Discounts & Promotions › Guest Offers › Regulars We Miss**. Each guest shows their visits, last visit, average check, phone and email.



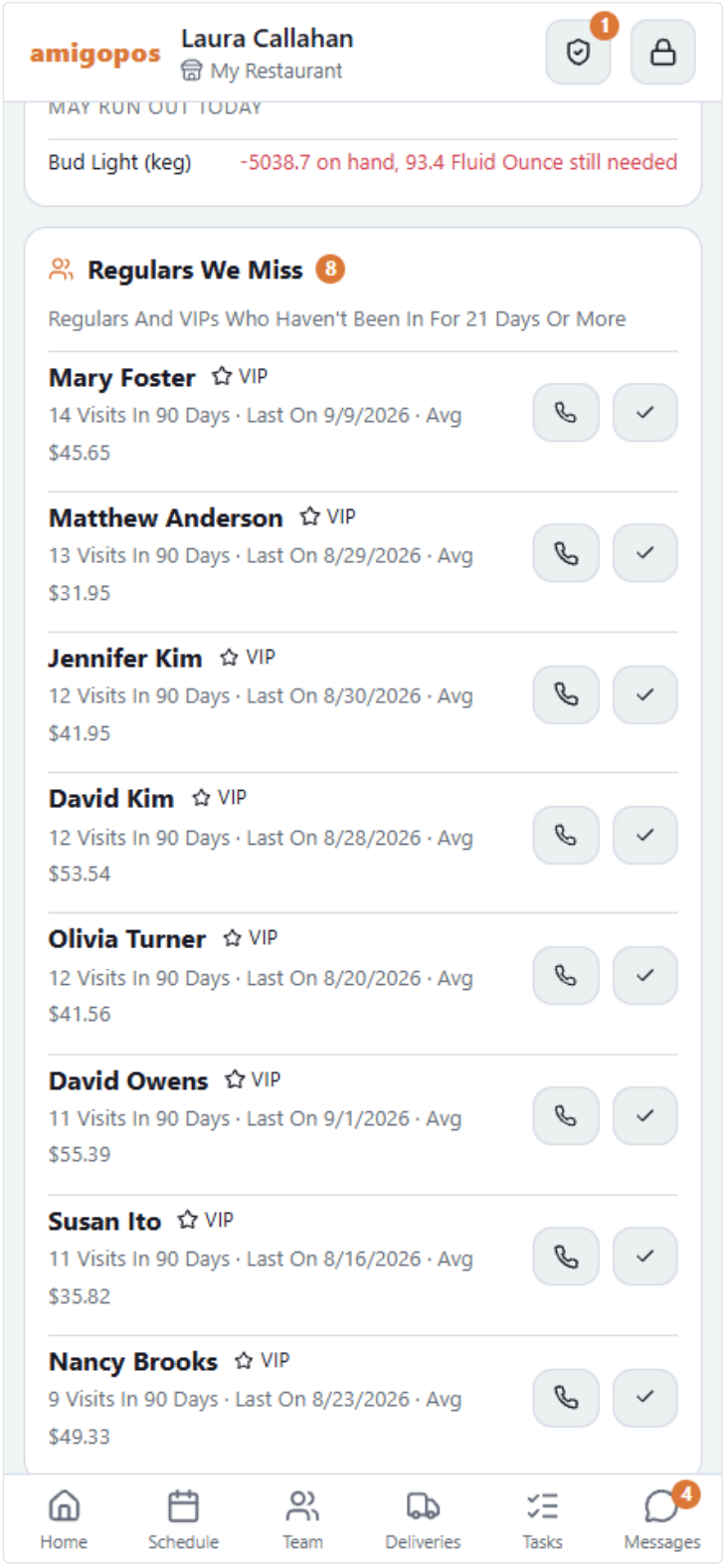
- **Called** — after you phoned them.
- **Send An Offer** — a one-time coupon by email with your own note (blank: the win-back wording). Only for guests on your offers list. It shows as **Personal Offer** on the Results tab.
- **Dismiss** — not now.



Each takes the guest off the list for 30 days.

On the staff app

Managers see the top 8 on the **Today** page, with a button to call and a check to mark them called.



Turn it off with **Show Regulars We Miss** in **Discounts & Promotions › Guest Offers › Settings › At The Host Stand And Table**.

Related: Regulars and VIPs at the host stand and table

Guest offers results: every promotion side by side

Discounts & Promotions › Guest Offers

View online ↗

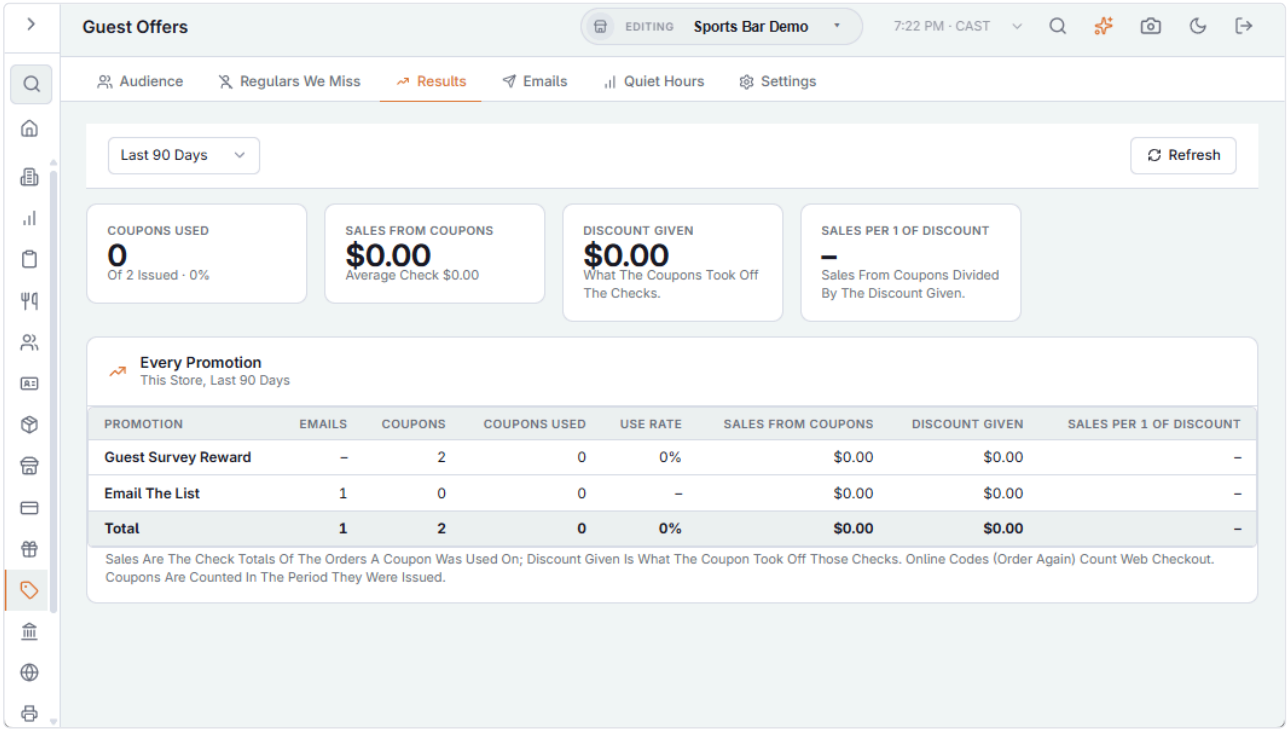
The Results tab: coupons used, sales from coupons, discount given and sales per 1 of discount for every promotion — survey rewards, offer emails, invites, gift card bonuses and printed coupons.

The **Results** tab of **Back Office › Discounts & Promotions › Guest Offers** puts all your promotions side by side, so you can see which ones bring guests back and what they cost.

The numbers

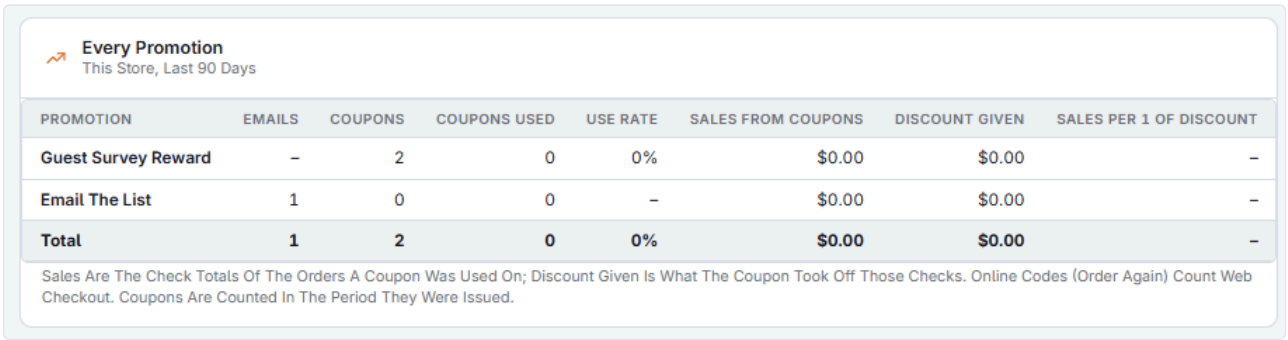
Pick the last 30, 90 or 365 days. The cards at the top add up every promotion of this store:

- **Coupons Used** — of the coupons issued, with the use rate.
- **Sales From Coupons** — the check totals of the orders a coupon was used on, with the average check.
- **Discount Given** — what the coupons took off those checks.
- **Sales Per 1 Of Discount** — sales from coupons divided by the discount given. 8.0× means every 1 of discount came with 8 in sales.



By promotion

The **Every Promotion** table has one row for each promotion that issued anything in the period: Guest Survey Reward, Win-Back, Birthday, Celebration, First Visit Anniversary, Order Again, Email The List, Thank-You Coupon, Friend's Welcome Coupon, Gift Card Bonus and Printed Receipt Coupons. Each shows the emails sent (for the email promotions), coupons issued, used, use rate, sales, discount given and sales per 1 of discount, with a total at the bottom.



- Coupons count in the period they were issued, so a coupon used next month still counts for the promotion that gave it.
- Order again codes are counted when they are used at web checkout.
- Email The List without an offer shows emails but no coupons.

For each email's detail — who got it, the code and whether it was used — see the **Emails** tab (Win-back and birthday emails).

Apology coupons

Coupons sent with an apology to an unhappy survey guest show as their own row, **Apology Coupon**. See Guest survey: making it right after a low rating.

What the emails really did

With a holdout group, a card under the table shows how many extra guests each email really brought back. See Guest offers: what your emails really do. Cart reminders show as their own row, and the same results arrive by email every Monday (the weekly results email).

Reminders and personal offers

Coupon reminders show as **Coupon Reminder** (emails only; a coupon used still counts for the email that gave it), and offers sent from Regulars We Miss as **Personal Offer**.

Guest offers: what your emails really do (holdout group)

Discounts & Promotions › Guest Offers

View online ↗

Hold a small share of guests back from each email and compare: Extra Guests Back shows how many more guests came back because of the email than would have come anyway.

Some guests who get a win-back email would have come back anyway. To see what your emails really do, keep a small group of guests who get nothing and compare how many of each group come back.

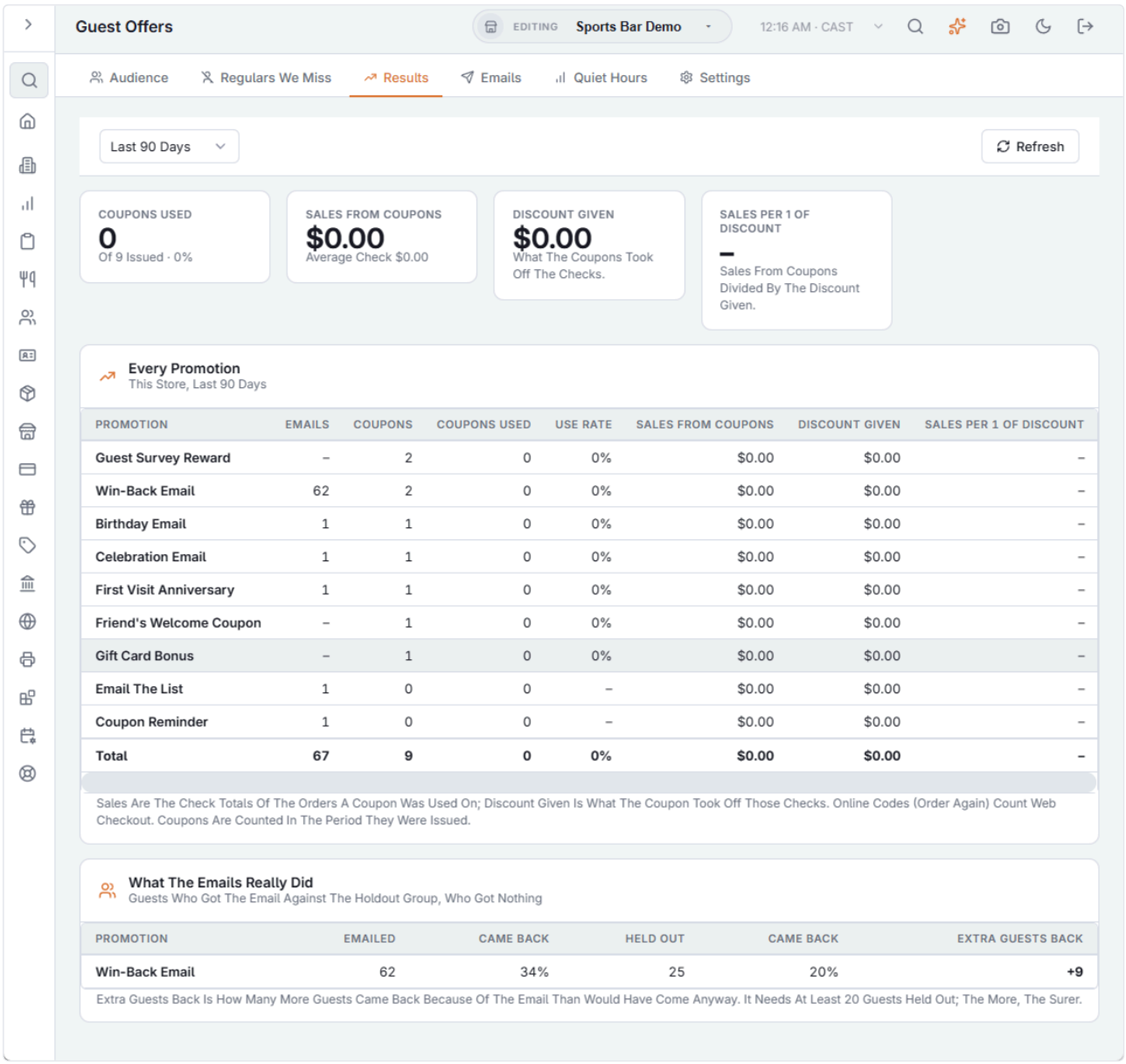
Turn it on

In **Discounts & Promotions › Guest Offers › Settings › Extras In Your Emails**, set **Holdout Group (%)**. 5 to 10 is plenty; 0 (the default) turns it off.

- Each guest due an automatic email (win-back, birthday, celebration, first visit anniversary, order again) or an Email The List email is held out at random at that rate: no email and no coupon.
- Held-out guests aren't picked again for that email, don't count toward the daily limit and don't show as sent.
- Guests in an A/B subject test, and thank-you coupons, are never held out.

Read the result

The **Results** tab shows a **What The Emails Really Did** card once guests have been held out in the period. For each email: how many were emailed and how many of them came back, how many were held out and how many of them came back, and **Extra Guests Back**.



- **Extra Guests Back** = (the emailed guests' return rate − the held-out guests' return rate) × guests emailed. +12 means 12 more guests came back because of the email.
- "Came back" means they ordered again after the email was due.
- It shows **Too Few Yet** until at least 20 guests have been held out; the more, the surer the number.
- Only emails from the first held-out guest on are compared, so older sends don't skew it.

Related: Offer results · Guest offers: extras in your emails

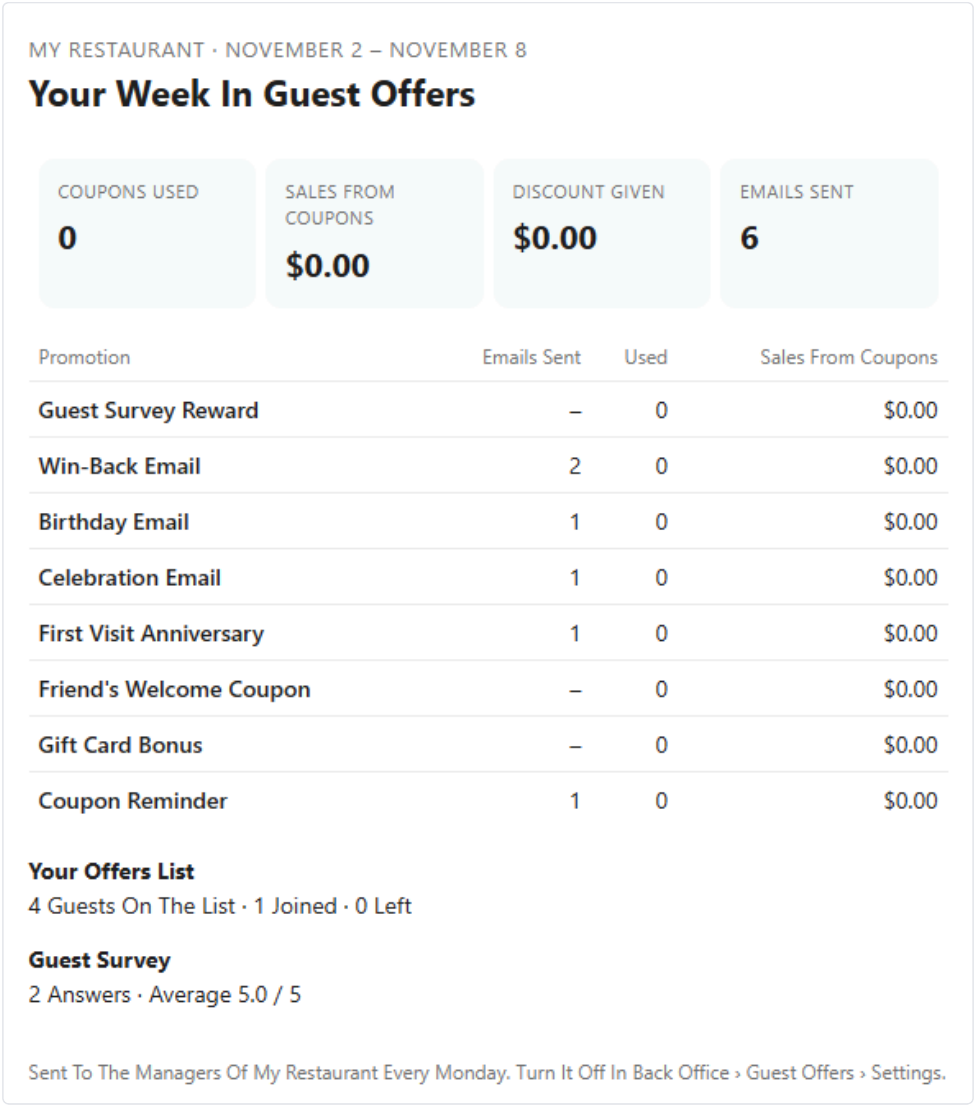
Guest offers: the weekly results email

Discounts & Promotions › Guest Offers

View online ↗

Every Monday the managers get last week's guest offers results by email: coupons used, sales, each promotion, extra guests back, the list, the survey and guests waiting to be contacted.

You don't have to open Back Office to know how your promotions are doing. Every Monday, from the store's send hour, the managers get an email with the last 7 days, in the store's language.



What's in it

- **Coupons Used**, **Sales From Coupons**, **Discount Given** and **Emails Sent**.
- Each promotion, with its emails, coupons used and sales.
- Extra guests back thanks to the emails, when the holdout group has enough guests.
- Your offers list: guests on it, joined and left.
- Guest survey answers and the average rating, and how many unhappy guests are waiting for you to get in touch.

Who gets it

In **Discounts & Promotions › Guest Offers › Settings › Extras In Your Emails**:

- **Weekly Results Email To The Managers** — on by default.
- **Send The Weekly Email To** — email addresses separated by commas. Blank: the end-of-day report recipients. With no address at all, nothing is sent.

> Nothing is sent for a week with nothing to report. If the email can't go out on Monday it is tried again, up to Wednesday.

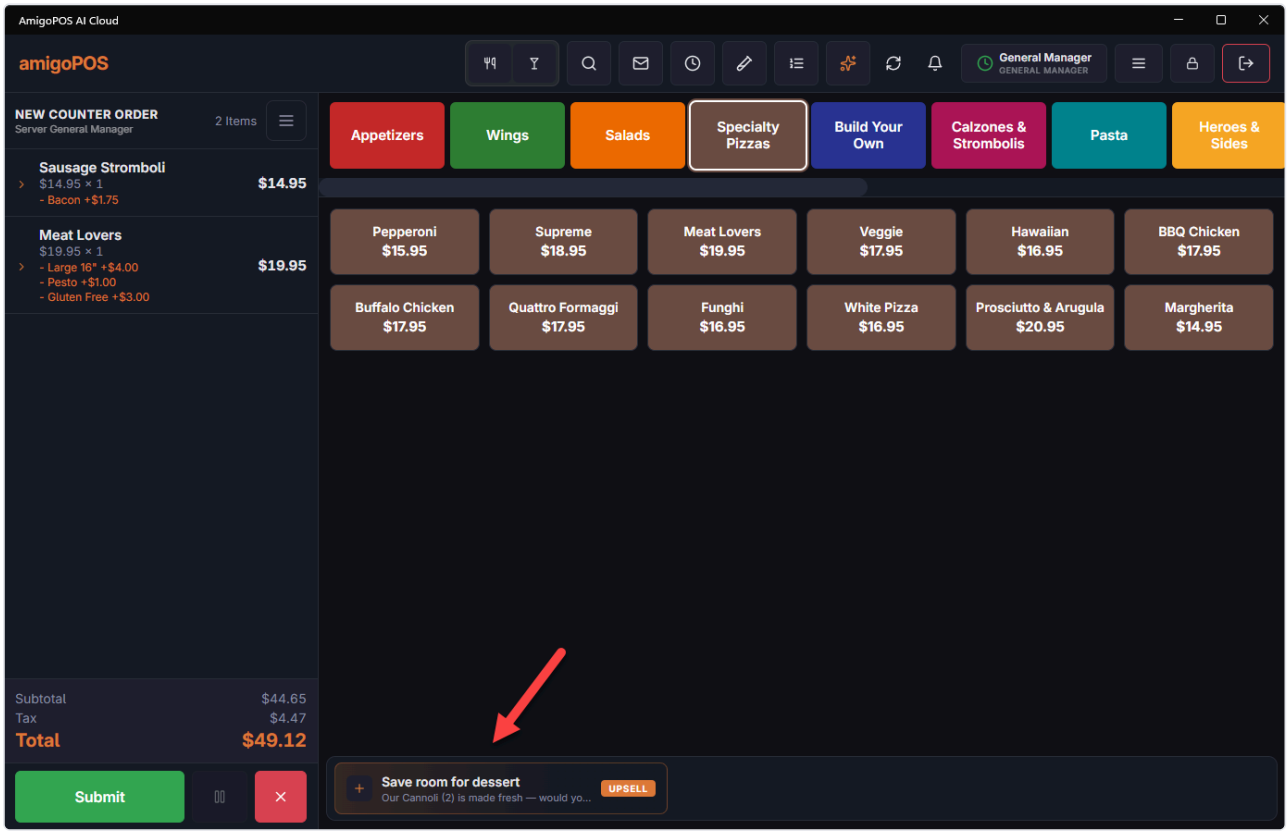
Suggestive Selling

Suggestive selling overview

View online ↗

What suggestive selling does and how the engine chooses which offer to show.

Suggestive selling shows the server a timely offer while an order is being built — "Add garlic knots?" when a pizza is added — and, if you choose, shows it to guests ordering online. It is set up under **Back Office › Discounts & Promotions › Suggestive selling**: **Rules** decide when to offer what, **Programs** turn accepted offers into staff goals with rewards, **Payouts** tracks the rewards earned, and **Reports** shows how offers perform.



How an offer is picked

- When an item is added, or an order starts, every enabled rule with a matching trigger is a candidate.
- Candidates are checked in **Priority** order, highest first. The first one that passes its order type, schedule, per-order limit and cooldown is shown; the rest stay silent for that moment.
- The rule presents one of its offers: the first by sort order, or variant A or B at random when A/B testing is on.
- Each time an offer is shown, the system records it, and records whether it was accepted, dismissed or ignored. Those records feed Suggestive reports and the staff Performance programs and contests.

At the register

Offers wait on the suggestion bar of the order screen. With **Prompt Before Parking** on (on the Rules page), a new offer opens in a dialog as soon as it fires; closing it without adding the item leaves it on the bar as usual. See Suggestive offers at the register.

> Rules with **Offer On Web Ordering** on also make offers to guests on your online store, and those results land in the same reports.

Start with Suggestive-selling rules, or let your sales suggest rules with Suggested pairings.

Suggestive offers at the register

Discounts & Promotions › Suggestive Selling

View online ↗

What a suggestion looks like mid-order and what happens when a server takes or skips it.

Suggestive offers are prompts that appear on the order screen while you're building a check — an upsell or add-on the system recommends based on what's already on the order. They're designed to be quick to act on without interrupting the sale.

How offers appear

As you add items, matching offers show up as pills along the order. Each pill includes a short headline, an optional **script** you can read to the guest, and a price when one applies.

> The script text is there to make the offer easy to say out loud — for example, "Make it a large for a dollar more?"

Adding and removing an offer

1. Tap a suggested pill to add it to the order. A quick confirmation appears.
2. Once added, the pill shows a check and an **Added** badge.
3. Changed your mind? Tap the added pill again to remove the item.

> **Note:** Which offers appear, the script, and the price are all defined by suggestive-selling rules in the back office, so prompts vary by store and by what's on the order.

Why it matters

Accepted offers are tracked toward your suggestive-selling performance — see your running progress and your team's standings on the suggestive tiles.

Suggestive-selling rules

Discounts & Promotions › Suggestive Selling

View online ↗

Setting up which offers appear, on which items, and when the register suggests them.

Back Office › Discounts & Promotions › Suggestive selling › Rules lists the rules that decide which offers appear at the register, when they fire and what the server sees. Each rule pairs a trigger — “when this happens on the order” — with one or more offers — “suggest this”.

The rule list

- Rules are listed by priority, highest first, each with what fires it and its priority number. Search by name or description.
- **Show Disabled** — also lists rules that are switched off; they show **Off**. Disabled rules stay for reuse.
- **Prompt Before Parking** — a store setting, saved at once: a new offer opens in a dialog at the register as soon as it fires, instead of only waiting on the suggestion bar. Closing the dialog without adding the item leaves it on the bar.
- **Suggested Pairings** — items your guests often order together, with a button to make a rule from them (Suggested pairings).

Creating a rule

1. Press **Create New Rule** (+). A rule called *New Rule* is added, enabled, with one empty offer, and opens.
2. Give it a name, and on the **Trigger** tab choose what fires it: **An Item Is Added**, **A Category Item Is Added** or **The Order Starts**.
3. On the **Offers** tab, pick the **Menu Item** to suggest and write the **Headline** and **Pitch Text**.
4. Limit it on the **Schedule** tab if it is only for some days or hours.

Changes save as you make them; the header shows **Saving**, then **Saved**. Turn the header switch off to stop a rule without deleting it, or press **Delete**.

Every field is described in Rule settings reference; testing two versions of an offer is in A/B testing offers.

> Use **Priority** to rank your best offers: when two rules could fire at the same moment, only the higher one shows.

Rule settings reference

View online ↗

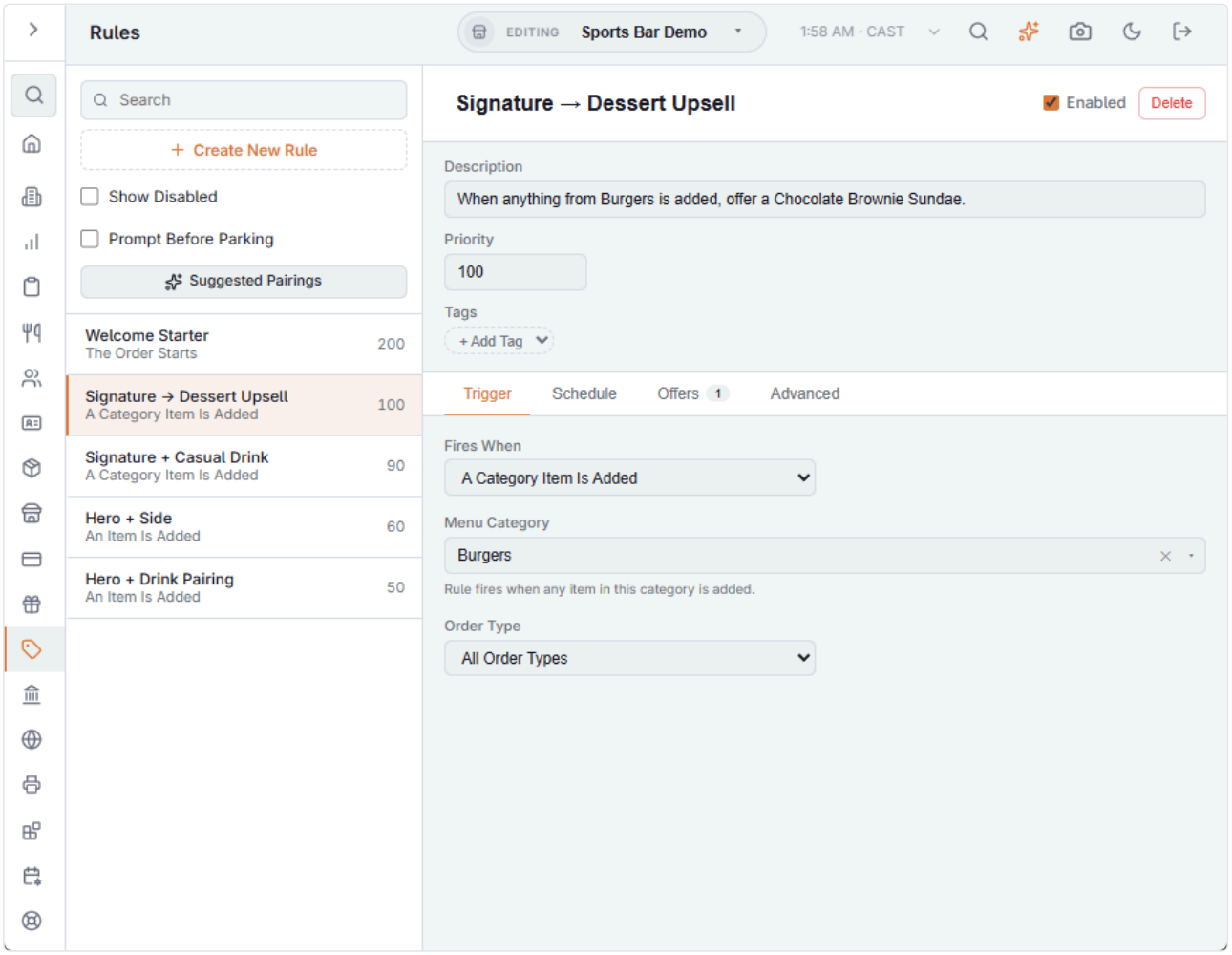
Every field on the suggestive rule editor: trigger, schedule, offers, and advanced options.

Each rule in **Back Office › Discounts & Promotions › Suggestive selling › Rules** is edited on four tabs: **Trigger**, **Schedule**, **Offers** and **Advanced**. Every change saves as you make it.

The header

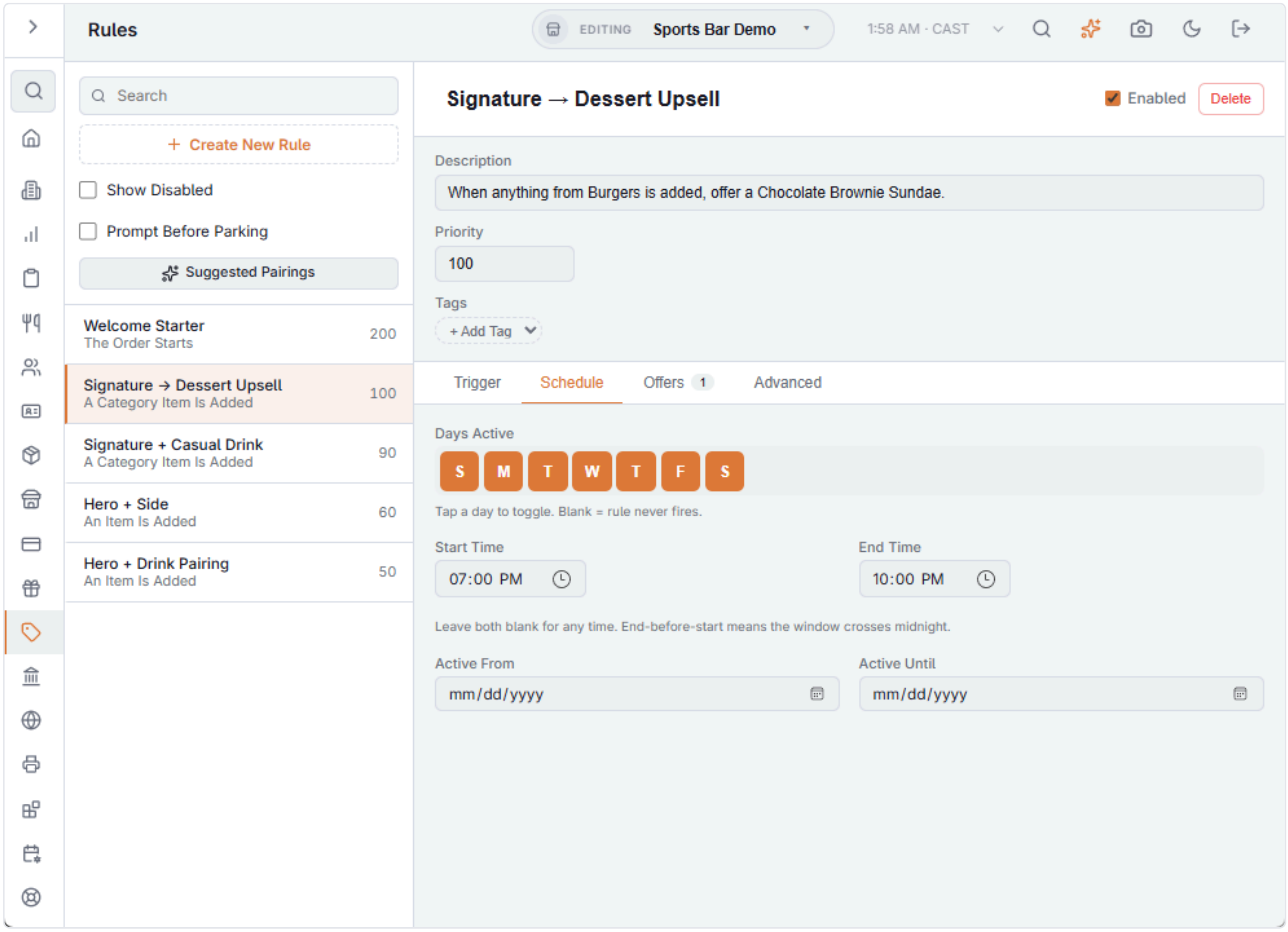
- The rule name, and the **Enabled** / **Disabled** switch: a disabled rule never fires.
- **Description** — free text; the rule list search looks at it too.
- **Priority** — when several rules could fire at the same moment, the highest number wins and the rest stay silent.
- **Tags** — labels picked with **Add Tag**. A program can count the offers of every rule with a tag (Performance programs and contests); tags don't change when a rule fires.
- **Delete** — removes the rule.

Trigger



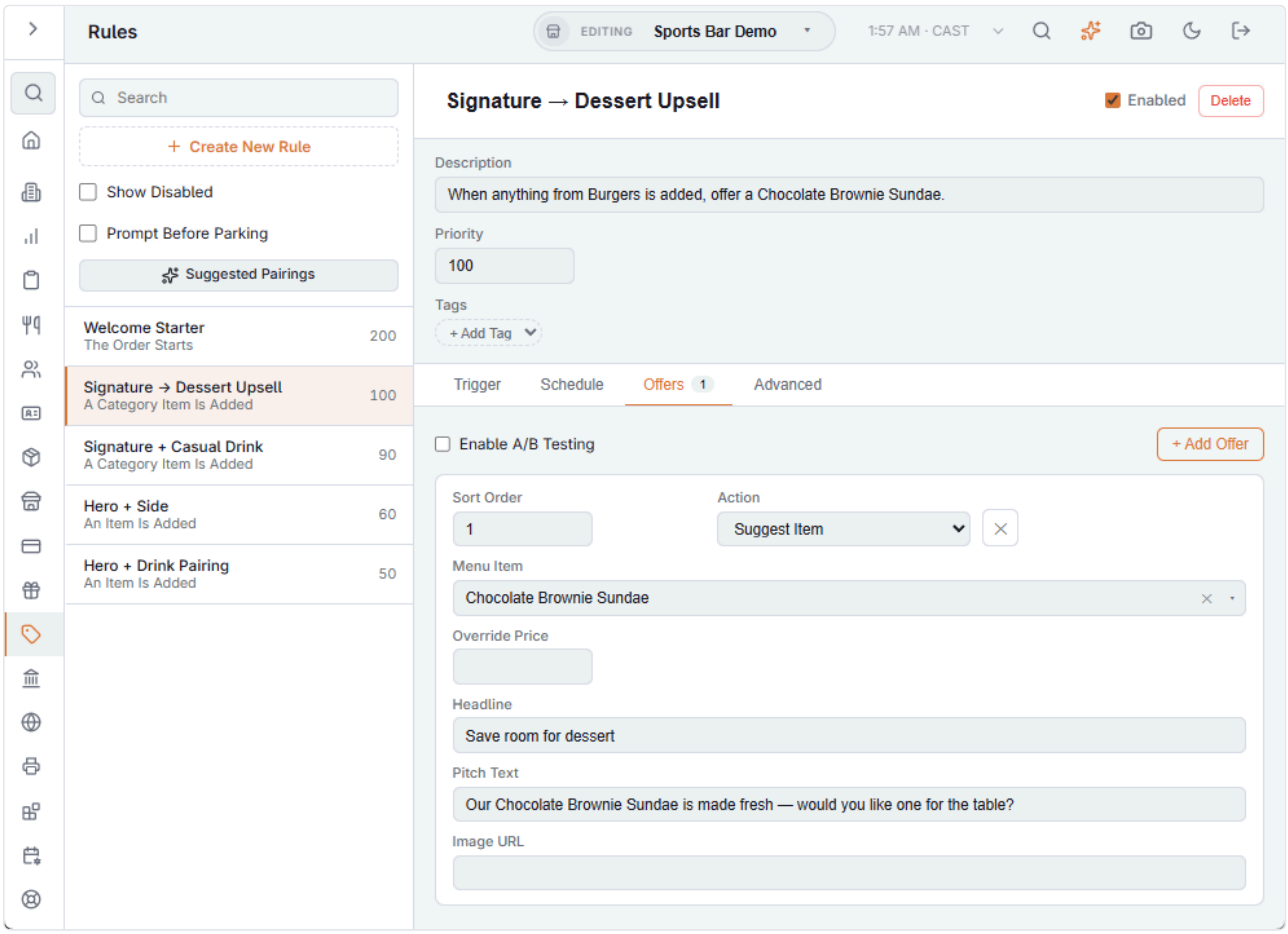
- **Fires When** — **An Item Is Added** (pick the **Menu Item**), **A Category Item Is Added** (pick the **Menu Category**; any item in it fires the rule), or **The Order Starts** (once per order, on the first screen). The item and category boxes search the regular and bar menus as you type. A rule saved earlier with a trigger that is no longer offered still shows it, marked **Stub**, with a note that rules of this type don't fire; pick one of the three above.
- **Order Type** — one order type, or **All Order Types**.

Schedule



- **Days Active** — tap a day to switch it; with no day on, the rule never fires.
- **Start Time** and **End Time** — leave both blank for any time; an end before the start runs past midnight. Store time.
- **Active From** and **Active Until** — optional dates, for limited-time promotions.

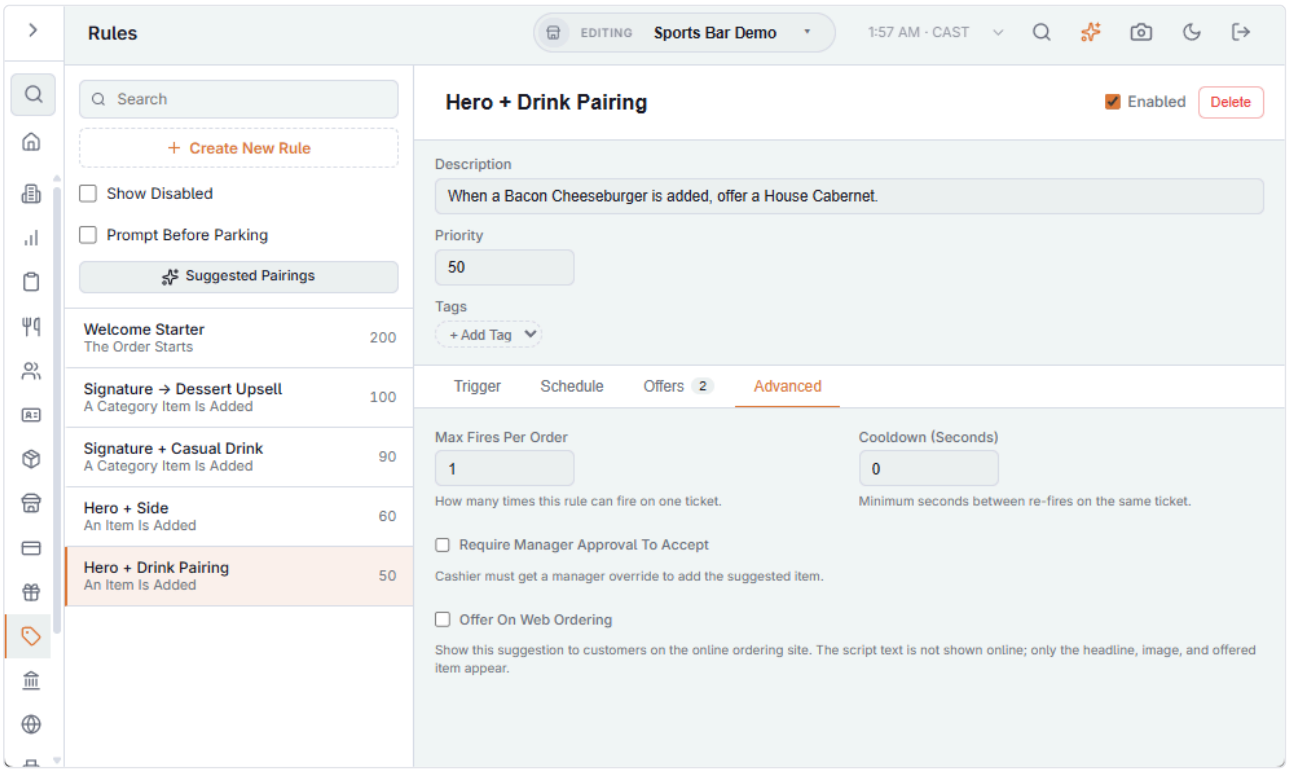
Offers



An offer is what the server (or the online guest) sees. **Add Offer** adds one; the ✕ removes it. Without A/B testing, the first offer by sort order is shown. **Enable A/B Testing** is described in A/B testing offers.

- **Sort Order** — the lowest number is the offer shown.
- **Variant** — A or B; shown only with A/B testing on.
- **Action** — **Suggest Item**: offers the menu item as an add-on. An offer saved earlier with another action still shows it, marked **Stub**.
- **Menu Item** — the item added to the order when the offer is accepted.
- **Override Price** — optional; the price the item gets when it is added from this offer, instead of its menu price.
- **Headline** — the short line on the suggestion, for example “Add fries for $2”.
- **Pitch Text** — the longer line for the server, worded the way you want it said.
- **Image URL** — an optional picture, shown with the offer on the online store.

Advanced



- **Max Fires Per Order** — how many times this rule can make an offer on one order (1 to 10). An offer the server hasn't answered yet doesn't use up the limit.
- **Cooldown (Seconds)** — the least time between two offers from this rule on the same order, so servers aren't asked on every item.
- **Require Manager Approval To Accept** — adding the suggested item needs a manager override; useful with an override price.
- **Offer On Web Ordering** — the rule also makes its offer to guests on the online store. Online guests see the headline, the image and the item, never the pitch text. Results online count in the same reports.

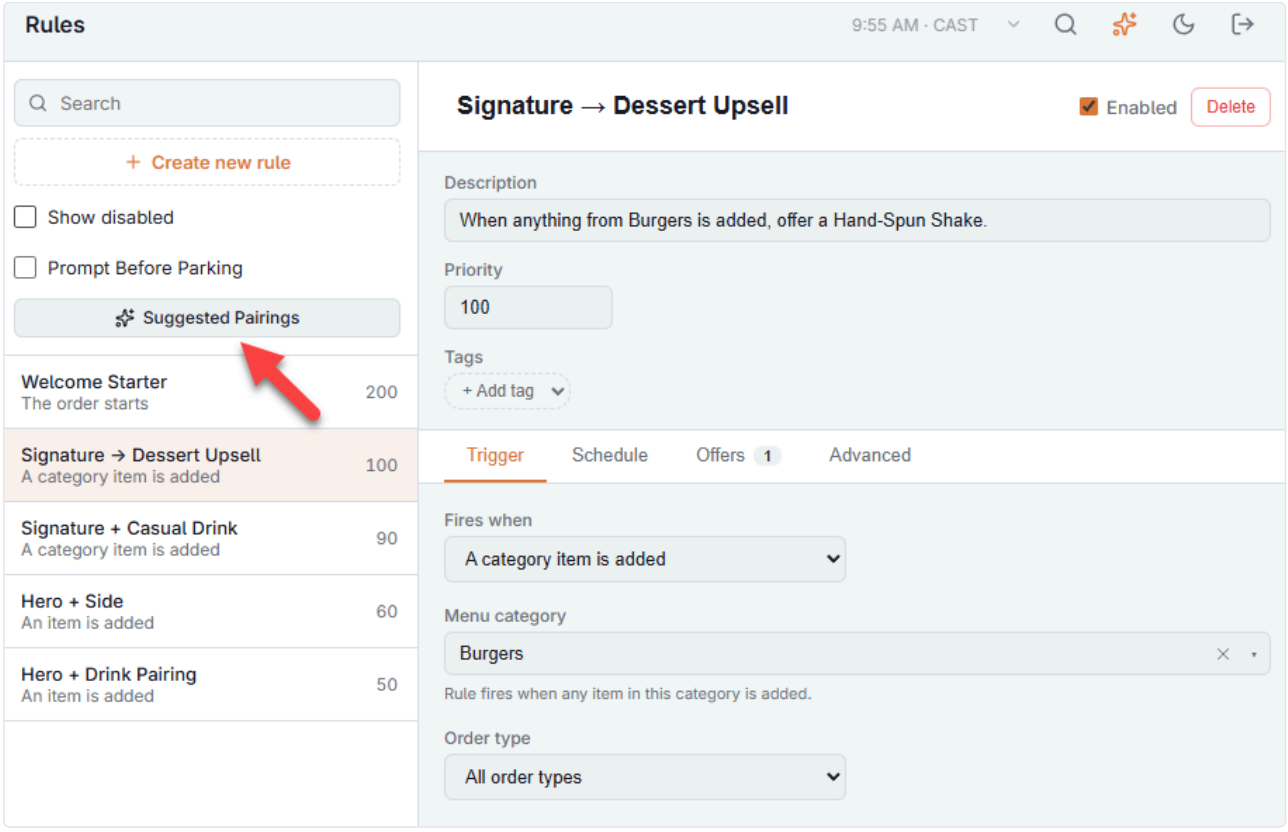
Suggested pairings

Discounts & Promotions › Suggestive Selling

View online ↗

See which items your guests order together and turn a pair into an offer in one click.

On the Suggestive Selling Rules page, choose **Suggested Pairings** in the header of the rule list. It shows the items on your regular menu that guests most often order together, from paid orders in the last 60 days.



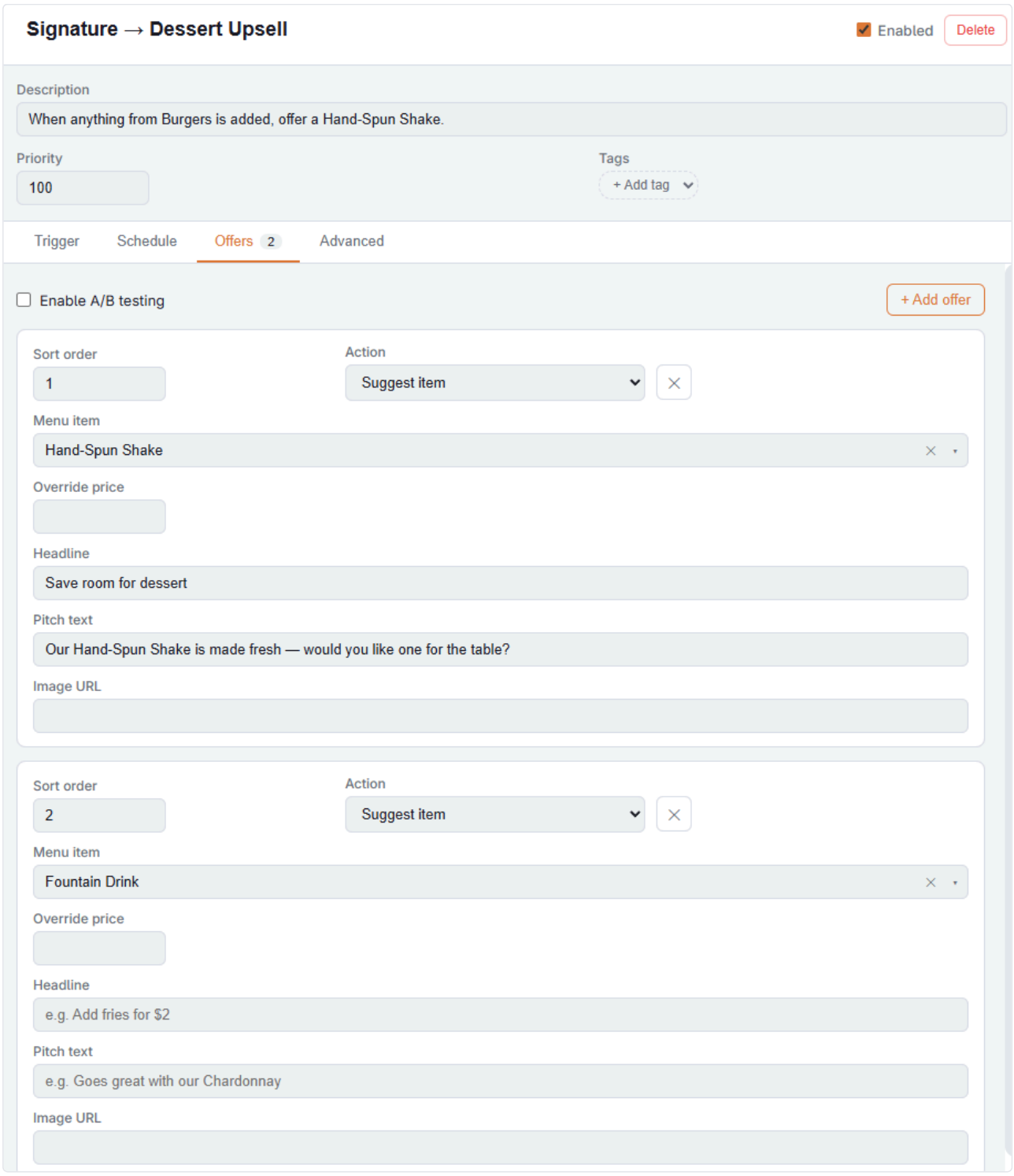
Reading the table

- **When Added** and **Offer** — the first item and the item to offer with it.
- **Ordered Together** — the share of the first item's orders that also had the second.
- **Lift** — how much likelier that is than on an average order; 2.0× means twice as likely.

Only pairs seen on 10 or more orders and at least 1.2× likelier are listed. **Has A Rule** marks a first item that already triggers a rule.

Creating a rule

Create Rule makes an Item Added rule for the first item that offers the second, named for example *Burger → Fries*, with a headline and a short script for the server. The rule is created **disabled** and opens in the rule editor: check the wording and settings, then enable it. See Suggestive-selling rules.



Bar menu items are not included here; the assistant's *what sells together?* covers everything — see Guests: reservations, regulars and upselling.

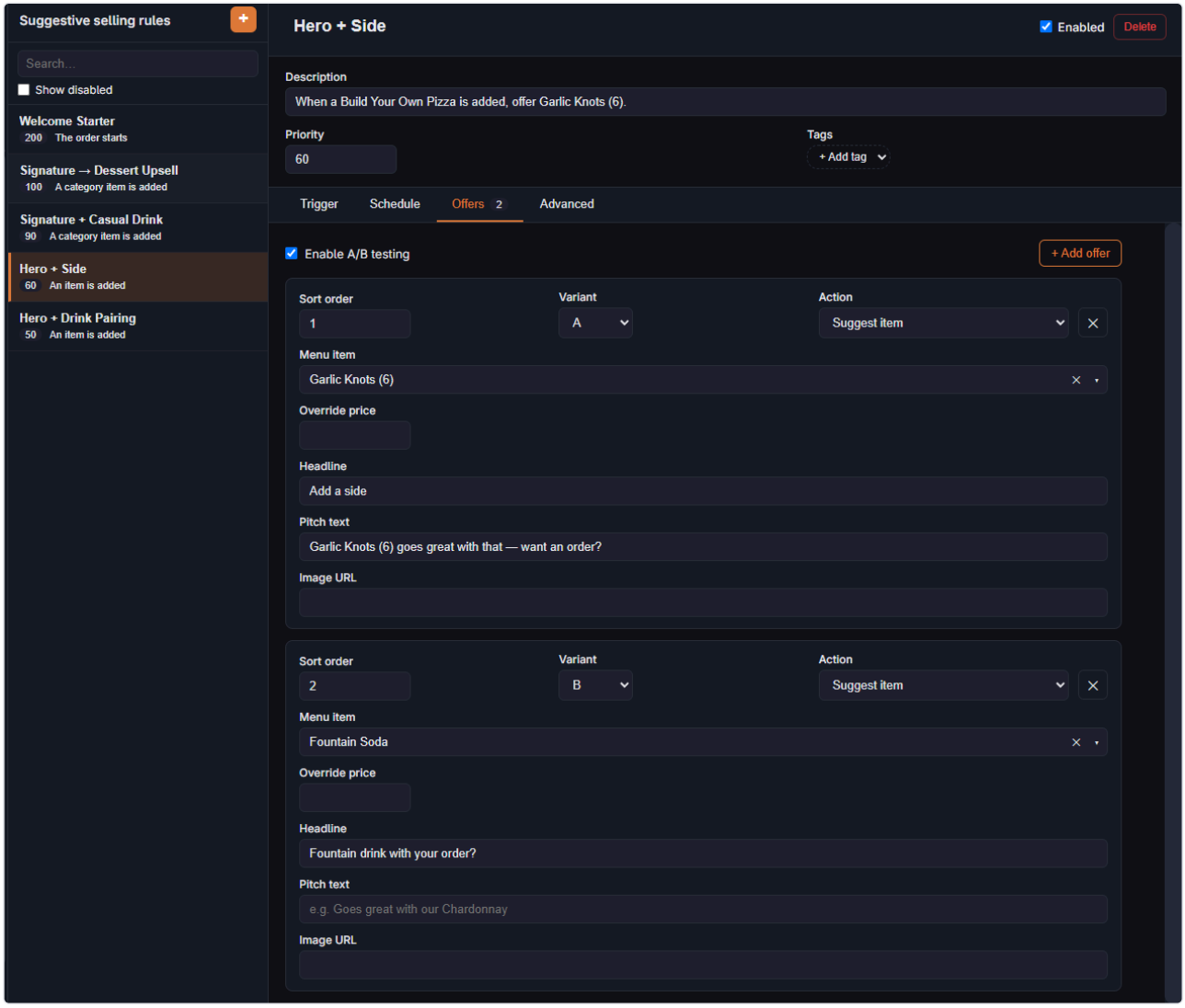
A/B testing offers

Discounts & Promotions › Suggestive Selling

View online ↗

Split-test two versions of an offer on the same trigger and compare conversion per variant.

Enable A/B Testing, on the **Offers** tab of a rule in **Back Office › Discounts & Promotions › Suggestive selling › Rules**, turns the rule into a split test. You keep one trigger and one schedule but give the rule two competing versions of the offer — a different headline, pitch text, image, suggested item or price — marked **Variant** A and B.

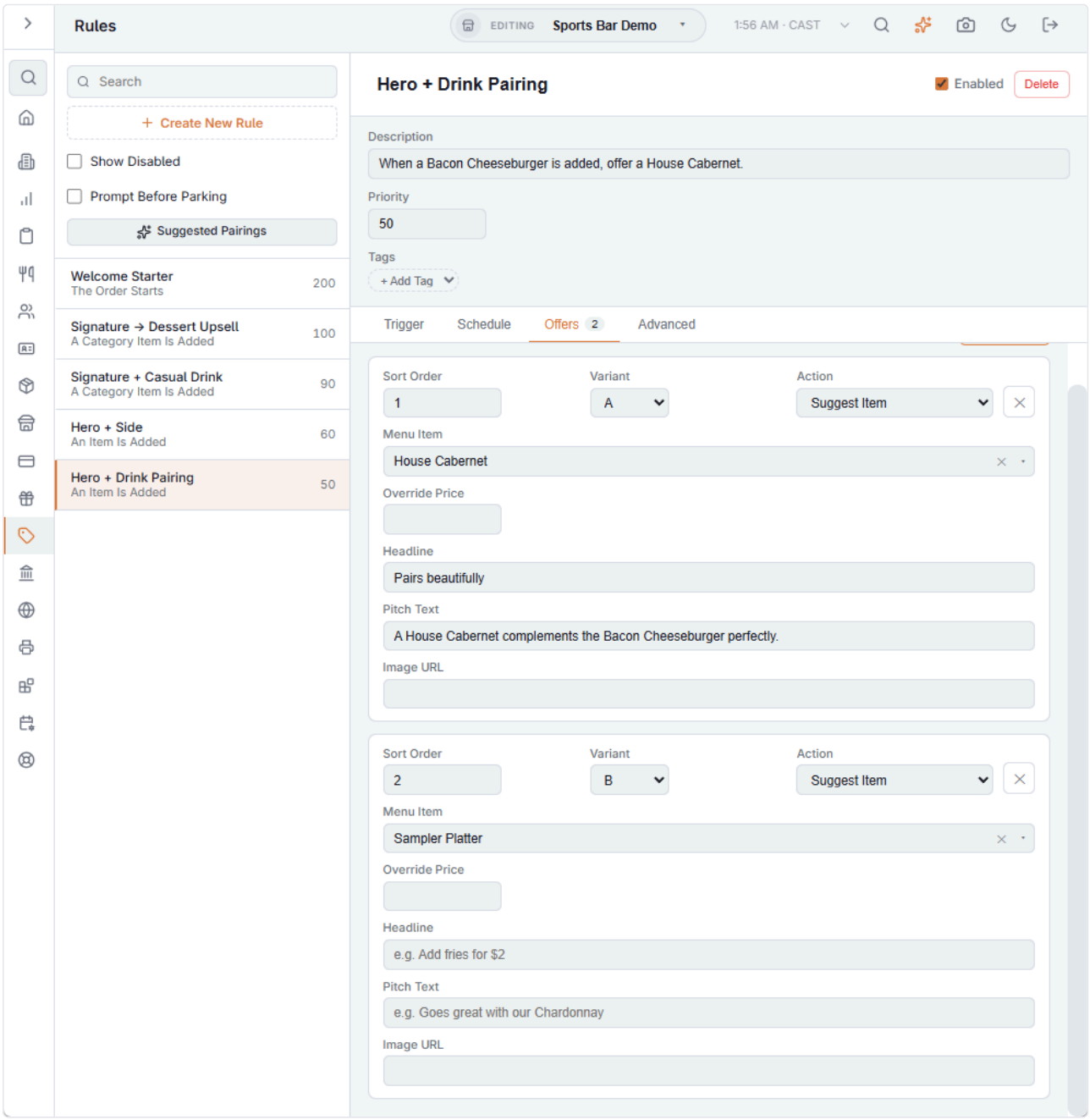


What changes when it’s on

- **Off** — the rule always shows its first offer by sort order.
- **On** — each time the rule fires and it has at least one A and one B offer, A or B is picked at random with even odds. The variant shown is recorded with the offer, so every accept or dismissal is credited to the version the server or guest saw.

> If the rule doesn’t have both an A and a B offer, nothing changes: the first offer is shown.

Reading the results



On the **Rule Performance** tab of Suggestive reports, a rule under test shows each variant on its own row, with times shown, accepted and the accept rate, so you can compare “Add garlic knots for $6.95?” against “Make it a combo — add garlic knots” for the same trigger.

- There is no automatic winner: the split stays even until you act. When the numbers are clear, remove the losing offer or switch the test off, so every fire shows the winner.
- With **Offer On Web Ordering** on, online offers draw variants the same way and count in the same totals.
- Give the test enough offers before judging; a handful per variant proves nothing.

Performance programs and contests

Discounts & Promotions › Suggestive Selling

View online ↗

Running a sales contest or target program, and how staff are scored against it.

Back Office › Discounts & Promotions › Suggestive selling › Programs turns suggestive selling into staff goals with rewards. A program sets a goal for a period — a shift, a day, a week, a month or a contest's dates — and each employee who reaches it earns the program's reward, with bigger rewards for going further.

Creating a program

Press **Create New Program** (+). A program called *New Program* is added and opens: enabled, per shift, with a goal of 20 accepted upsells. Change it as below; every change saves as you make it. **Show Disabled** also lists programs that are switched off.

- The name and the **Enabled** switch: off, the program stops tracking progress. **Delete** removes it.
- **Description** — one line on what counts, shown to staff under the name.

Goal

- **Period** — **Per Shift**, **Per Day**, **Per Week**, **Per Month**, or **Custom Date Range** with **Custom Period Start** and **Custom Period End** for a one-off contest. Progress starts again each period.
- **Goal Type**:

Goal type	Counts
Total Upsells	Accepted suggestions, any rule.
Specific Rule	Accepted suggestions of the **Target Rule**.
Rule Tag Group	Accepted suggestions from rules with the **Target Tag**.
Upsell Revenue	The sales of the accepted suggestions.
Accept Rate	Accepted suggestions out of those shown; written as 0 to 1, so 0.30 is 30%.

- The goal itself — **Goal Count**, **Goal Revenue** or **Goal Rate (0 – 1)**, depending on the type.
- **Minimum Offers Shown** (accept rate only) — how many offers an employee must be shown before their rate counts, so one offer accepted out of one isn't 100%.

Rewards

- **Base Reward** — earned at 100% of the goal: the **Reward** staff see (for example "$5 gift card" or "leave 30 minutes early") and an optional **Amount**, the cash value used on the Payouts page.
- **Tier 2 Reward** — tick it to add a bigger reward: **Unlock At** is a multiple **Of Goal** (1.5 means 150% of the goal), with its own Reward and Amount.
- **Tier 3 Reward** — a third level; Tier 2 must be on first.

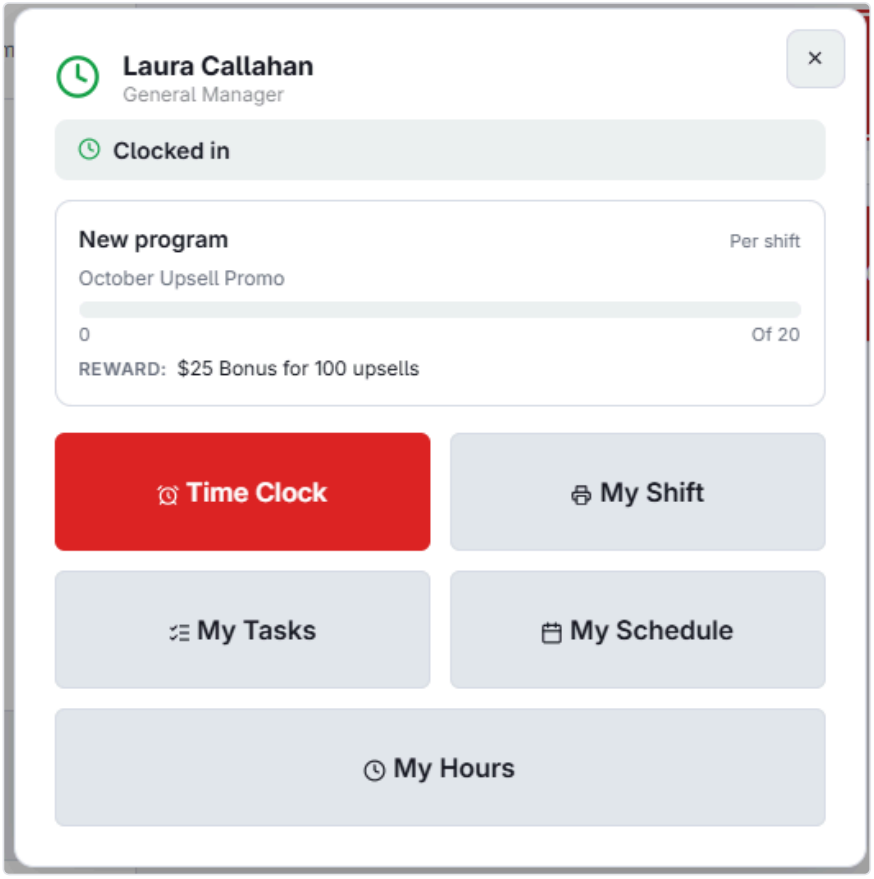
Each reward an employee reaches in a period is added to Payouts and commissions straight away, to be paid and marked paid.

Visibility & Active Window

- **Active From** and **Active Until** — when the program runs; leave **Active From** blank to start now.
- **Notify User On Milestones** — the employee gets an alert at the register at 50% of the goal, at 100% and at each tier.
- **Show On Welcome Screen** — the program's team standings appear on the welcome screen tile (Server progress and team standings).

What staff see

Each running program appears as a card on the employee's **My Status** screen: the program's **name**, its **description** underneath, the period and the time left, progress toward the goal, and the reward.



Give each program a clear name and a one-line description of what counts, such as *Suggest a dessert to every table of two or more*. Without a description, staff see only the name and the numbers.

Server progress and team standings

Discounts & Promotions › Suggestive Selling

View online ↗

Where staff see their own progress and how they compare with the rest of the team.

Two tiles let staff track suggestive-selling performance in real time: a personal **progress card** and a **team standings** leaderboard. Both update as offers are accepted during the shift.

Your progress card

The progress card shows where you stand on every active program you're part of. For each one you'll see:

- A **progress bar** with markers for each reward tier.
- Your **current value against the goal** (rate, count, or revenue, depending on the program).
- The **tier you've reached**, shown as a chip.
- The **period** and its time window.

> Hover or tap the bar for a tooltip with the reward preview — what you'll earn at the next tier.

The card appears wherever progress is useful — the register user drawer, the welcome screen, and your back-office profile.

Team standings

The team standings tile on the welcome screen is a leaderboard. Each program with standings enabled shows its own card with the period and target, then the **top-ranked staff** for the current period.

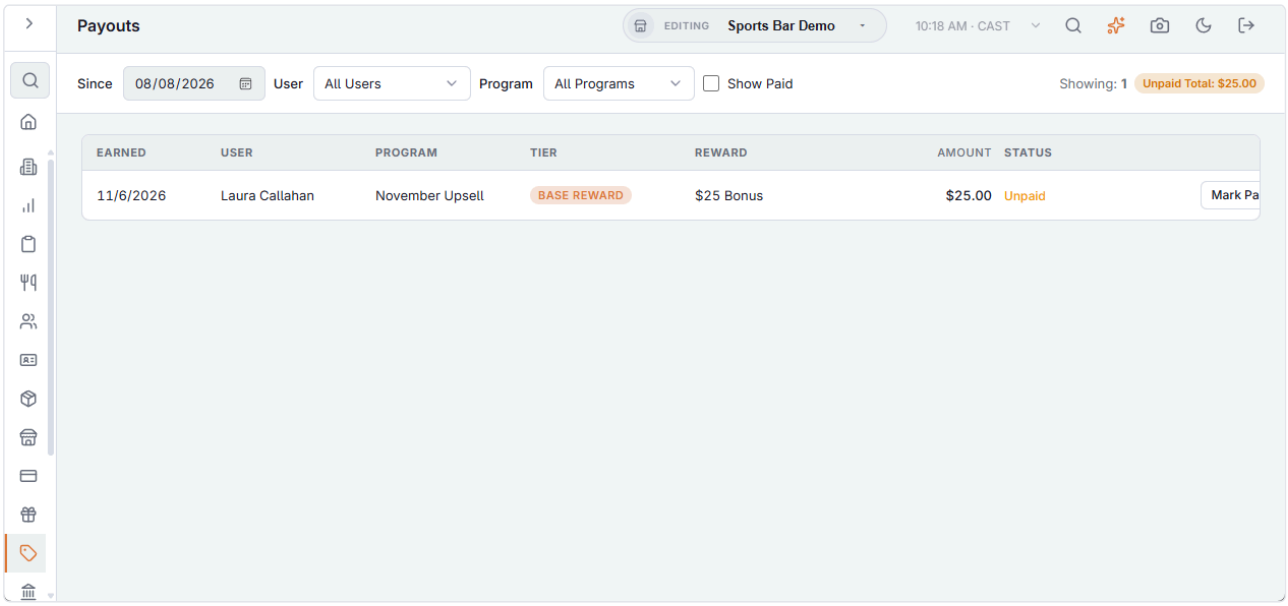
> **Note:** A program only appears on the standings tile if it's set to show on the welcome screen, and a card stays empty until there's activity in the current period.

Payouts and commissions

View online ↗

Calculating what staff have earned from offers and contests, and paying it out.

Back Office › Discounts & Promotions › Suggestive selling › Payouts is the ledger of the rewards staff earn through Performance programs and contests. A row is added the moment an employee reaches a reward in a program's period; here you see what is owed and record what you have paid.



Filters

- **Since** — rewards earned from this date; it opens on 90 days ago.
- **User** and **Program** — one employee or one program, or all.
- **Show Paid** — off (the default) lists only what is still owed; on lists paid rewards too, after the unpaid ones.

The toolbar shows how many rows are listed and, in the unpaid view, the **Unpaid Total** of their amounts.

The rows

Column	Shows
Earned	The date the reward was reached, in the store's time.
User	Who earned it.
Program	The program it came from.
Tier	**Base Reward**, **Tier 2 Reward** or **Tier 3 Reward**.
Reward	The reward text of that tier.
Amount	The tier's cash value, when the program has one.
Status	**Unpaid**, or **Paid** with the payment date on hover and the note under it.

Marking a reward paid

1. Press **Mark Paid** on the row.
2. Optionally write **Notes**, for example "paid in cash" or a payroll reference.

3. Press **Confirm**. The row is marked paid with today's date and leaves the unpaid view; **Cancel** closes it without changes.

> Marking paid only records that the reward was settled; it doesn't move money. Pay through your normal payroll or cash process, then record it here so the ledger stays right.

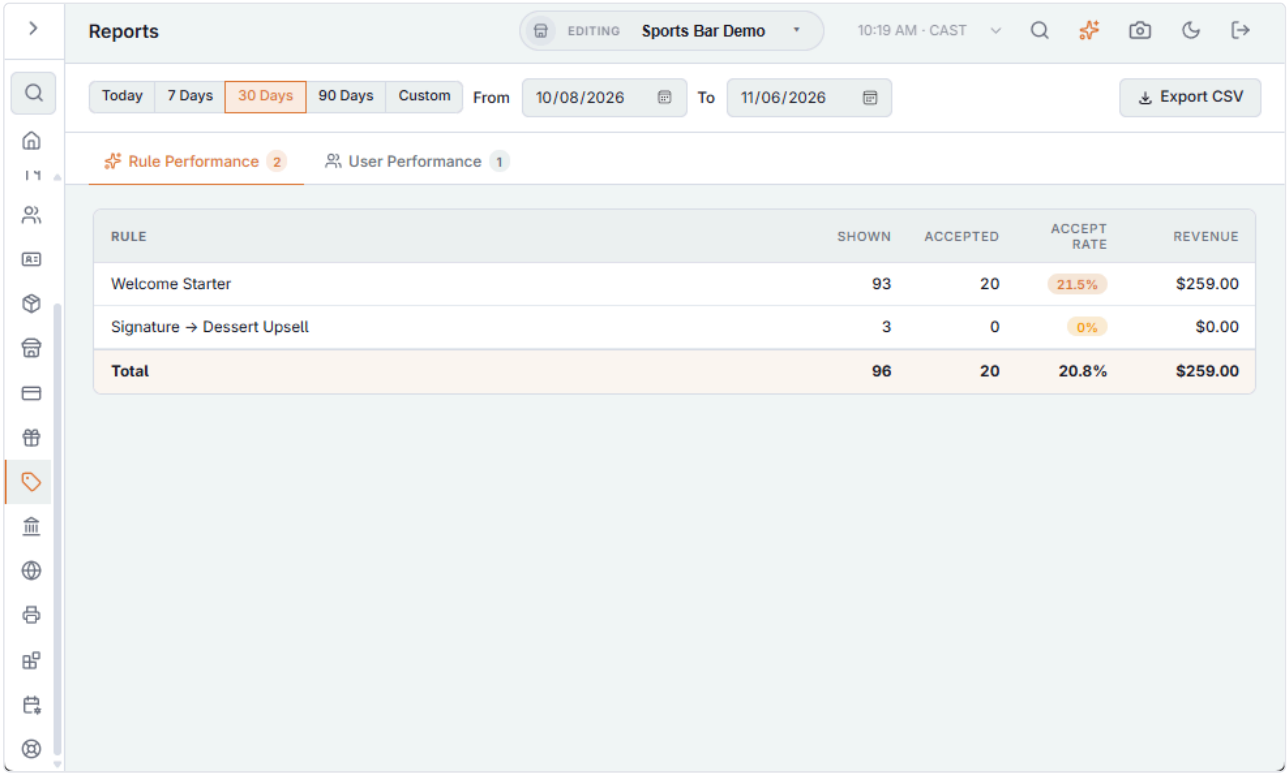
Suggestive reports

Discounts & Promotions › Suggestive Selling

View online ↗

Which offers converted, which servers used them, and what the suggestions were worth.

Back Office › Discounts & Promotions › Suggestive selling › Reports shows how your offers perform: how often they are shown, how often they are accepted, and the sales they add — by rule and by employee.



Choosing the dates

Pick **Today**, **7 Days**, **30 Days** (where the page opens) or **90 Days**, or set **From** and **To** yourself, which switches to **Custom**. Dates are store days, and both **From** and **To** are included; the presets end today. Both tabs use the same dates.

Rule performance

One row per rule, the rules with the most revenue first, and a **Total** row. A rule under A/B test shows each variant on its own row, named with the rule and the variant letter (for example *Rule · A* and *Rule · B*), and the variants of a rule stay together. The letter shows only when the rule had more than one variant in the dates (A/B testing offers).

Column	Meaning
Shown	Times the offer was presented.
Accepted	Times the item was added from the offer.
Dismissed	Times it was turned down.
Ignored	Times it was shown and left without an answer.
Accept Rate	Accepted out of shown, as a percentage. Rates of 50% and more show in green.

Column	Meaning
Revenue	The sales of the items added from the offer.

An offer replaced by a newer one before anyone answered is not counted.

User performance

One row per employee, with **Shown**, **Accepted**, **Accept Rate** and **Revenue**, and a **Total** row.

Exporting

Export CSV downloads the tab you are on, for the same dates, with the column headings in the language the Back Office is shown in.

> Many shown with a low accept rate usually means the rule fires on the wrong orders: check its trigger. Few shown means the trigger rarely matches.

CHAPTER 20

Cash Management

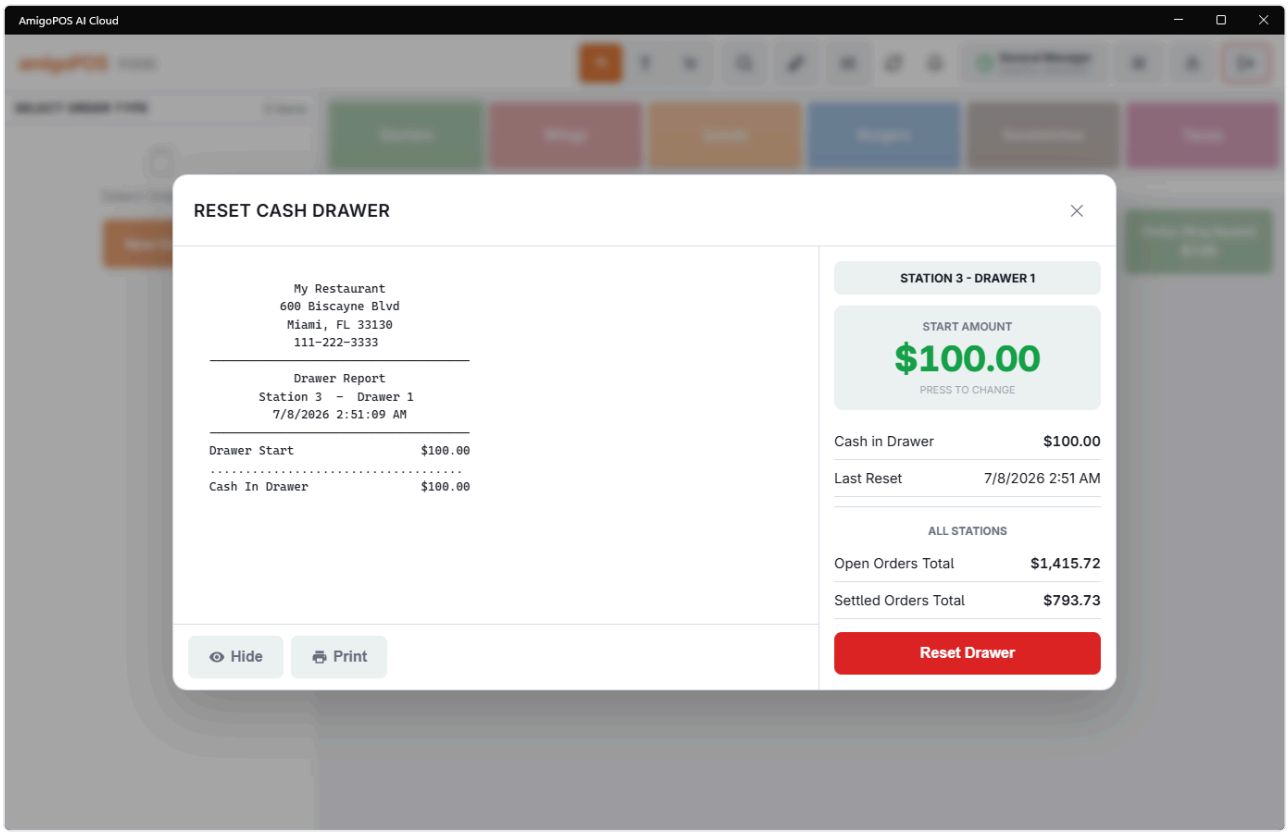
Cash drawers

What a cash drawer is

View online ↗

The drawer as the unit of cash accountability.

In CloudPos a **cash drawer** is the physical till plus a running record of the cash in it. Every cash event is written against it — opening cash, cash payments and change, drops, payouts, deposits — so at any moment the register knows what *should* be in the till, per currency, and every count compares the till with that figure. Drawers are set up at **Back Office › Cash Management › Cash Drawers**.



The parts

- **The drawer entry** — name, home station, drawer number, default opening float, and the levels that call for a count or a drop. See Creating and editing cash drawers.
- **The hardware** — the till is wired to its station's receipt printer, which opens it. See Cash Drawer Quick Setup & Troubleshooting.
- **Who may use it** — job permissions. See Cash-drawer permissions.
- **Currencies** — a store that takes more than one currency has every expected amount and count kept per currency. See Accepting Foreign Currency.

The lifecycle

1. **Claim** — with Assign cash drawers on, a cashier picks the drawer at clock-in and enters the cash already in it. See Assigning drawers to users at clock-in.
2. **In use** — payments, drops and payouts change the expected amount. A spot count checks it at any time without closing anything. See Drawer states overlay and spot count.

3. **Hand-off** — when the cashier clocks out, the drawer is marked **Count required**, or **Pending Handoff** if they counted it (with **Count Drawer At Clock-Out** on). The next person counts or checks it before taking it over, so a drawer can run across several shifts.
4. **Reset** — a manager counts and resets the drawer: the over or short is recorded and the drawer starts again from zero. See Drawer reset at end of shift.

More › Drawer States shows every drawer's state at a glance.

> Cash should only move with a recorded event. Cash that leaves without a drop or payout shows up as a variance at the next count.

Cash Drawer Quick Setup & Troubleshooting

Cash Management › Cash drawers

View online ↗

The three things a drawer needs and where each is set, two drawers on one printer, and a checklist for a drawer that won't open.

This is the fastest path to a working cash drawer, and what to check when one won't open. A drawer needs three things, set in three places:

1. **A printer that has the drawer** — the receipt printer the drawer is plugged into, flagged in the Print Agent.
2. **A drawer entry** — the money side (name, station, drawer number, opening float), at **Back Office › Cash Management › Cash Drawers**.
3. **A payment that opens it** — the Cash method, set to open the drawer.

> Drawers are opened by the **Print Agent**, which sends the kick to the receipt printer the drawer is wired to. This works however that printer is connected (a network printer, or a USB printer installed in Windows on a Windows agent); the drawer is configured once, on the printer.

Set up a drawer

1. Plug the drawer cable into the receipt printer's **DK** port (not the pole-display port). For two drawers on one printer, use a **Y-cable**. Power everything on.
2. Open the **Print Agent**, select the receipt printer and tap **Test print**. If paper does not print, fix the printer first — nothing else matters until it prints.
3. Still in the Print Agent, **Edit** the printer, turn on **Has cash drawer**, choose the drawer **brand** (**Epson** for Epson and most ESC/POS printers, **Star** for Star, or **Custom** to type exact codes) and save.
4. In **Back Office › Hardware & Printing › Print Routing**, check that this station's **Receipt Printer** row is the printer the drawer is plugged into. **Station Hardware**, opened on the register itself, names that printer and has a **Test** button for each drawer.
5. In **Back Office › Cash Management › Cash Drawers**, type a name in **New cash drawer…** and add it. Pick the **POS Station** with that printer, set the **Drawer number** (1, or 2 for the second drawer on a Y-cable), enter the **Default opening float**, keep **Enabled** ticked and select **Save**. See Creating and editing cash drawers.
6. *Optional:* on the same screen, add the drawer's currencies under **Mandatory action thresholds** and set the count, drop and over/short levels.
7. In **Back Office › Payments › Payment Methods**, check that the **Cash** method has **Opens drawer** on.
8. **Test it:** ring a cash sale, or use **More › No Sale**. The drawer should open. No Sale needs at least one reason on the **No Sale Reasons** tab of **Back Office › Store Setup › Order Entry Screen** (No sale — opening the drawer without a transaction).

> **Pick the right brand.** Epson and Star codes are not interchangeable — a drawer wired for one won't open on the other. If the brand is right and the drawer still won't open, switch the brand to **Custom** and enter the exact codes from the drawer or printer manual.

Two drawers on one printer

One receipt printer can drive two drawers through a **Y-cable** on its DK port. The kick picks which one opens, so nothing else is needed beyond the cable:

1. Wire both drawers to the printer with a Y-cable.
2. Create **two** drawer entries for the station — one with **Drawer number** 1, one with 2.
3. Each cashier picks their drawer at clock-in; a cash sale then opens that drawer.

> With the **Custom** brand, the printer's **Drawer 1 codes** and **Drawer 2 codes** (Print Agent, editing the printer) set the exact bytes for each drawer. With Epson and Star the second drawer is handled for you.

Drawers without a printer

Drawers that connect directly to the POS device by USB or Bluetooth, with no receipt printer, are not supported. Use a printer-driven drawer; the printer can be a network printer, or a USB printer on a Windows agent.

My drawer won't open — checklist

Work through these in order. Most dead drawers are one of the first three.

1. **Does Test print work?** If the receipt printer won't print, it is a printer or connection problem, not a drawer setting. Fix that first.
2. **Is Has cash drawer on?** In the Print Agent, for that exact receipt printer. This is the most common miss.
3. **Right port?** The cable must be in the printer's **DK** port, not the pole-display port.
4. **Right receipt printer?** The station's **Receipt Printer** row in Print Routing — named on **Station Hardware** — must be the printer the drawer is attached to.
5. **Is Cash set to open the drawer? Payments › Payment Methods**, the Cash method, **Opens drawer**.
6. **Right brand?** In the Print Agent the brand must match the printer. Try **Custom** with exact codes if it still won't fire.
7. **Second drawer not opening?** Check that the drawer entry's **Drawer number** is 2 and the Y-cable's second drawer is wired to its pin. On Custom, check the **Drawer 2 codes**.
8. **Is the drawer locked with its key?** A drawer locked with its key won't open electronically.

Two ways to test a drawer

- **From the Print Agent** — **Edit** the receipt printer and press **Test drawer 1** or **Test drawer 2**. Only the pulse is sent, with the settings on screen. This tests the printer, the cable and the drawer, and nothing in Back Office.
- **From Back Office** — **Hardware & Printing › Station Hardware** on the register, **Test** next to the drawer. This goes the same way as a cash sale: Print Routing's Receipt Printer row, the Print Agent, the printer.

If the agent test opens the drawer and the Station Hardware test does not, the hardware is fine and the Receipt Printer row points at a different printer. See Printer settings explained.

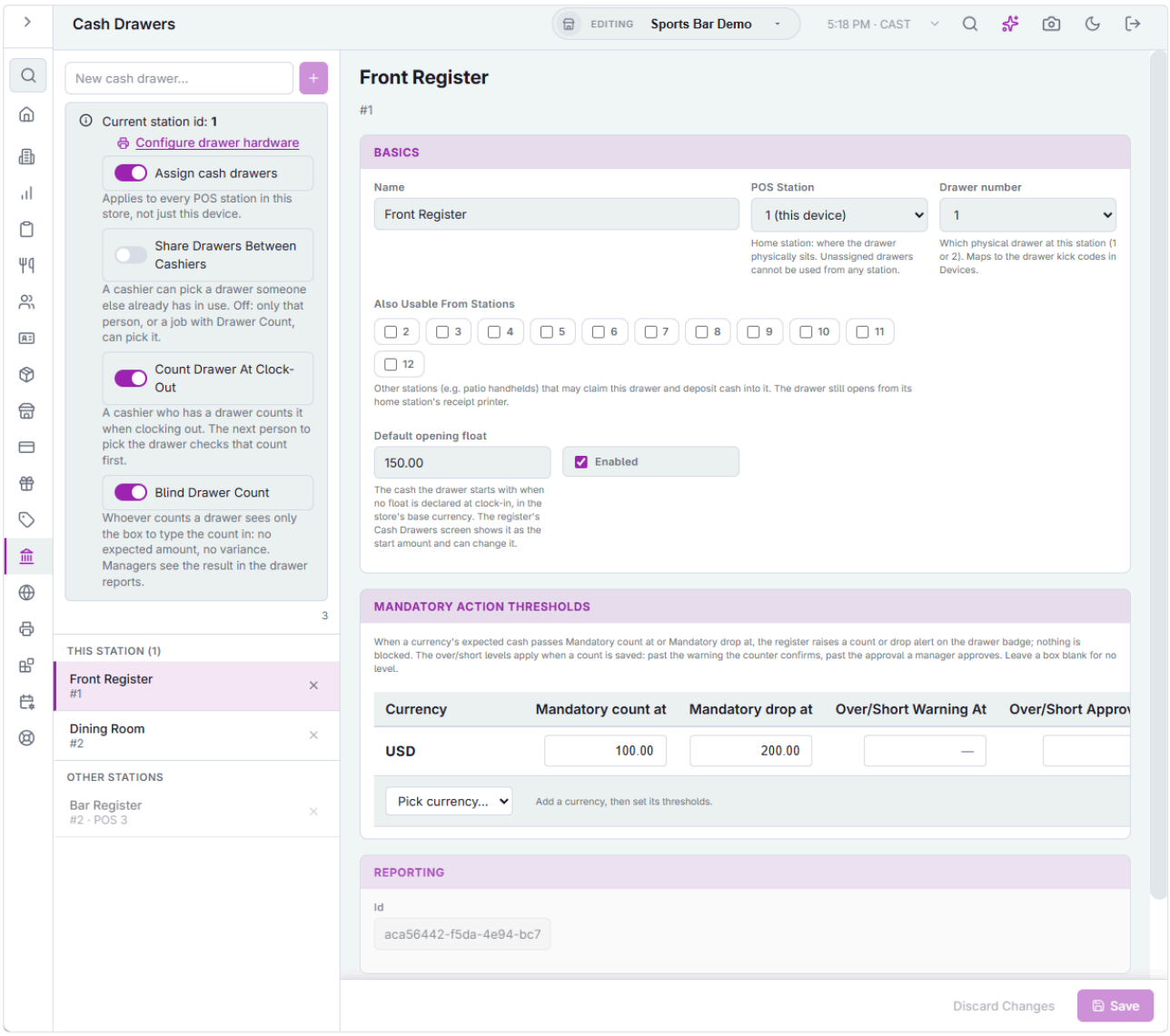
Creating and editing cash drawers

Cash Management › Cash drawers

View online ↗

Defining drawers in the back office and attaching them to stations.

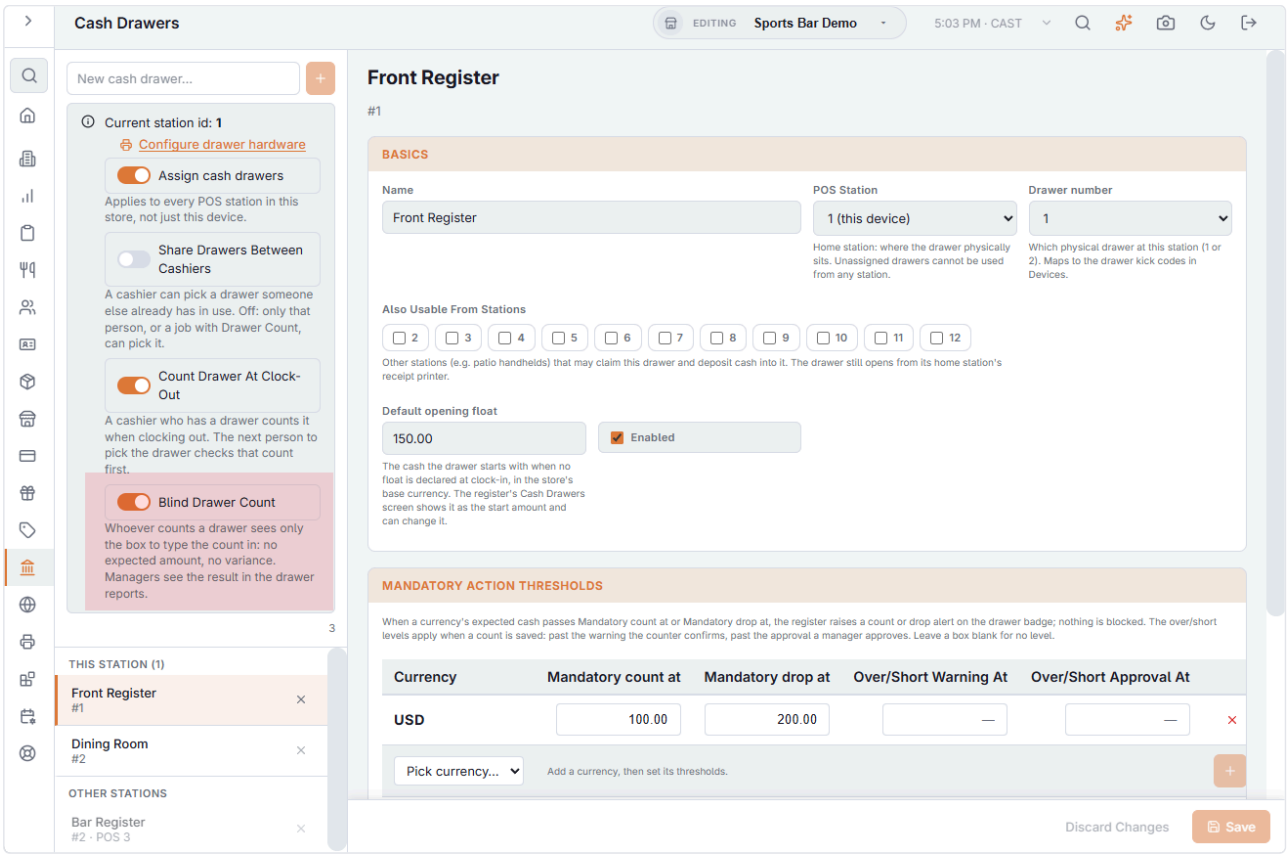
Back Office › Cash Management › Cash Drawers is where the store's cash drawers are set up: one entry per physical till, with the station it sits at, its number on that station's receipt printer, its default opening float and the cash levels that call for a count or a drop. Four store-wide switches for drawers sit at the top of the list.



The box at the top of the list

- **Current station id** — the station number of the device you are on, or **Unassigned**.
- **Configure drawer hardware** — opens **Hardware & Printing › Station Hardware**, where the drawers wired to this station's receipt printer are tested. See Cash Drawer Quick Setup & Troubleshooting.
- **Assign cash drawers** — on, a cashier picks a drawer at clock-in, and the cash they take is recorded against that drawer. It applies to every station in the store, not just this device, and is the same setting as on General Settings. See Assigning drawers to users at clock-in.
- **Share Drawers Between Cashiers** — a cashier can pick a drawer someone else already has in use. Off (the default): only that person, or a job with **Drawer Count**, can pick it.
- **Count Drawer At Clock-Out** — a cashier who has a drawer counts it when clocking out, and the next person to pick the drawer checks that count first. Off by default.
- **Blind Drawer Count** — whoever counts a drawer sees only the box to type the count in: no expected amount, no variance. Managers see the result in the drawer reports. See Drawer states overlay and spot count.

The switches save as soon as you change them. A register picks up the change the next time it loads its data.



The drawer list

This station lists the drawers whose home is the device you are on. When the store picker has Back Office on another store, no station of that store is this device, so none is marked. **Other stations** lists the rest, each with its number, its station (or **Unassigned**) and the stations it is shared with. Disabled drawers and drawers of other stations are greyed.

- To add a drawer, type its name in **New cash drawer…** and add it. It starts enabled, with no station and a float of 0.
- To remove one, use the delete button on its row and confirm. The drawer leaves the list; its history stays in the reports. A drawer someone is clocked in with can't be deleted: *This drawer could not be deleted. A drawer in use can be deleted once its cashier clocks out.*

Basics

- **Name** — what cashiers see when they pick a drawer, for example *Front counter* or *Bar*.
- **POS Station** — the home station: where the drawer physically sits. The device you are on is marked **(this device)**. A drawer left **Unassigned** cannot be used from any station.
- **Drawer number** — which drawer on the home station's receipt printer: 1, or 2 for a second drawer on a split cable. It can only be set once a station is chosen, and no two drawers on one station can share a number. See Drawer numbers and kick codes.
- **Also Usable From Stations** — other stations, such as patio handhelds, that may pick this drawer and take cash into it. The drawer still opens from its home station's receipt printer.
- **Default opening float** — the cash the drawer starts with when nobody declares a float at clock-in, for example with Assign cash drawers off. The register's Cash Drawers screen shows and changes it as the start amount; changing it there needs **Change Drawer Start Amount** or a manager's approval.
- **Enabled** — clear it to take a drawer out of use without deleting it.

These fields save with **Save**. If the drawer number is already used on that station, the save stops with *Drawer number already in use on this station*.

Mandatory action thresholds

One row per currency the drawer takes. Pick a currency in **Pick currency…** and add it; only cash payment methods set to count in the drawer are offered. Leave a box empty for no threshold. Each box saves as soon as you leave it, and the row's delete button removes the currency.

Column	What happens when the drawer passes it
Mandatory count at	Expected cash above this amount raises a *Count required* alert for the drawer. After a count, the next alert comes when expected cash passes the lowest it has been since that count plus this amount.
Mandatory drop at	Expected cash above this amount raises a *Drop required* alert.
Over/Short Warning At	A count that is over or short by more than this asks the counter to confirm.
Over/Short Approval At	A count that is over or short by more than this needs a manager's approval to save.

The levels only raise alerts and ask for confirmation or approval; nothing is blocked. Alerts show on the register's drawer badge. A saved count clears the drawer's *Count required* alerts in the currencies counted; a *Drop required* alert clears once a drop brings the drawer under the level. See Mandatory count and mandatory drop thresholds.

Reporting

The drawer's **Id**, read-only, for support.

> One entry per physical till. Two enabled entries for the same till split its cash between them, and neither will count right.

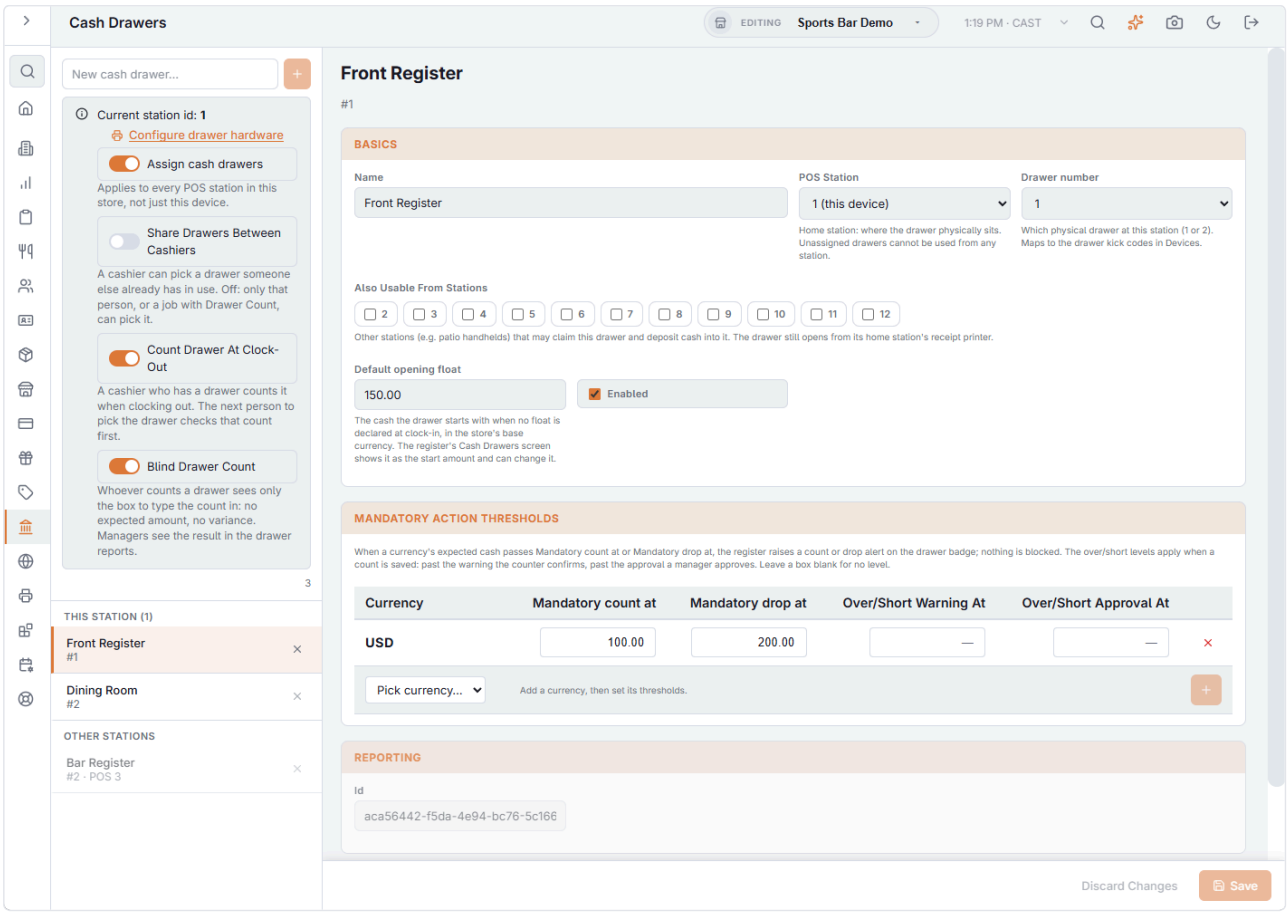
Drawer numbers and kick codes

Cash Management › Cash drawers

View online ↗

How the POS opens the right till when two drawers share one printer.

A till opens because its station's receipt printer sends it an electrical pulse — the **kick**. The **Drawer number** on the drawer's entry (**Back Office › Cash Management › Cash Drawers**) says which of the printer's two drawer outputs to pulse: 1, or 2 for a second till on a split cable. The codes the printer sends are set on the printer itself, in the Print Agent.



The chain

1. Something at the register opens the drawer.
2. The register asks the Print Agent to kick drawer 1 or 2 on the station's **Receipt Printer** (**Hardware & Printing › Print Routing**).
3. The Print Agent sends that printer's drawer codes — only if **Has cash drawer** is on for the printer.
4. The printer pulses its drawer port, and the till opens.

Without a connection, the register uses the station's offline printer instead, if one is set on Registered Devices.

What opens the drawer

- A payment with a method set to **Opens drawer** (**Payments › Payment Methods**). Cash normally is; cards normally are not.
- **No Sale** and **Payouts**.
- A drawer reset, when **Open drawer after reset** is on and the drawer's home is this station.

Recording a cash drop does not open the drawer.

A drawer shared with other stations still opens from its home station's printer.

When the wrong drawer opens, or none

- **Nothing opens** — work through the checklist in Cash Drawer Quick Setup & Troubleshooting: printer prints, Has cash drawer on, cable in the drawer port, the right Receipt Printer row.
- **The other till opens** — the two entries on that station have their drawer numbers swapped. Change them on **Cash Drawers**.
- **It opens on card payments** — that payment method has **Opens drawer** on. Turn it off in **Payments › Payment Methods**.

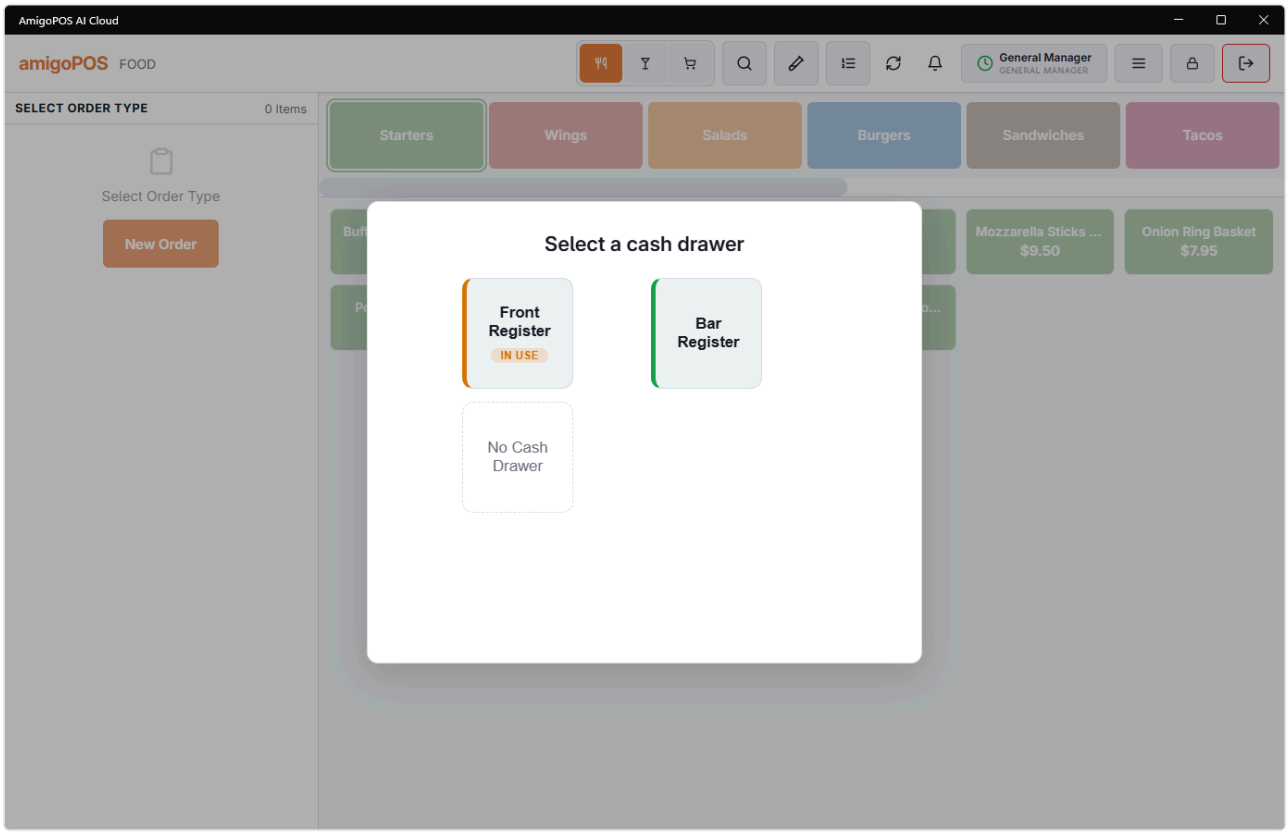
> A key opens the till without any record. Keep the keys with managers: a till opened by key mid-shift shows up as unexplained variance.

Assigning drawers to users at clock-in

View online ↗

Which drawer a user gets at clock-in, and what claiming one makes them responsible for.

With **Assign cash drawers** on (**Back Office › Cash Management › Cash Drawers**, or General Settings), a cashier picks a cash drawer when they clock in, and the cash they take, drop or pay out is recorded against that drawer and against them. What the cashier sees step by step is in Claiming a cash drawer at clock-in.



Who is asked to pick a drawer

The **Select a cash drawer** screen opens after clock-in when all of these are true:

- **Assign cash drawers** is on;
- employee banking is off (with banking on, nobody picks a drawer; see Employee Banking Settings);
- the job the employee clocked in under has both **Cash Sale** and **Settle Orders**.

Kitchen and other non-cash jobs skip it. An employee who skipped it, or needs another drawer, uses the **Cash Drawers** button on the time clock.

The drawers offered

The screen lists the drawers whose home is this station, and drawers shared with it. Each shows its name and its state:

State	What happens when it is picked
(no label) — available	The drawer is claimed and the opening cash screen opens.
Count required	The last person clocked out without counting it. The cashier counts it first; the claim goes through when the count is saved.
Pending Handoff	The last person counted it at clock-out, which happens when **Count Drawer At Clock-Out** is on (Cash Drawers page). The cashier checks that count against the drawer first.

State	What happens when it is picked
In use by …	Someone else has it. Only that person, or a job with **Drawer Count**, can pick it — or anyone, when **Share Drawers Between Cashiers** is on (Cash Drawers page).

A job with **Drawer Count** can take a drawer in any state without counting it first; the claim is marked as started on an uncounted drawer, which the variance report shows. **No Cash Drawer** clocks the employee in without a drawer: cash payments are then not offered to them.

Opening cash

Opening cash in drawer asks for what is already in the drawer, one line per cash currency the store takes. Leave a line blank for a currency the drawer does not hold, or select **Skip**. If another open shift already declared the drawer's opening cash, the screen is skipped with *Drawer already opened this shift — opening count skipped*, so the opening is not counted twice.

Without a drawer

No Sale, **Payouts**, **Cash Drops** and **Employee Banking** need a drawer on the station. Without one, the register says so instead of opening them.

> For per-person accountability, give each cashier their own drawer. A drawer shared by several people is reconciled through the counts at each hand-off.

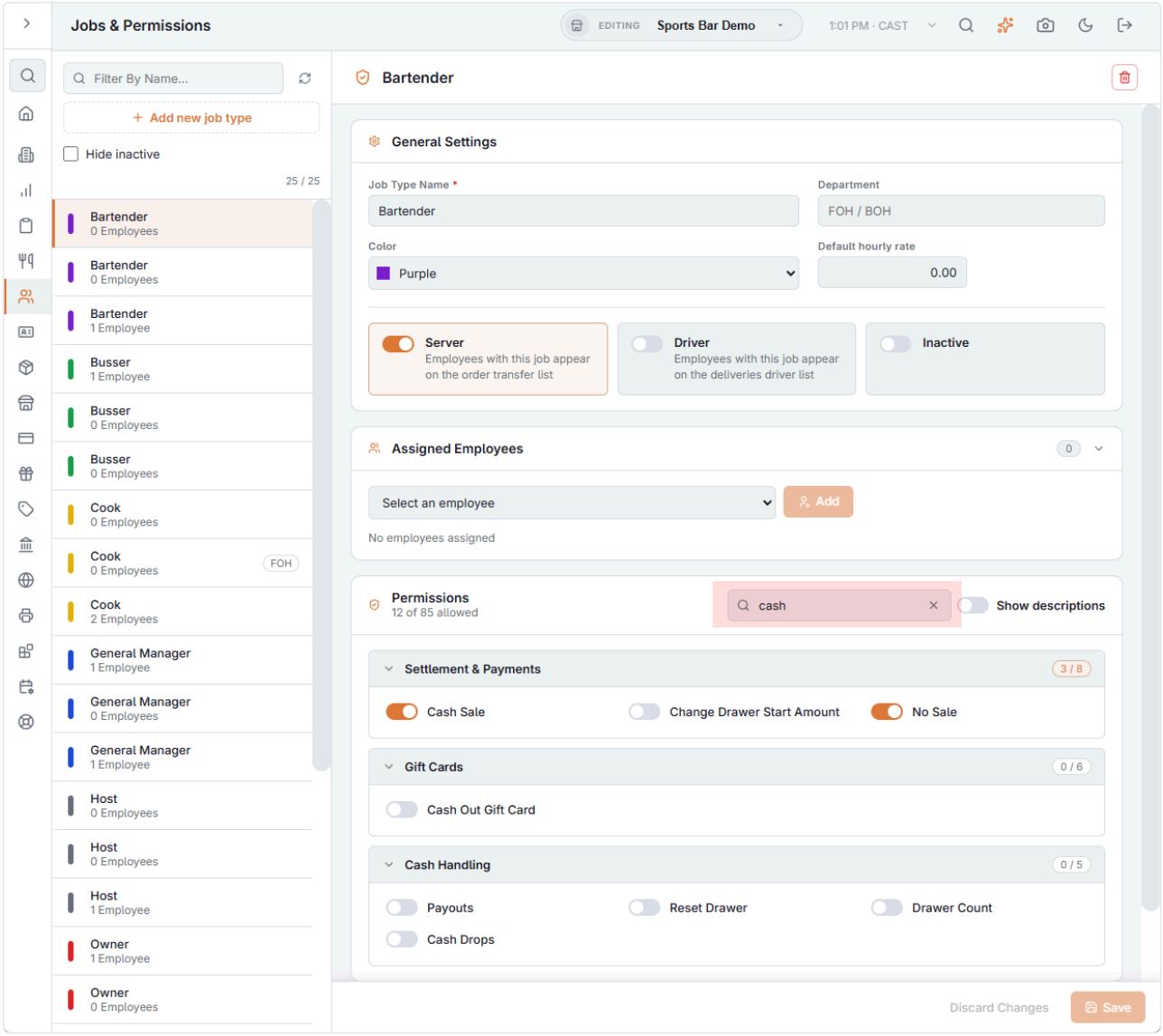
Cash-drawer permissions

Cash Management › Cash drawers

View online ↗

Which drawer actions — open, count, reset, drop — each job is allowed to perform.

What a person may do with cash drawers is set on their job, at **Back Office › Employees › People › Jobs & Permissions**. This is the map of the permissions that matter for drawers and where each one applies. See also Jobs, roles, and permissions.



Taking cash

- **Cash Sale** and **Settle Orders** (**Settlement & Payments** group) — together they let a job take cash payments. Only jobs with both are asked to pick a drawer at clock-in when **Assign cash drawers** is on.
- **No Sale** (same group) — opens the drawer with **No Sale** without a manager. Without it, a manager approves after the reason is picked. If the approval is refused, the drawer stays shut and *No Sale could not be completed.* shows. No Sale is the only way to open the drawer without a sale; there is no separate switch for it.
- **Change Drawer Start Amount** (same group) — changes a drawer's start amount on the register's **Cash Drawers** screen, and answers the start-amount prompt after a reset. Without it, a manager approves; **Skip** on the prompt leaves the amount as it is.

The Cash Handling group

Permission	What it allows
Payouts	Paying cash out of the drawer with **Payouts**. Without it a manager approves; a job with **Manager Screen** needs no approval.
Reset Drawer	Resetting a drawer on the register's **Cash Drawers** screen, also when it is opened with **Reset Here** from End Of Day or the Pre-EOD Summary. Without it, a manager approves just before the reset is saved, after the count.
Drawer Count	Taking over a drawer that is in use, needs a count or is pending hand-off, without counting first; dismissing drawer alerts; approving a count that is past its over/short approval level; clearing a pending hand-off on **Drawer States**; and seeing the cash in the drawer and alert amounts when **Blind Drawer Count** is on.

Permission	What it allows
Cash Drops	Recording a cash drop on **More › Cash Drops**, and voiding one there. Without it, a manager approves. Voiding a drop in Back Office needs **Void Records** instead.
Banking	Seeing other employees' banked shift figures in **Employee Banking** at the register, and voiding an employee deposit there or in Back Office. **Manager Screen** also allows the void, and in Back Office so do **Void Records** and **Delete Records**.

The manager part of the More menu

Manager Screen (**Manager Screen** group) shows the manager section of **More**: **Cash Drawers**, **Drawer Spot Count**, **Drawer States**, **Cash Drops**, **Drawer Activity Log**, **Variance Report** and **Employee Banking**. Someone with it can count any drawer without claiming one. Resetting a drawer, recording a drop and changing a start amount still follow **Reset Drawer**, **Cash Drops** and **Change Drawer Start Amount**: a manager whose job lacks one of them is asked for another manager. Each action is recorded under the name of the person who did it.

Manager approval

When an action needs a permission the person does not have, the register asks for a manager's approval on the spot. The approving manager needs the same permission and **Override**. The approval is recorded with both names; see Permission overrides and override log.

No Sale, Change Drawer Start Amount, Reset Drawer and Cash Drops are checked again when the register saves the action, so the approval cannot be skipped from another device. An approval lasts 5 minutes.

> Give cashiers what their job needs without a manager, so the manager is not the bottleneck, and keep everything that moves cash leaving a name in the records. Drawer events are read in Drawer activity log and variance report.

During the shift

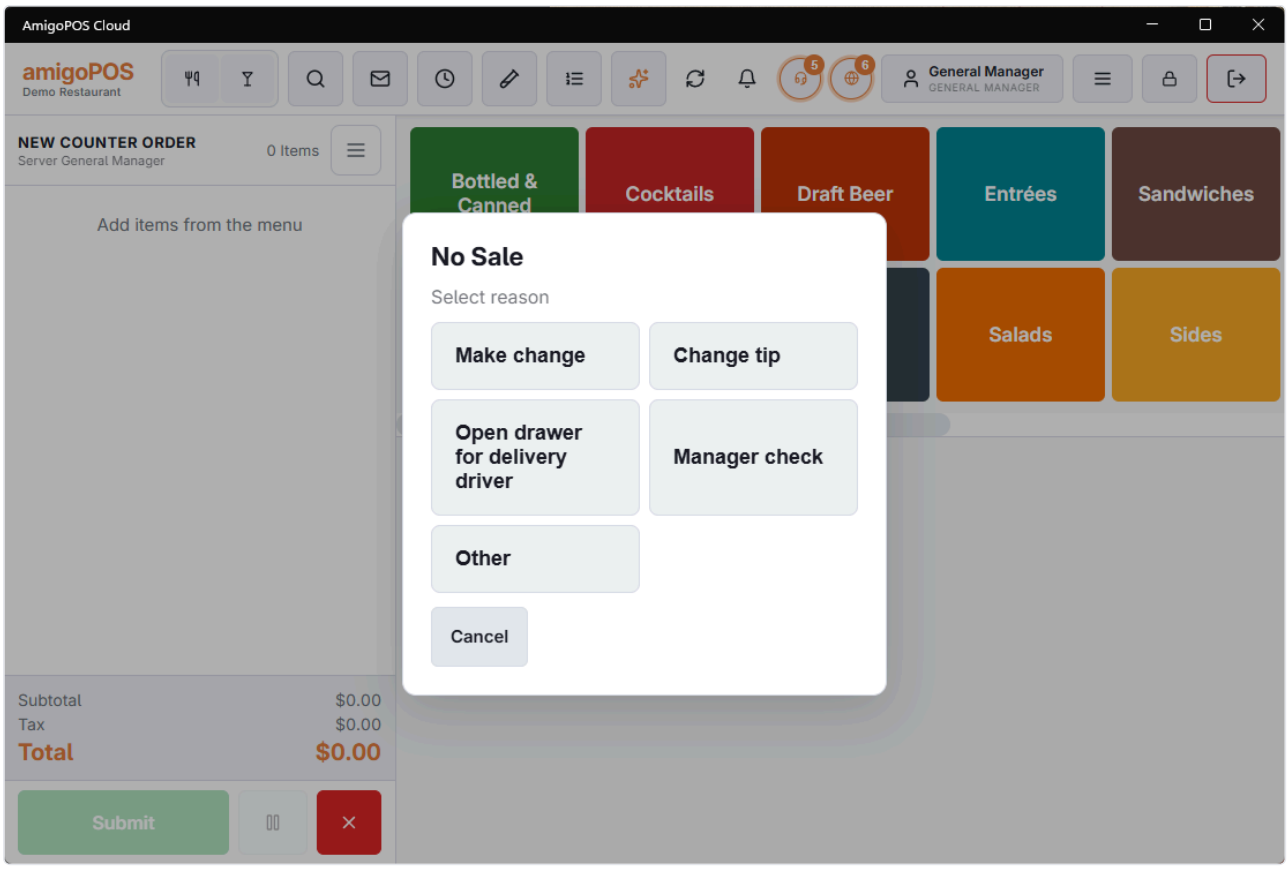
No sale — opening the drawer without a transaction

Cash Management › During the shift

View online ↗

Opening the till to make change, the reason it asks for, and everything the log records about it.

A **No Sale** opens the cash drawer without ringing anything up — to make change for a guest, fix a miscount or reach something in the till. Every No Sale is recorded with a reason. It is at the register under **More › No Sale**.



Opening the drawer

1. Open **More › No Sale**.
2. Under **Select reason**, tap the reason. Without the **No Sale** permission, a manager approves at this point. The drawer opens and *Drawer Open* confirms it. **Cancel** closes without opening anything.

Each No Sale is recorded with its reason, who did it, the station, the drawer and the time. If it can't be recorded, or the approval is refused, *No Sale could not be completed.* is shown and the drawer stays shut.

The reason list

The reasons are kept at **Back Office › Store Setup › Order Entry Screen**, **No Sale Reasons** tab. **Click To Add A No Sale Reason** adds a row; each row has the **No Sale Reason** (up to 50 characters) and a **Button position**, the order the reasons are listed in at the register. The delete button removes a reason after you confirm. With no reasons in the list there is nothing to pick, so No Sale can't be used; add at least one before the store opens.

What can stop it

- **Permission** — a job without **No Sale** needs a manager's approval, asked after the reason is picked and checked again when the No Sale is recorded. A refused approval leaves the drawer shut. See Cash-drawer permissions.
- **No drawer** — the station needs a drawer in use. If nobody has picked one, the register says so instead. See Assigning drawers to users at clock-in.
- **No connection** — the record is kept on the server, so No Sale shows *Not Available While Offline* until the station is back online.

Where No Sales show

- **More › Audit Trail** at the register.
- The End of Day report, as no sales by employee, and the **No Sales** count on the consolidated end of day. See The end-of-day report.
- **Analytics › Performance › Loss Prevention**, as no sales per 100 checks for each employee. See Loss Prevention: exceptions by employee.

When a drawer does not balance, read the No Sales next to the drops and payouts. A run of No Sales on one station, one person or one part of the evening is usually where the answer is.

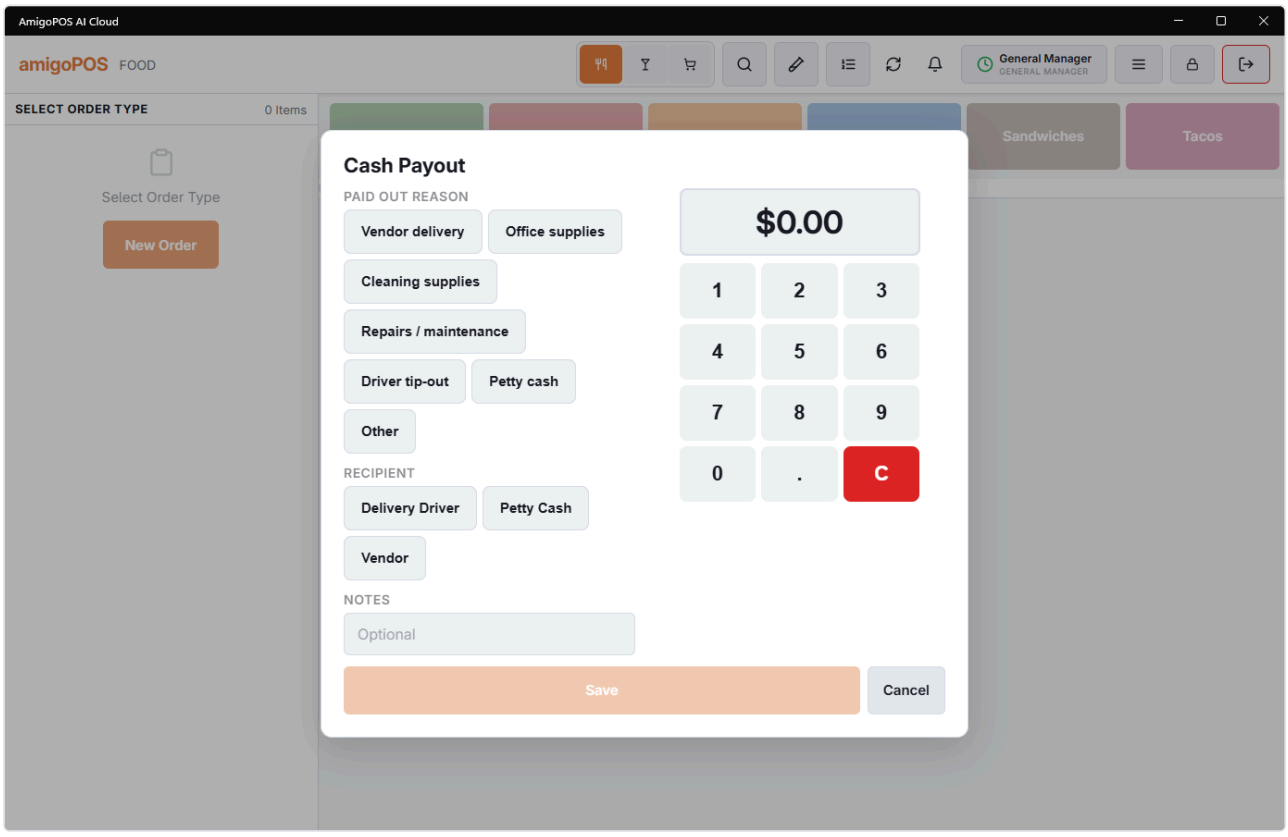
Cash paid-out and reasons

Cash Management › During the shift

View online ↗

Taking cash from the drawer for expenses, with a paper trail.

A **payout** records cash taken out of the drawer to pay for something — a delivery paid on arrival, emergency supplies. Recording it keeps the drawer's expected cash right and gives the bookkeeper a list of cash expenses with reasons. Payouts are made at the register with **More › Payouts**.



Making a payout

1. Open **More › Payouts**. The station needs a drawer in use, and a connection: offline it shows *Not Available While Offline*.
2. In **Cash Payout**, pick a **Paid Out Reason** and a **Recipient**.
3. Add **Notes** if you want, such as the invoice number (optional, up to 100 characters).
4. When the store takes more than one cash currency, pick the currency. Type the amount on the keypad. A payout in another currency is shown, printed and confirmed in that currency, for example *12.00 EUR*.
5. Select **Save**. It is available once a reason, a recipient and an amount above zero are chosen.

A job without **Payouts** needs a manager's approval at this point; a job with **Manager Screen** does not. The drawer then opens, a payout slip prints on the receipt printer with the amount, reason, recipient, notes, station, drawer, who made it and a **Received By** line to sign, and *Cash Payout* with the amount confirms it. If the payout can't be saved, *The payout could not be saved.* is shown.

The slip prints only while **Print Payout Slip** is on. It is on the **Cash Payouts** tab of **Back Office › Store Setup › Settle Screen**, on by default.

The reason and recipient lists

Both lists are kept at **Back Office › Store Setup › Settle Screen**, **Cash Payouts** tab, under the **Print Payout Slip** switch: **Payout Reasons** and **Payout Recipients**. Keep them specific (*Produce vendor*, *Cleaning supplies*) so the reports mean something. A payout cannot be saved

until both lists have at least one entry. See Settle-screen layout.

Where payouts show

- The drawer's expected cash goes down by the amount, so counts and the reset expect less.
- **Back Office › Activity › Cash Logs › Cash Paid Out** lists them, where a mistaken one can be voided; the void puts the amount back into the drawer's expected cash. See Cash logs in Back Office.
- **Paid Outs** on **Analytics › Analytics › Transaction Trends**, a **Payout** line in the **Drawer Activity Log**, the drawer reset report and the End of Day.

> Payouts are for cash expenses. Change for a guest is part of the payment, cash moved to the safe is a Cash drops to the safe, and a refund records itself through the refund. Keep the signed slip in the till until the drawer is reset.

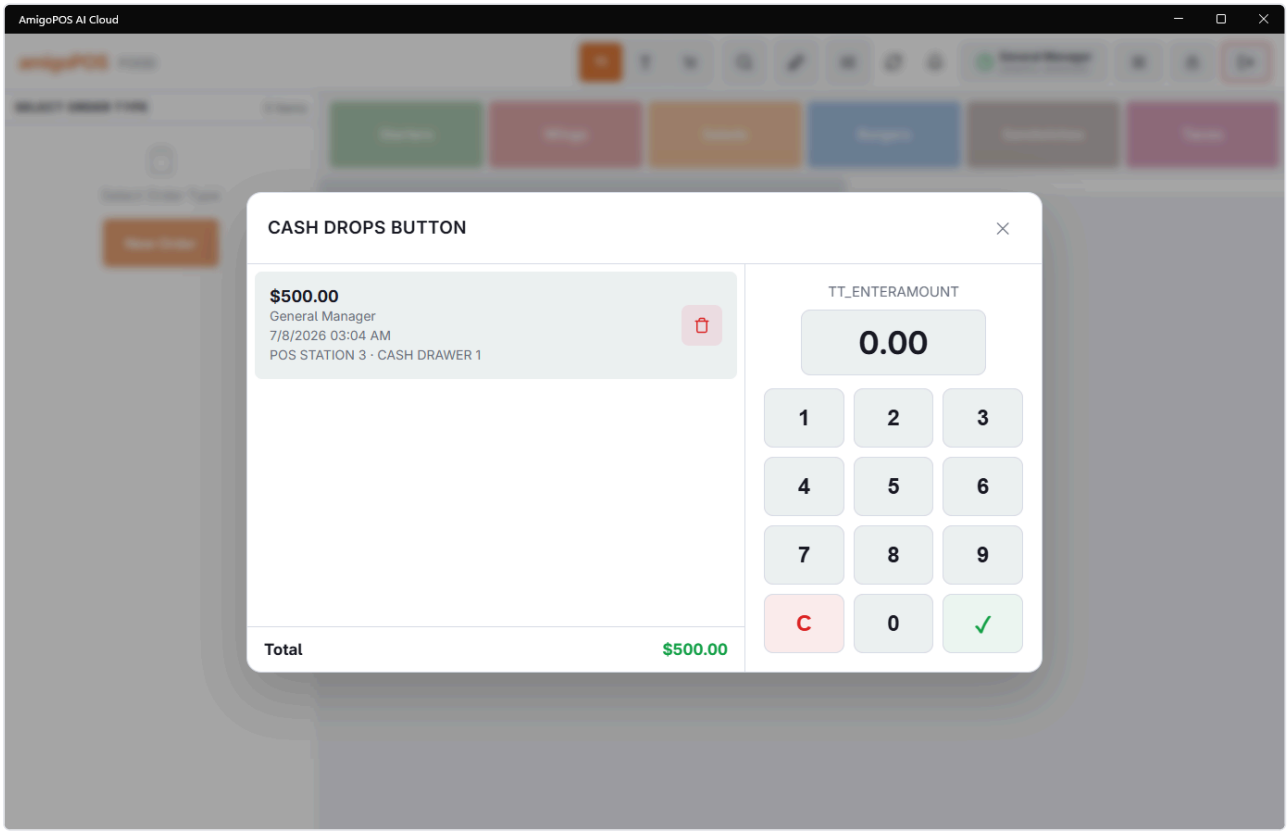
Cash drops to the safe

Cash Management › During the shift

View online ↗

Skimming excess cash out of the drawer during the shift.

A **cash drop** records cash taken out of the till and put in the safe during the shift, so the drawer's expected cash goes down by exactly what left. Drops are recorded at the register with **More › Cash Drops**, in the manager section.



Recording a drop

1. Open **More › Cash Drops**. The station needs a drawer in use; without one the register says so.
2. Check the drawer under **Cash Drawer**: it is the drawer in use on the station, shown by its name.
3. When the store takes more than one cash currency, pick the **Currency**.
4. Type the amount on the keypad — it fills from the right, so 2, 0, 0, 0, 0 is 200.00 — and press ✓. A zero amount shows *Invalid amount*.

The drop is recorded against the drawer in use on the station, also when that drawer is shared with other stations, under your name, and the drawer does not open. It appears at once in the list on the left.

Recording a drop, and voiding one here, needs the **Cash Drops** permission. Without it, **Manager Override Required** asks a manager to approve before the drop is saved or voided. Voiding a drop in Back Office needs **Void Records** instead.

The list

The list shows the current business day's drops: amount (a drop in another currency shows with its code, for example *12.00 EUR*), who recorded it, when, and the station and the drawer's name. **Total** adds them up per currency. With none yet it reads *No cash drops for the current business day.*

A mistaken drop can be voided with its delete button, after **Delete Cash Drop** asks you to confirm. The drop leaves the list, its amount goes back into the drawer's expected cash, and the drawer's alerts are worked out again. It is kept as voided in **Back Office › Activity › Cash Logs › Cash Drops**.

Once a drop is part of a drawer reset it shows a lock and can no longer be voided here. Back Office can still void it; the amount is then not put back, because the reset already started the drawer's expected cash over. See Cash logs in Back Office.

Where drops show

- The drawer's expected cash in that currency goes down by the drop, so spot counts and the reset expect less.
- A *Drop required* alert clears right after a drop that brings the drawer back under its **Mandatory drop at** level. The drawer badge's **Drop** button for such an alert opens Cash Drops. See Mandatory count and mandatory drop thresholds.
- Each drop is a **Drop** line in the **Drawer Activity Log**, prints on the drawer reset report and counts in the End of Day.

> A drop is not a bank deposit: the money is still on the premises. The safe count at night should equal the day's drops.

> Many stores set a **Mandatory drop at** level on each drawer so the register asks for a drop before the till holds more than you would accept losing.

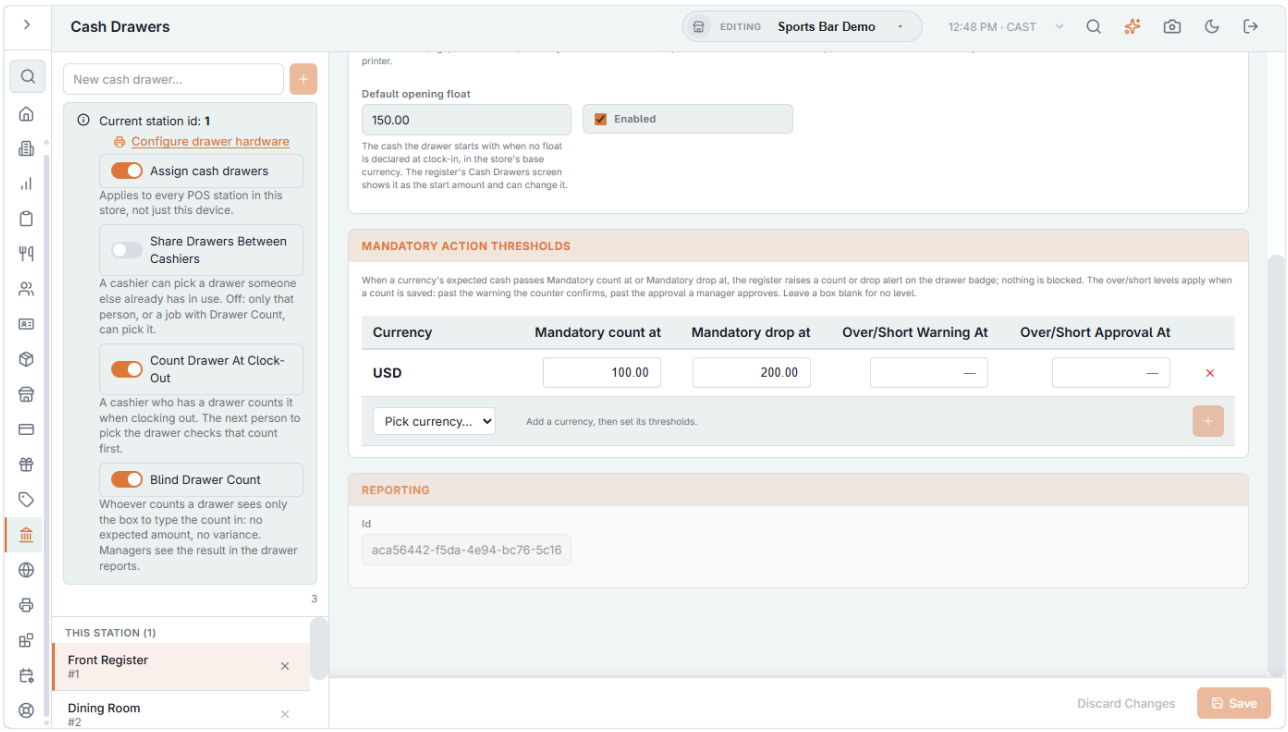
Mandatory count and mandatory drop thresholds

Cash Management › During the shift

View online ↗

Force a count or a drop when the drawer crosses a limit.

Each drawer can carry two cash levels per currency, set on its entry at **Back Office › Cash Management › Cash Drawers**, **Mandatory action thresholds**: **Mandatory count at** and **Mandatory drop at**. When the drawer's expected cash passes one of them, the register raises an alert on the drawer badge. See Creating and editing cash drawers.



How they behave

After each cash event the register compares the drawer's expected cash in each currency with that currency's levels:

- Above **Mandatory drop at** — a *Drop required* alert. The drawer holds more cash than the store wants in a till; take some to the safe with Cash drops to the safe. The alert clears right after a drop that brings the drawer back under the drop level; a smaller drop leaves it open.
- Above **Mandatory count at**, but not above the drop level — a *Count required* alert. Count the drawer with **Drawer Spot Count**; saving the count clears the drawer's *Count required* alerts in the currencies you counted.

After a count

A count does not switch counts off for the rest of the day. From the latest count on, the register tracks the lowest the drawer's expected cash has been in each currency. The next *Count required* alert comes when expected cash passes that lowest amount plus **Mandatory count at**, and the alert shows that amount as its level. A drop or payout after the count lowers the starting point, so the next alert comes sooner. A drawer reset after the count starts over from the plain level.

Voiding a cash drop or a cash payout puts its amount back into the drawer's expected cash, and the alerts are worked out again. An employee deposit raises the expected cash of the drawer that took it when it is recorded, and stays there until that drawer is reset; it comes back out only if it is voided. End Shift takes the deposits it applies off the expected cash of the drawer it runs at. The alerts are worked out again each time.

Nothing is blocked: the register keeps taking cash while an alert is open. Each cash event while it is open is added to the alert, and after five of them it gets more urgent: a count alert turns from amber to red, a drop alert from red to critical. Resetting the drawer clears both.

The alert shows on the drawer badge in the register's top bar, where a job with **Drawer Count** can also dismiss it without counting. See The drawer alert badge.

Setting the levels

- **Mandatory drop at** — the most cash you will leave in the till: the float plus what you would accept losing.
- **Mandatory count at** — a lower level, for a check before the drop is due, or the only level at a store that prefers counts to drops.
- Leave a box empty for no alert. A drawer with no currency rows never raises one.

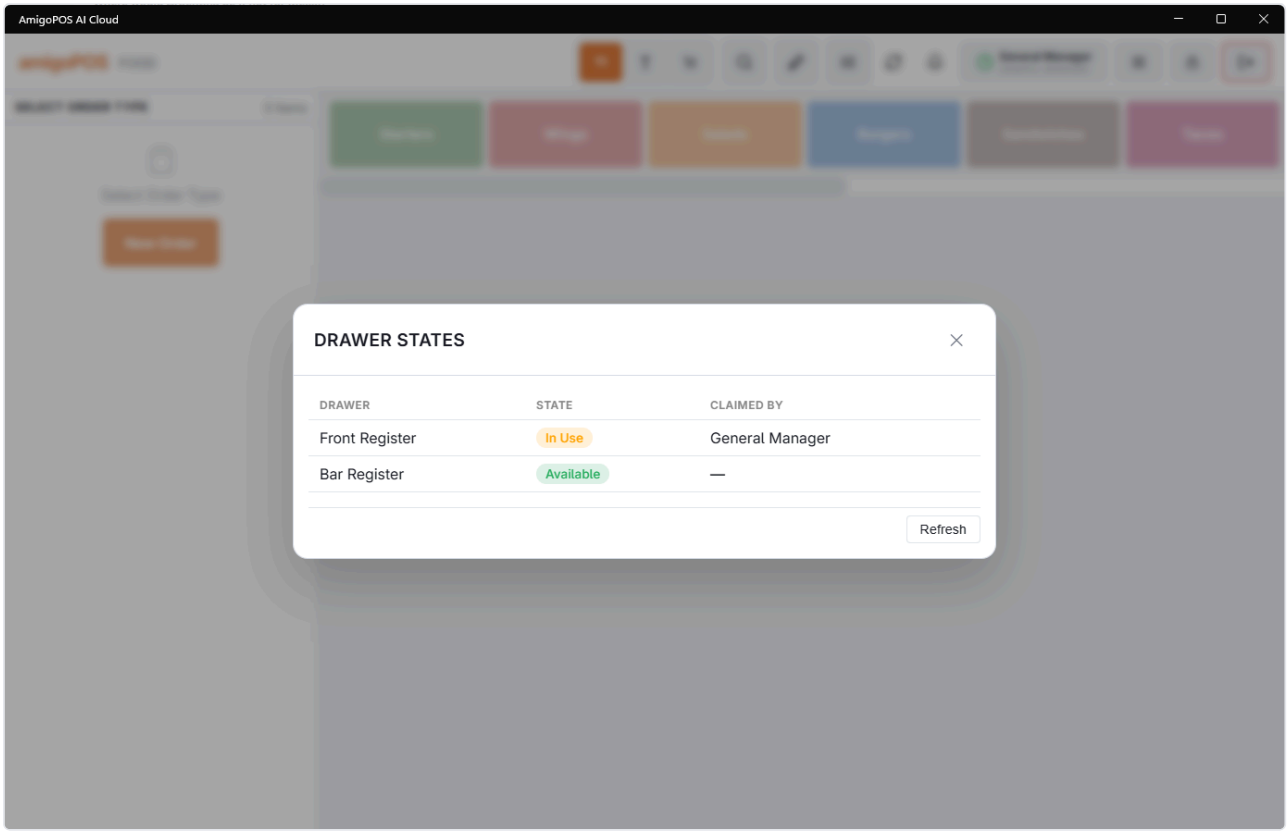
> If the badge is on all evening, the levels are too low for your trade. Raise them until an alert means something.

Drawer states overlay and spot count

View online ↗

Seeing every drawer at a glance and counting without closing.

Two manager tools at the register answer “how are the tills right now?” without closing anything: **More › Drawer States** and **More › Drawer Spot Count**, both in the manager section.



Drawer States

Drawer States lists every drawer of the store with its **State** and, when it is in use, who has it (**Claimed By**):

- **Available** — nobody has it; ready to be picked.
- **In Use** — claimed by someone clocked in.
- **Count required** — the last person clocked out without counting it. The next person counts it before taking it.
- **Pending Handoff** — the last person counted it at clock-out. The next person checks that count before taking it.

On a Pending Handoff drawer, **Clear Pending Handoff** makes it Available without the check, after a manager with **Drawer Count** approves. **Refresh** reloads the list. It is the pre-rush walk-through: is every till taken and counted?

Drawer Spot Count

Drawer Spot Count checks a live drawer. It doesn’t need a drawer in use on the station: when it opens on the list of the store’s drawers, pick one under **Select a drawer to count**. The header shows the **Drawer**, **As of** and the **Cashier**.

Each currency gets a row with the drawer’s **Opening**, **Tenders**, **Change out**, **Drops** and **Payouts**, the **Expected** amount, a **Counted** box and the **Variance**. When the drawer holds employee deposits taken since its last reset, an **Employee Deposits** column shows them before **Expected**, and they count in it. When an End Shift at this drawer applied deposits since its last reset, a **Deposits Applied** column shows them, and they come off **Expected**. See Employee banking and deposits. **Total variance in base** adds the currencies up in the store’s own currency.

- **Refresh expected** — recalculates the expected amounts, for example after a sale during the count.
- **Unannounced audit** — marks the count as a surprise check.

- **Notes** — anything worth saying about the count.
- **Save audit** — records the count and clears the drawer's *Count required* alerts in the currencies counted. Nothing closes; the drawer keeps working.

When a currency is over or short by more than the drawer's **Over/Short Warning At**, *Variance Detected* asks you to confirm. Past **Over/Short Approval At**, *Variance Limit Exceeded* needs a manager with **Drawer Count** to approve. The levels are set on the drawer; see Creating and editing cash drawers.

> The same count screen opens as **Closing Count** at clock-out, as **Verify Drawer Handoff** (with the **Outgoing** count beside it) when someone takes over a drawer, and at drawer reset. Saved counts appear in the **Drawer Activity Log** and the **Variance Report**; see Drawer activity log and variance report.

> An unannounced count mid-shift narrows any shortage to half a day instead of a whole one.

Blind drawer count

With **Blind Drawer Count** on, whoever counts a drawer sees only a **Counted** box per currency. The opening float, tenders, change, drops, payouts, employee deposits, deposits applied, the expected amount and the variance are all hidden, so the count can't be steered towards the number on the screen.

- It applies to every count screen: the spot count, the closing count at clock-out, the hand-off check when a cashier takes over a drawer, and the count at drawer reset. It applies to everyone at the register, managers included. The reset screen also hides the cash in the drawer from staff without the **Drawer Count** permission — see Drawer reset at end of shift.
- **Refresh expected**, **Unannounced audit** and **Notes** still work.
- The over/short levels still apply. Past the warning level, *Variance Detected* asks for a confirmation; past the approval level, a manager has to approve. Both name only the currencies that are off, never the amounts.
- The full count — expected, counted and variance — is still recorded. Managers read it in **More › Drawer Activity Log** and **Variance Report**.

Switch it on at Creating and editing cash drawers.

The drawer alert badge

Cash Management › During the shift

View online ↗

The badge in the top bar that says a drawer needs counting or dropping, and how to clear it.

The drawer badge is a number on the register's top bar that appears when a cash drawer has passed one of its own levels — **Mandatory count at** or **Mandatory drop at** on **Back Office › Cash Management › Cash Drawers**. The number is how many alerts are open. See Mandatory count and mandatory drop thresholds.

The two reasons

- **Count required** — the drawer's expected cash has passed the level at which the store wants it counted. After a count, that level is the lowest expected cash since the count plus **Mandatory count at**, and the alert shows it.
- **Drop required** — it holds more cash than the store wants in a till, and some should go to the safe.

The badge takes the colour of its most urgent alert. A count alert starts amber and a drop alert red; each gets more urgent after five more cash events with nothing done.

The list

Tap the badge to open **Drawer Alerts**. Each alert shows the drawer and the reason, the expected cash against the level (*threshold*), the time it was raised and how many cash events have happened since. The list refreshes every 30 seconds.

- The first button reads **Count** on a count alert and opens **Drawer Spot Count** for that drawer; on a drop alert it reads **Drop** and opens **Cash Drops**. A saved count clears the drawer's count alerts in the currencies counted; a drop alert clears right after a drop that brings the drawer under the drop level.
- **Dismiss** — closes the alert without counting. Only jobs with **Drawer Count** see it.

Without **Drawer Count**, a person sees only the alerts of the drawer they have, and with **Blind Drawer Count** on, the amounts are hidden from them.

Levels are set per drawer. If the badge is on all the time, the levels are wrong for your trade.

On managers' phones

When manager alerts are on, a drawer that needs a count or a cash drop is also pushed to managers' phones and listed in Manager Alerts. See Cash drawer and forecast alerts.

Banking and reconciliation

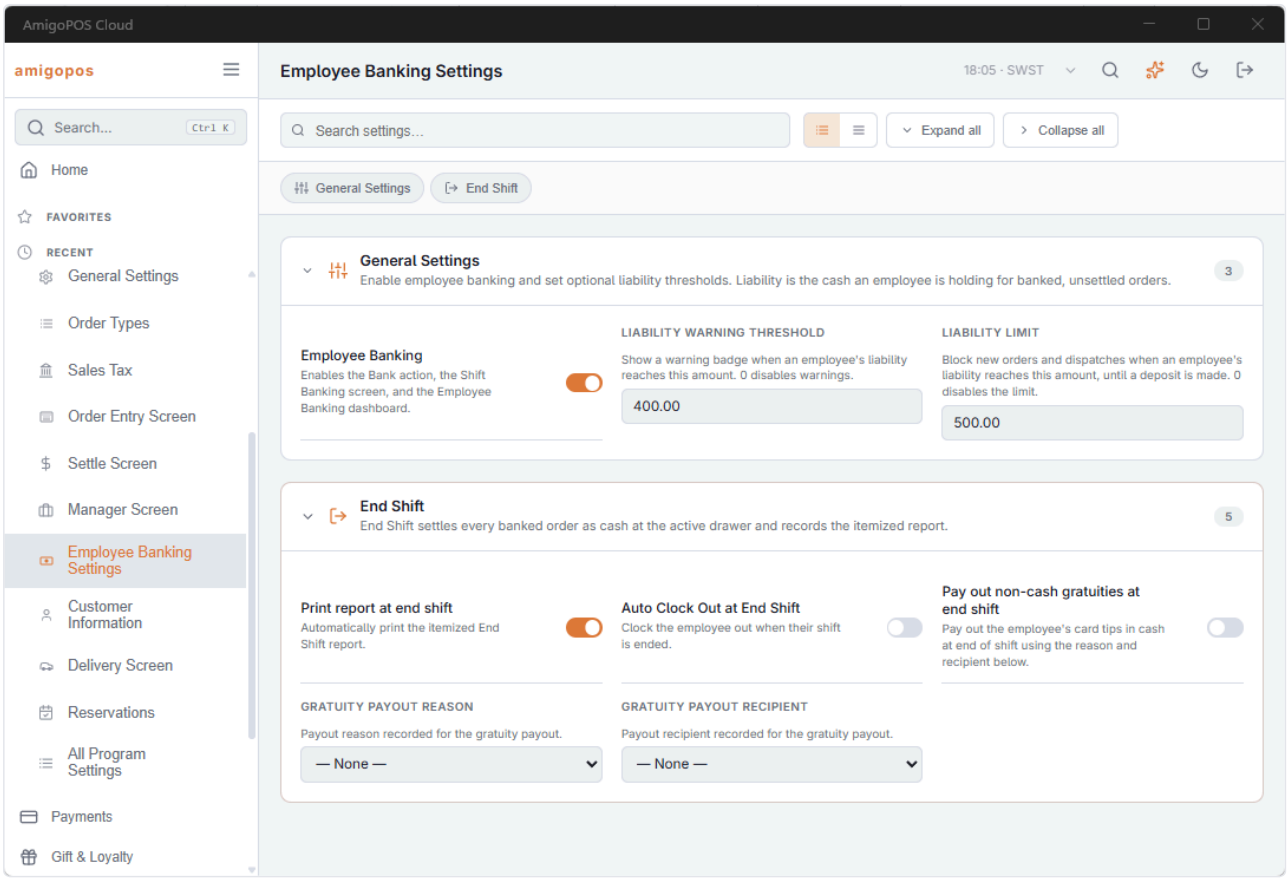
Server banking vs. driver banking

Cash Management › Banking and reconciliation

View online ↗

How employee banking splits the sale from the cash: settles record immediately with no drawer touched, while the liability tracks the cash each banked employee is carrying.

Employee banking replaces the shared till for roles that carry their own cash: servers who keep guests' payments in their apron, and delivery drivers who collect at the door. The system stops tracking a drawer for them and starts tracking *the person*: what they've collected, what they're owed, and what they owe the house.



The core idea: the sale and the cash are two different records

When a banked server settles a cash order, **the sale records immediately** — the order settles, leaves the active list, and lands in sales and tax reporting at the moment the guest paid. But **no cash drawer is touched**: the transaction carries no drawer attribution, no drawer opens, and no drawer's expected cash changes. The money is in the server's apron, and the system knows it — that amount joins the server's running **liability**.

This split is what keeps both books honest. The drawers expect exactly the cash physically inside them; the liability tracks exactly the cash walking around the floor. Neither ever double-counts the other.

One bank per person

Servers and drivers share a single model: one liability per employee, one unified deposit record, one end-shift log. The server's bank fills as they settle their own tables; the driver's fills as their runs are **banked** on return. Either can check their position any time via the **Bank report** button on the time clock, and both square up the same way — the *deposit* (see *Employee banking and deposits*).

Banking an order

An order joins an employee's bank when it is **banked**: dine-in and pickup orders from the **Bank** button on the orders list (with **Undo bank** for mistakes), delivery runs when the driver returns. Banking a table order frees the table immediately — the guests have paid and left; only the cash custody remains open. Banked orders stay visible with a *Banked by* attribution until settlement completes at deposit time.

Configuration

Banking is switched on for the store on **Back Office › Store Setup › Employee Banking Settings**, which also holds the liability warning and limit and the End Shift options — see Employee Banking Settings. Any job that can both take cash and settle orders can bank; the job's **Server** and **Driver** flags decide who appears in the transfer list and on the driver rail. The cash discount on banked orders is the **Cash Discount (%)** on the same page.

While banking is on, nobody is asked to claim a cash drawer at clock-in: employee banking and the *drawer lockdown* clock-in flow are mutually exclusive store-wide — a store runs one custody discipline or the other.

The manager's live view is the *Shift banking overlay*; the day's history is the **Employee Banking dashboard** (*Back Office › Cash Management › Employee Banking*); the full custody picture across drawers, aprons, and safe is *Where the cash is: settle to deposit to EOD*.

> The trade: banking gives perfect per-person accountability — no shared-drawer ambiguity, every dollar attributed to the person carrying it — at the cost of staff physically holding cash mid-shift. Most full-service stores consider that a good trade.

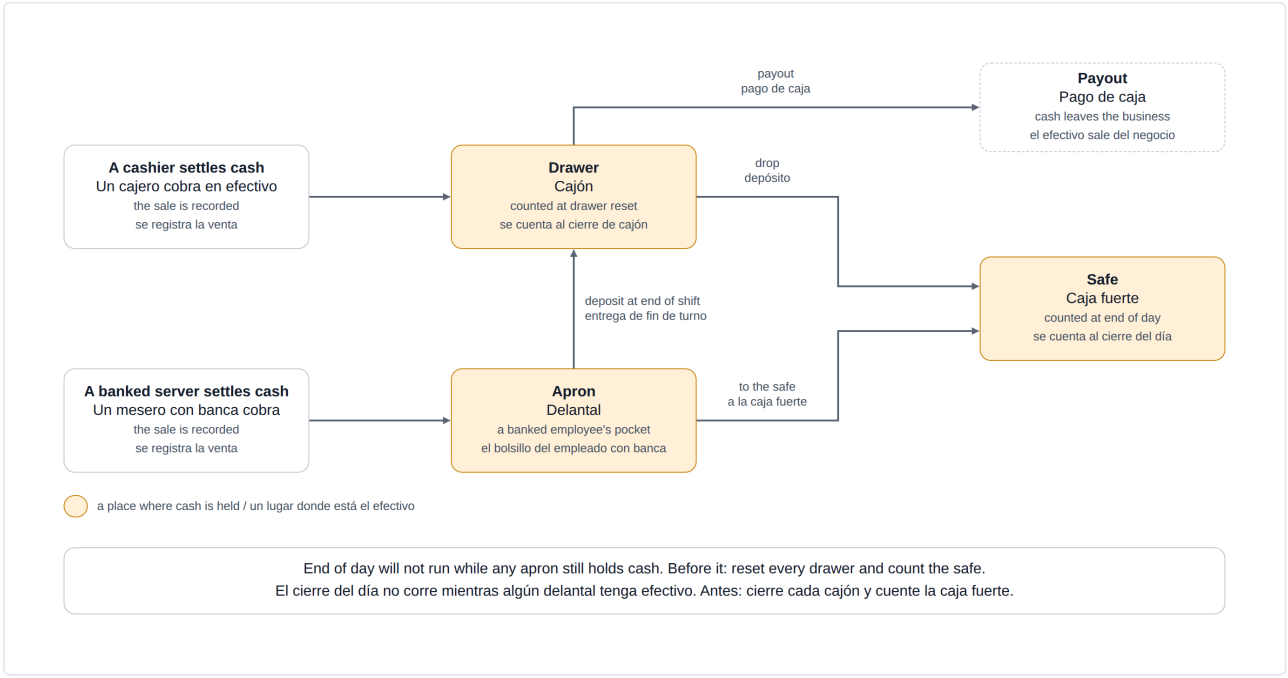
Where the cash is: settle to deposit to EOD

Cash Management › Banking and reconciliation

View online ↗

The complete map of cash custody in a store running drawers and employee banking side by side — every dollar locatable from the moment a guest pays to the end-of-day close.

On a night with cashiers on drawers and banked servers on the floor, "where is the cash?" has several answers at once. This topic is the map: every amount the store takes is in one place at a time, and every hand-over is a recorded event.



The places cash can be

- **A drawer** — tracked by the drawer's expected cash: opening cash in, cash payments in, employee deposits in, change out, drops out, payouts out, and the deposits an End Shift there applied out. Counts check it.
- **With a banked employee** — tracked by their liability: the orders they banked, less their deposits.
- **The safe** — receives the cash drops recorded from the drawers.

The events that move cash

1. **A cashier takes a cash payment** → the drawer's expected cash rises, because the cash went into the till.
2. **A server or driver banks an order** → no drawer changes. Their liability rises instead: the cash is with them.
3. **Cash drop** → the drawer's expected cash falls; the cash is in the safe. See Cash drops to the safe.
4. **Payout** → the drawer's expected cash falls; the expense is recorded. See Cash paid-out and reasons.
5. **Deposit** → a banked employee hands cash into the drawer in use; the drawer's expected cash rises and their liability falls by the amount.
6. **End Shift** → every order they banked is settled as cash at the active drawer and End Shift takes their deposits off that drawer, so its expected cash rises by the banked total less the deposits: what they hand over now. The deposits stay in the drawer that took them. Their liability is now zero. See Employee banking and deposits.
7. **Drawer reset** → the drawer is counted against everything above, and the over or short is recorded. See Drawer reset at end of shift.

A worked night — one cashier, two servers

Drawer 1 opens with 200.00. The cashier takes 500.00 in cash: the drawer expects 700.00. Maria (banked) banks orders worth 400.00 and Tom (banked) orders worth 250.00; the drawer does not change. Mid-shift the drawer passes its drop level and 400.00 goes to the safe: the drawer expects 300.00.

Maria deposits 150.00 into Drawer 1: her liability is 250.00, and the drawer holds and expects 450.00. At Maria's End Shift she hands over the other 250.00; her orders settle as 400.00 cash and End Shift takes her 150.00 deposit off that drawer: the drawer expects 700.00 and holds 700.00. (Had her End Shift run at another drawer, Drawer 1 would still expect 450.00 and the other drawer would expect 250.00 more.) Tom's End Shift at the same drawer adds 250.00: the drawer expects 950.00.

The reset counts 950.00 in Drawer 1, and the safe holds the 400.00 drop: 1,350.00 = 200.00 opening + 500.00 + 400.00 + 250.00.

With ten servers

Nothing changes except the number of liability lines. **Shift Banking** at the register, and the Employee Banking page in Back Office (The Employee Banking dashboard), list everyone's live position. Each End Shift closes one line and leaves a record in the End Shift Log.

Reading problems off the map

- **A drawer counts short** → a drawer event is missing or wrong: change given wrongly, a till opened by key, a payout not recorded. Banked cash does not touch the drawer until a deposit or End Shift.
- **End Shift ran at a different drawer from the one that took the deposits** → nothing to fix. The drawer that took the deposits expects them, and the End Shift drawer expects only the cash handed over. Each drawer's reset closes its own part, in either order.
- **Before End of Day** → run End Shift for every banked employee, reset the drawers, and check that the safe holds the day's drops. End of Day refuses to run while banked orders are outstanding.

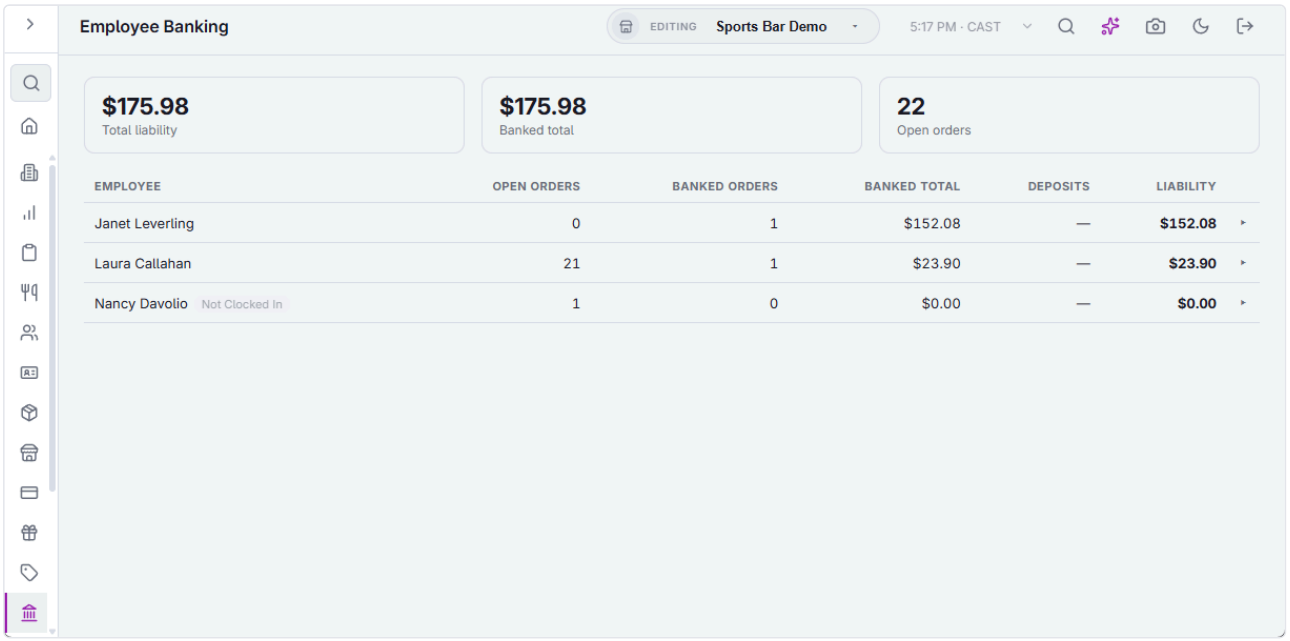
> Sales are recorded on the order; custody is recorded when cash changes hands. Keeping the two apart is what lets the night reconcile.

The Employee Banking dashboard

View online ↗

See live what each banked employee owes: open and banked orders, deposits and liability.

Back Office › Cash Management › Employee Banking shows, live, how much cash each banked employee is holding for the house: their open orders, the orders they have banked, the deposits they have made and what they still owe. It is read-only; deposits and End Shift are done at the register in Shift banking overlay. Banking is turned on and its limits set at Employee Banking Settings.



The figures at the top

- **Total liability** — what all listed employees still owe.
- **Banked total** — the amount to collect on all banked orders.
- **Open orders** — orders not yet settled or banked, for all listed employees.

The employee list

An employee is listed while they have an open order, a banked order not yet settled, or a deposit not yet applied by End Shift. With nobody to list, the page reads *No Open Banking Activity*. The columns are:

- **Employee** — with **Driver** when every order they banked is a delivery, **Not Clocked In** when they are off the clock, and **Over limit** when they have reached the **Liability limit**.
- **Open orders** and **Banked orders** — how many of each.
- **Banked total** — the amount to collect on their banked orders.
- **Deposits** — cash already handed in this shift, shown as a minus.

- **Liability** — what they still owe: the banked total less the deposits.

A row is tinted once the employee reaches the **Liability warning threshold**, and marked **Over limit** at the **Liability limit**. A threshold set to 0 is off.

Banked orders

Select an employee's row to list their banked orders: **Order** number, the time it was **Banked**, the **Customer**, the **Balance** due and the amount **Collected**. When the store gives a cash discount on banked orders, a **Cash Discount** column shows the part they do not owe. Select the row again to close it.

Keeping current

The page refreshes itself when an order is banked, settled or deposited at any station, and at least once a minute.

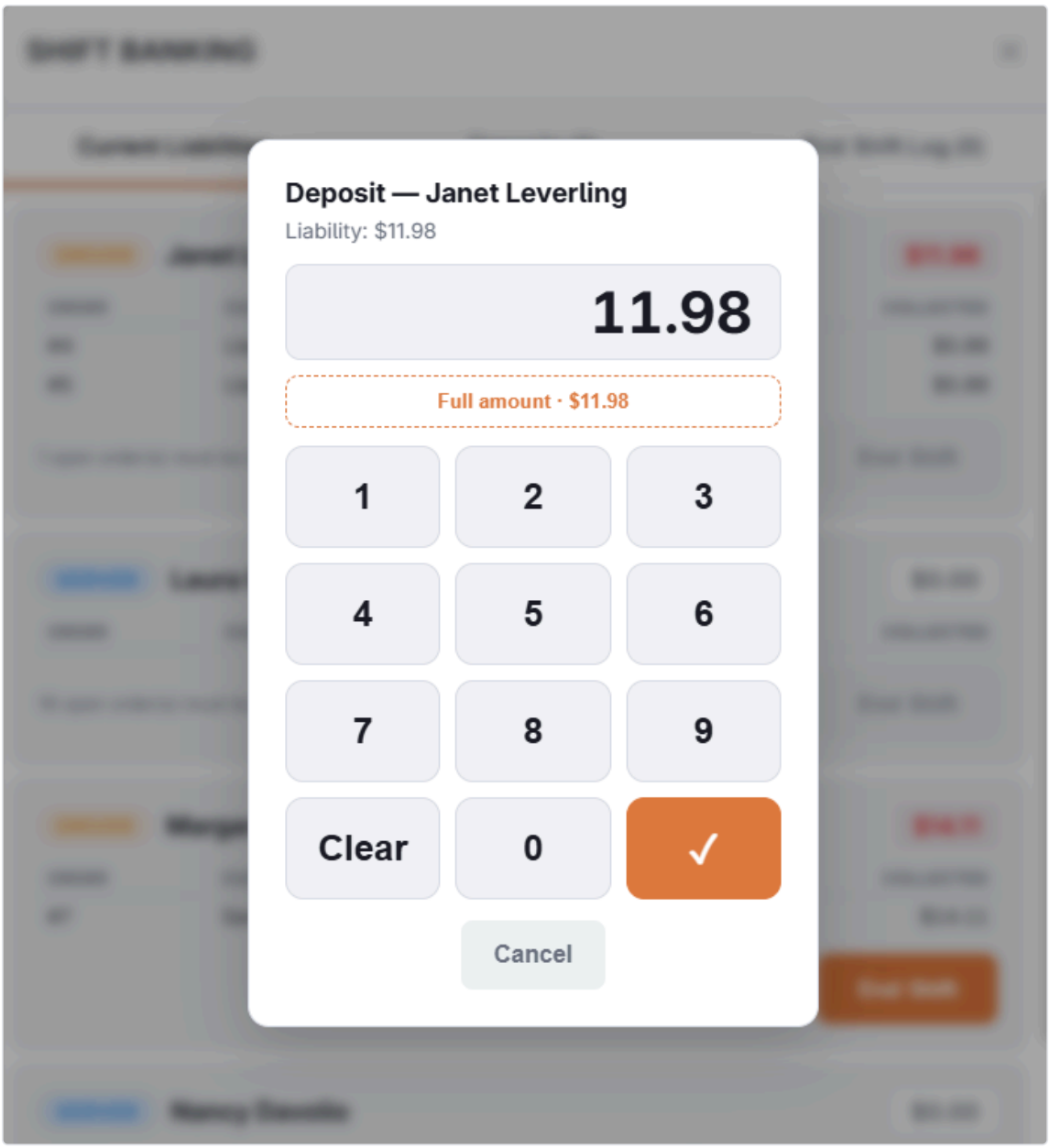
How banking works, end to end: Server banking vs. driver banking and Employee banking and deposits.

Employee banking and deposits

View online ↗

How a banked server or driver hands in cash during the shift, what they still owe, and how End Shift settles it.

With employee banking, a server or driver keeps the cash from the orders they bank and owes it to the house. A **deposit** is cash they hand in before their shift ends; **End Shift** settles everything they banked and closes their position. Both are done at the register in **More › Employee Banking**, the **Shift Banking** screen. How banking works is in Server banking vs. driver banking.



What an employee owes

Their **Liability** is the amount to collect on the orders they banked, less any cash discount the store gives on banked orders, less the deposits they have already made. Shift Banking lists it under **Current Liabilities**; Back Office shows the same figures on the Employee Banking page (The Employee Banking dashboard).

Making a deposit

1. In Shift Banking, select **Deposit** on the employee. It is not available while they owe nothing.
2. Type the amount, or select **Full amount**. It cannot be more than they owe.
3. Save. … *deposit recorded* confirms it, and their liability goes down by the amount.

The deposit is recorded against the drawer in use on the station, and that drawer's expected cash rises by the amount at once. The deposit stays in that drawer's expected cash until the drawer is reset, before and after End Shift. A spot count shows it in an **Employee Deposits** column, so the drawer does not count over by the deposit. When the station has no drawer in use, the deposit is still recorded, but no drawer's expected cash changes.

The deposit shows on the **Deposits** tab until End Shift applies it, and a mistaken one can be voided there with **Void Deposit**. The void takes the amount back out of the drawer's expected cash. Voiding needs **Manager Screen** or **Banking** on the job; anyone else needs a

manager with **Banking** to approve. A void that cannot be saved shows *Save failed*. A deposit that End Shift has applied can no longer be voided.

End Shift

1. The employee's open orders must be settled or banked first; until then the screen says how many are still open.
2. **End Shift** shows *All banked orders will be settled as cash at the active drawer. Turn over the cash now.*, with **Cash to turn over** and the **Deposits applied**.
3. Confirm. Every banked order is settled with a cash payment at the active drawer, and the deposits are applied: the active drawer's expected cash rises by the banked total less the deposits — the cash turned over now. The deposits stay in the drawer that took them. The closing record goes to the **End Shift Log** tab, where it can be reprinted.

> End Shift can run at any drawer, before or after the drawer that took the deposits is reset. Each drawer expects the cash it holds: the drawer that took the deposits keeps them, and the End Shift drawer gets only the cash turned over. For example, with 50.00 deposited at Drawer 1 and End Shift for 80.00 banked at Drawer 2, Drawer 1 expects 50.00 and Drawer 2 expects 30.00. Until it is reset, the End Shift drawer shows the deposits in a **Deposits Applied** column on the spot count. Each drawer's reset closes its own part, in either order.

> A deposit that an End Shift applied before this change keeps the earlier result: if that End Shift ran at another drawer, the drawer that took the deposit counts over by it and the End Shift drawer counts short by it, until each is reset.

Depending on Employee Banking Settings, End Shift also prints the report, pays the employee's card tips out in cash, and clocks them out.

Later

- The deposits print on the reset report of the drawer that took them, and under **DEPOSITS APPLIED TO ORDERS (-)** on the reset report of the drawer where End Shift applied them. Back Office lists them at **Activity › Cash Logs › Employee Deposits**. See Cash logs in Back Office.
- Closed shifts are at **Activity › Shifts & End of Day › End Shift Log**. See End-of-shift and end-of-day logs.

> **End of Day will not run while banked orders are outstanding.** It stops with *n banked order(s) are outstanding — run End Shift first*. Run End Shift for each employee first. The whole chain is in Where the cash is: settle to deposit to EOD.

Clocking out with banked orders

An employee whose orders are all settled or banked can clock out before End Shift. Banked orders stay in their bank — they still count in what they owe — and are settled when End Shift is run for them, by them or by a manager. On the staff app, banked orders are not counted as open checks and do not set off the open-check or late pickup and delivery alerts.

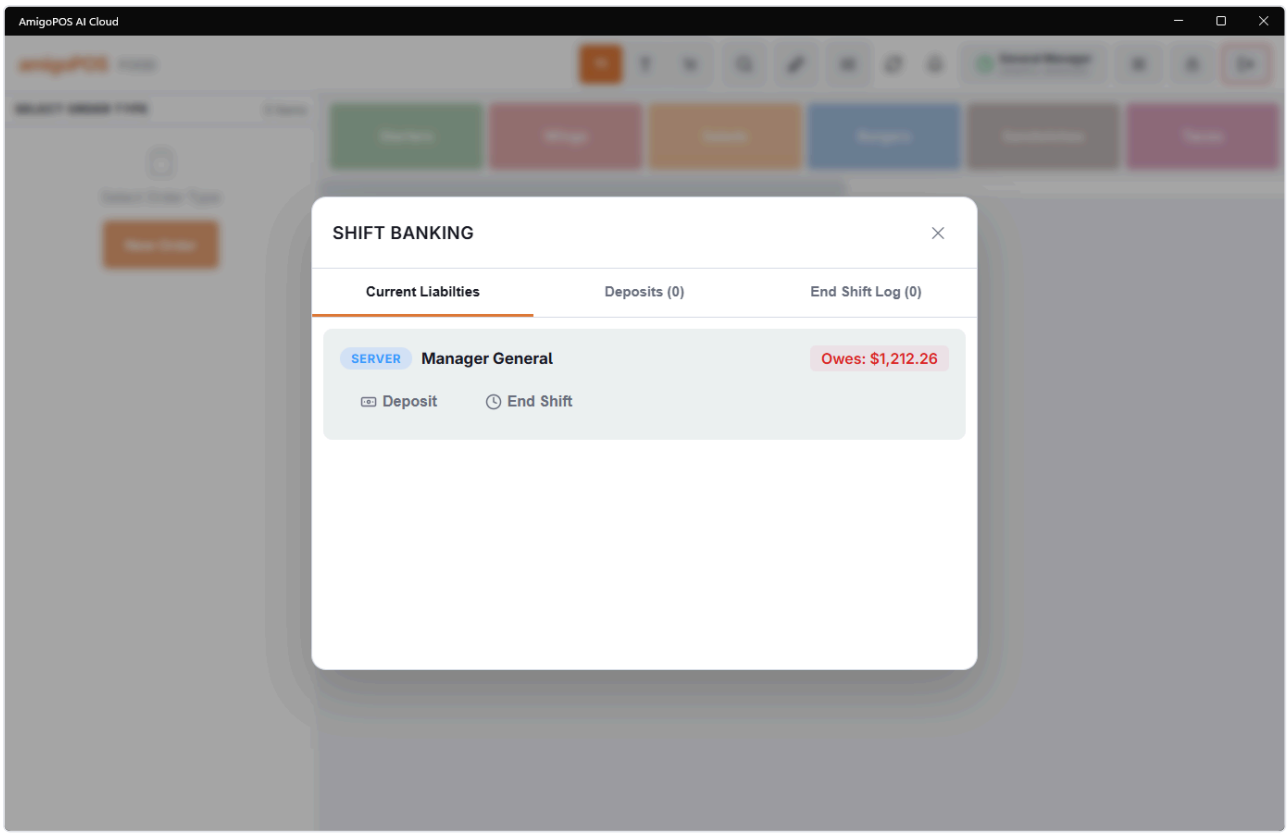
Shift banking overlay

Cash Management › Banking and reconciliation

View online ↗

The manager view of every employee's bank for the day.

The **shift banking overlay** (More › Shift banking, manager section) is the live control panel for employee banking — every banked employee's position on one screen.



What it shows

- **Current liabilities** — each banked employee with what they presently owe (or are owed), driven by their cash collections and card tips so far.
- **Open orders** — the unsettled orders still attached to each employee; these must settle, bank, or transfer before their shift can end.
- **Deposits** — the deposits recorded this shift, with **Void Deposit** for mistakes. A void takes the amount back out of the drawer's expected cash. It needs **Manager Screen** or **Banking** on the job, or a manager's approval.
- **End-shift logs** — the completed end-shift records, with the printable report per employee.

Taking a deposit

Selecting an employee opens the layered deposit dialog: their liability, a numpad and a **Full amount** chip that fills the exact amount owed. The deposit goes to the drawer in use on the station, and that drawer's expected cash rises by the amount at once. **Deposit** is only enabled while the employee actually owes cash; **End shift** is only enabled once their open orders are cleared and their position is settled — the disabled buttons are the checklist.

Typical uses

- **Mid-shift check** — a glance at who's carrying how much; prompt a partial deposit when a bank gets heavy or a driver nears the liability limit.
- **Closing an employee out** — clear their open orders, take the deposit, run **End shift**. The overlay walks the order.
- **Next-day questions** — the end-shift log answers "did Maria square up last night, and for how much?" without leaving the register; the **Employee Banking dashboard** in Back Office holds the longer history.

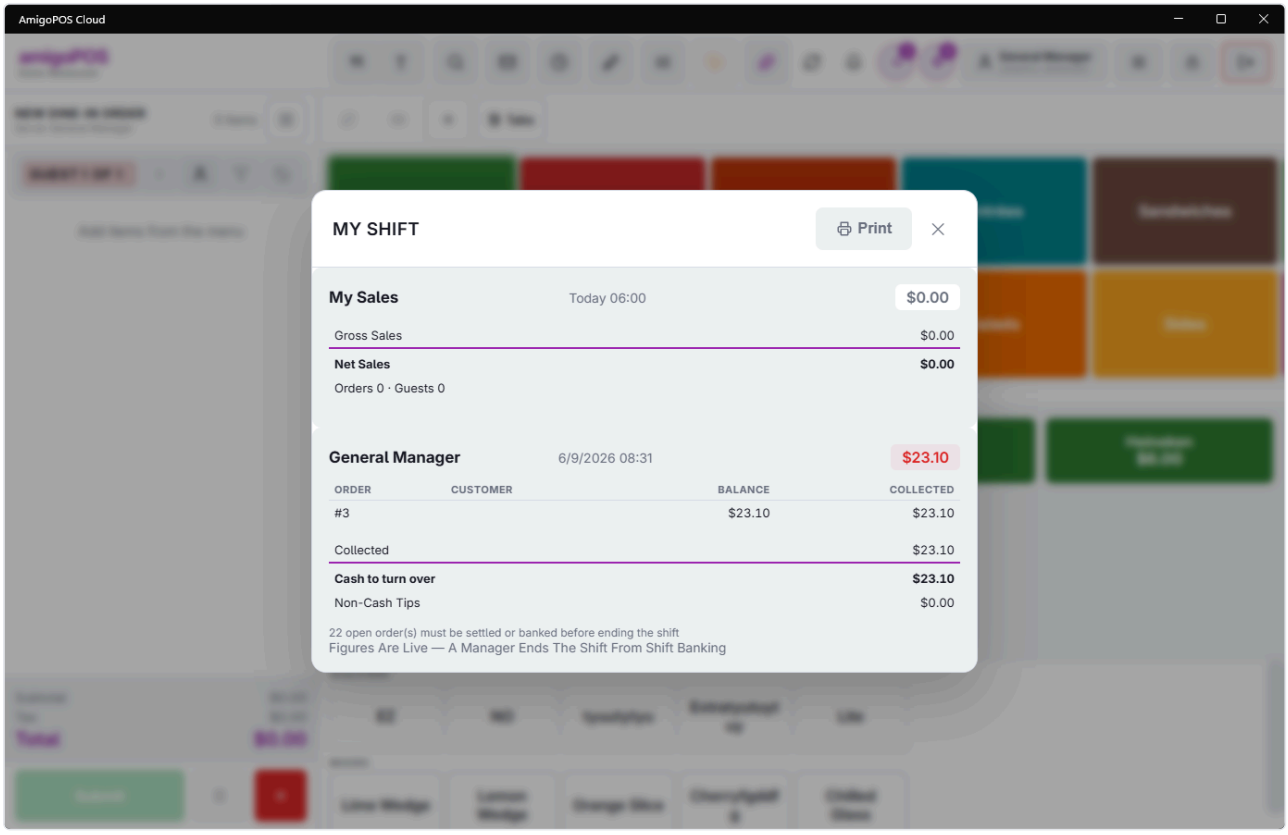
> The overlay manages the banking flow; the money model behind it is in *Server banking vs. driver banking*: orders settle normally, the liability math runs underneath, and each deposit counts in the expected cash of the drawer in use on the station until that drawer is reset. End Shift takes the deposits off the cash it settles at its own drawer.

Staff printing their own shift report

A server or bartender does not need the manager to see where they stand. **My Status** (their name in the More menu) has a **My Shift** button that shows only their own position — banked orders, what they have collected, deposits taken, cash to turn over and non-cash

tips — with a Print button for the same slip the manager prints at End shift. It is read-only: nothing is settled and the shift is not ended, so it can be printed as often as they like.

The button appears for anyone whose permission has **Print own shift report** (Employees › People › Jobs & Permissions, in the printing group). Without it, checking totals still means a manager and Shift banking.



How the sales figures are credited

Shift figures count the orders an employee **owns**, which is the same rule the End of Day “sales by server” uses — so a mid-shift print and the close always agree. An item rung on somebody else’s check belongs to that check’s owner, not to whoever rang it.

> A shift report printed before the close also includes orders that are still open, so its total can move before the day ends. The End of Day figure is the settled one.

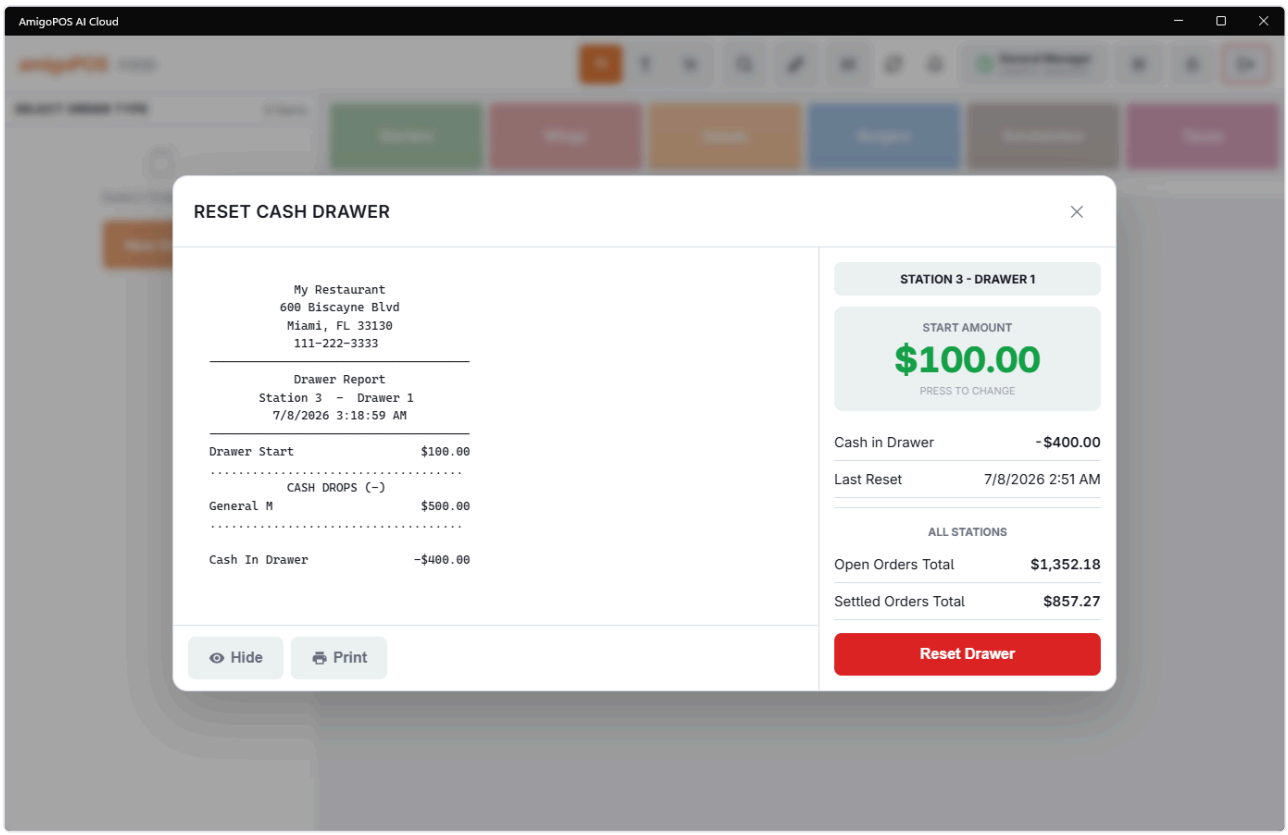
Drawer reset at end of shift

Cash Management › Banking and reconciliation

View online ↗

Counting and closing a drawer so the next shift starts clean.

The **drawer reset** closes a drawer’s ledger: count, record over/short, re-baseline to zero, start fresh. It’s the cash side’s bookend to the opening float.



Running a reset

1. Open **More › Cash drawers**, pick the drawer. The overlay shows its **cash in drawer** (the base-currency expected amount), start amount, last reset, and open/settled totals.
2. With **Show drawer count** on, tap **Count Drawer** — the standard per-currency count screen opens (blank lines record as zero). Saving the count runs the reset automatically.
3. The reset report prints (and is stored in the reset log) with a **CURRENCY SUMMARY** — float, tenders, change, drops, payouts, **DEPOSITS (+)** for the employee deposits the drawer took, **DEPOSITS APPLIED (-)** for the deposits an End Shift at this drawer applied, expected per currency — plus, when counted, a **CURRENCY COUNT** section with expected / counted / over-short per currency.

What a reset does

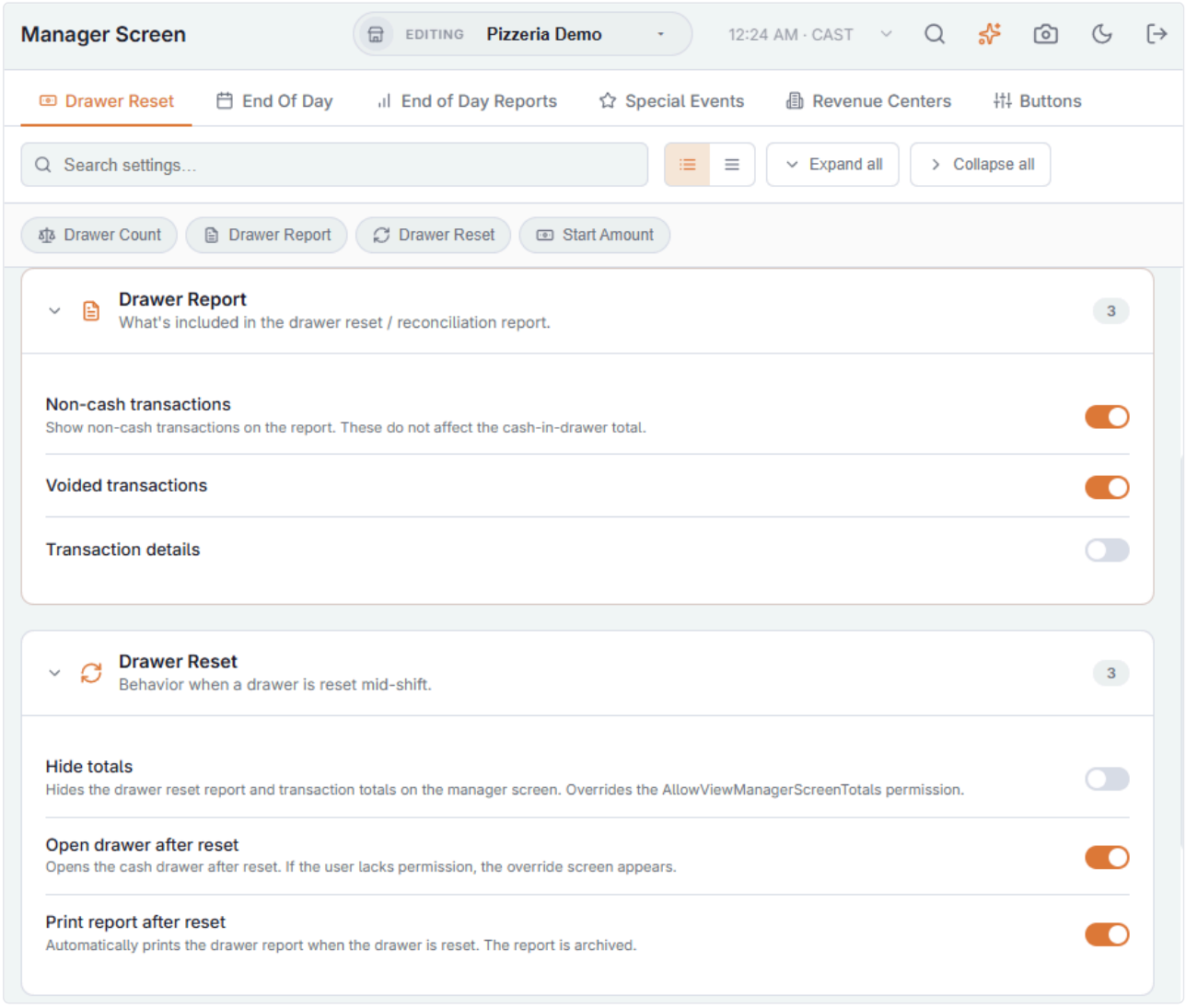
- Closes the shift's opening floats and re-baselines the ledger to zero in every currency — a spot count right after a reset expects 0.00 across the board.
- Records the over/short permanently — it feeds the *variance report*.
- Closes the employee deposits the drawer took and the deposits an End Shift at this drawer applied. Each drawer closes its own part, so the drawer that took an employee's deposits and the drawer where their End Shift ran can be reset in either order, before or after the End Shift.

Notes

- Someone with manager functions can reset any drawer without claiming it, but the reset itself needs the **Reset Drawer** permission. Without it, **Manager Override Required** asks a manager to approve just before the reset is saved — after the count when **Show drawer count** is on. The reset is recorded under the name of the person who did it. Cashiers may clock out first — the hand-off counts reconcile the gap, and a drawer can span multiple shifts between resets.
- Reset before EOD for the day's cash reporting to be complete; the *pre-EOD summary* flags unreset drawers.
- Changing the start amount in the prompt after the reset needs **Change Drawer Start Amount**, or a manager's approval; **Skip** leaves the amount as it is.
- Post-reset start-amount behavior and the Default Start Amount fallback are covered in *Accepting Foreign Currency* and *Cash Drawer Quick Setup*.

What the reset report includes

Back Office › Store Setup › Manager Screen › Drawer Reset, section *Drawer Report*, decides which optional sections print on the reset report:



- **Non-cash transactions** — card and other tenders taken on the drawer. They don't change the cash in drawer.
- **Voided transactions** — payments voided on the drawer, with a total.
- **Transaction details** — every payment line: time, cashier, order and tender. Useful when investigating a variance; long on a busy day.

The currency summary, deposits, drops, payouts and the cash in drawer always print. Employee deposits print under **SERVER DEPOSITS (+)** or **DRIVER DEPOSITS (+)** on the drawer that took them, and under **DEPOSITS APPLIED TO ORDERS (-)** on the drawer where End Shift applied them. Payouts in the base currency are listed under **Cash Payouts (-)**, the section that adds up with the cash in drawer. Payouts in another currency get their own section, such as **Cash Payouts EUR (-)**. A payout with no reason or recipient, such as a gift card cash-out, is listed with its note in place of the reason. Voided drops and payouts are left out.

When the drawer's own station cannot do it

Cash Drawers on a station offers the drawers of that station. If the station a drawer belongs to is broken, switched off or has been replaced, reset the drawer from another station with **Reset Here**, on End Of Day or on the Pre-EOD Summary: it opens Cash Drawers on that one drawer. The reset needs **Reset Drawer** there too. See Running end of day.

Blind count at reset

With **Blind Drawer Count** on, the **Count Drawer** step of a reset shows only the boxes to type the count in, like every other count screen. On the reset screen, someone whose job lacks the **Drawer Count** permission sees no **Cash in Drawer** line, no drawer report and no Show

or Print button for it; with the permission, everything shows as before. The report printed after the reset still carries the expected and counted amounts. See Drawer states overlay and spot count.

Settings for the reset

Whether the drawer is counted first, whether totals are hidden, whether the drawer opens and the report prints after the reset, and whether the start amount is asked for are set under **Back Office › Store Setup › Manager Screen › Drawer Reset**. See Manager screen and buttons.

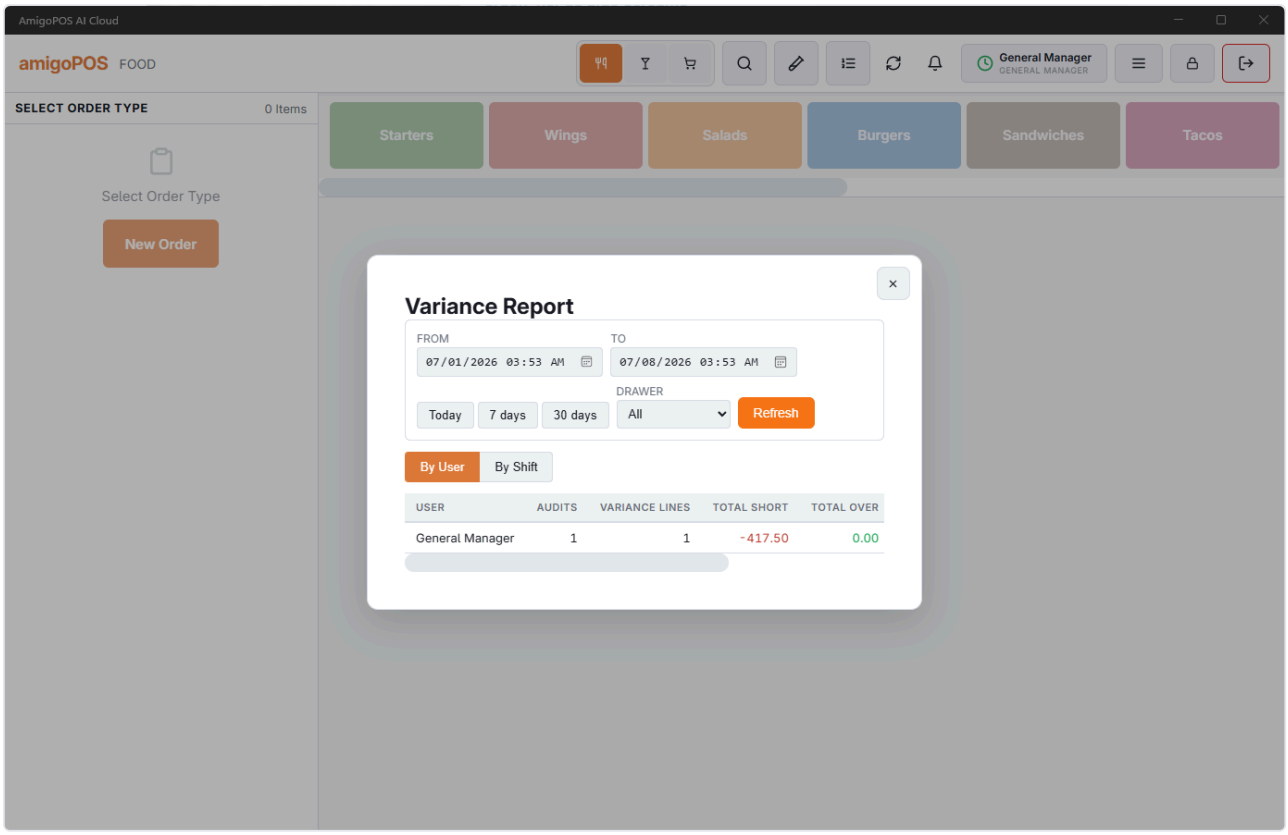
Drawer activity log and variance report

Cash Management › Banking and reconciliation

View online ↗

Tracing every cash movement and every over/short.

Two reports at the register reconstruct what happened to the cash: **More › Drawer Activity Log**, every event that moved a drawer's expected cash, and **More › Variance Report**, every count and what it found. Both are in the manager section and need a connection.



Drawer Activity Log

Choose the period with **From** and **To**, or **Today**, **7 days** or **30 days**; narrow it to one **Drawer** and one **Event Type**, or leave **All**; then **Refresh**.

Each row has the **Time**, **Drawer**, **User**, **Event Type**, **Amount** (negative for cash out), **Currency**, **Expected After** — the drawer's expected cash after the event — **Station** and **Notes**. The number of rows shows below the table.

The event types are **Opening Float**, **Float Adjustment**, **Cash Sale**, **Void Sale**, **Drop**, **Payout**, **Bank Deposit** (an employee's banked cash handed in), **Audit** (a spot count), **Closing Count**, **Verify Handoff**, **Manager Override** and **Reset**.

Voiding a cash drop, at the register or in Back Office, adds a second **Drop** row with a positive amount and the note *Cash Drop Voided*, which puts the cash back into the expected amount. Voiding a cash payout, in Back Office or by voiding a gift card cash-out, does the same with a positive **Payout** row and the note *Cash Payout Voided*.

An employee deposit adds a **Bank Deposit** row with a positive amount and the note *Employee Deposit* to the drawer that took it. Voiding it takes it back out with a negative **Bank Deposit** row, *Employee Deposit Voided*. End Shift leaves that row in place: it adds a negative **Bank**

Deposit row, *Employee Deposit Applied At End Shift*, to the drawer it runs at, because the orders it settles there carry the deposited cash too.

Voiding a drop, payout or deposit that was already part of a drawer reset adds no row, because the reset already started the expected cash over. The notes the register writes show in your language; notes someone typed show as written.

> For “what happened to this drawer between 2 and 4 p.m.?”, set From and To to those times, pick the drawer and read Expected After down the page.

Variance Report

The same period buttons and **Drawer** filter, then **Refresh**. Two views:

- **By User** — per person: **Audits** (counts made), **Variance Lines** (currency lines that were off), **Total Short**, **Total Over**, **Max Variance** and **Inherited Dirty** — drawers they took over without the count that was due.
- **By Shift** — per shift: user, **Shift Start**, **Shift End**, drawer, audits and the totals.

Reading variance fairly

- Small variances in both directions are counting noise. A steady shortage in one direction is the pattern that matters.
- By User points at a person only on drawers nobody else used. On a shared drawer the variance belongs to the hand-offs, not to whoever counted last; Inherited Dirty shows where a count was skipped.
- A steady shortage with careful counts usually means events nobody recorded — change given from the wrong drawer, a till opened by key — before it means theft.

Drop, payout and employee deposit records can also be checked in Back Office: Cash logs in Back Office.

CHAPTER 21

Web Orders

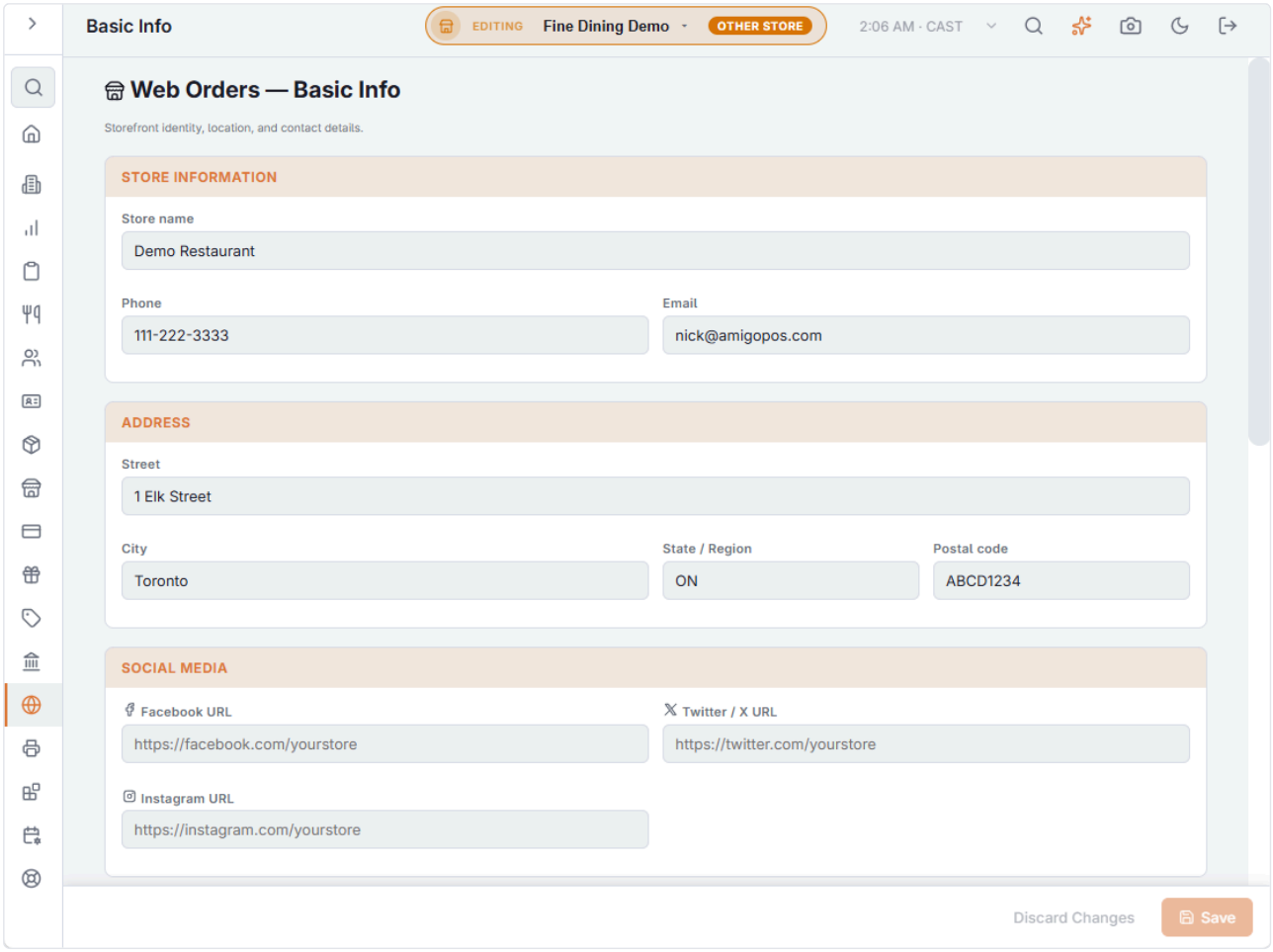
Basic info and storefront identity

Web Orders

View online ↗

What the online ordering site says about the store: name, contact details, address, social links, legal pages, analytics and regional settings.

Back Office › Web Orders › Basic Info holds what the online ordering site says about the store — name, contact details, address and social links — plus its legal pages, its analytics, its time zone and currency, and the Popular badge on the menu. Changes take effect on the site when you select **Save**. If the save fails, *Save failed* is shown and your changes stay on the page, unsaved.



Store information and address

- **Store name**, **Phone** and **Email** — shown on the site and in the footer. The phone is the number customers call about an order, so make it one someone answers.
- **Street**, **City**, **State / Region** and **Postal code** — the address shown to customers who pick up.

Social media

Facebook URL, **Twitter / X URL** and **Instagram URL** appear as icons in the site's footer. Leave a box empty to leave its icon out.

Legal Pages

The site has a Privacy Policy page (*/privacy*) and a Terms and Conditions page (*/terms*), linked from its footer. Sign in to the site as a manager to write each page's text, then switch it on here with **Show The Privacy Policy Page** and **Show The Terms And Conditions Page**.

A page that is off is not shown to customers.

Analytics

Track visits, carts and orders in your own Google Analytics and Meta accounts. Leave both boxes empty to track nothing.

- **Google Analytics 4 Measurement ID** — from Google Analytics › Admin › Data Streams › your web stream; it starts with *G-*. See Google Analytics 4 for your ordering site.
- **Meta Pixel ID** — from Meta Events Manager › Data Sources › your pixel; digits only. See Meta Pixel for Facebook and Instagram ads.
- **Ask Visitors For Cookie Consent First** — shows a consent banner and tracks only after the visitor accepts. Required in the EU and the UK.

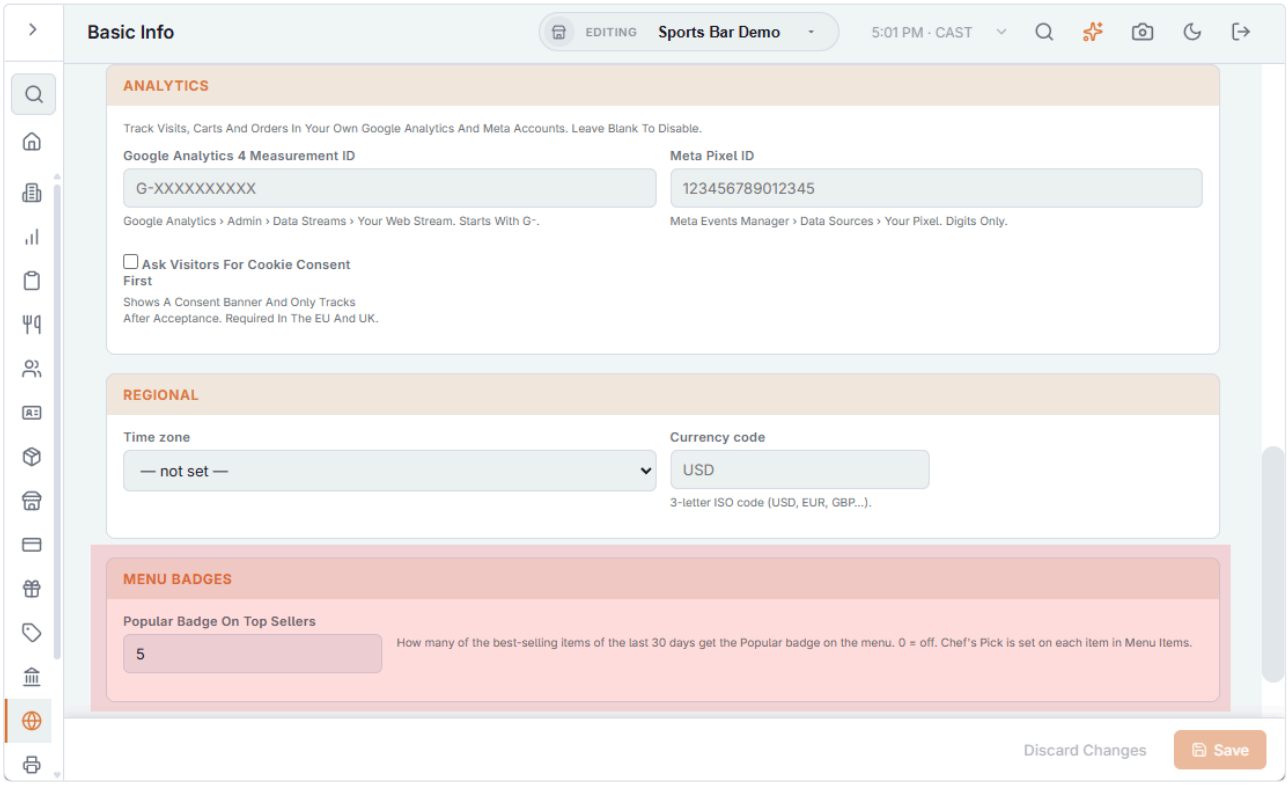
Regional

- **Time zone** — the site's clock: business hours, open and closed, scheduled times and ready times are worked out in it. When it is not set, the site uses UTC.
- **Currency code** — the 3-letter ISO code (USD, EUR, GBP…) online card payments are charged in and order emails show. Empty means USD.

> A wrong time zone shifts open hours and promised times by the difference, and the symptom ("the site says we're closed") never mentions time zones. Check it first when hours behave strangely.

Menu badges

Popular Badge On Top Sellers sets how many items get a *Popular* badge on the online menu: the store's best sellers of the last 30 days among the items on the web menu. The default is 5; 0 turns the badge off.



- Sales from every channel count — the register, the call center and the web — by quantity sold. Voided orders, voided lines and modifiers don't.
- The ranking is worked out at most once an hour, so a change can take up to an hour to show.
- *Chef's Pick* is set on each item instead — see Menu items (prices, SKUs, buttons).

Google Analytics 4 for your ordering site

Web Orders

View online ↗

Creating a GA4 property, finding the Measurement ID, and what the storefront measures.

Google Analytics tells you what happens on your ordering site before the order: how many people looked, where they came from, which pages they left on. The point of sale already tells you what was sold; this tells you what almost was.

It is **your** Google account and your data. AmigoPOS only renders the tag.

1. Create a property

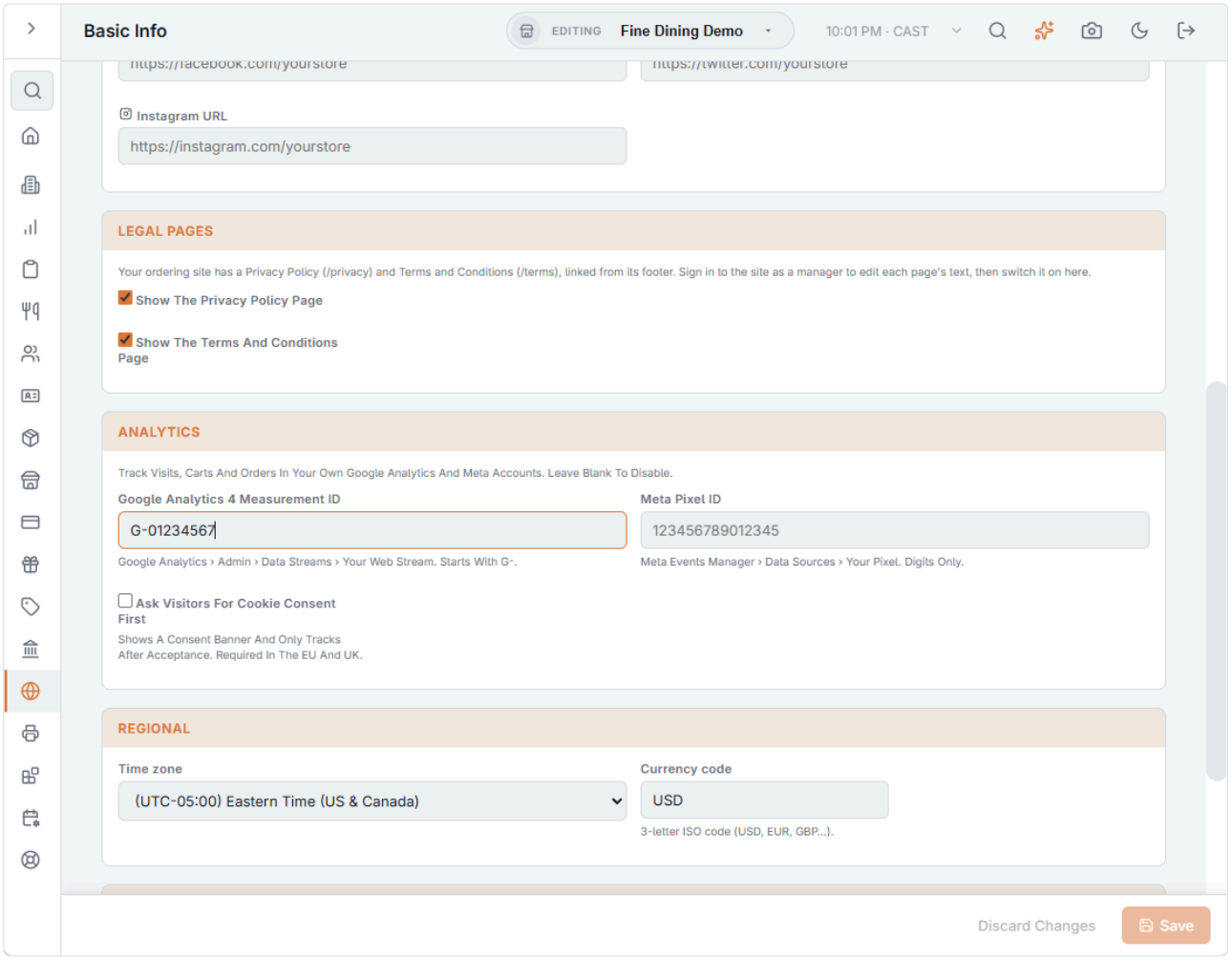
- Sign in at **analytics.google.com** with the Google account the restaurant should own.
- **Admin › Create › Property**. Name it after the restaurant, set the time zone and currency to match the store — the currency here is what your revenue reports are shown in.
- When asked for a platform, choose **Web** and enter your ordering site address (for example `order.yourrestaurant.com`).

2. Copy the Measurement ID

Admin › Data streams, open the web stream you just made. The **Measurement ID** at the top right begins with `G-`.

3. Paste it into the POS

Back Office › Web Orders › Basic Info › Analytics. Paste the ID, save, and reload your ordering site.



4. Check it is working

In Google Analytics open **Reports › Realtime** and load your site in another tab; you should appear within a few seconds. Place a test order and the *purchase* event follows it.

What is measured

The standard ecommerce events, so the built-in reports work without configuration:

- **view_item** — a menu item was opened.
- **add_to_cart** / **remove_from_cart** / **view_cart**.
- **begin_checkout** and **add_payment_info**.
- **purchase** — with the order number, the total, tax, delivery charge and every item sold.

That turns *Monetisation › Ecommerce purchases* into a list of your best-selling items by revenue, and *Reports › Acquisition* into an answer to “is the Instagram link actually bringing orders?”

> The most useful number here is the drop-off between *begin_checkout* and *purchase*. If many people reach checkout and few finish, the problem is usually a delivery fee or a minimum they only discover at the end.

> If your customers are in the EU or UK, switch on *Ask visitors for cookie consent first* in the same section. Tracking then waits for the visitor to accept.

Meta Pixel for Facebook and Instagram ads

Web Orders

View online ↗

Creating a Meta Pixel, finding its ID, and the events the ordering site sends for ad reporting.

The Meta Pixel is what lets Facebook and Instagram ads report which orders they produced, and lets you show ads to people who visited your ordering site but did not finish. Without it, ad spend is guesswork.

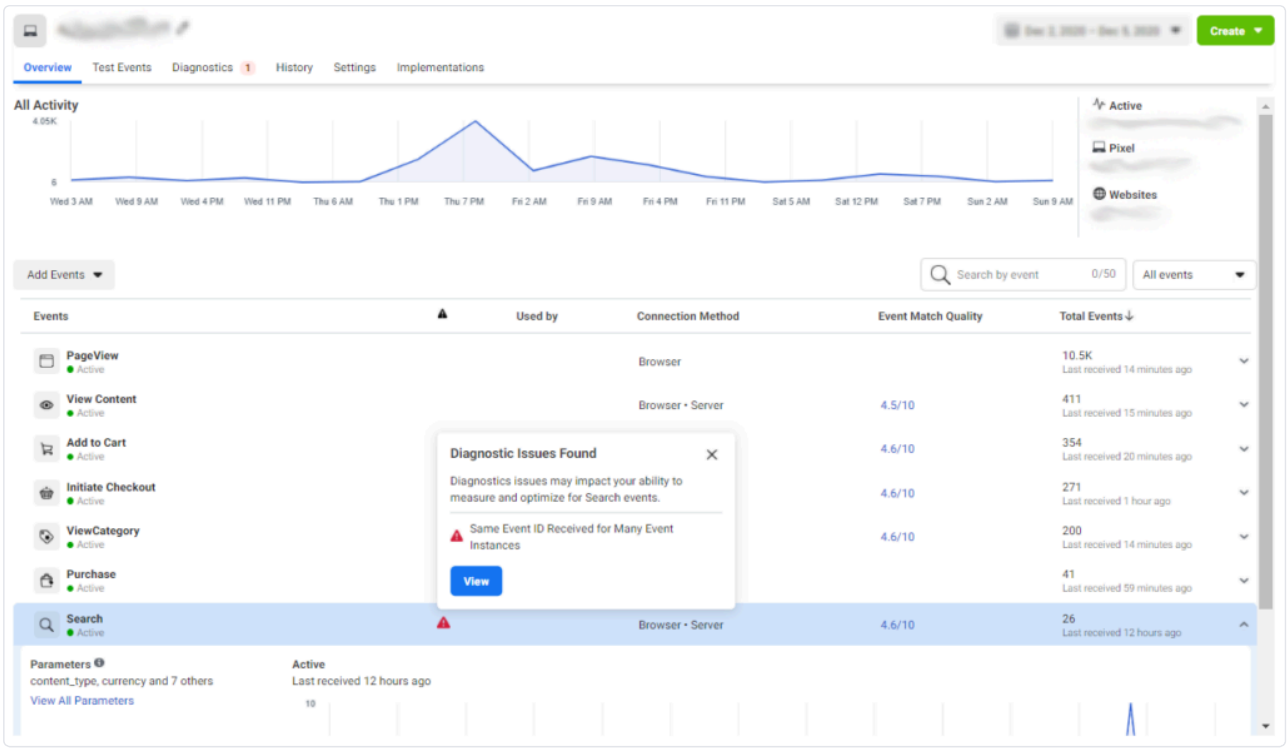
The pixel belongs to your own Meta business account; AmigoPOS only renders it.

1. Create the pixel

- Go to **business.facebook.com** and open **Events Manager**. You need a Meta Business account — the one that owns the restaurant’s Facebook page.
- **Connect data sources › Web › Meta Pixel**, name it after the restaurant, and enter your ordering site address when asked.
- Choose to install the code manually. You are not pasting code anywhere — you only need the ID.

2. Copy the Pixel ID

In Events Manager the **Pixel ID** sits under the data source name: a long string of digits, nothing else.



3. Paste it into the POS

Back Office › Web Orders › Basic Info › Analytics, save, and reload the ordering site.

4. Check it is working

Install Meta's **Pixel Helper** browser extension and open your site: it lists the events as they fire. Events Manager also shows them under *Test events* within a minute or two.

What is measured

- **PageView** on every page.
- **ViewContent** when a menu item is opened, **AddToCart** when it is added.
- **InitiateCheckout** and **AddPaymentInfo** during checkout.
- **Purchase** with the order value and items.

Those are Meta's standard events, so the ads setup offers them directly: optimise a campaign for Purchase, or build an audience of everyone who fired AddToCart in the last week and never Purchase.

> Before spending on ads, let the pixel collect a week of ordinary traffic. Meta optimises against what it has seen, and a campaign started on an empty pixel spends its first days learning what you already knew.

> Advertising cookies are the ones regulators care about most. If you have customers in the EU or UK, switch on *Ask visitors for cookie consent first* — the pixel then loads with consent revoked until the visitor accepts.

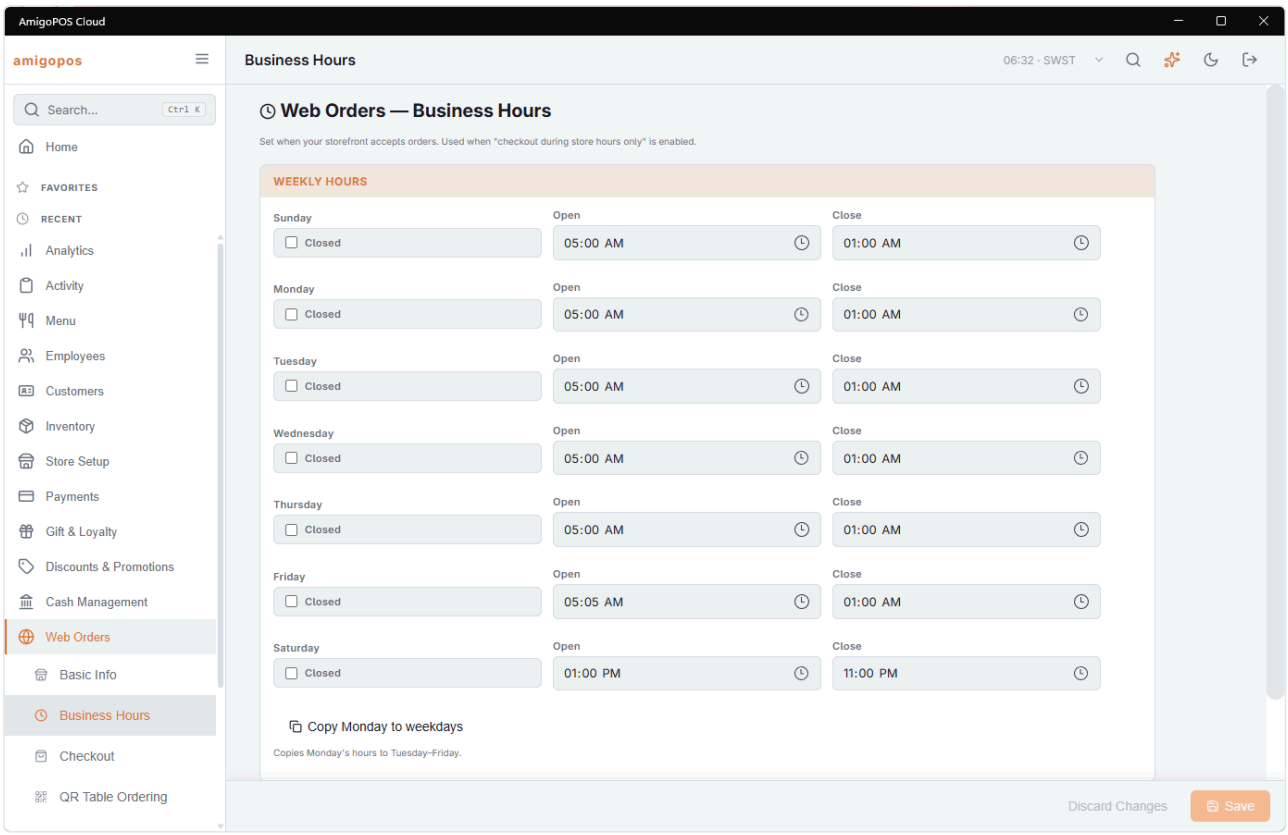
Business hours for web orders

Web Orders

View online ↗

When the storefront takes orders, and why a late kitchen needs the hours set carefully.

Back Office › Web Orders › Business Hours sets when the online ordering site is open: the weekly hours, and dates with holiday or special hours that replace them. The site shows whether the store is open now and lists the hours; with **Allow checkout during store hours only** on (**Web Orders › Checkout**), it also refuses orders outside them. See Checkout settings.



Weekly hours

For each day, set **Open** and **Close**, or tick **Closed**. A close time earlier than the open time runs past midnight: open 17:00, close 01:00 is open until one in the morning. **Copy Monday to weekdays** copies Monday's hours to Tuesday–Friday.

The hours are read in the store's time zone, set on Basic info and storefront identity.

> Set the hours to when the kitchen takes orders, not when the doors lock. An order accepted at closing time is a customer expecting food from a kitchen that has gone home.

Holiday & Special Hours

A date listed here replaces the weekly hours for that day on the site and, when the store is linked to Uber Eats, on Uber Eats.

1. Select **Add Date**. A new row starts on the day after the last date listed (or today), set to **Closed All Day**.
2. Set the **Date** and a **Description**, for example *Christmas Day*.
3. To open with reduced hours instead, clear **Closed All Day** and set the times under **Open Hours**. **Add Hours** adds another window for the same day.
4. With Uber Eats linked, **Send To Uber Eats** decides whether the date goes to Uber Eats too.

The remove button on a row takes the date out. Dates already past drop off the list.

The page will not save a date in the past, a date listed twice, an open day with no hours, or a window that closes before it opens; the message names the date.

Push To Uber Eats Now, shown when the store is linked, sends every date to Uber Eats at once. Saving sends them on its own within about a minute, so this is only needed when you want it now; save your changes first. See Hours, holidays and pausing the store.

Saving

Both sections save with **Save**. If the save fails, *Save failed* is shown and your changes stay on the page, unsaved. The site picks up the new hours straight away.

> These are the site's hours. They are separate from the business day start that groups your reports.

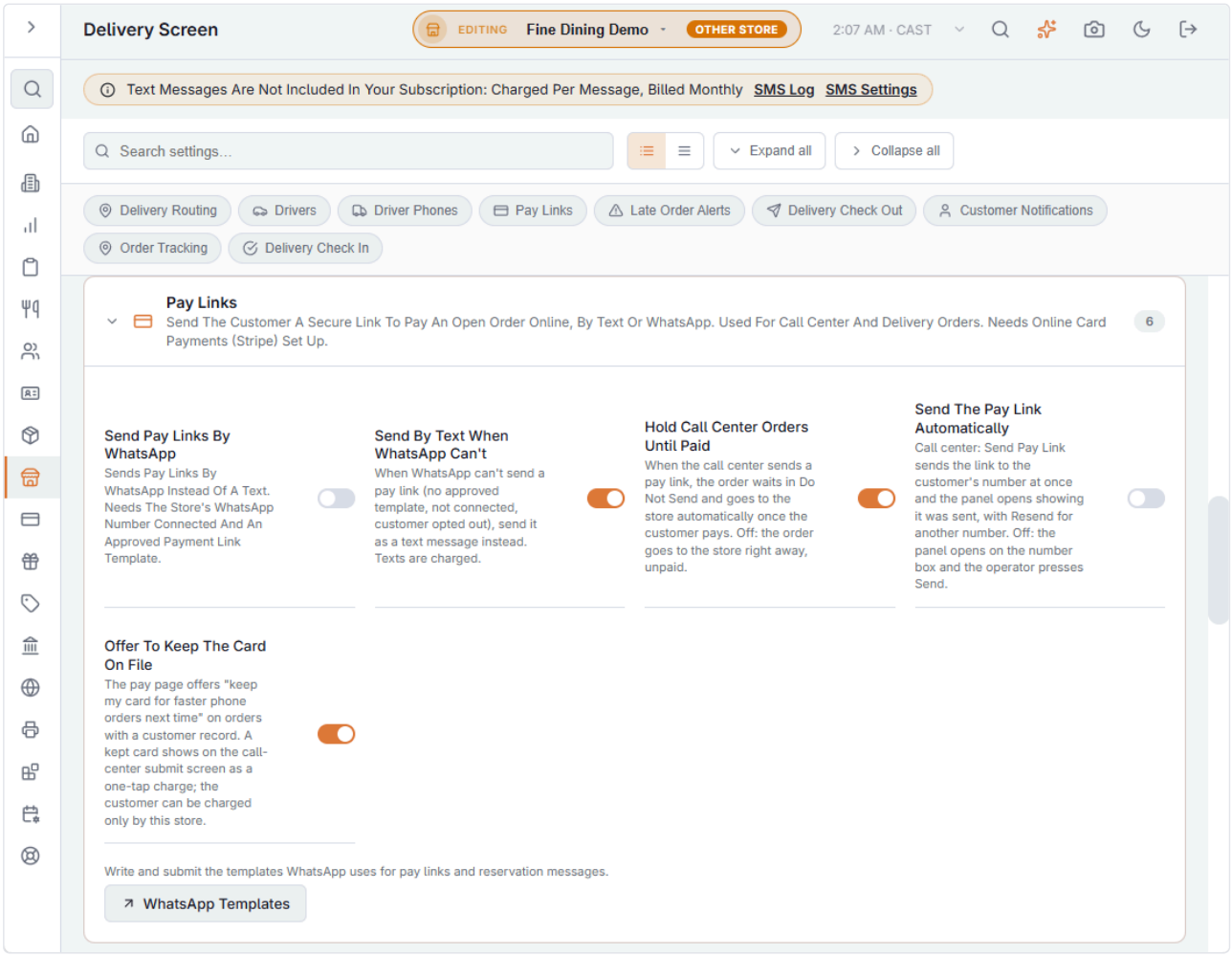
Checkout settings

Web Orders

View online ↗

How the online ordering site takes orders: pickup and delivery times and minimums, who may check out, scheduled orders and gift cards.

Back Office › Web Orders › Checkout controls how the online ordering site takes orders: pickup and delivery, who may check out and when, scheduled orders, gift and loyalty cards, and the user online payments are recorded under. Changes take effect when you select **Save**. If the save fails, *Save failed* is shown and your changes stay on the page, unsaved.



Pickup and delivery

- **Accept pickup orders**, with **Minimum pickup time** in minutes — the earliest the site promises a pickup order.
- **Accept delivery orders**, with **Minimum delivery time** in minutes, **Minimum delivery amount** (the smallest order subtotal accepted for delivery; 0 for none) and **Default delivery fee** (charged when no delivery zone sets a fee).

> Set the minimum times to what the kitchen manages at rush, not on a quiet Tuesday. A promise kept late costs more than a cautious one.

Checkout access

- **Require login to checkout** — customers must sign in before they place an order. Guests ordering from a table QR code are not asked.
- **Disable checkout**, with **Message shown when checkout is disabled** — the site can still be browsed but takes no orders, and shows your message. Use it when the kitchen is overwhelmed or equipment is down; it takes effect as soon as you save.
- **Allow checkout during store hours only**, with **Message shown when store is closed** — outside the hours on Business hours for web orders the order is refused with your message.

- **Web order checkout user** — the employee record that online payments and gift and loyalty redemptions are recorded under. **Create New** creates one and sets it straight away; when none is set, one is created at the first checkout.

Online Payment

Cancel Unpaid Orders After (Minutes) — an online order paid by card that is not paid within this time is cancelled, and any item counters it used are given back. The default is 20, the most is 240, and 0 never cancels. It is the same setting as on the QR Table Ordering page (Setting up QR table ordering); changing it on either page changes both.

Order scheduling

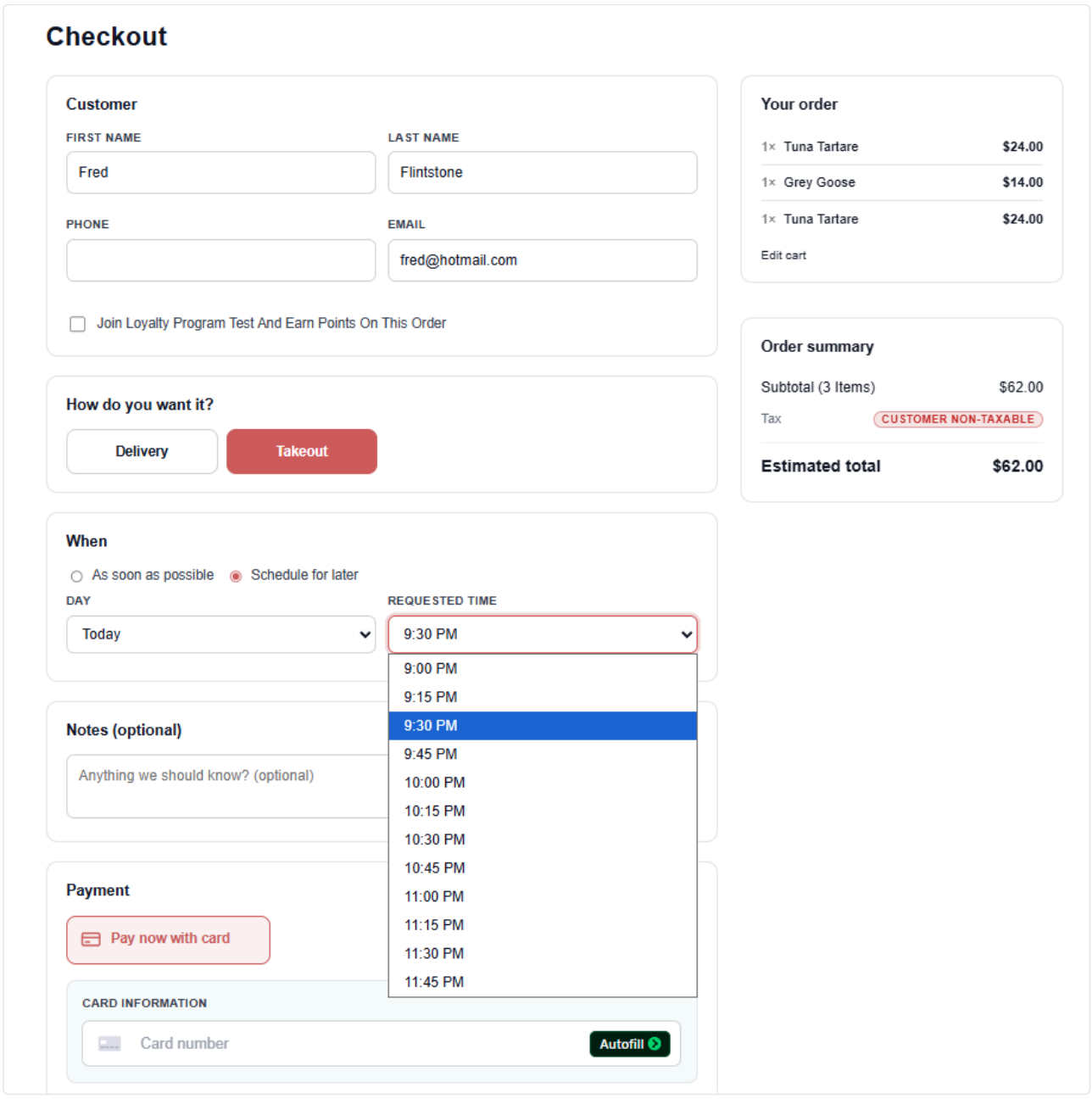
- **Allow scheduled orders** — customers can pick a future day and time at checkout, up to **Maximum days in advance** (1–30). Scheduled orders reach the register under the **Delayed** filter.
- **Max Orders Per 15 Minutes** — see *Limiting orders per time slot* below.

Gift & Loyalty Cards

Accept gift & loyalty cards shows gift card and loyalty card entry on the checkout page.

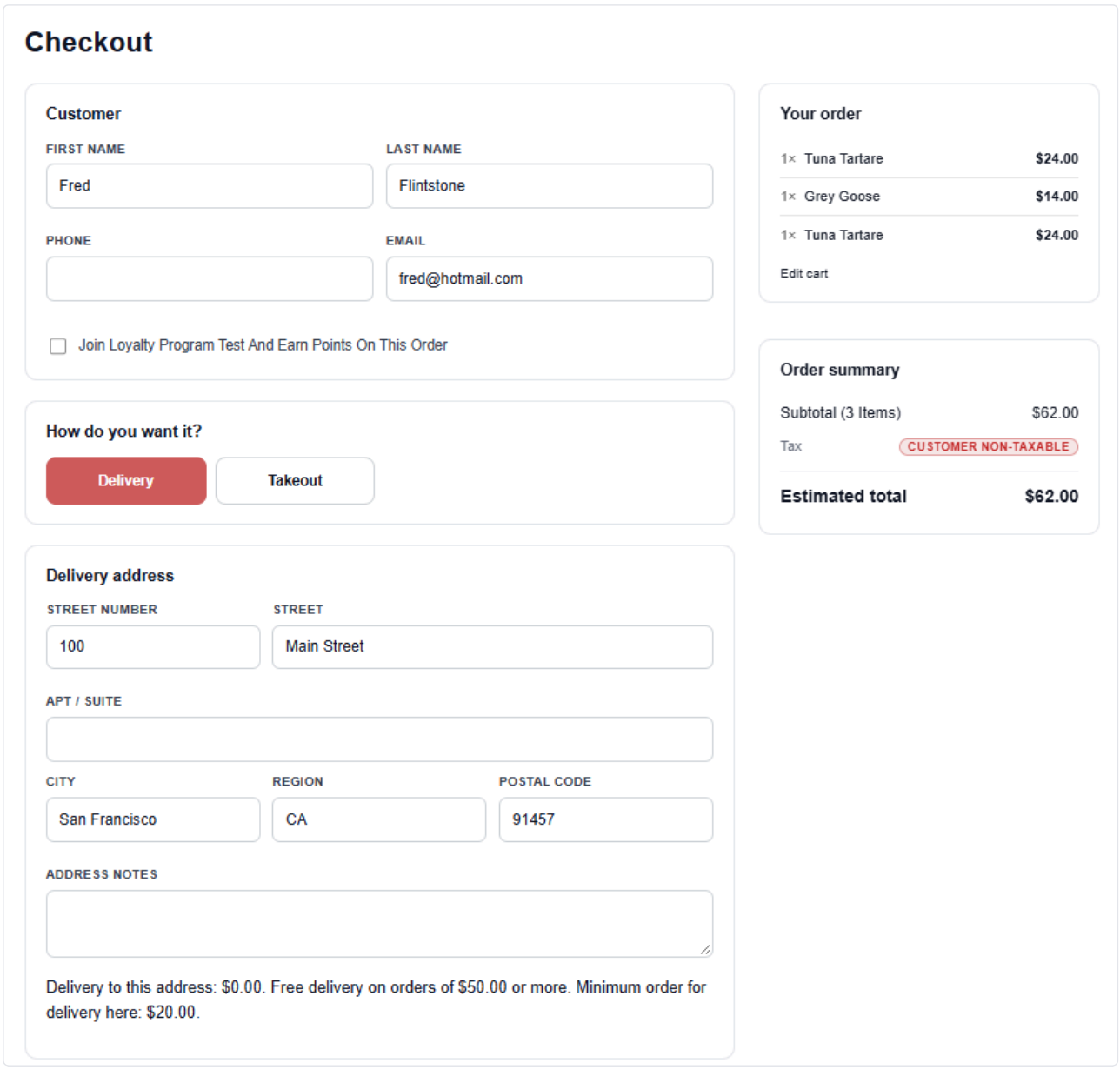
Scheduled orders at checkout

When **Scheduled orders** is on, the customer picks a **Day** and a **Time** from lists that only offer bookable times: 15-minute slots inside the store's open hours (holidays included), no sooner than the pickup or delivery minimum minutes, and no further out than the maximum scheduled days. Times are the store's local time. When scheduling is off the choice is not shown, and when nothing is bookable it is shown disabled with a note. Scheduled web orders reach the kitchen at their kitchen time — see Scheduled orders on the KDS.



Delivery zones at checkout

With delivery zones set up for the store, checkout prices delivery from the customer's address as they type it: the zone's fee, a free-delivery amount and the zone's order minimum are shown under the address, and an address outside every zone is refused with a message. If the address cannot be located, the default delivery fee applies. See Delivery zones and the zone map.



Delivery partner texts

Under the delivery address, checkout asks the customer whether a delivery partner may text them updates about their delivery, with a tracking link. The box is never ticked for them. Stores that use Entreo pass the answer on, and Entreo texts only the customers who ticked it. See Customer texts and tracking.

Saving cards at checkout

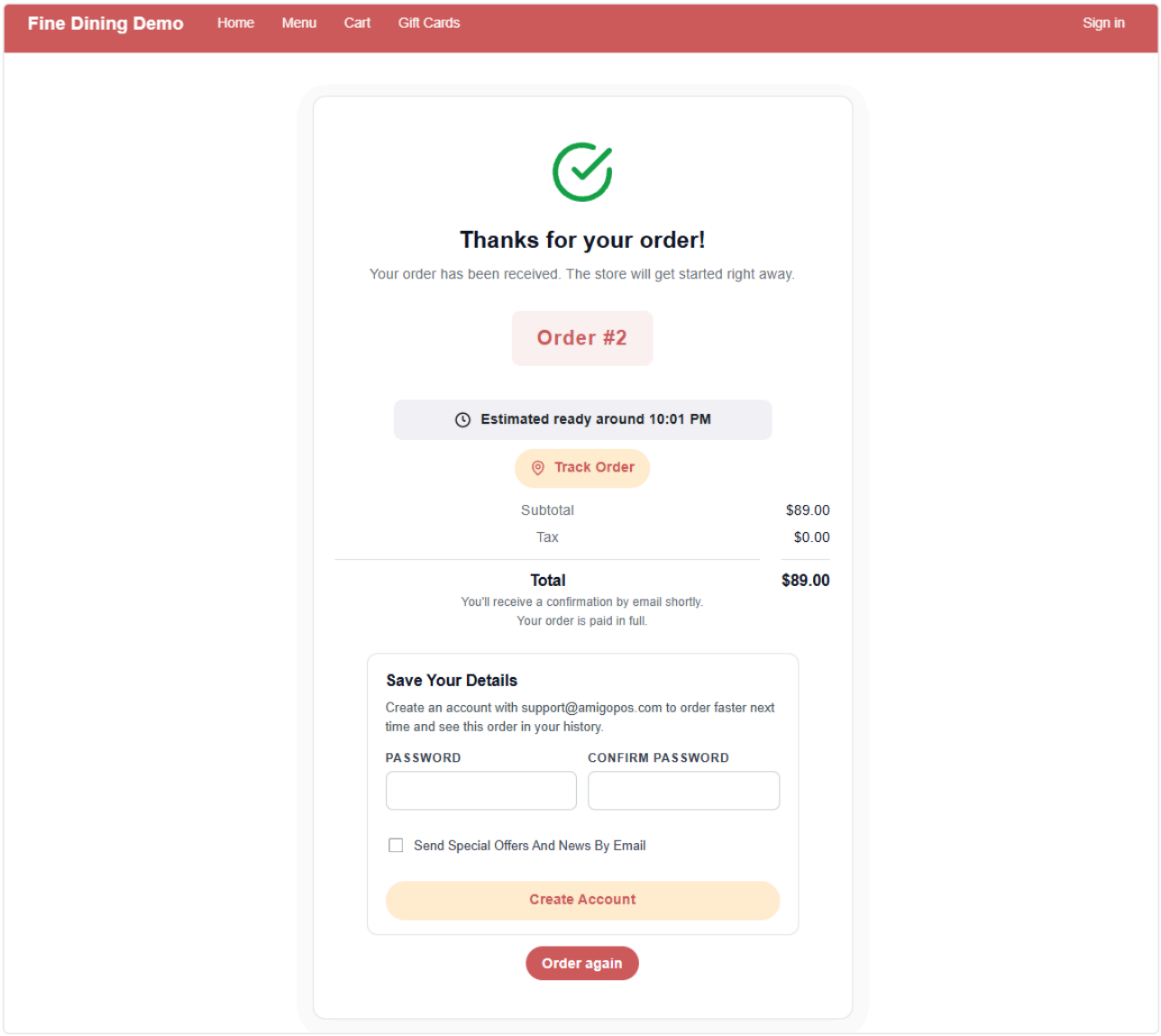
Whether signed-in customers are offered **Save this card for next time** is not set on this page. It follows **Offer To Keep The Card On File** in Back Office › Store Setup › Delivery Screen › Pay Links, the same switch the pay page uses. Turned off, checkout stops offering to save a card; cards already saved still show and can be used or removed. See Customer accounts on the storefront.

The ready time the customer sees

On the order confirmation page, and on the order's page under **My orders**, the storefront tells the customer when to expect the order. The estimate is the time the order was placed plus the **minimum pickup time** or **minimum delivery time** on this page — *Estimated ready around 6:45 PM* or *Estimated delivery around 7:15 PM*, in the store's time zone.

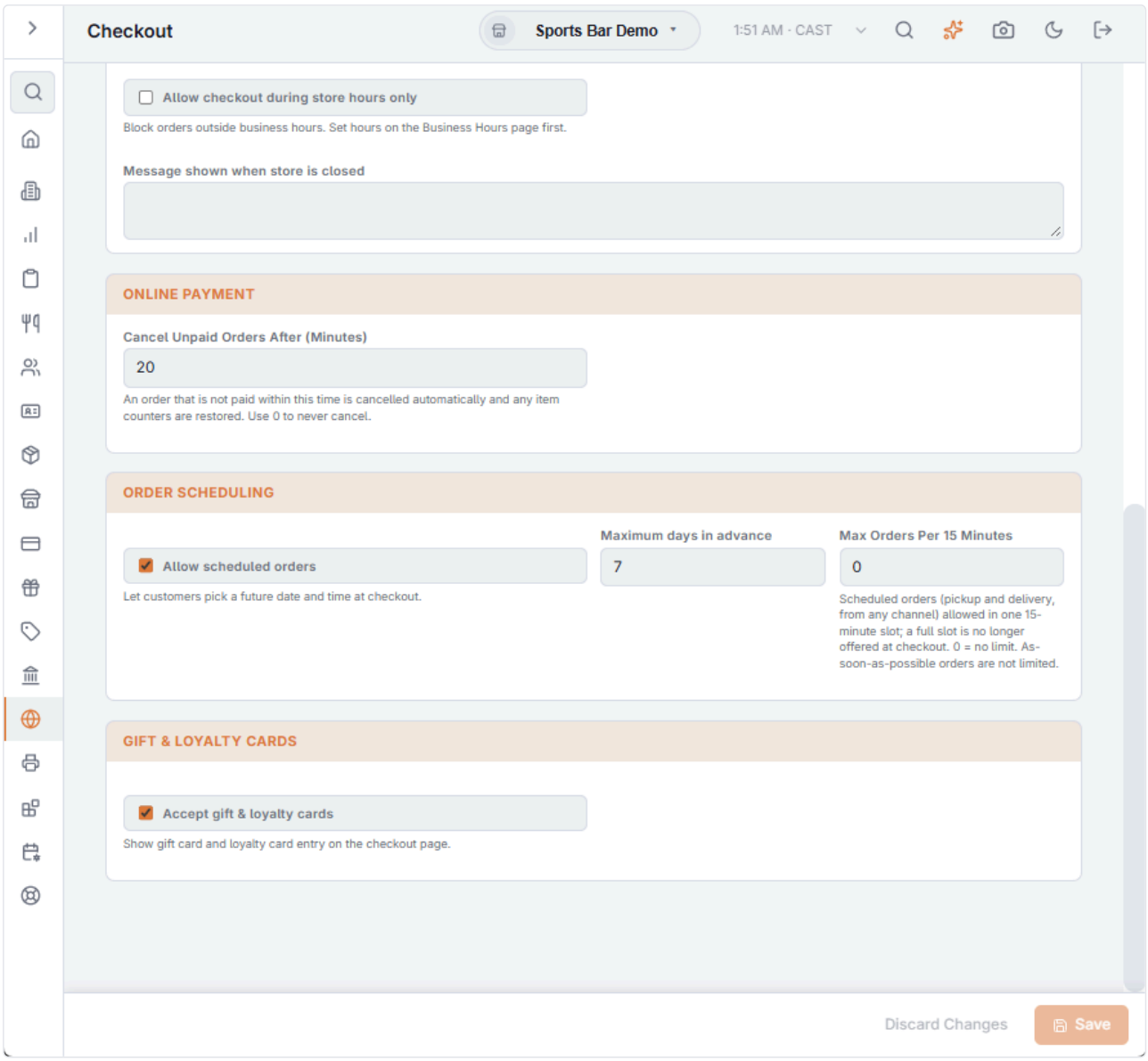
- Once that time passes it says *Should be ready any minute* (or *on its way*). Three hours past it, with nothing recorded, the line disappears rather than guess.

- A scheduled order shows *Scheduled For* the time the customer chose.
- When the store marks the order ready it turns green: *Ready For Pickup*, or *Ready, Waiting For The Driver*; later *Picked Up*, *On The Way* or *Delivered*.
- It is a fixed offset: it does not know how busy the kitchen is, so set the minimums to what the kitchen manages at rush. The page does not update by itself; the customer reloads it.
- Table (QR) orders and voided orders show no estimate.



Limiting orders per time slot

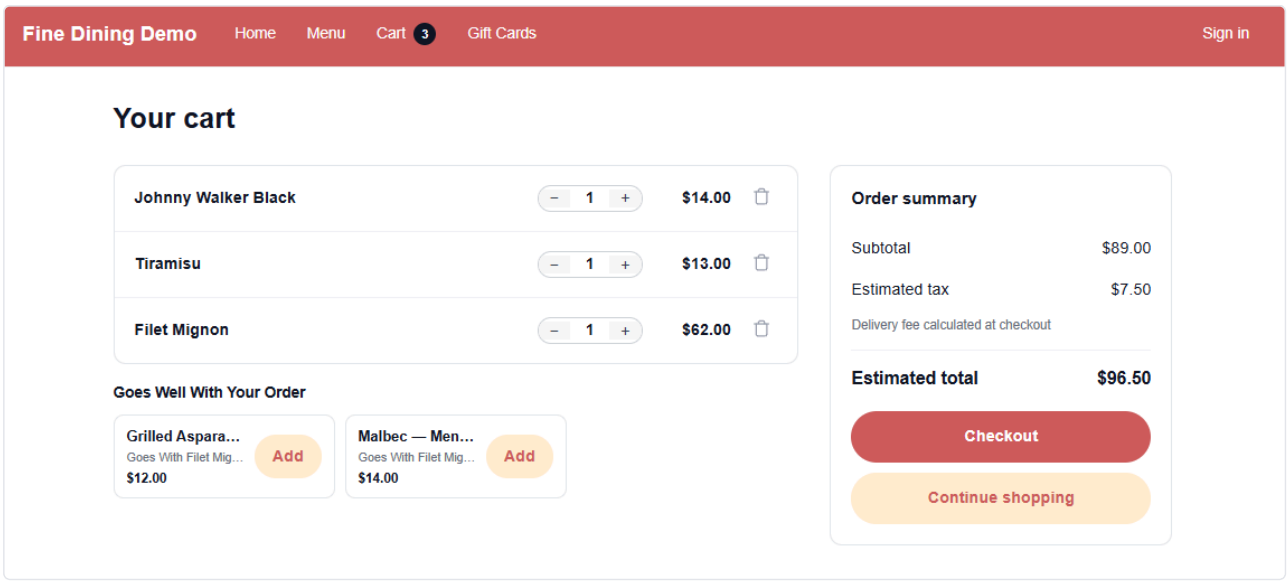
Max Orders Per 15 Minutes, in the **Order scheduling** section of this page, caps how many scheduled orders one 15-minute slot can take. 0, the default, means no limit.

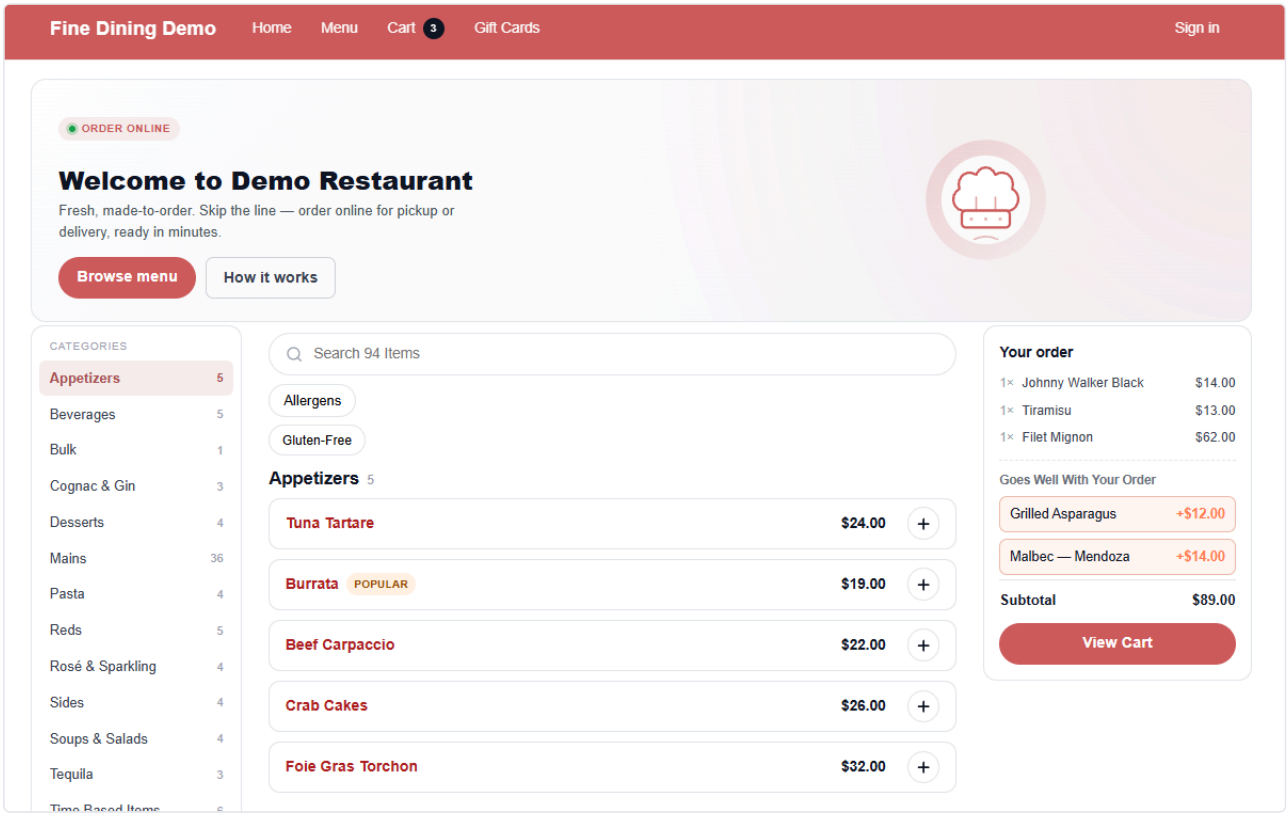


- Every scheduled order for the slot counts — pickup and delivery together, from any channel: web, call center or the register. Voided orders don’t, and neither does a card checkout the customer abandoned before paying.
- A full slot is left out of the **Time** list at checkout. The time is checked again when the order is placed, so a customer whose page was open while the slot filled up has to pick another time. Two orders placed in the very same second can still both get in.
- As-soon-as-possible orders are not limited, and do not count towards a slot.

Goes Well With Your Order

The cart shows up to three items that go with what the guest has chosen — what this store's guests most often add, or today's recommended items — each with **Add** (or **Choose** when it has options to pick). On a computer the cart panel beside the menu offers two. Only items on the online menu right now and not sold out are offered. It is on unless Goes Well With In Online Ordering is turned off (Store Setup › Order Entry Screen › Guests).





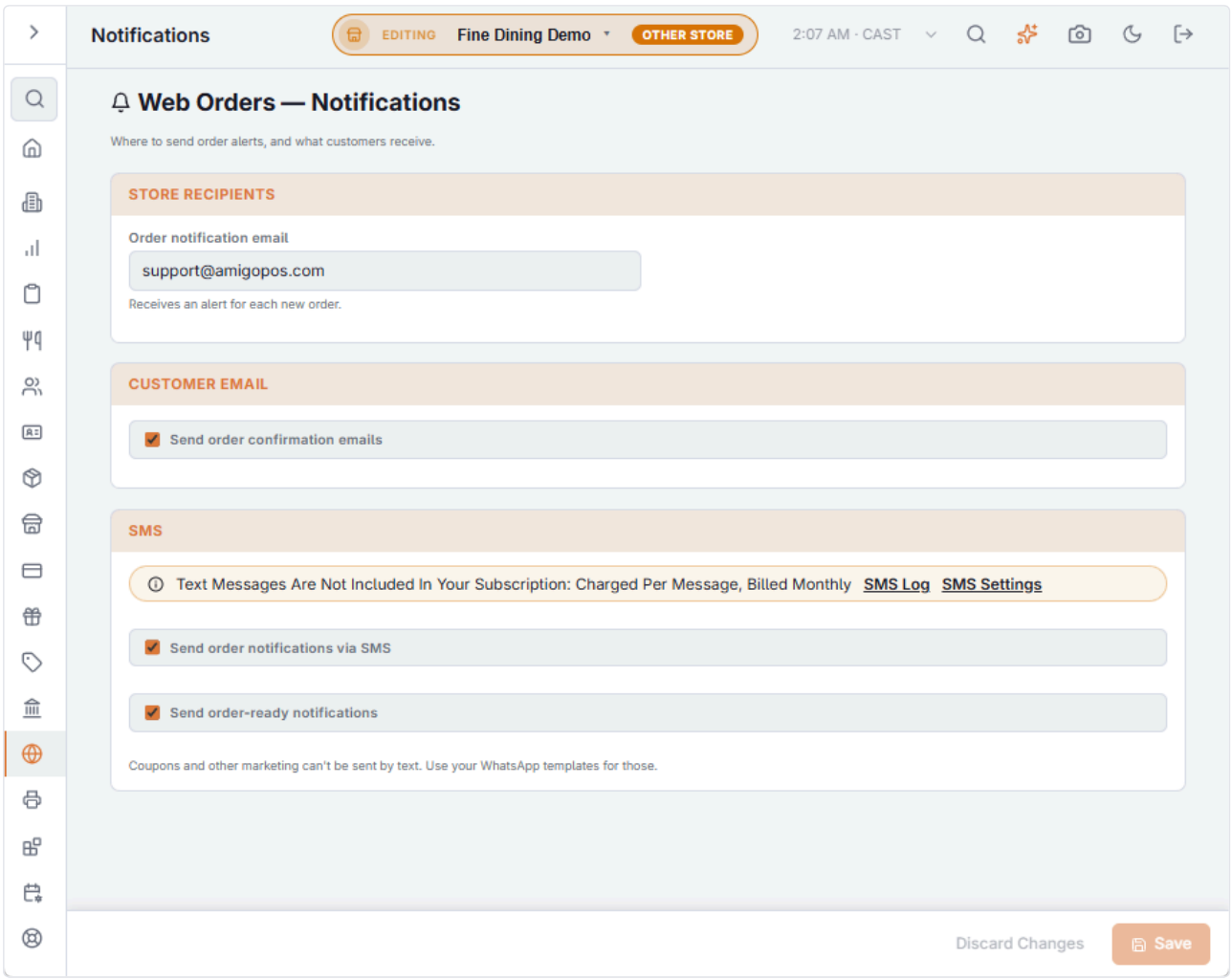
Notifications (email/SMS)

Web Orders

View online ↗

Order confirmations to customers and alerts to the store.

Back Office › Web Orders › Notifications decides who hears about online orders: the email the store receives for each new order, and the email and texts customers receive. Changes take effect when you select **Save**. If the save fails, *Save failed* is shown and your changes stay on the page, unsaved.



Store recipients

Order notification email receives an email for each new online order — a backstop for the register's pending-order badge. Leave it empty for none.

Customer email

Send order confirmation emails emails the customer a confirmation when they place the order.

Texts to the customer

- **Send order notifications via SMS** — texts the customer that the order was received, with its number and total.
- **Send order-ready notifications** — texts the customer that the order is ready, once, at its first bump on the kitchen display or when someone selects **Mark Ready And Notify** on the orders list.

A text goes out only when the order has the customer's phone number. Orders placed from a table QR code get no email and no texts: the guest is in the restaurant.

Coupons and other marketing can't be sent by text; use your WhatsApp templates for those. See WhatsApp message templates.

Messaging and costs

Texts go through AmigoPOS's text service, which sends only what is switched on in SMS settings. Each text is charged and billed monthly, outside the subscription. Where the store has connected its own WhatsApp account and switched order messages to WhatsApp (**Back Office › Integrations › WhatsApp**), they go by WhatsApp instead and Meta bills the store directly. The **SMS Log** lists every message, including online-order notifications, with its status and cost. See SMS log and message costs.

> Place a test order before going live and check that the store email and the customer messages arrive.

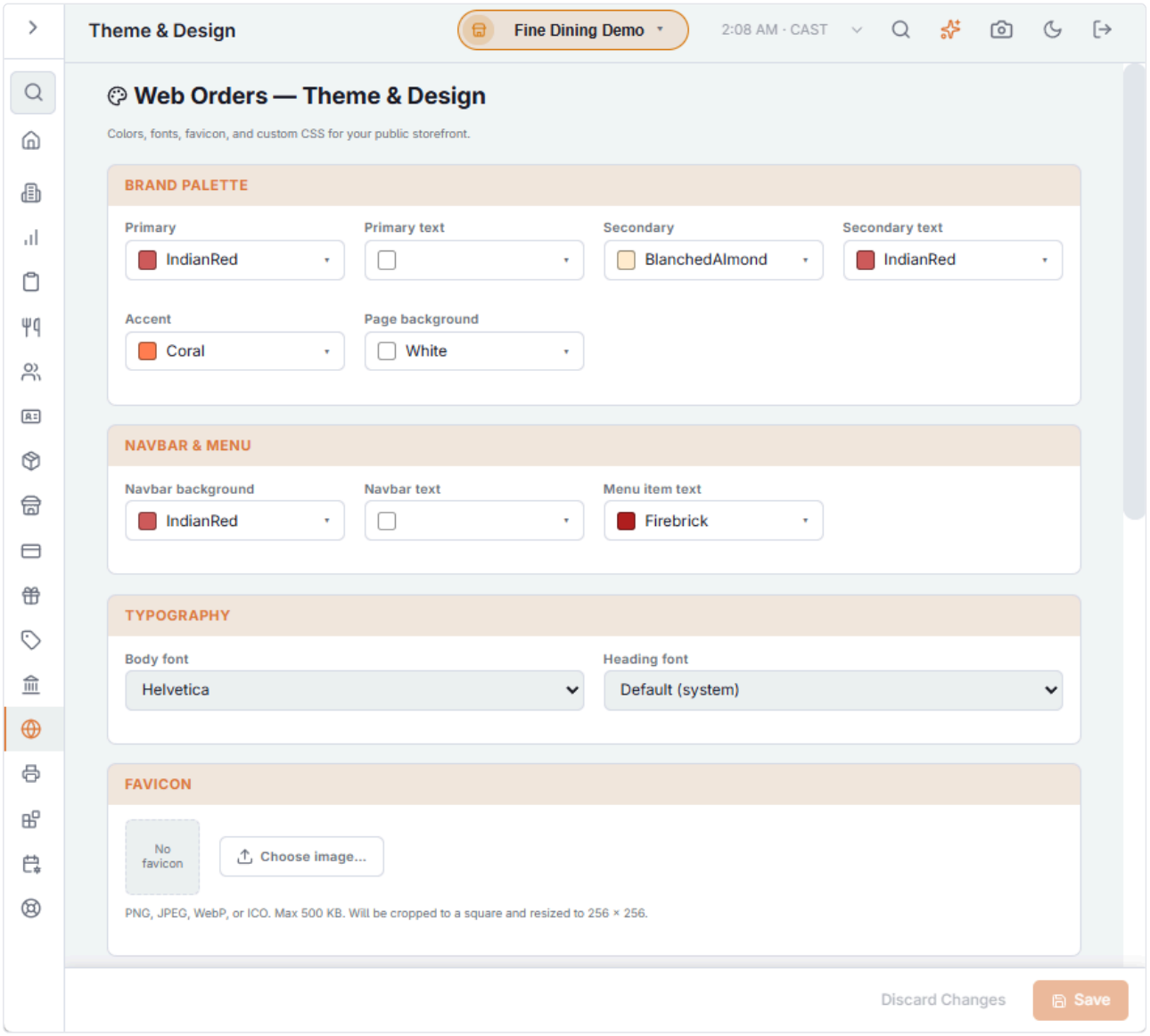
Theme and appearance

Web Orders

View online ↗

Colours, fonts, favicon and custom CSS for the online ordering site, with a live preview as you change them.

Back Office › Web Orders › Theme & Design styles the online ordering site to the brand — colours, fonts, favicon and custom CSS — with a live preview beside the controls. Colours, fonts and CSS take effect on the site when you select **Save**. If the save fails, *Save failed* is shown and your changes stay on the page, unsaved.



Colours

Each colour has its own picker.

- **Brand palette** — **Primary** (buttons and highlights) with its **Primary text**, **Secondary** with its **Secondary text**, **Accent** and **Page background**.
- **Navbar & menu** — **Navbar background**, **Navbar text** and **Menu item text**.

The **Live preview** draws a small version of the site as you change values: the top bar with the brand and the Home, Menu and Cart links, a heading, an active and an inactive category pill, an item card, and the primary and secondary buttons.

> Check the buttons in the preview: brand colours that look right on a website can leave button text unreadable. The text colours exist for that fix.

Typography

Body font and **Heading font** each offer **Default (system)** or one of Arial, Helvetica, Segoe UI, Roboto, Open Sans, Lato, Montserrat, Verdana, Tahoma, Trebuchet MS, Georgia, Times New Roman and Courier New.

Favicon

The small icon in the browser tab. **Choose image…** uploads it straight away, without Save: PNG, JPEG, WebP or ICO, up to 500 KB, cropped to a square and resized to 256 × 256. **Remove** deletes it. Uploading or removing the favicon saves only the favicon: colour, font and CSS changes you have not saved yet stay unsaved.

Advanced

Custom CSS is applied last and overrides the theme. Use it for a tweak the controls don't cover, and keep it short: custom CSS is the part of a theme that can break when the site is updated.

Customer accounts on the storefront

Web Orders

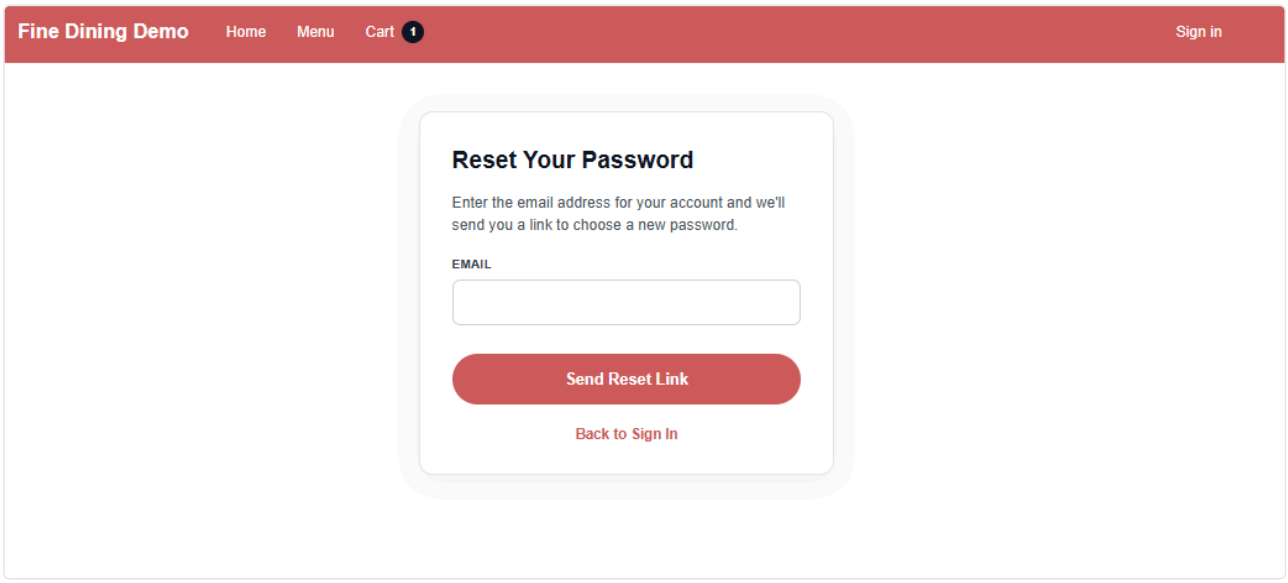
View online ↗

What customers can do with an account on the web store: sign in, reset a forgotten password, keep addresses and favorites, and reorder.

Customers can order as guests, or create an account on the storefront to save their details. This is what they will ask you about.

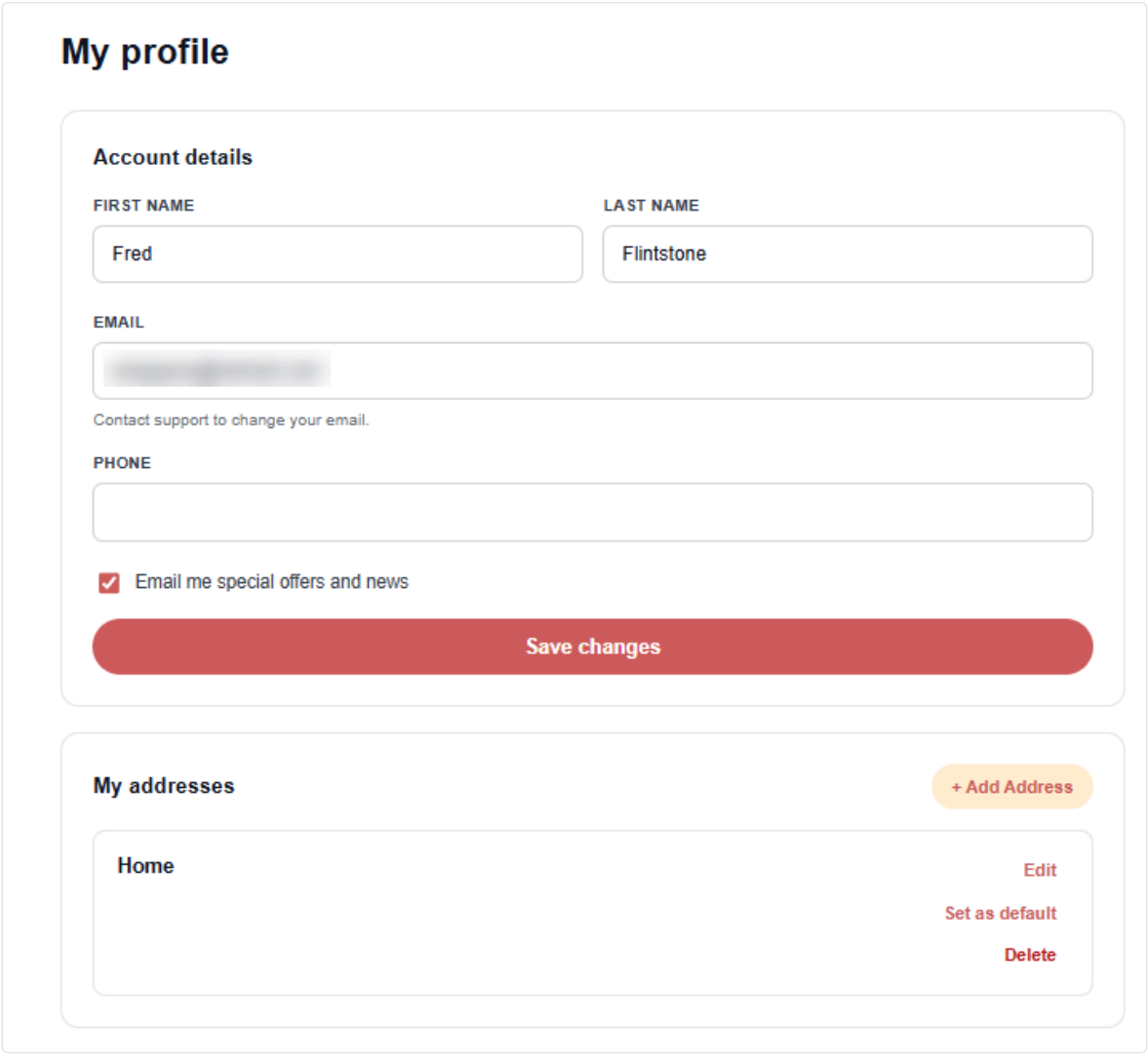
Signing in and forgotten passwords

- **Sign in / Register** from the storefront menu. Repeated failed attempts are slowed down for a short while.
- **Forgot Password?** on the sign-in page emails a reset link to the account's address. The link works for 2 hours; resetting also clears a lockout from too many attempts.
- Staff accounts (managers and admins) cannot be reset from the storefront; they are managed in the Back Office.



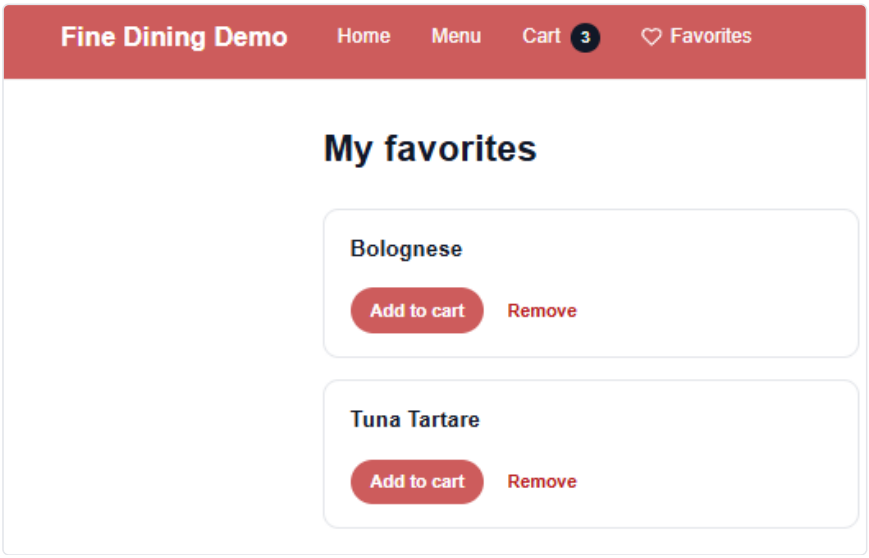
Profile and addresses

The **Profile** page holds the name, phone and whether the customer wants offers by email, and their delivery addresses: add, edit, delete, and pick the default used at checkout. A customer only ever sees and changes their own addresses.



Favorites and reorder

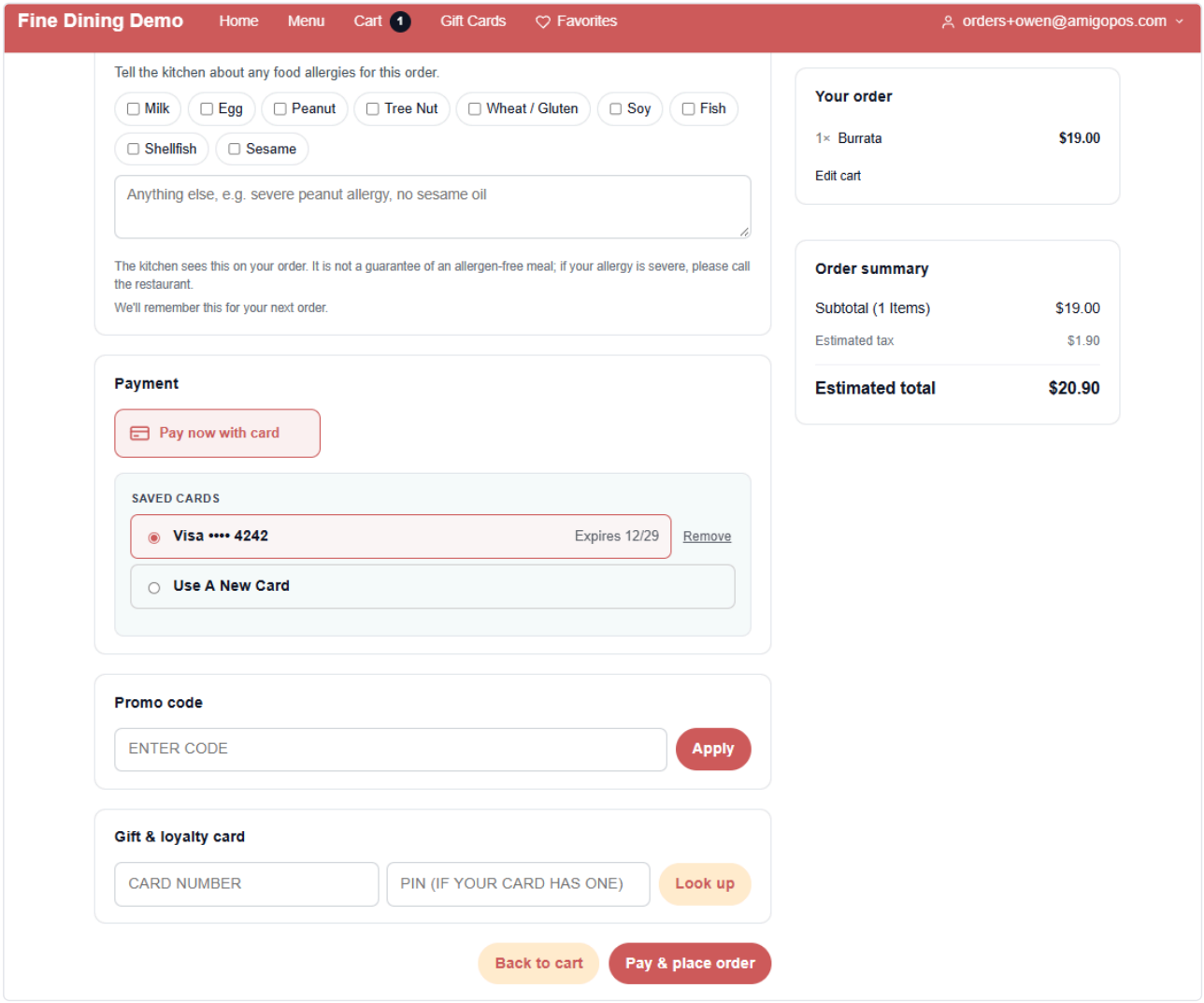
- Signed-in customers see a heart on menu items; tapping it saves the item to **Favorites**, where it can be added to the cart, renamed or removed.
- Past orders can be ordered again from the order history. Items or options no longer on the menu are left out, and prices are today's.



Saved cards

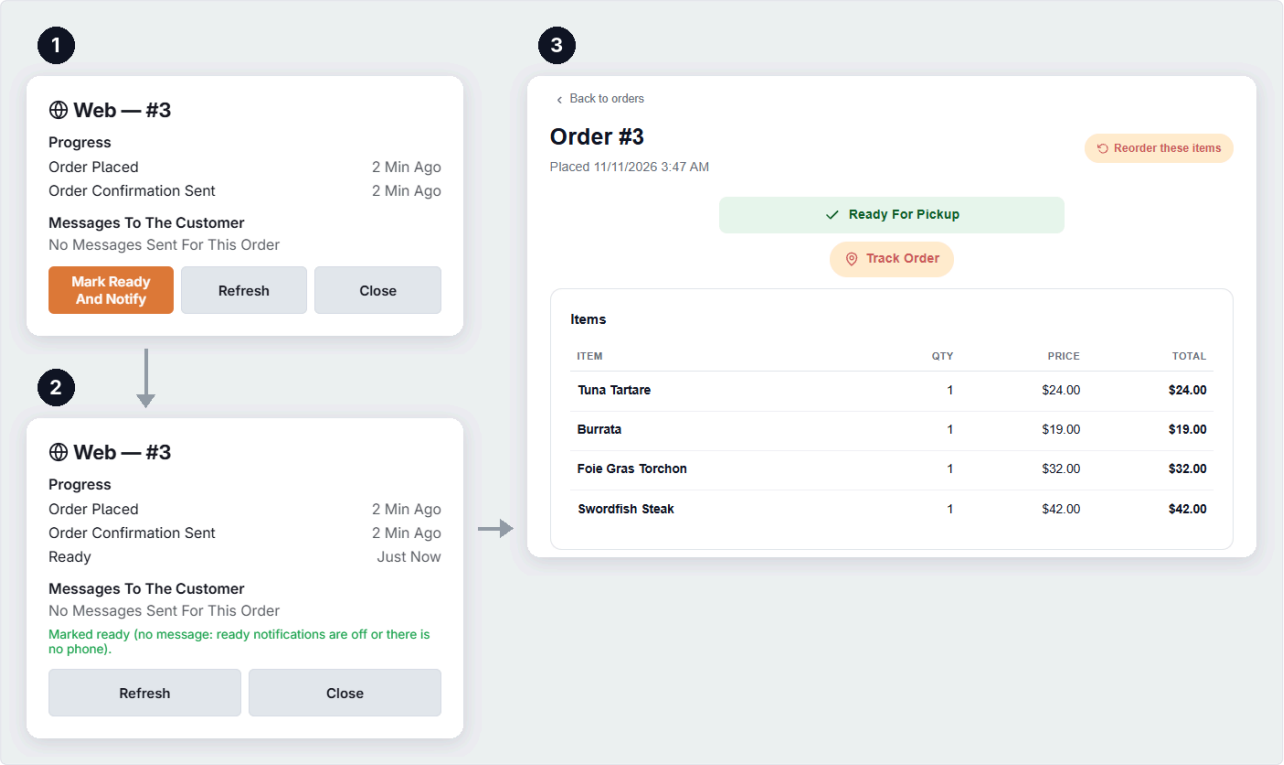
A signed-in customer paying by card can tick **Save this card for next time** at checkout. The card is kept by Stripe, the payment processor: the store never sees or stores the card number, and the note under the checkbox says so.

- Next time, checkout lists their **Saved Cards** — for example *Visa •••• 4242, Expires 12/27*. They pick one and pay, or choose **Use A New Card**. Their bank may still ask them to confirm the payment, as it can with a new card.
- **Remove** beside a card takes it off the list after a confirmation. A charge the store already arranged with that card, such as a reservation fee or a call-center order, still goes through.
- Guests, and orders placed from a table's QR code, never see saved cards. A customer only ever sees their own.
- A card saved here is also one the call center can charge on file for that customer.
- Whether the checkbox is offered follows the store's **Offer To Keep The Card On File** setting — see Checkout settings.



Order status on the order page

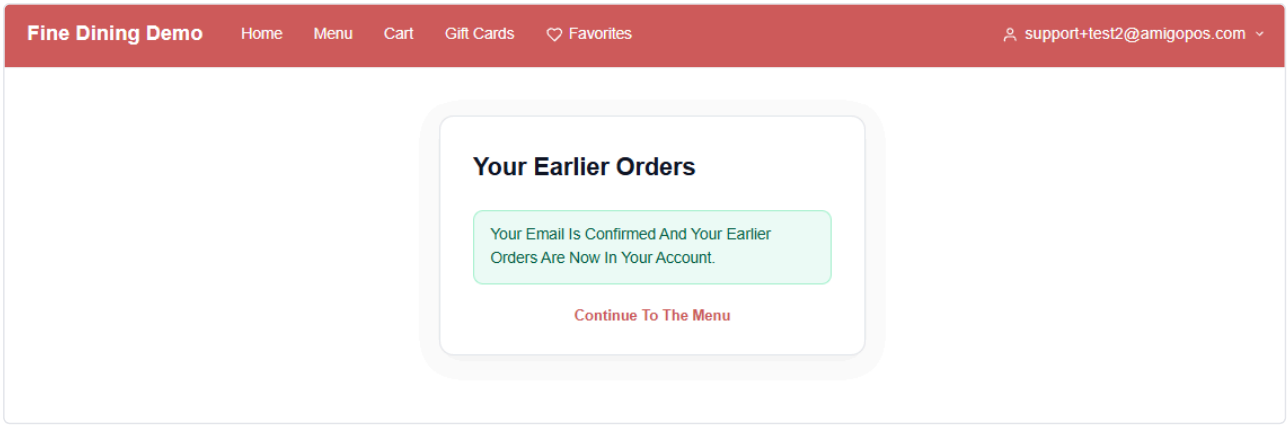
Opening an order from **My orders** shows when it should be ready, or that the store has marked it ready, picked up, on the way or delivered. See Checkout settings for how the time is worked out.



Earlier orders join an account after the email is confirmed

When a guest who just ordered creates an account, the account starts with its own customer record, and the guest gets an email: open the link to add the earlier order to the account. The link confirms the email address and works for 2 hours.

- Until the link is opened, the earlier order stays with the guest record. This stops someone from taking over another person's order history by registering with their details.
- If the new account already placed orders before the link was opened, the records are kept apart, and the page says so. Join them in Back Office with the customer merge.



Incoming web orders at the register

Web Orders

View online ↗

How new online orders announce themselves at the register — the pulsing globe badge, the pending list with order ages, and pulling an order in with Recall.

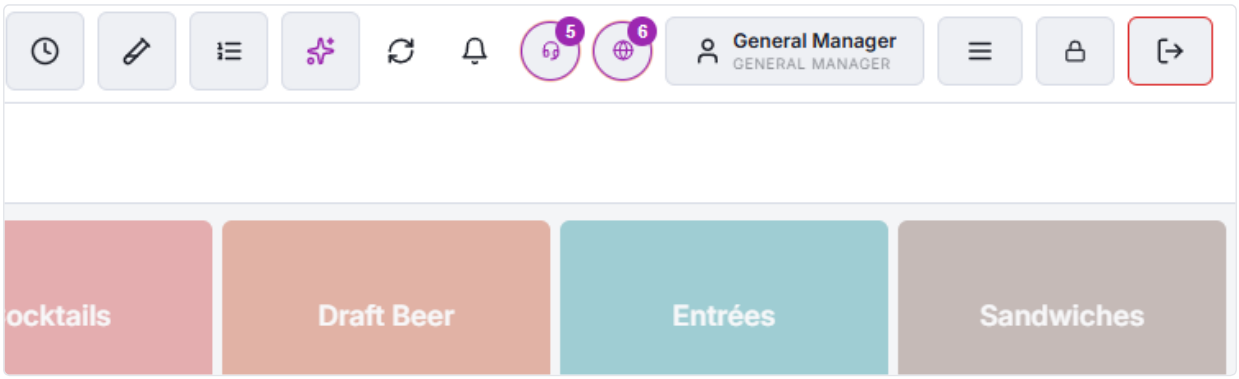
When a customer places an order on the online storefront, it lands at the register as a **pending web order**. Nothing is made until someone at the store pulls the order in — this page covers how new orders announce themselves and how to work them.

The alert badge

A pulsing **globe badge** with a count appears in the register's top bar the moment at least one web order is waiting. It shows on every station, so whoever is free can take it. The badge disappears on its own when the pending list is empty.

The pending list

Tap the badge to open the **Pending web orders** panel. Each row shows the order number and its **age** — how long ago the customer submitted it. Ages past the store's lateness threshold turn red: those customers have been waiting; take them first.



Working an order

1. Tap **Recall** on the row. The order opens in order entry with everything the customer chose — items, modifiers, notes, and their details.
2. Review it, make any changes the customer phoned in, and send it to the kitchen like any other order.
3. Payment depends on how the customer checked out: prepaid web orders settle against the online payment; pay-at-pickup orders settle normally when the customer arrives.

Web orders also appear under the **Web** filter on the orders list, and their storefront status can be viewed and advanced from the **Web status** action there — useful for marking an order ready so the customer's tracking page updates.

Common questions

- **No badge, but a customer says they ordered.** Check the orders list under *Web* — the order may already have been recalled by another station. If it's not there at all, check the storefront's business hours and the store's connection.
- **Two people tapped Recall at once.** The order opens for the first; the second gets the refreshed list without it.
- **How do web orders pause when we're slammed?** Turn on **Disable checkout** at **Back Office › Web Orders › Checkout**: the site stays browsable but takes no orders until you turn it off. See Checkout settings.

What the customer sees when you mark it ready

Marking a web order ready from the orders list (**Web › Mark Ready And Notify**) turns the customer's order page to *Ready For Pickup* (or *Ready, Waiting For The Driver*), whether or not a text goes out. Bumping it on the KDS does the same only when the ready text is actually sent — the customer has a phone number and the store's order-ready notification is on. Until then the page shows the estimate from Checkout settings. The customer sees the change when they reload the page.

CHAPTER 22

Hardware & Printing

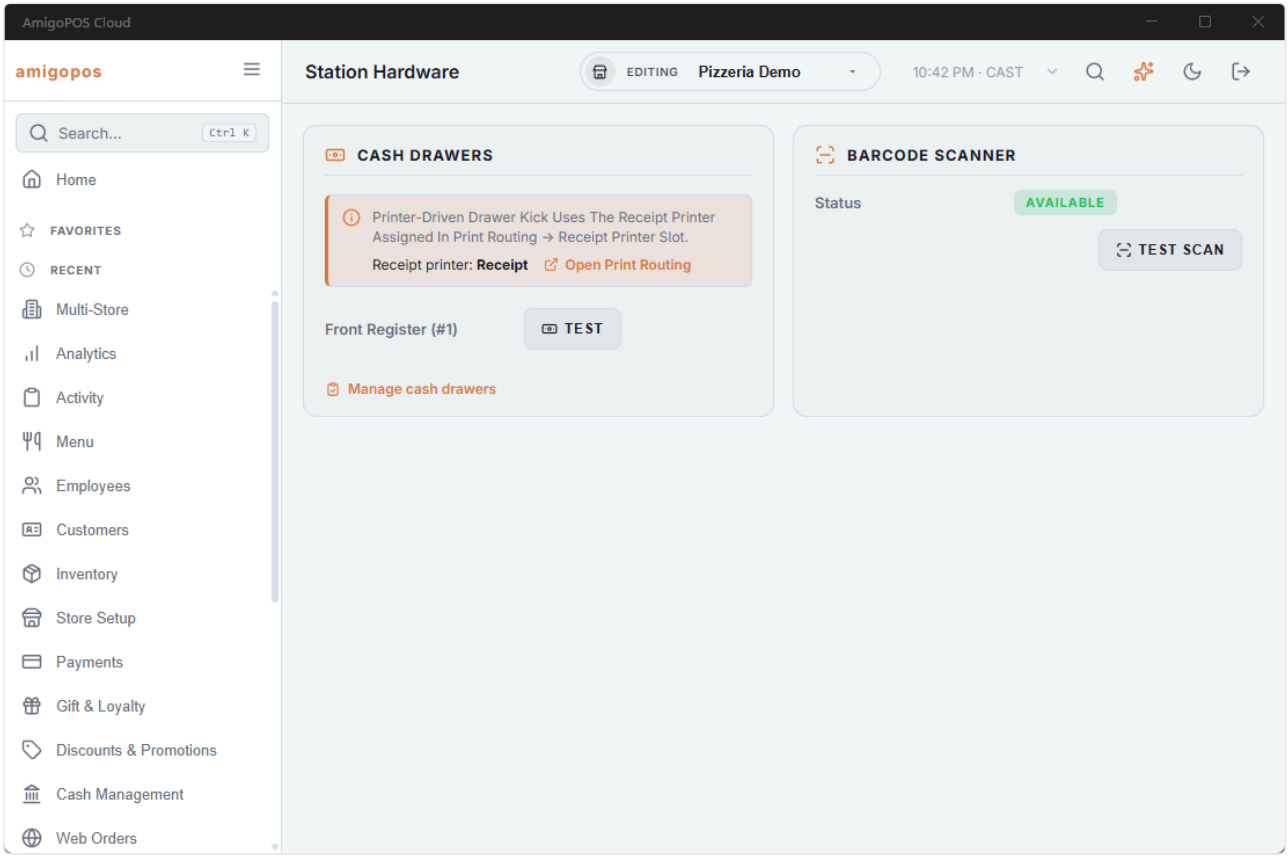
Station hardware (cash drawers and scanner)

Hardware & Printing

View online ↗

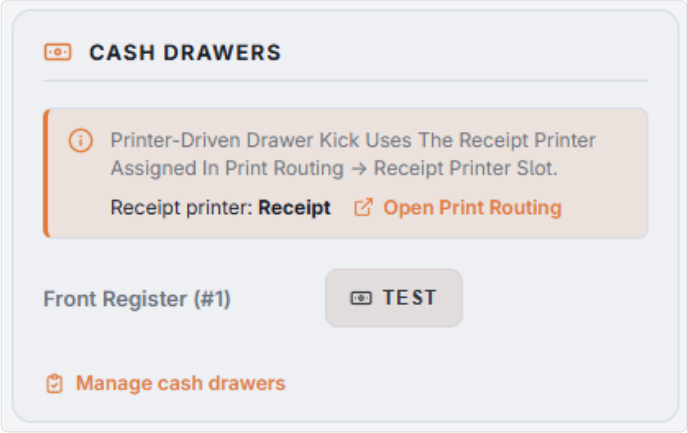
One register's hardware: its cash drawers and their test buttons, which receipt printer opens them, and the barcode scanner test.

Back Office › Hardware & Printing › Station Hardware shows the hardware of the register Back Office is open on — its cash drawers and its barcode scanner — and lets you test each one. It is per station: to check another register's hardware, open Back Office on that register.



Cash Drawers

Cash drawers plug into the receipt printer, not into the register, and open when that printer sends them a pulse. The card therefore starts by naming the **Receipt printer** this register prints to — the printer in the **Receipt Printer** row of Print Routing for this station — with **Open Print Routing** to change it. See Print routing.

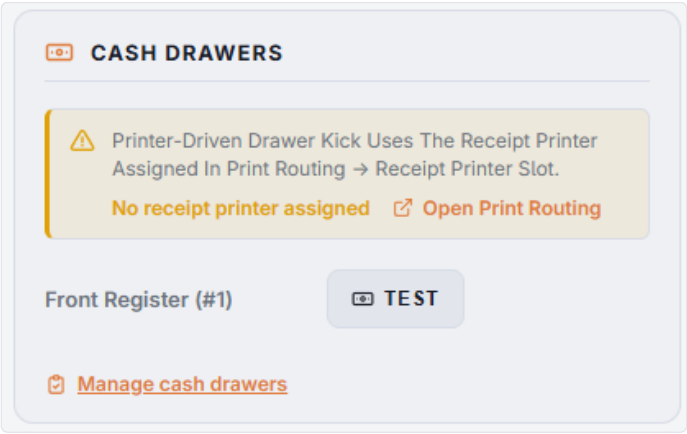


Below it, the enabled cash drawers assigned to this station are listed by name and drawer number (up to two), each with a **Test** button. Test sends a real drawer pulse through the receipt printer, as a cash sale does. While the station is offline, the pulse goes through the station's own offline printer instead.

After a Test, a message says **Drawer Kick Sent To The Receipt Printer**, or **The Drawer Kick Could Not Be Sent. Check The Receipt Printer In Print Routing.** The first message only means the kick went out to the printer; it does not prove the drawer opened, so watch the drawer itself:

- **The drawer opens** — everything is wired and set correctly.
- **Nothing happens, and receipts print** — the printer is fine; check that the drawer cable is in the printer's drawer port and that the cash drawer setting is on for that printer in the Print Agent, with the right brand. See Printer settings explained.
- **Nothing happens, and receipts do not print either** — it is a printer or Print Agent problem; see Nothing printed, or it printed in the wrong place.
- **The wrong drawer opens** — the two drawer records have their drawer numbers swapped.

If no receipt printer is routed to this station, the card shows **No receipt printer assigned** as a warning, and no drawer can open until one is set in Print Routing. If no drawer is assigned to the station, it says **No cash drawers are configured for this station**.

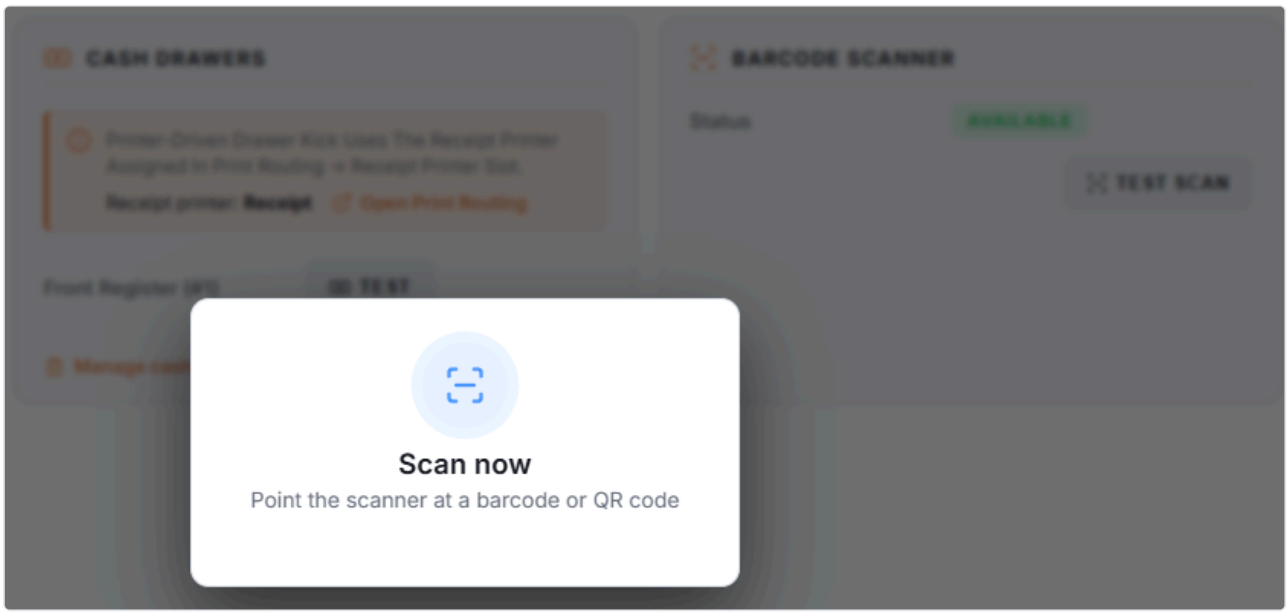


Manage cash drawers opens **Back Office › Cash Management › Cash Drawers**, where drawers are created, numbered and assigned to stations. See Creating and editing cash drawers.

> The drawer brand and any custom codes are settings of the *printer*, made in the Print Agent, not of the drawer.

Barcode Scanner

The **Status** line shows **Available** or **Not available**: whether the app has its own scanner support on this device. **Test scan** opens a window that waits up to 30 seconds for a scan. Scan any barcode and a message shows **Scanned:** and the value, which proves the scanner works end to end. Closing the window without a scan shows **Scan Cancelled**. Test scan works even when the Status reads **Not available**: a USB scanner that types like a keyboard scans straight into the window.



To see what a scanned code would ring up as, use **More › Scanner Test** at the register. See USB barcode scanner.

Setting up printing, start to finish

Hardware & Printing

View online ↗

The whole path from a new printer to a printed ticket: activate a Print Agent, add the printers in it, route them in Back Office, test.

Printing is set up in **three places**, always in the same order. Most confusion comes from looking for a setting in the wrong one, so it is worth knowing what each place is for before starting.

Where	What you do there
Back Office › Hardware & Printing › Registered Devices	Generate a one-time code that connects a Print Agent to *one* store.
The Print Agent app, on the computer or tablet the printers are connected to	Add each printer: how to reach it, paper, language, cash drawer. **This is the only place a printer is created or changed.**
Back Office › Hardware & Printing › Print Routing	Decide what prints where: which printer takes receipts, which takes each kitchen or bar station, how many copies.

> There is no “add printer” in Back Office. A printer appears in Back Office by itself once the Print Agent saves it, and only for the store that agent belongs to.

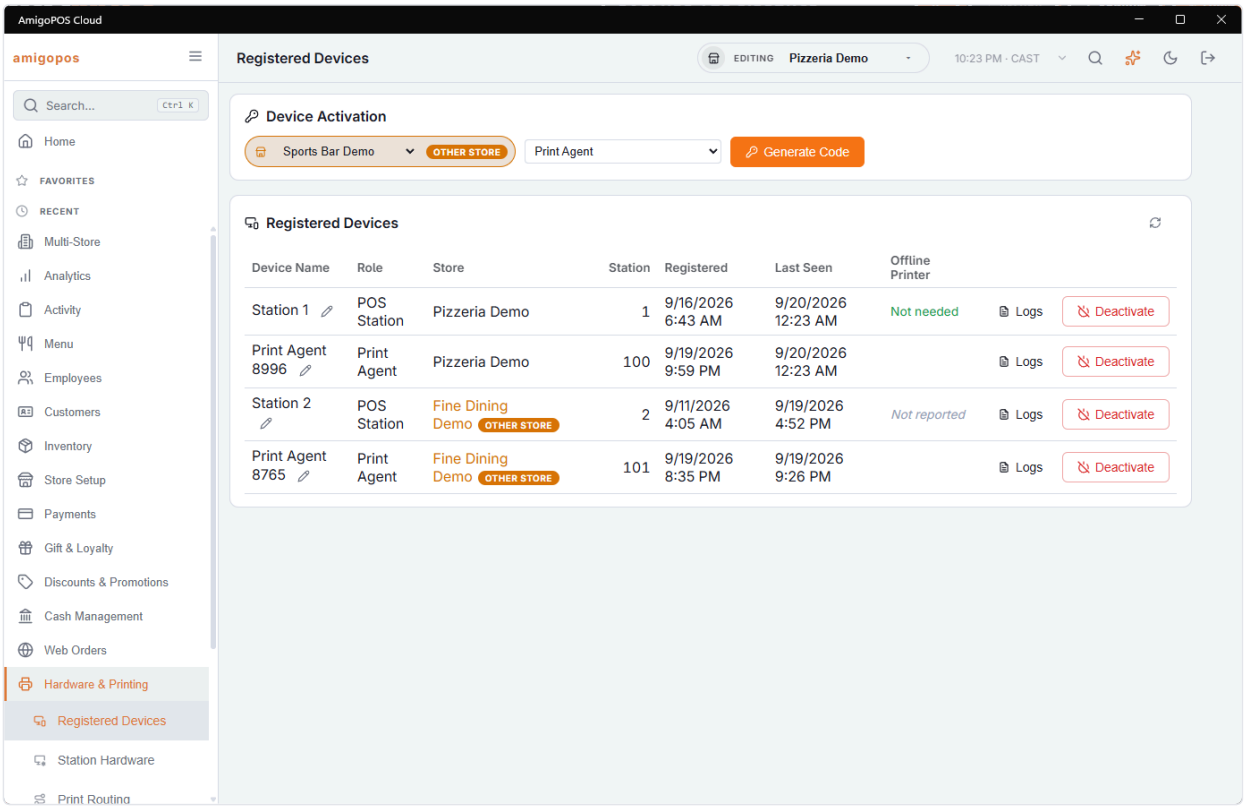
Before you start

- **Pick the device that will run the Print Agent.** It must stay switched on during trading hours and be able to reach every printer: a Windows PC the receipt printer is plugged into by USB, or any Windows PC or Android tablet on the same network as network printers. One agent can drive many printers; a store can have several agents.
- **Give network printers a fixed address.** Print the printer’s self-test page (usually: hold the feed button while switching it on) to see its IP address, and reserve that address in the router. A printer that changes address overnight looks exactly like a broken printer.
- **USB printers on Windows:** install the maker’s Windows driver first, so the printer appears in Windows’ list of printers. The agent prints through that entry.
- **Know which store you are setting up.** Each agent serves exactly one store. If your account manages several stores, check the store shown at the top of Back Office before generating the code.

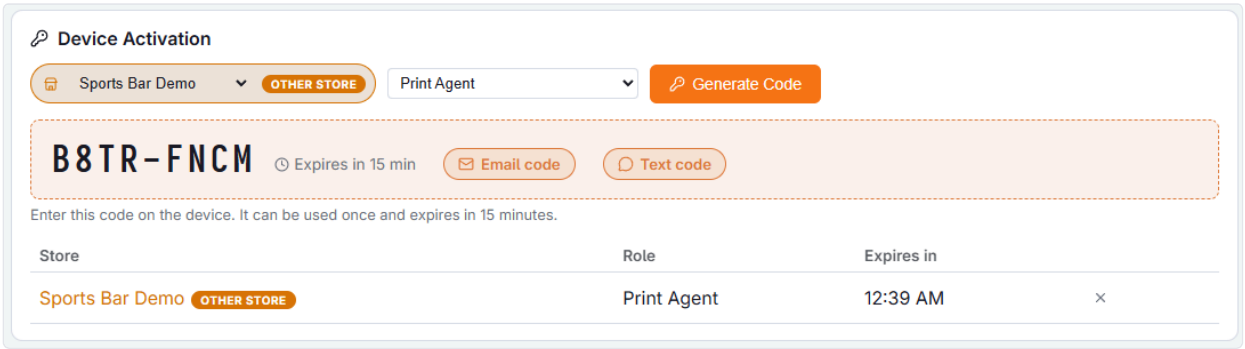
Step 1 — Connect a Print Agent to the store

1. Install the Print Agent on the chosen device — see *Installing the Print Agent on Windows* or *on Android*.

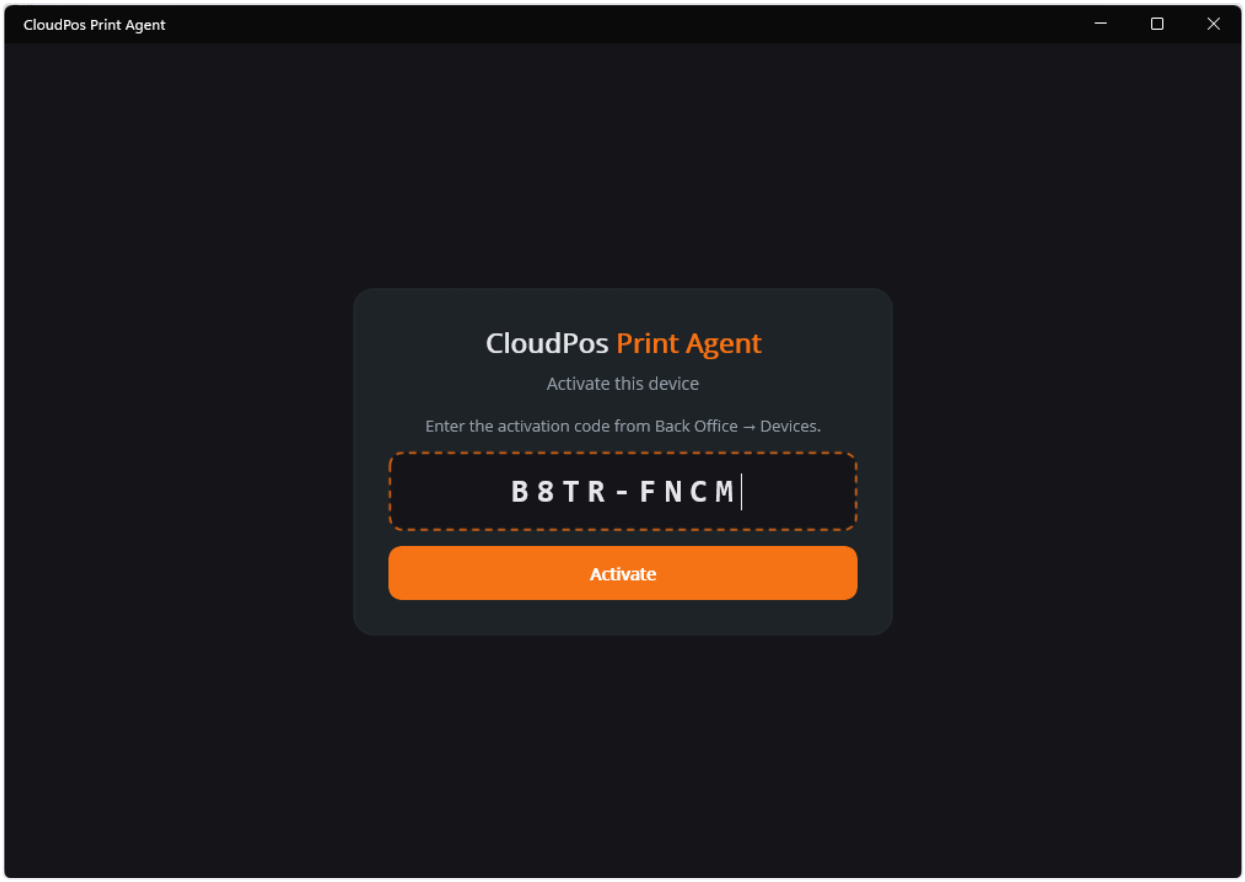
2. In **Back Office › Hardware & Printing › Registered Devices**, in the **Device Activation** card, choose the **store** (it starts on the store Back Office is editing), set the role to **Print Agent** and press **Generate Code**.



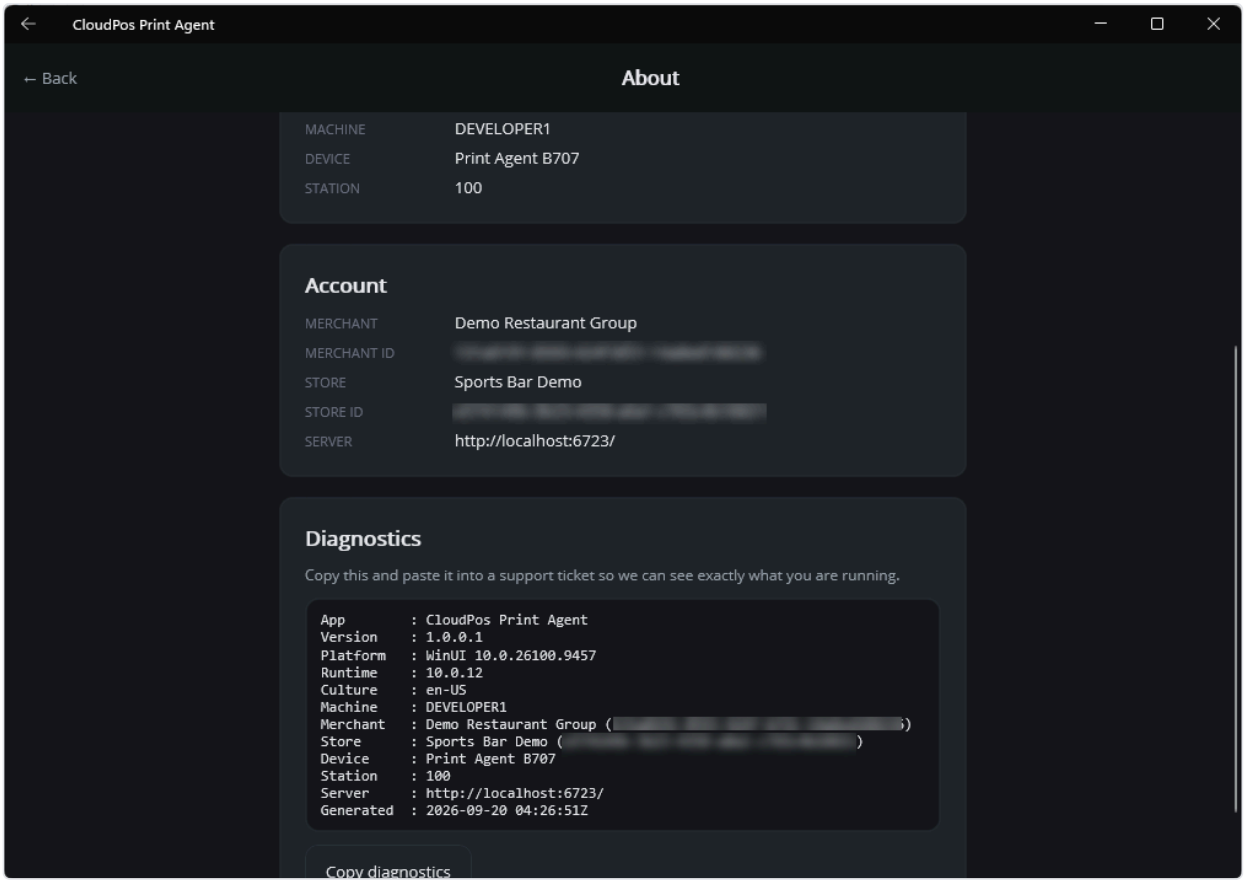
3. A code appears. It works once and expires after 15 minutes, so generate it when you are standing at the device. **Email code** and **Text code** send it to your phone if the device is somewhere else.



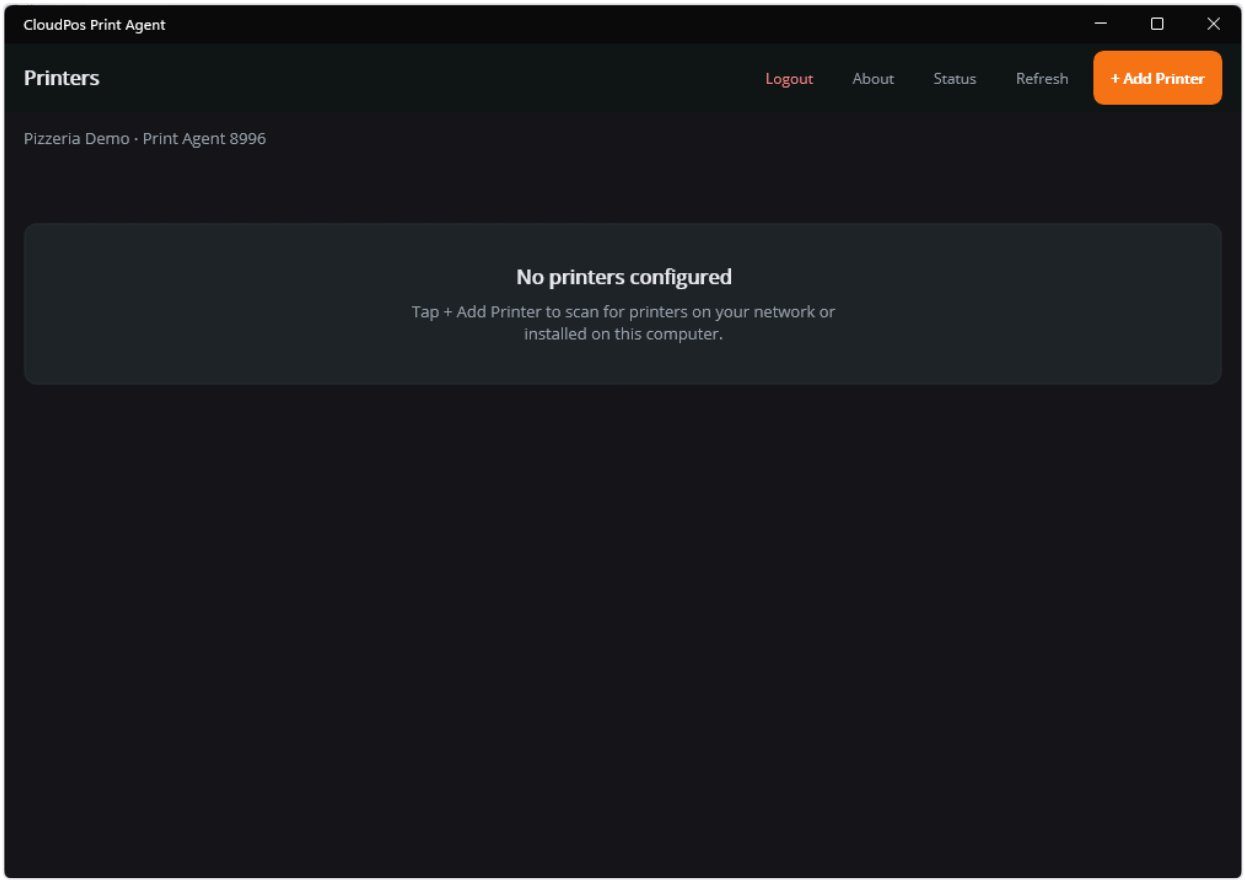
4. On the device, type the code into the Print Agent and press **Activate**.



5. The agent confirms with **Setup complete** and the merchant and store it now belongs to. **Check the store name.** If it is the wrong store, stop here and see *Activating an agent for the right store*.

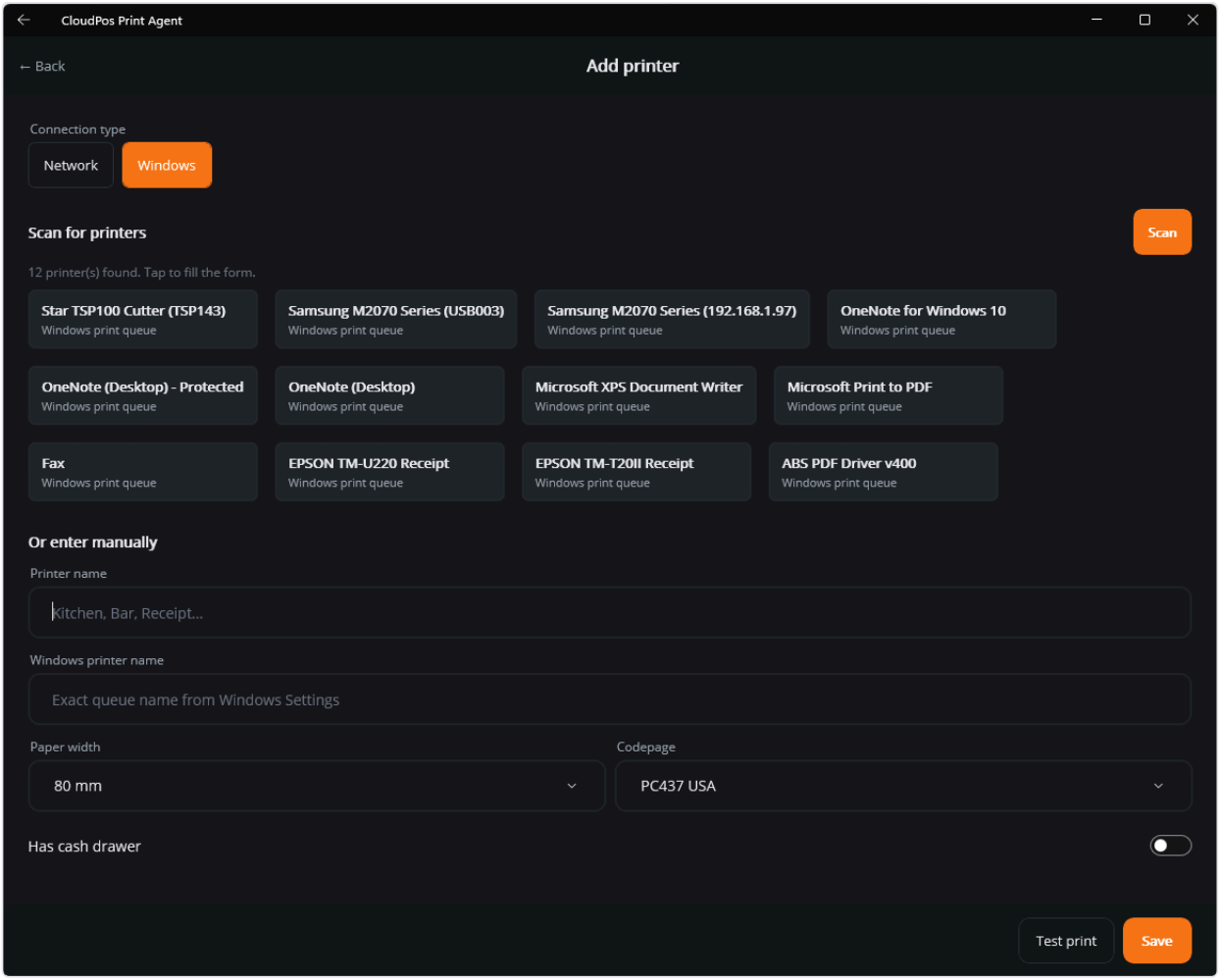


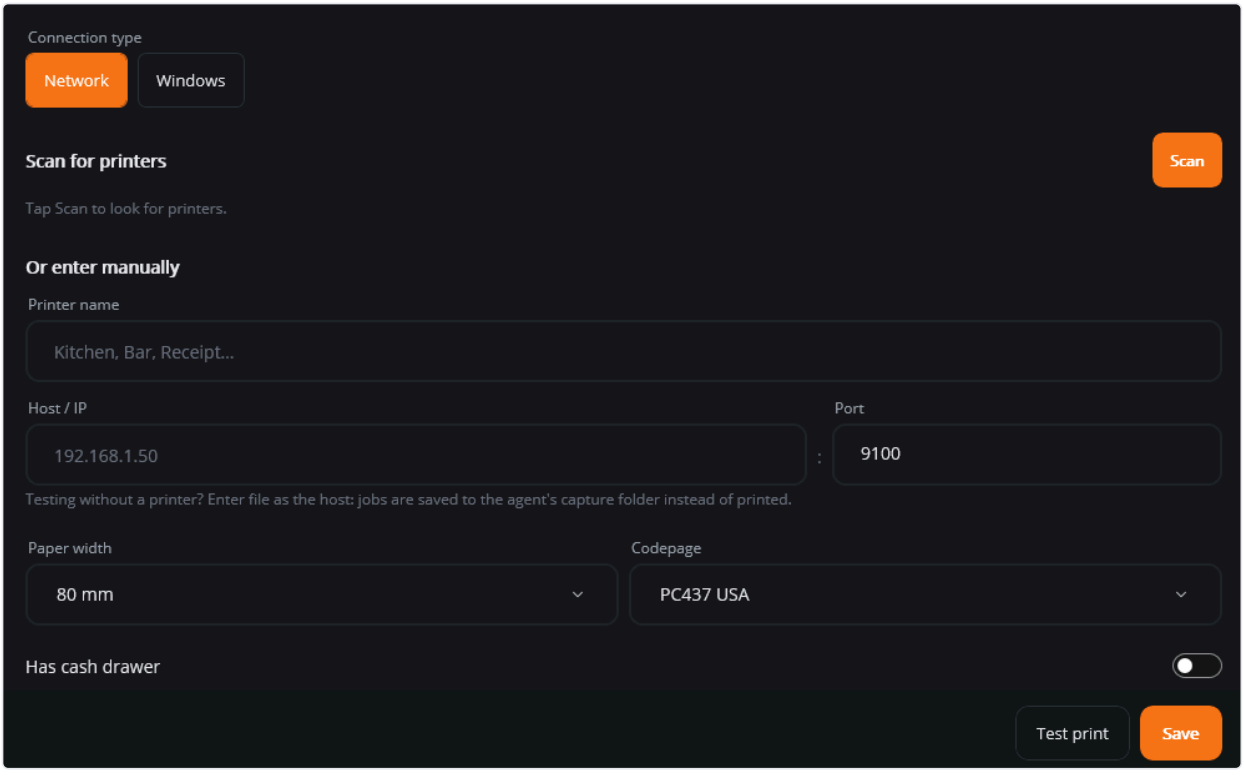
6 The agent opens on its **Printers** screen, empty for now. The line under the title shows the store and the agent's name. Back in Registered Devices, the agent is listed as a new device; rename it there with the pencil (*Office PC*, *Kitchen tablet*) so it is easy to recognise later.



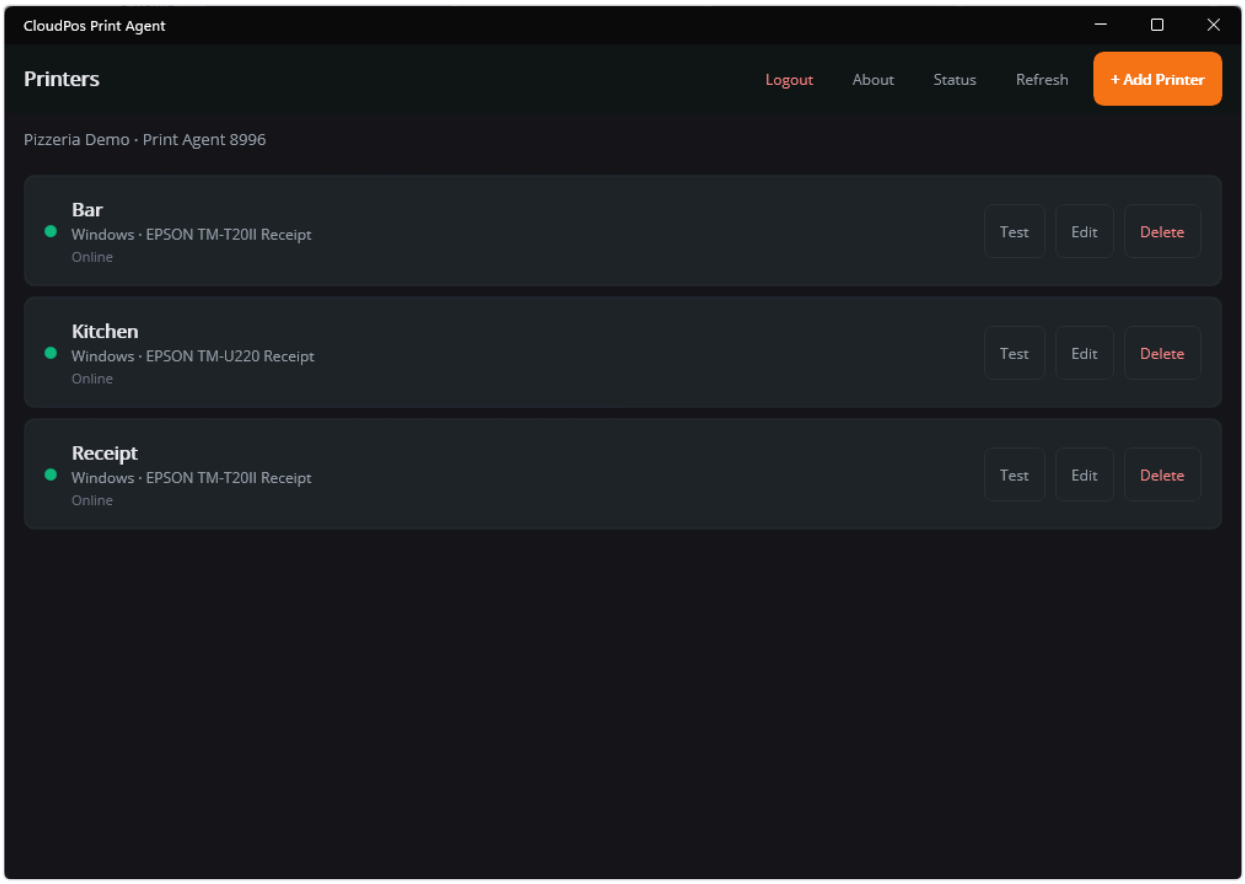
Step 2 — Add the printers in the Print Agent

1. Press **+ Add Printer**.
2. Choose the **connection type**:
   - **Windows** (Windows agent only) — for printers installed in Windows, including USB printers. Press **Scan** and tap the printer in the list.
   - **Network** — for printers with an Ethernet or Wi-Fi port. On Windows, **Scan** looks for printers on the local network; otherwise type the IP address and keep port **9100**.


CloudPos Print Agent
← Back
Add printer
Connection type
Network
Windows
Scan for printers
Scan
12 printer(s) found. Tap to fill the form.
Star TSP100 Cutter (TSP143)
Windows print queue
Samsung M2070 Series (USB003)
Windows print queue
Samsung M2070 Series (192.168.1.97)
Windows print queue
OneNote for Windows 10
Windows print queue
OneNote (Desktop) - Protected
Windows print queue
OneNote (Desktop)
Windows print queue
Microsoft XPS Document Writer
Windows print queue
Microsoft Print to PDF
Windows print queue
Fax
Windows print queue
EPSON TM-U220 Receipt
Windows print queue
EPSON TM-T20II Receipt
Windows print queue
ABS PDF Driver v400
Windows print queue
Or enter manually
Printer name
Kitchen, Bar, Receipt...
Windows printer name
Exact queue name from Windows Settings
Paper width
80 mm
Codepage
PC437 USA
Has cash drawer
Test print
Save

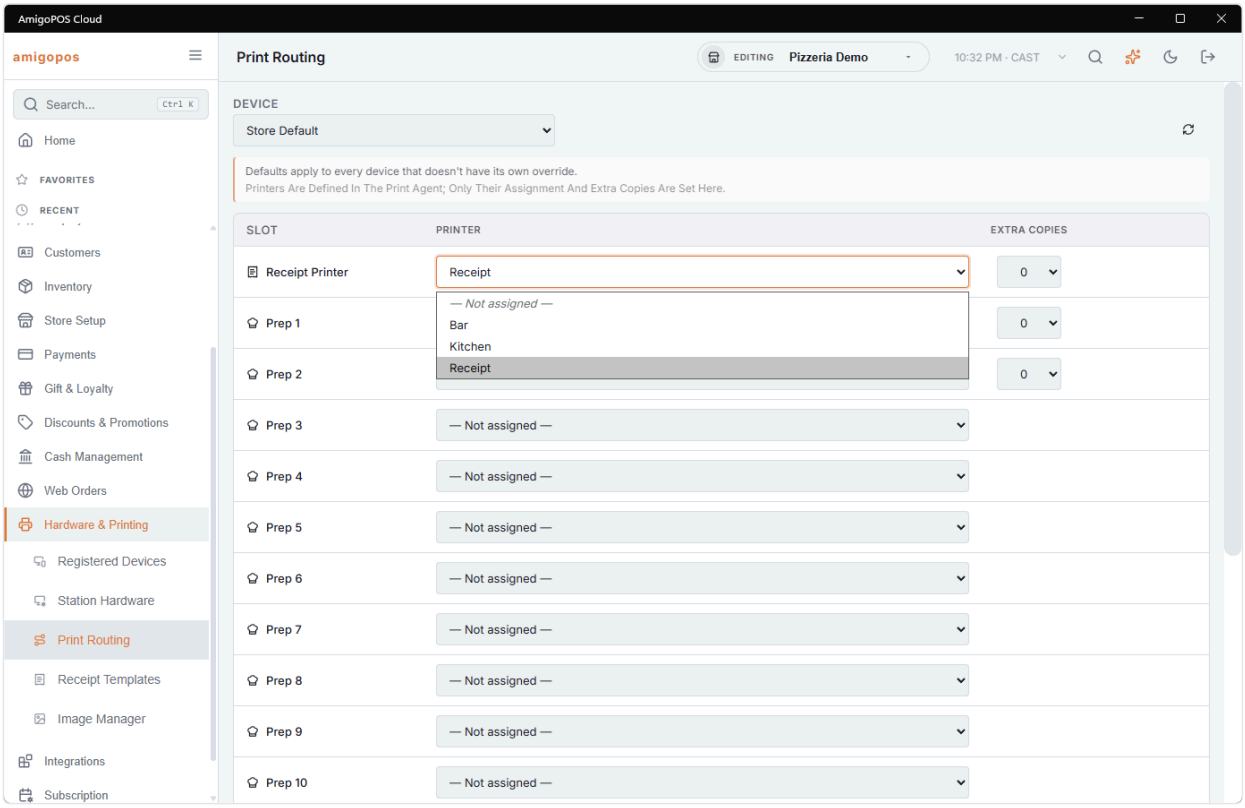

Connection type
Network
Windows
Scan for printers
Scan
Tap Scan to look for printers.
Or enter manually
Printer name
Kitchen, Bar, Receipt...
Host / IP
192.168.1.50
Port
9100
Testing without a printer? Enter file as the host: jobs are saved to the agent's capture folder instead of printed.
Paper width
80 mm
Codepage
PC437 USA
Has cash drawer
Test print
Save

7. Give the printer a **name that says where it is** — *Receipt*, *Kitchen*, *Bar*, *Expo*. This is the name you will pick in Back Office, so the brand is less useful than the place.
8. Set the **paper width** (80 mm for almost every receipt and kitchen printer, 58 mm for small ones) and leave the **codepage** on PC437 unless accented letters print wrong.
9. If a **cash drawer** is plugged into this printer, switch on **Has cash drawer** and choose the brand.
10. Press **Test print**. A short slip should come out. If it does not, fix that now — nothing later will work until a test prints.
11. Press **Save**. Repeat for every printer.
12. For **Star printers** in their own language, or **impact (dot-matrix)** kitchen printers, open the printer again with **Edit** and set **Command language** or **Impact printer** — see *Printer settings explained*.

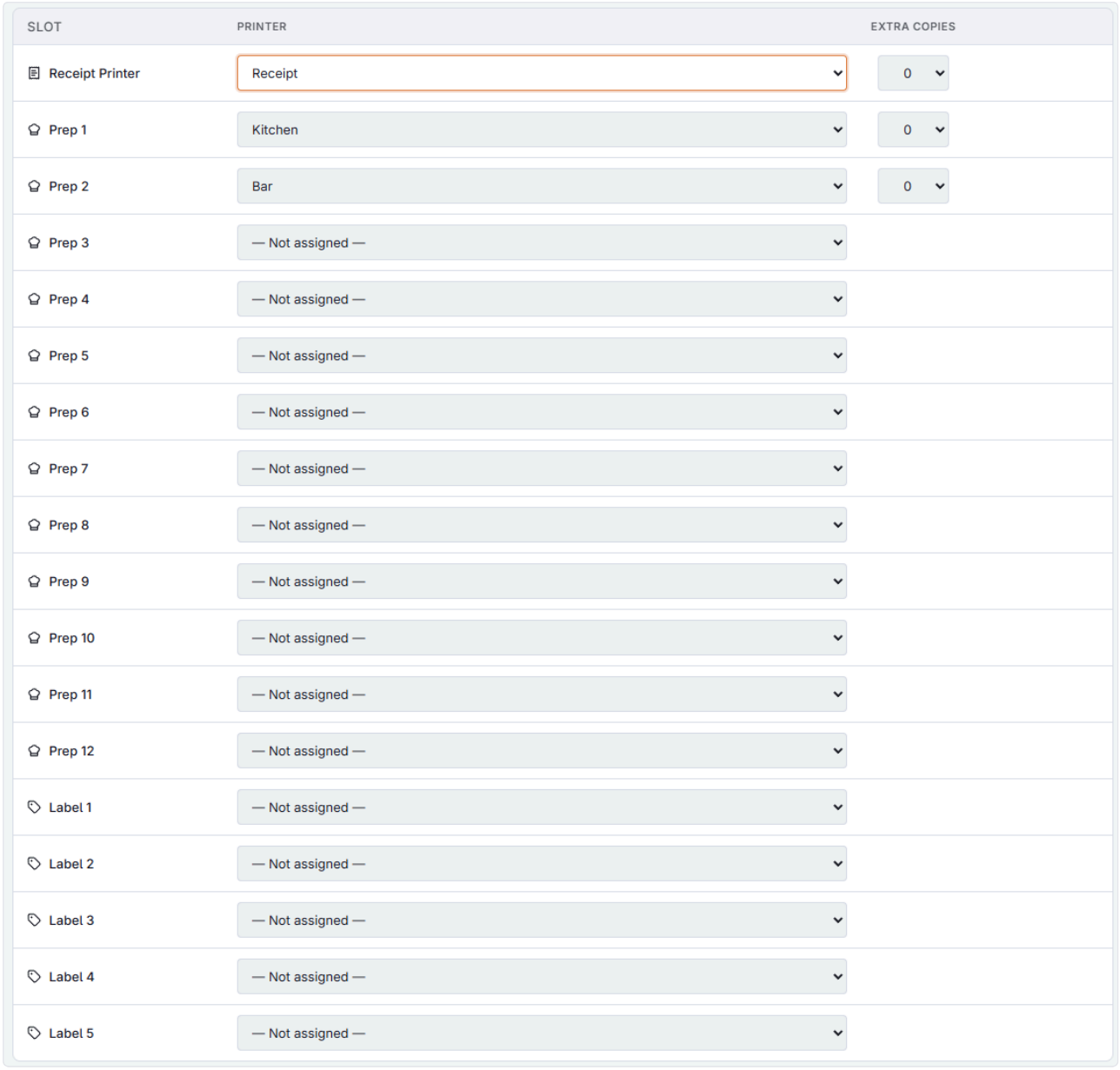


Step 3 — Route the printers in Back Office

1. Open **Back Office › Hardware & Printing › Print Routing**. Leave **Device** on **Store Default**.
2. In the **Receipt Printer** row, choose the receipt printer. The list shows every printer the store's agents have added. The choice saves as soon as you pick it.

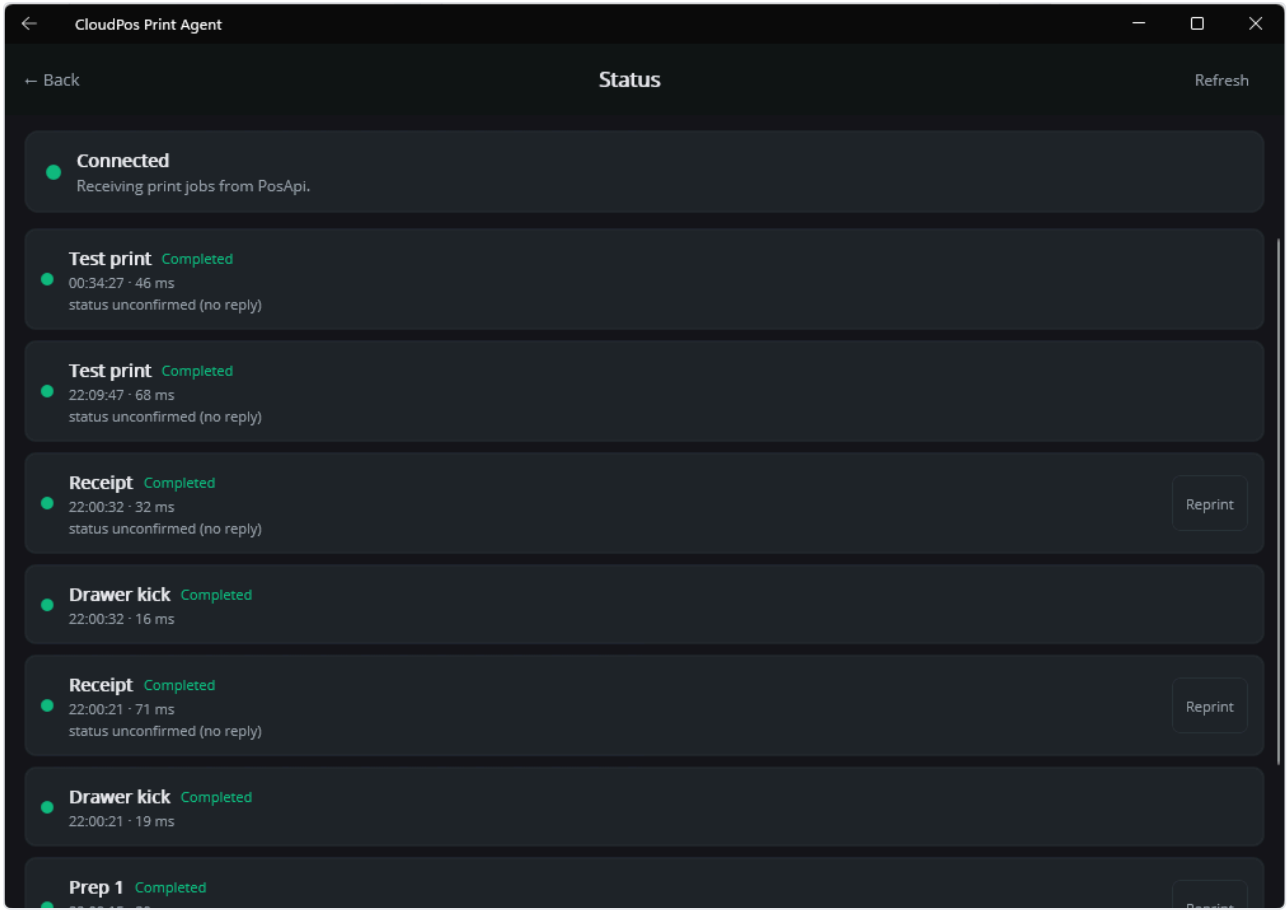


13. In **Prep 1**, **Prep 2** and so on, choose the kitchen and bar printers. The prep numbers are the ones menu items and categories are assigned to; see *Print routing*.
14. Only if one register should use a different printer from the rest, choose that register in **Device** and change its rows. Everything else follows the store default.



Step 4 — Prove it end to end

1. On a register, ring a short order with one item from each prep station and pay it.
2. The receipt should print on the receipt printer and each item's ticket on its station's printer.
3. If something did not print, open the agent's **Status** screen: every job that reached the agent is listed with its result. A job that is not listed never reached this agent, which means routing, not the printer.



To check routing before the real printers are in place, add a **capture-to-file** printer: a Network printer whose address is the word `file` . Jobs are written to text files you can read. See *Testing without a printer*.

What happens when something prints

The register never talks to a printer. It sends the job to the AmigoPOS Cloud server, the server looks up the slot in Print Routing to find the printer, and pushes the job to the Print Agent that owns that printer. The agent prints it and reports back. That is why a register needs no printer drivers, why any register can print on any printer in the store, and why the agent's device must stay on.

Print routing

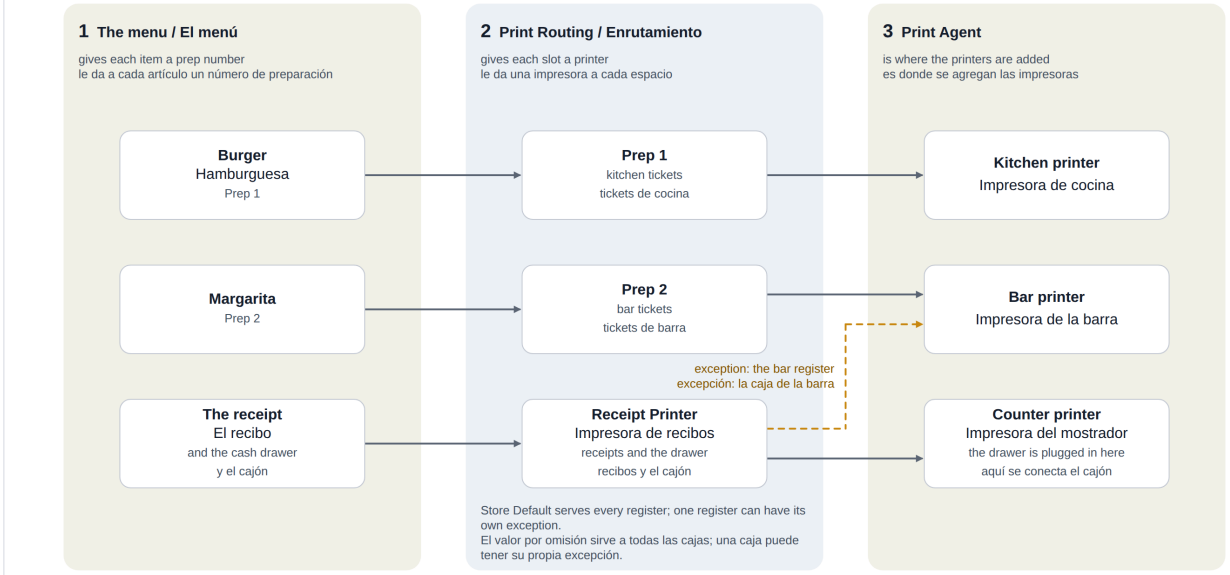
Hardware & Printing

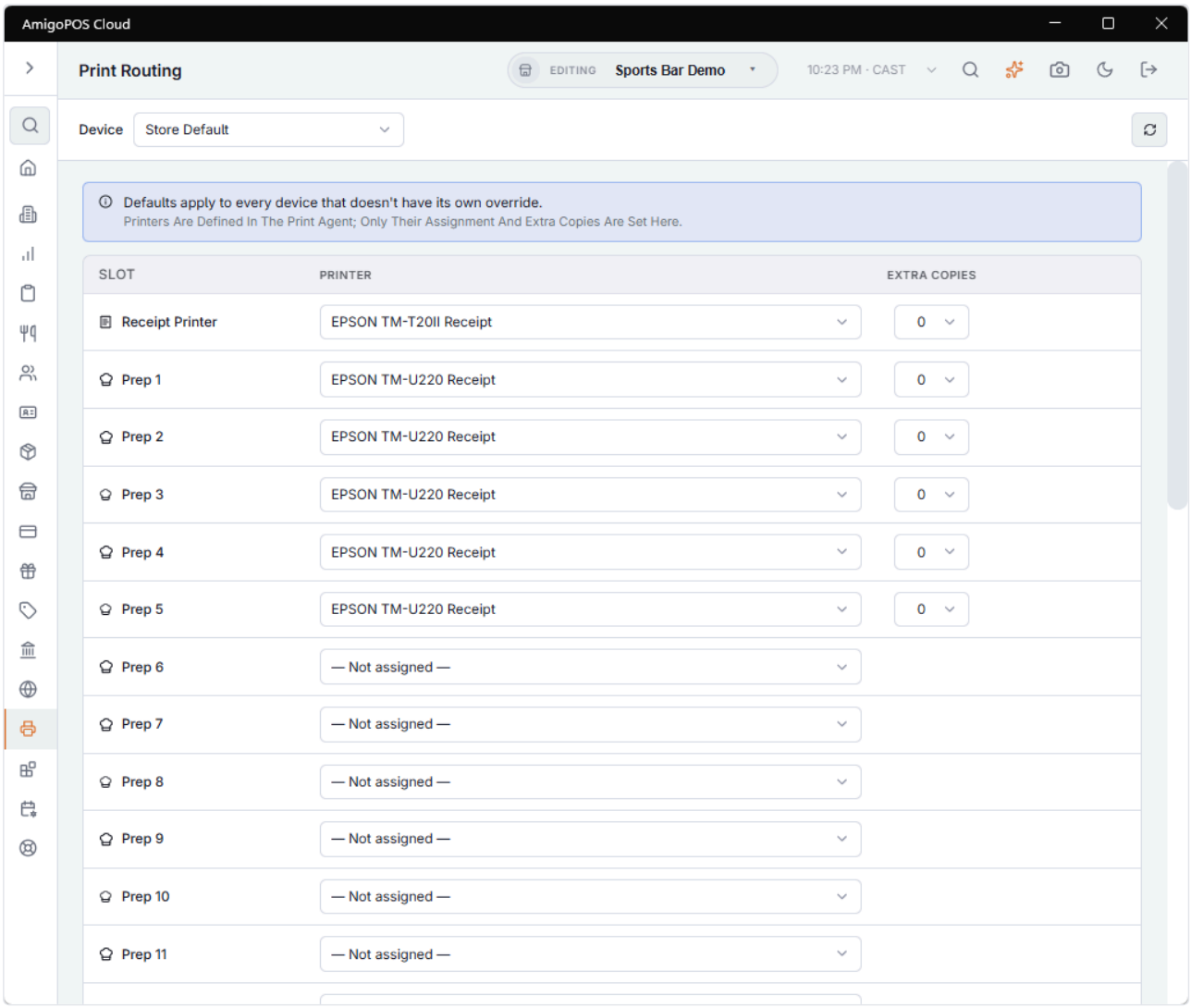
View online ↗

Which printer takes receipts and each prep station, the store default and per-register exceptions, and extra copies.

Back Office › Hardware & Printing › Print Routing decides where everything the registers print goes. It does not create printers — those come from the Print Agent — it only connects each kind of output to one of them.

In one picture: the menu gives each item a prep number, Print Routing gives each slot a printer, and the printers themselves are added in the Print Agent.


1 The menu / El menú
gives each item a prep number
le da a cada artículo un número de preparación
2 Print Routing / Enrutamiento
gives each slot a printer
le da una impresora a cada espacio
3 Print Agent
is where the printers are added
es donde se agregan las impresoras
Burger
Hamburguesa
Prep 1
Margarita
Prep 2
The receipt
El recibo
and the cash drawer
y el cajón
Prep 1
kitchen tickets
tickets de cocina
Prep 2
bar tickets
tickets de barra
Receipt Printer
Impresora de recibos
receipts and the drawer
recibos y el cajón
exception: the bar register
excepción: la caja de la barra
Store Default serves every register; one register can have its own exception.
El valor por omisión sirve a todas las cajas; una caja puede tener su propia excepción.
Kitchen printer
Impresora de cocina
Bar printer
Impresora de la barra
Counter printer
Impresora del mostrador
the drawer is plugged in here
aquí se conecta el cajón


AmigoPOS Cloud
Print Routing
EDITING
Sports Bar Demo
10:23 PM · CAST
Device
Store Default
Defaults apply to every device that doesn't have its own override.
Printers Are Defined In The Print Agent; Only Their Assignment And Extra Copies Are Set Here.
SLOT
PRINTER
EXTRA COPIES
Receipt Printer
EPSON TM-T20II Receipt
0
Prep 1
EPSON TM-U220 Receipt
0
Prep 2
EPSON TM-U220 Receipt
0
Prep 3
EPSON TM-U220 Receipt
0
Prep 4
EPSON TM-U220 Receipt
0
Prep 5
EPSON TM-U220 Receipt
0
Prep 6
— Not assigned —
Prep 7
— Not assigned —
Prep 8
— Not assigned —
Prep 9
— Not assigned —
Prep 10
— Not assigned —
Prep 11
— Not assigned —

Slots

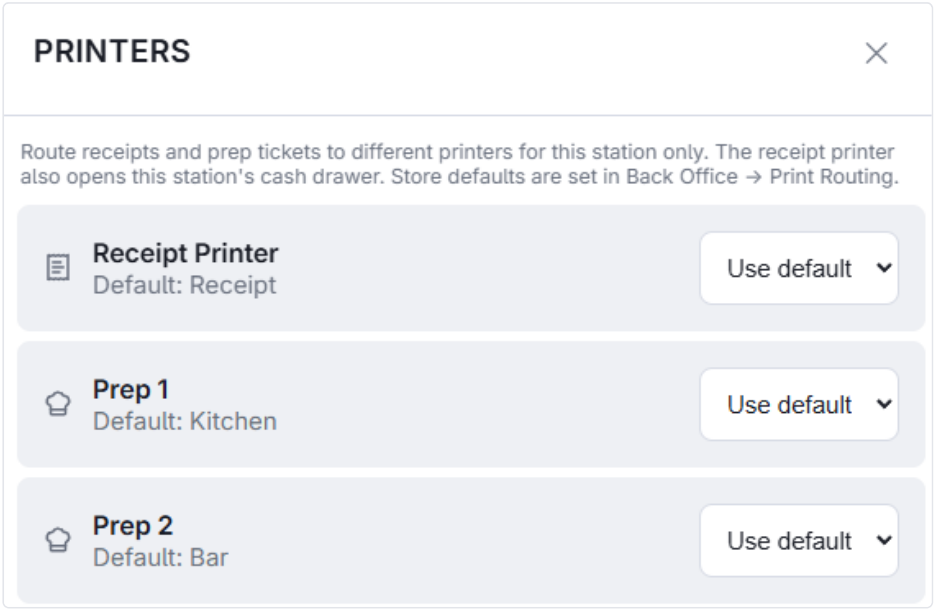
The page lists **slots**, one per row. Each slot is a destination; the printer chosen in the row is where that destination prints.

- **Receipt Printer** — customer receipts and reprints, and everything else that is not a kitchen ticket or a label: gift card and loyalty slips, coupons, delivery trip tickets, guest Wi-Fi slips. The **cash drawer** kick is sent through this printer too, so it must be the printer the drawer is plugged into.
- **Prep 1 to Prep 12** — kitchen, bar and expo tickets. Menu items and categories are assigned to prep numbers in the menu; when an order is sent, each item goes to its prep number's printer. One order can print on several printers at once.
- **Label 1 to Label 5** — label printers, for items set to print labels.

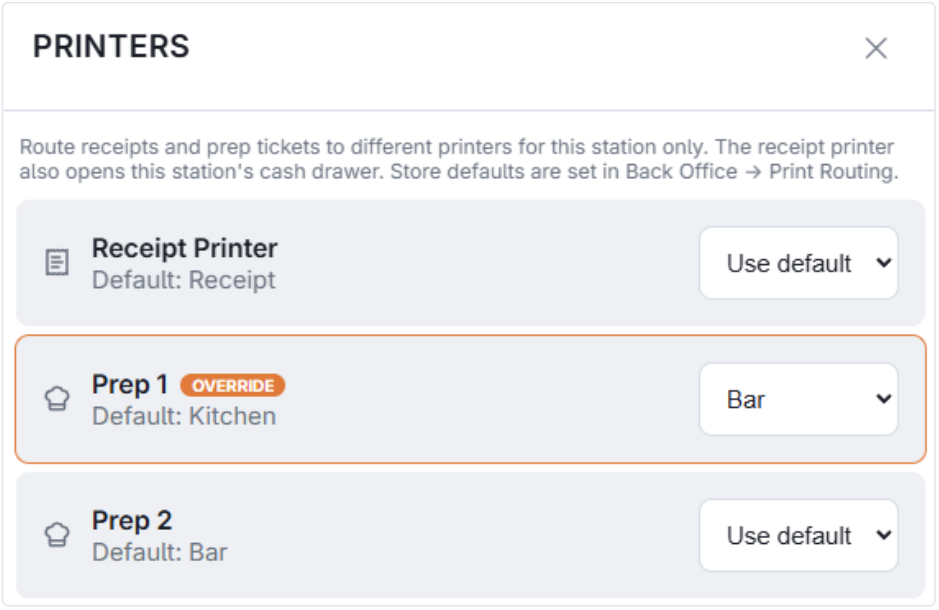
A slot left on **— Not assigned —** prints nothing. That is fine for prep numbers the menu does not use.

Store Default and per-register exceptions

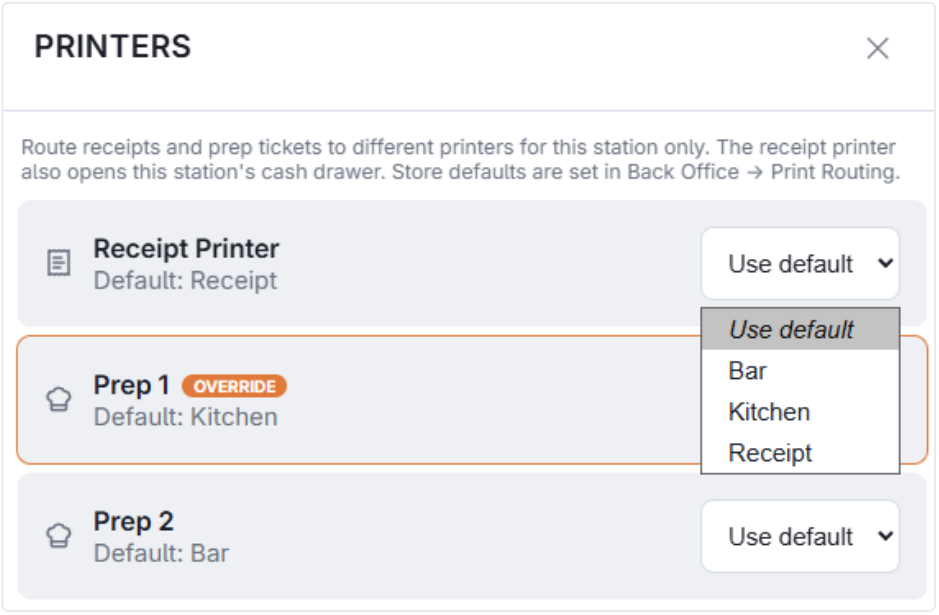
The **Device** dropdown at the top chooses which routing you are looking at.



- **Store Default** applies to every register that has no exception of its own. Set this first; a store where every register uses the same printers never needs anything else.
- **A register** (listed as *name — Station N*) shows what that register actually uses. Rows it inherits carry a grey **From default** chip. Choosing a different printer in a row creates an exception for that register only, marked **Override**.



To remove an exception, choose **Use store default** at the top of that row's list. The row goes back to *From default*.



> Typical exception: the bar register prints its receipts on the bar printer, every other register on the counter printer. Set the counter printer in Store Default, then select the bar register and set only its Receipt Printer row.

Extra copies

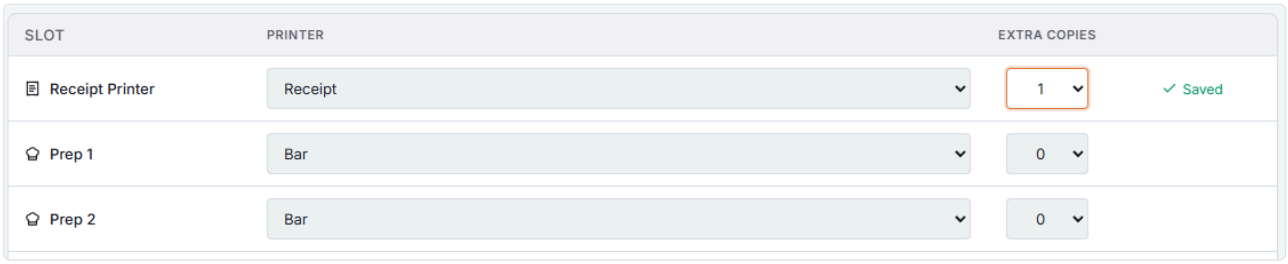
The **Extra Copies** column prints the slip more than once: **0** prints one copy, **1** two copies, up to 5. It belongs to the row, so it can differ per slot and per register — two receipts on the bar register, one everywhere else; two copies of Prep 1 for a busy grill, one of everything else.



- You can change it where the row lives: in Store Default, or on a register's *Override* row. On an inherited row the number is shown greyed; change it in Store Default, or override the row first.
- Each copy is a complete slip, cut included. A cash drawer only opens once, whatever the copies.

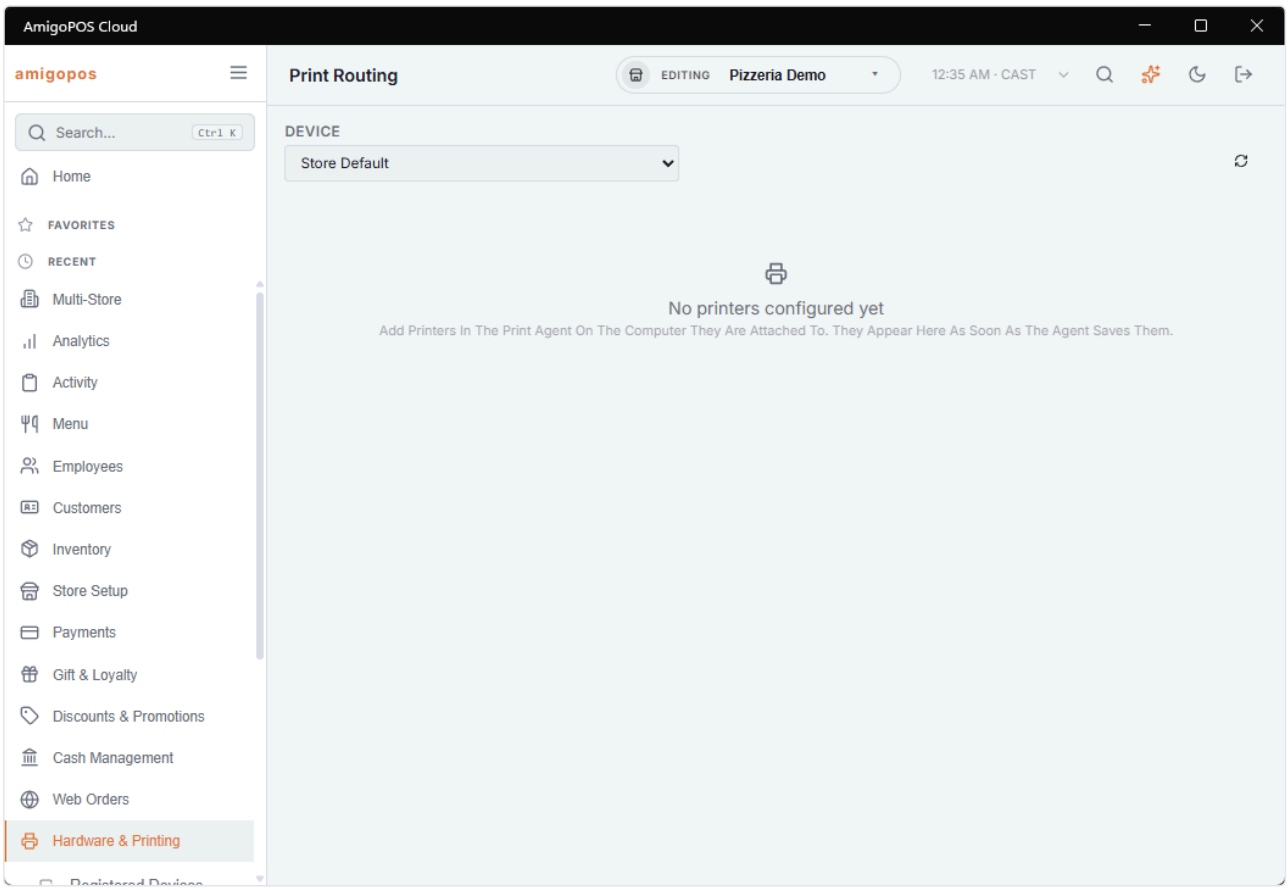
Saving

There is no Save button. Every change is saved the moment it is made and a green **Saved** tick flashes beside the row. Registers pick up the change on their next print.



Where the printers in the lists come from

The lists show every printer added in a Print Agent that is connected to *this* store, by the name given in the agent. If the page says **No printers configured yet**, no agent for this store has added a printer; a printer added in an agent connected to a different store never appears here.



Common questions

- **A new printer is not in the list** — press the refresh button at the top right. Still missing: check, on the agent, that its header shows this store.
- **A ticket printed at the wrong station** — check, in order: the item's prep number in the menu, the sending register's override for that prep slot, then the store default.
- **One register prints differently from the others** — select it in Device and look for Override chips.
- **A printer died mid-service** — the **Prep printers** overlay in the manager functions points a slot at another printer from the register, without opening Back Office.
- **Deleting a printer in the agent** clears every row that used it. Rename or re-address a printer with **Edit** instead, and the routing stays.

Offline Backup Printers

Below the slots there is a second table, **Offline Backup Printers**, with one row per prep number. A printer chosen there is used only while a register is offline, for a prep station whose own printer the register cannot reach: a station that only has a kitchen display, or a printer on another computer's USB port. Choose a network printer. See Kitchen tickets during an outage.

A modifier group at another station

Modifiers print with their item, at the item's prep stations. A food modifier group can have its own stations instead — the drink included with a breakfast printed at the bar, say. The bar ticket then shows the item's name with the drink under it, and the kitchen ticket leaves the drink off. See Sending a modifier group to its own prep station.

Printing questions and answers

Hardware & Printing

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Short answers to the printing questions that come up most: missing printers, several stores, renaming, replacing and moving printers.

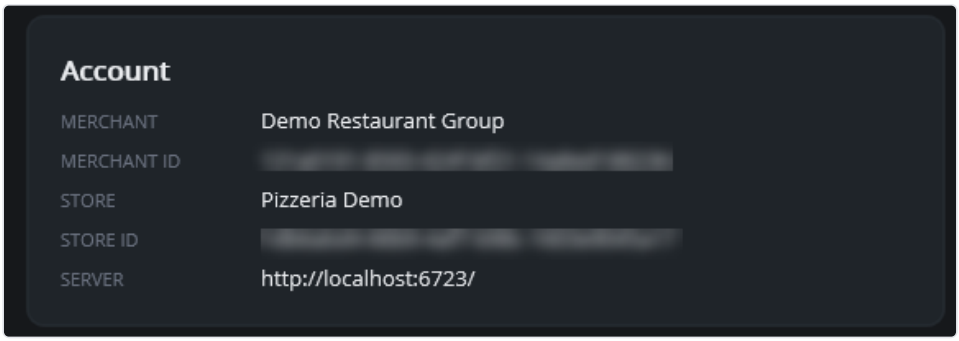
Short answers to the printing questions that come up most. For the full walkthrough, see *Setting up printing, start to finish*.

Where is Printer Setup in Back Office?

There is none. Printers are added and changed only in the **Print Agent** on the computer or tablet they are connected to, because that is the only place that can actually reach them. Back Office keeps **Print Routing**, which decides what prints where, and **Receipt Templates**, which decides what the slips look like.

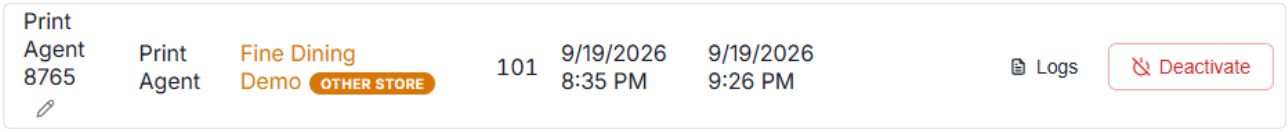
I added a printer in the agent but it is not in Print Routing

1. Press the refresh button on Print Routing.
2. On the agent, look at the line under **Printers**: it shows the store the agent belongs to. If it is another store, the printer was added to that store.
3. Check the store Back Office is editing (top of the screen). Print Routing shows the printers of that store only.



How do I know which store an agent belongs to?

On the agent: the header of the Printers screen, or **About › Account**. In Back Office: Registered Devices lists every device with its store; a device belonging to a store other than the one you are editing carries an **Other Store** tag.



The agent is connected to the wrong store

Press **Logout** on the agent, generate a new code for the right store in Registered Devices, and activate again. Printers belong to the store they were added to, so add them again on the right store and route them there. Deactivate the old entry in Registered Devices.

We have two stores and one computer

An agent serves exactly one store. Each store needs its own agent, so each store needs its own device to run it on. A **network** printer can be added in both stores' agents — network printers accept jobs from more than one sender — so two stores can share a kitchen printer that way.

How do I rename a printer?

On the agent: **Edit**, change **Printer name**, **Save**. Print Routing keeps its assignments and shows the new name after a refresh.

The printer got a new IP address, or was replaced with another one

Edit the existing printer on the agent and change **Host / IP** (or the Windows printer name), then Test print and Save. Keep the same printer entry: routing, copies and the cash drawer setting all stay. Deleting it and adding a new one works too, but clears its routing, which then has to be set again.

We moved the agent to a new computer

Install the agent on the new computer, activate it with a new code, add the printers there and route them in Back Office. The printers on the old computer's agent cannot be taken over, because that agent is the one that knew how to reach them. When everything prints, deactivate the old agent in Registered Devices.

Can two agents drive the same printer entry?

No. Each printer entry belongs to the agent that added it, and only that agent prints to it. If the computer running that agent is off, that printer does not print — which is why the agent belongs on a device that stays on.

Where do I set extra copies?

In **Print Routing**, in the **Extra Copies** column of the slot — not on the printer. That way the same printer can print two receipts on one register and one on another.

Where is the setting for Star printers or dot-matrix kitchen printers?

On the agent, under **Edit**: **Command language** for Star printers in their native mode, and **Impact (dot-matrix) printer** for printers such as the Epson TM-U220. See *Printer settings explained*.

Can I print from a register without a Print Agent?

Normal printing always goes through a Print Agent. A register can have an **offline printer** of its own, used only while the register cannot reach the server; see the *Offline Mode* topics.

Are Bluetooth printers supported?

Not yet, on either platform. Use a network printer, or a USB printer on a Windows agent.

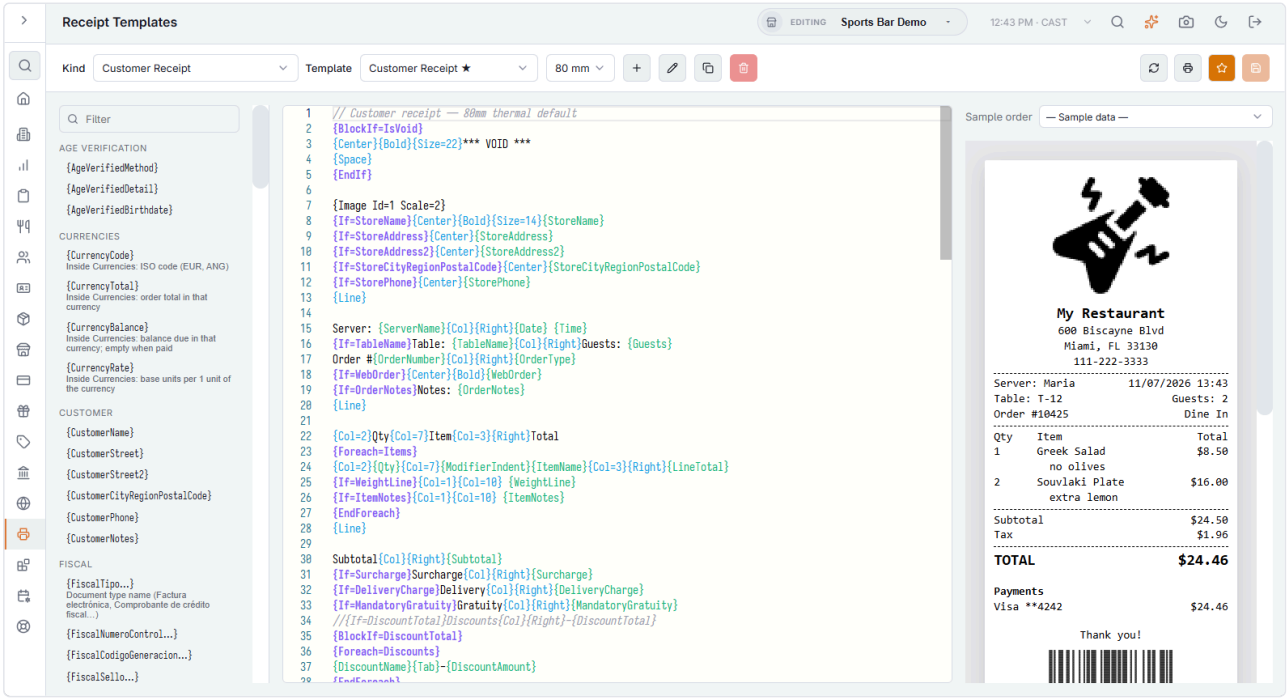
Receipt and prep-ticket templates

Hardware & Printing

View online ↗

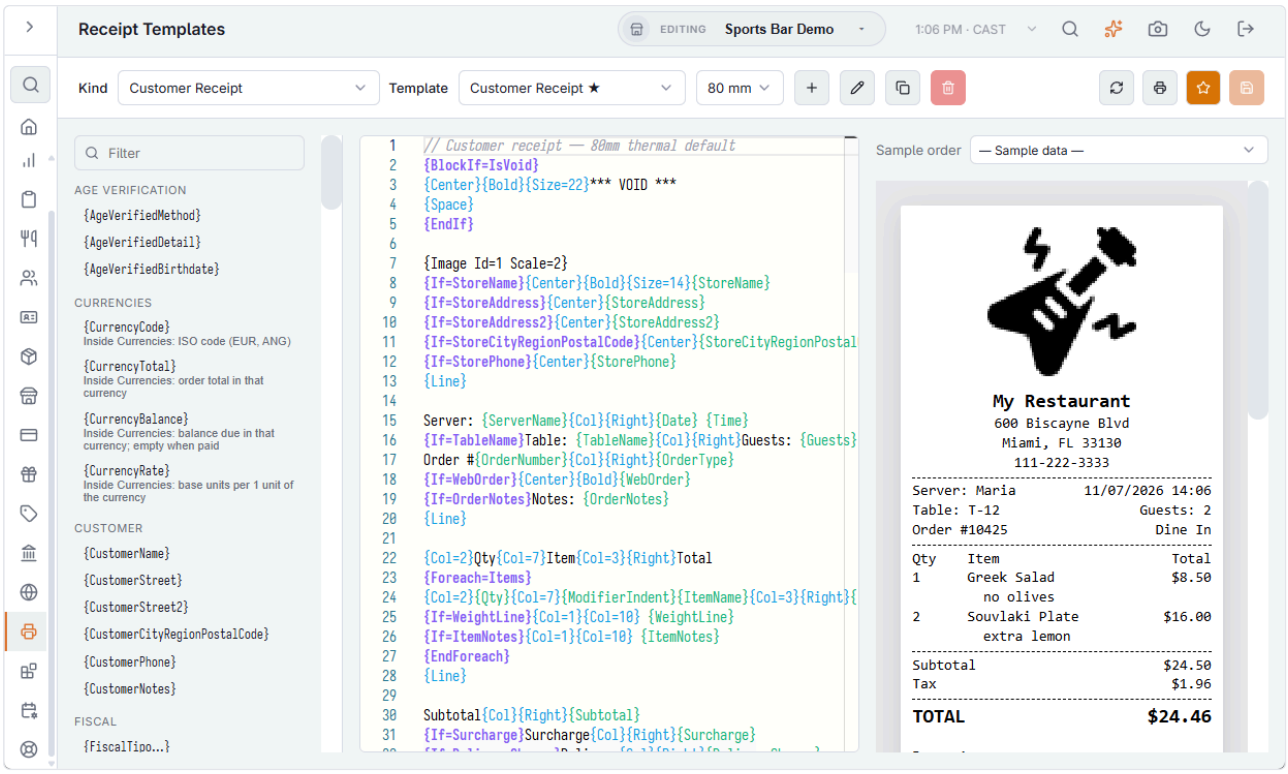
Designing what prints, using tokens for data, columns for layout and blocks that appear only when they apply.

Back Office › Hardware & Printing › Receipt Templates is where you edit what the printers produce: customer receipts, prep tickets, labels and slips. A template is plain text with **tokens** in braces where the data belongs. The page shows the token list on the left, the editor in the middle and a live preview on the right.



Choosing what to edit

- **Kind** — what the template is for: Customer Receipt, Discount Coupon, Gift Card Slip, Guest Survey Slip, Guest Wi-Fi Slip, Label, Loyalty Card Slip, Prep Ticket or Trip Ticket. Each kind has its own tokens.
- **Template** — **— Default —** is the built-in template; below it are the store's saved templates of that kind. A star (★) marks the one that prints.
- **58 mm** or **80 mm** — the paper width of the template. It changes the preview and is saved with the template; changing it enables **Save**.



The buttons

- **New** (+) — asks for a name and saves a new template of this kind, starting from the built-in one.
- **Rename** (pencil) — renames the selected saved template, and saves any changes in the editor with it.
- **Copy** — saves a copy under a new name, including any changes not saved yet.
- **Delete** (bin) — deletes the selected template after a confirmation. It is available only while the kind has more than one saved template.
- **Refresh** — redraws the preview.
- **Test print** (printer) — opens **Send test print to…** with the store's printers and their paper size. The template in the editor, saved or not, prints with sample data at that printer's width.
- **Set as default for this kind** (star) — makes the selected template the one that prints, and the star moves to it in **Template**. Save your changes first.
- **Save** — saves the template. It is enabled while there are unsaved changes, which the preview marks with **Unsaved Changes**.

Which template prints

For each kind, the template marked with the star prints. A new or copied template does not print until you press **Set as default for this kind**. While no saved template of a kind is the default, the built-in one prints.

The preview

The preview shows the template filled with sample data, as it changes. For a Customer Receipt, **Sample order** above the preview can show one of the last 20 orders instead of **— Sample data —**.

Tokens

A token is replaced with its value when the ticket prints — `{OrderNumber}`, `{ServerName}`, `{TotalAmount}`. The list on the left shows every token of the kind you are editing, grouped by what it belongs to, such as header, customer, items, totals, payments, validation and media. Type in **Filter** to narrow it, and click a token to insert it where the cursor is. The **Image** token opens **Pick an image** with the pictures from the Image manager.

Store tokens

A customer receipt can print the store's own details. The **Store** group of tokens is filled from the **Store Information** section of **Back Office › Store Setup › General Settings**; see General settings.

Token	Prints
`{StoreName}`	**Business Name**.
`{StoreAddress}`	**Street Address**.
`{StoreAddress2}`	**Address line 2**; empty when it is not set.
`{StoreCityRegionPostalCode}`	**City**, **Region** and **Postal Code** on one line.
`{StorePhone}`	**Phone**.

The built-in customer receipt prints them at the top, after the picture `{Image Id=1 Scale=2}`. Each line starts with `{If=…}`, so a setting left empty prints nothing:

```
{If=StoreName}{Center}{Bold}{Size=14}{StoreName}
{If=StoreAddress}{Center}{StoreAddress}
{If=StoreAddress2}{Center}{StoreAddress2}
{If=StoreCityRegionPostalCode}{Center}{StoreCityRegionPostalCode}
{If=StorePhone}{Center}{StorePhone}
```

The preview and **Test print** fill them with the store's own values. A customer receipt template saved earlier, including one copied from the old built-in template, can still have typed lines such as *Your Store Name* and *123 Main Street*, and keeps printing them as typed. Replace those lines with the ones above, or make the template again from the built-in one.

Layout

- `{Center}`, `{Right}`, `{Bold}` and `{Size=14}` affect the line they appear on.
- `{Line}` draws a rule; `{Space}` leaves a blank line.
- `{Col}` splits a line into columns. `{Col=N}` weights them, so `{Col=1}{Qty}{Col=8}{ItemName}{Col=3}{LineTotal}` gives a narrow quantity, a wide name and a right-hand total that line up down the ticket.

Blocks that only print when they apply

`{If=Token}` drops a single line when its token is empty or zero. `{BlockIf=Token}` … `{EndIf}` drops a whole section. That is how a receipt shows a discount line only when there was a discount, or customer details only when there is a customer, without printing empty headings.

Formatting and defaults

A token can carry `Format=` to control how a number or date is rendered, and `Default="…"` to print something when the value is missing.

> Change one thing and test-print before changing the next. A template is easier to fix one edit at a time than to unpick after five.

> Prep tickets use their own token set; see Prep ticket names and abbreviations. Gratuity suggestions have their own tokens; see Printing gratuity suggestions on receipts. The Guest Wi-Fi Slip is covered in Printing guest Wi-Fi details.

Currencies repeater

The customer receipt has a `{Foreach=Currencies}` repeater, one row per foreign-currency payment method the store can tender. Inside it: `{CurrencyCode}`, `{CurrencyTotal}` (the order total in that currency), `{CurrencyBalance}` (the balance due, empty once paid) and `{CurrencyRate}`. Wrap it in `{BlockIf=Currencies}` so stores without such methods print nothing. The built-in template carries the block just under TOTAL; a store with its own saved template must paste it in. See Accepting Foreign Currency.

Payment tokens

Inside `{Foreach=Payments}`, each payment can print these tokens:

Token	Prints
`{PaymentAmount}`	The amount applied to the bill, in the store's currency — also for a foreign-currency payment.
`{PaymentCurrency}`	The payment's currency code (EUR); empty for the store's own currency.
`{PaymentForeignAmount}`	The amount in that currency, e.g. *EUR 20.00*; empty if not foreign.

Token	Prints
`{PaymentRate}`	Store-currency units per 1 unit of that currency; empty if not foreign.
`{PaymentTendered}`	Cash handed over, when more than the amount applied, in the currency it was handed over in.
`{PaymentChange}`	Change given, in the currency it was given in; empty when there was none.
`{PaymentChangeCurrency}`	The code of change given in a foreign currency; empty otherwise.

The built-in customer receipt prints them on the lines after `{PaymentType}{Col}{Right}{PaymentAmount}`:

```
{If=PaymentForeignAmount}  {PaymentForeignAmount} @ {PaymentRate}
{If=PaymentTendered}  Tendered{Col}{Right}{PaymentTendered}
{If=PaymentChange}  Change{Col}{Right}{PaymentChange}
```

A customer receipt template saved before these tokens existed, including one copied from the built-in template, does not have these lines: paste them under the payment line inside `{Foreach=Payments}`. *Tendered* and *Change* are plain words you can translate.

Prep ticket names and abbreviations

Hardware & Printing

View online ↗

Why the kitchen ticket says something different from the check, and how to control it.

An item can print one name for the guest and a different one for the kitchen. The check and receipt use the item's name; the prep ticket can use a shorter or clearer **prep text** instead.

Why bother

- **Width.** A prep printer is narrow. "STRB COLADA" fits where "Strawberry Colada" wraps.
- **Clarity for the line.** The kitchen wants the station's word for it, not the menu's marketing name.
- **Language.** A second prep text lets the ticket print in the kitchen's language while the guest reads the menu's.

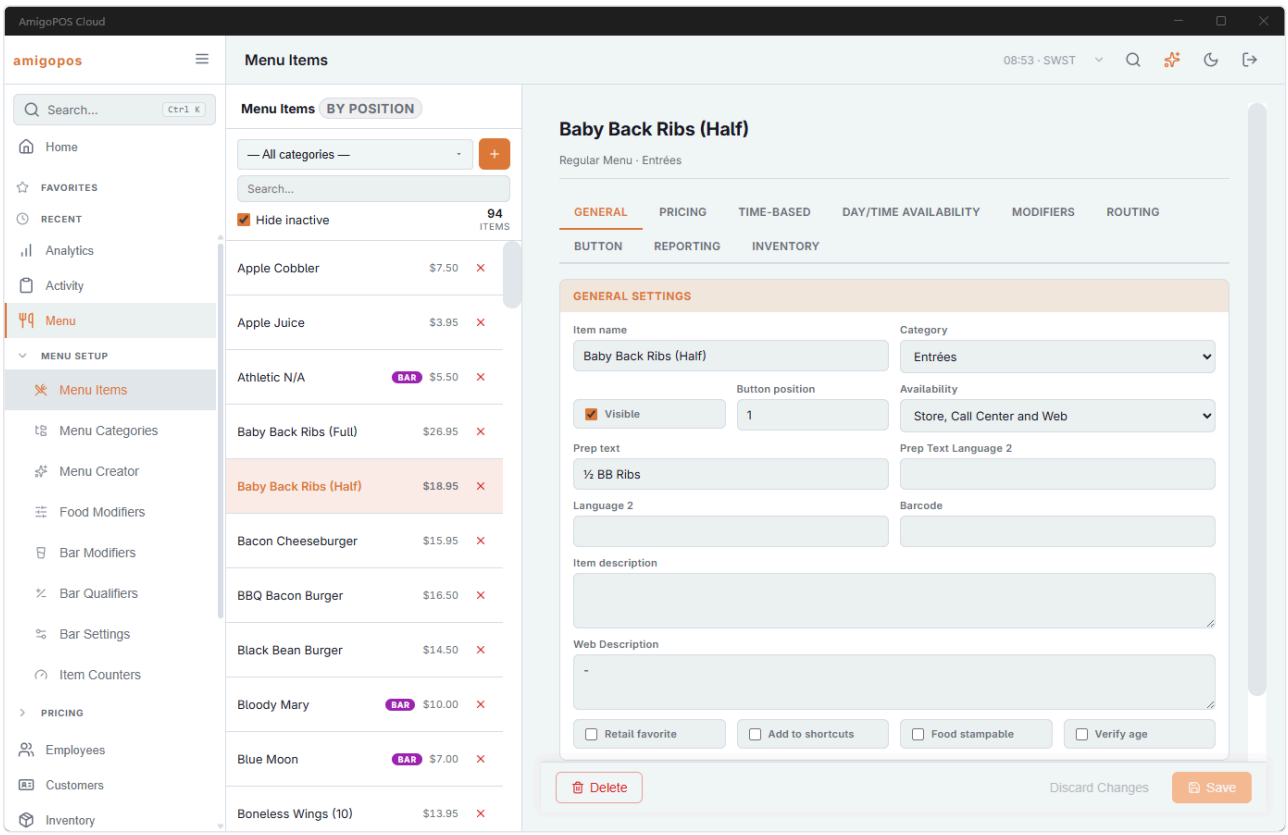
Where it comes from

Prep text is set on the menu item and on modifiers. A line rung at the register keeps its own prep text, so a line that was built with affixes or qualifiers prints what it was actually built as rather than falling back to the plain menu abbreviation.

> Upcharge prefixes and suffixes are applied to the prep name as well as the guest name, so a Virgin or a Double reads as such on the ticket. See **Bar menu upcharges**.

> If the kitchen ticket is missing a variation the check clearly shows, the prep text is where to look first — not the printer and not the routing. A prep abbreviation that describes only the base item will print only the base item.

> Leave prep text blank where the item name is already short and clear. An abbreviation nobody needs is one more place for the ticket and the check to disagree.



Printing gratuity suggestions on receipts

Hardware & Printing

View online ↗

Adding a 15/18/20 tip guide to the bottom of a receipt, switched on per order type.

A receipt can print suggested tip amounts — the "15% / 18% / 20%" block guests are used to seeing — with each amount worked out from the order.

Two things to switch on

1. **The order type.** Each order type has a **gratuity suggestions** setting. Dine-in usually wants it; take-out usually does not.
2. **The template.** Add the block to the receipt template, wrapped in `{BlockIf=GratuitySuggestions}` … `{EndIf}` so it only prints for order types where the setting is on.

The tokens

Each line prints a percentage of a base amount, currency-formatted:

- `{PercentSubtotal Value=20}` — 20% of the subtotal.
- `{PercentTotal Value=20}` — 20% of the total.
- `{PercentTotalBeforeDiscount Value=20}` — 20% of the total less discounts.

Change `Value=` to whichever percentages you want to show. Which base to use is a decision worth making deliberately: on the subtotal the suggestion excludes tax, on the total it includes it.

A typical block

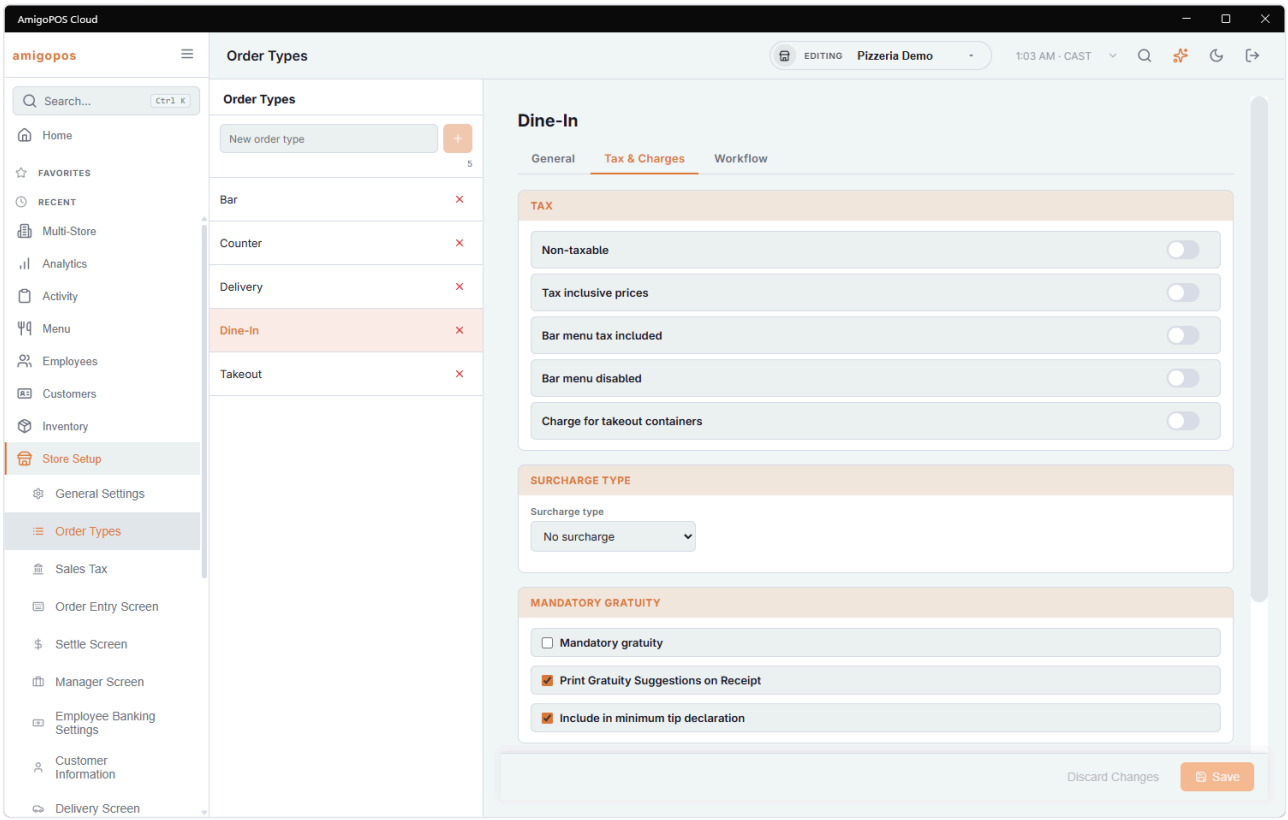
```
{BlockIf=GratuitySuggestions}
{Space}
{Center}{Bold}Gratuity Suggestions
{Col=3}{Col=2}15%{Col=2}{Right}{PercentTotal Value=15}{Col=3}
{Col=3}{Col=2}18%{Col=2}{Right}{PercentTotal Value=18}{Col=3}
```

`{Col=3}{Col=2}20%{Col=2}{Right}{PercentTotal Value=20}{Col=3}`
`{EndIf}`

The empty `{Col=3}` at each end of a line is a margin, so the suggestions sit centered with the amounts lined up under each other. Larger outer numbers make the block narrower.

> These are printed suggestions only. Nothing is added to the check — the guest writes what they want on the slip, and it is entered afterwards in tip adjust.

> Local custom matters more than the default numbers. Print percentages your guests would recognise, not the ones another market uses.



```
{BlockIf=StripePayUrl}
{Space}
{Center}Scan to pay
{Center}{StripeQRCode}
{EndIf}

{BlockIf=GratuitySuggestions}
{Space}
{Center}{Bold}Gratuity Suggestions
{Col=3}{Col=2}15%{Col=2}{Right}{PercentTotal Value=15}
{Col=3}{Col=2}18%{Col=2}{Right}{PercentTotal Value=18}
{Col=3}{Col=2}20%{Col=2}{Right}{PercentTotal Value=20}
{EndIf}

{BlockIf=Fiscal}
{Space}
{Center}{FiscalTipo}
No. control: {FiscalNumeroControl}
Cod. gen.: {FiscalCodigoGeneracion}
{EndIf}
{BlockIf=FiscalSealed}
```

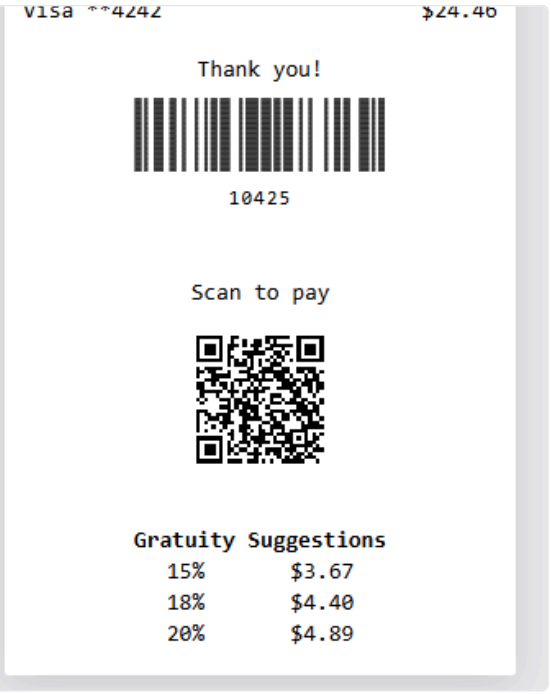


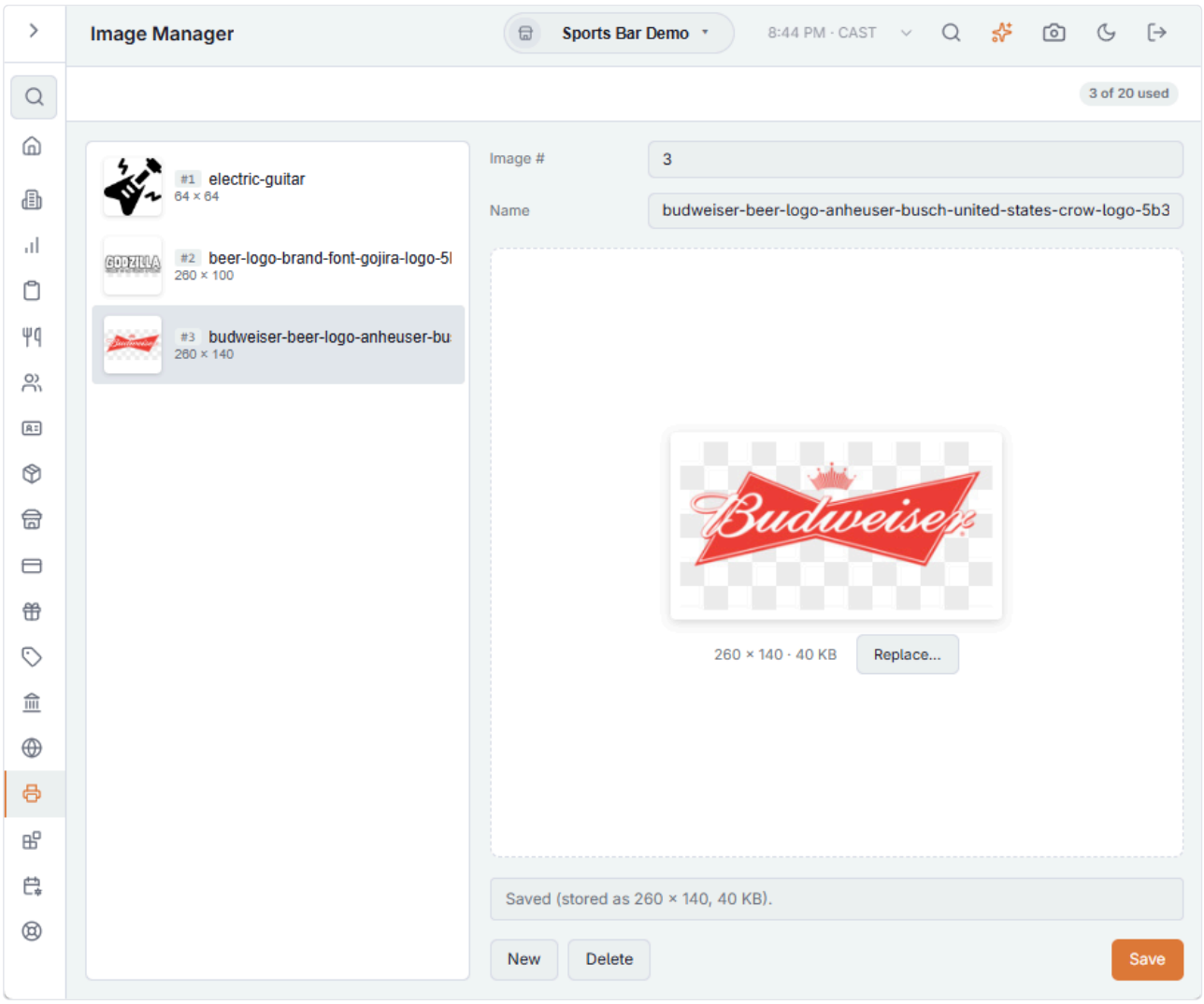
Image manager

Hardware & Printing

View online ↗

The pictures your receipts, slips and coupons print, such as the logo, and how a template prints one by its number.

Back Office › Hardware & Printing › Image Manager holds the pictures your print templates print: the logo at the top of receipts, slips and coupons, or any other graphic. Each picture has a number, and a template prints it with `{Image Id=N}`. Pictures for menu buttons are not kept here; see Button images.



The list

The left side lists the pictures by number, each with a thumbnail, its name and its size in pixels. The badge at the top right shows how many of the 20 places are used, for example **3 of 20 used**.

Adding a picture

1. Press **New**. **Image #** is set to one more than the highest number in use.
2. Type a **Name** you will recognise, for example *Store logo*.
3. Press **Choose file…**, or in a web browser drag a file onto the box. PNG, JPEG and WebP files are accepted. The picture shows in the box.
4. Press **Save**. The message says how it was stored, for example **Saved (stored as 600 × 240, 18 KB)**.

Pictures are stored as PNG, scaled down to fit 600 × 400 pixels and 200 KB. A file larger than the upload limit is refused with a message giving its size and the limit.

Changing or removing a picture

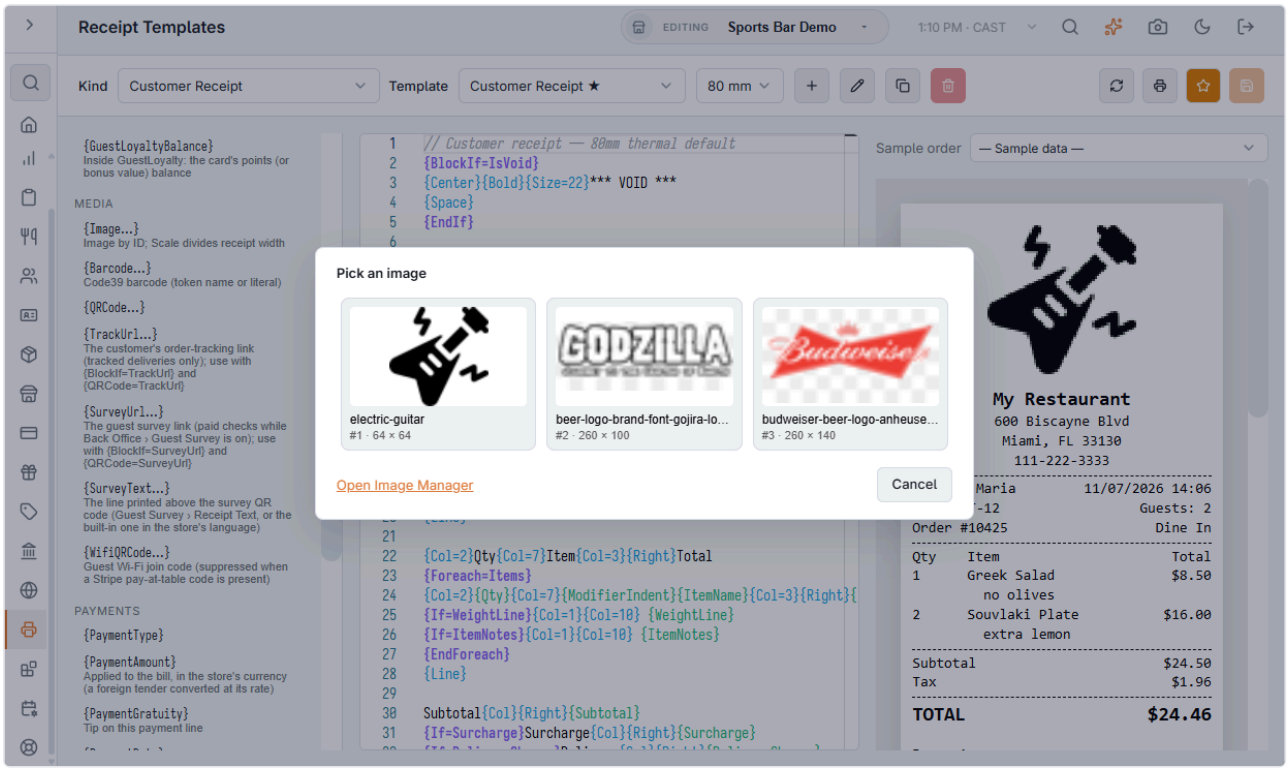
- Select it in the list. Change its **Name** or **Image #**, or press **Replace…** to pick a new file, then press **Save**. A template that prints the picture shows the new one from then on.
- A number can belong to one picture only. Choosing a number that is in use shows which picture has it.
- **Delete** asks first: **Delete Image #N? Templates That Print It Will Print Without It.** Press **Delete** again to remove the picture. Check first which templates print its number.

> Templates find a picture by its number. Changing a picture's **Image #** means every template that used the old number must be changed too.

Using a picture in a template

In Receipt and prep-ticket templates, click the **Image** token in the list on the left. **Pick an image** shows your pictures; click one to insert `{Image Id=N Scale=2}` where the cursor is. `Scale` divides the paper width: `Scale=2` prints the picture at half the width of the paper. **Open Image Manager** in that window brings you back here.

The built-in Customer Receipt, Discount Coupon, Gift Card Slip and Loyalty Card Slip templates print picture **#1** at the top. Save your logo as #1 and it appears on them without editing a template.



> Receipt printers print in black only. Use a plain, high-contrast black-and-white version of your logo; a photo or a colour logo prints as a grey blur.

USB barcode scanner

Hardware & Printing

View online ↗

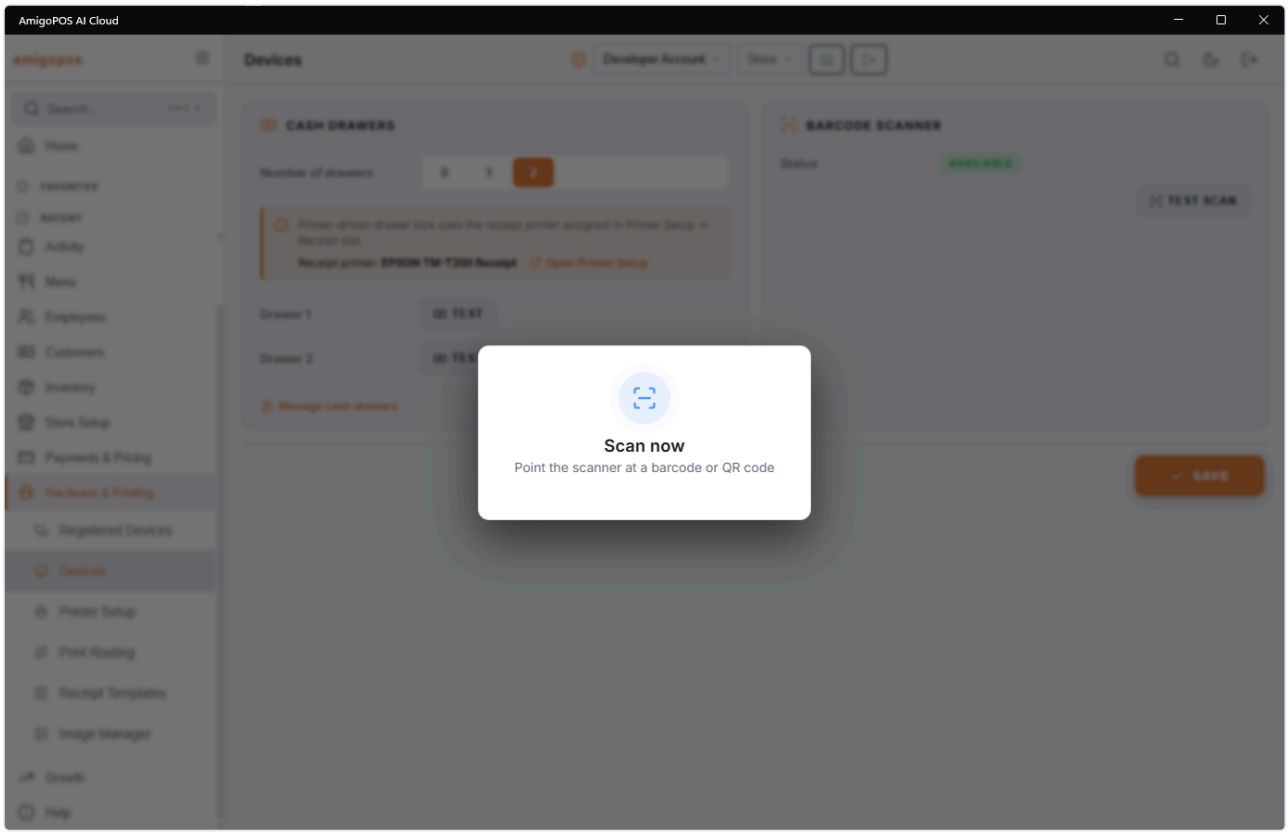
Connecting a scanner, testing it, and what to do when scans do nothing.

A USB barcode scanner makes item lookup instant — scan a SKU, the item lands on the order. CloudPos works with any scanner that operates in **keyboard-wedge** mode (the near-universal default): the scanner types the barcode like a keyboard and the register captures it.

Setup

1. Plug the scanner into the station. No driver is needed for keyboard-wedge units.
2. Confirm the scanner sends an **Enter/CR suffix** after each code — most ship that way; if not, the scanner's manual has a configuration barcode to enable it. Without the suffix, scans run together.
3. Verify with **Test scan** on **Back Office › Hardware & Printing › Station Hardware**, opened on that register: scan anything and the message shows **Scanned:** and the value. Test scan works even when the scanner **Status** reads **Not available**. See Station hardware (cash drawers and scanner).

4. To see what a code would ring up as, use **More › Scanner Test** at the register. Each scan is listed with the code and the item it matches; nothing is added to the order.



Using it

- With an order open, just scan — no button needed. The item is matched by SKU/barcode and added; unknown codes report as not found rather than adding a wrong item.
- **Price-embedded (GS1) labels** from scales and prepack stations are supported — the embedded price and weight are honored. See Scanning barcodes and price-embedded (GS1) labels for label formats.
- Scanners also work anywhere a code is asked for: gift and loyalty card entry, printed coupon redemption.

Troubleshooting

- **Scan types into a text box instead of adding an item** — a field had keyboard focus; tap the order area and rescan.
- **Item not found** — the barcode isn't on any menu item's SKU; add it in the menu-item editor.
- **Nothing at all** — try the scanner in a text editor; if it types there but not in CloudPos, run **More › Scanner Test** and check station focus. If it types nowhere, it's cable/port.

Scales for weighed items

Hardware & Printing

View online ↗

Connect a serial scale to a station, set up an item priced by weight, and ring one up.

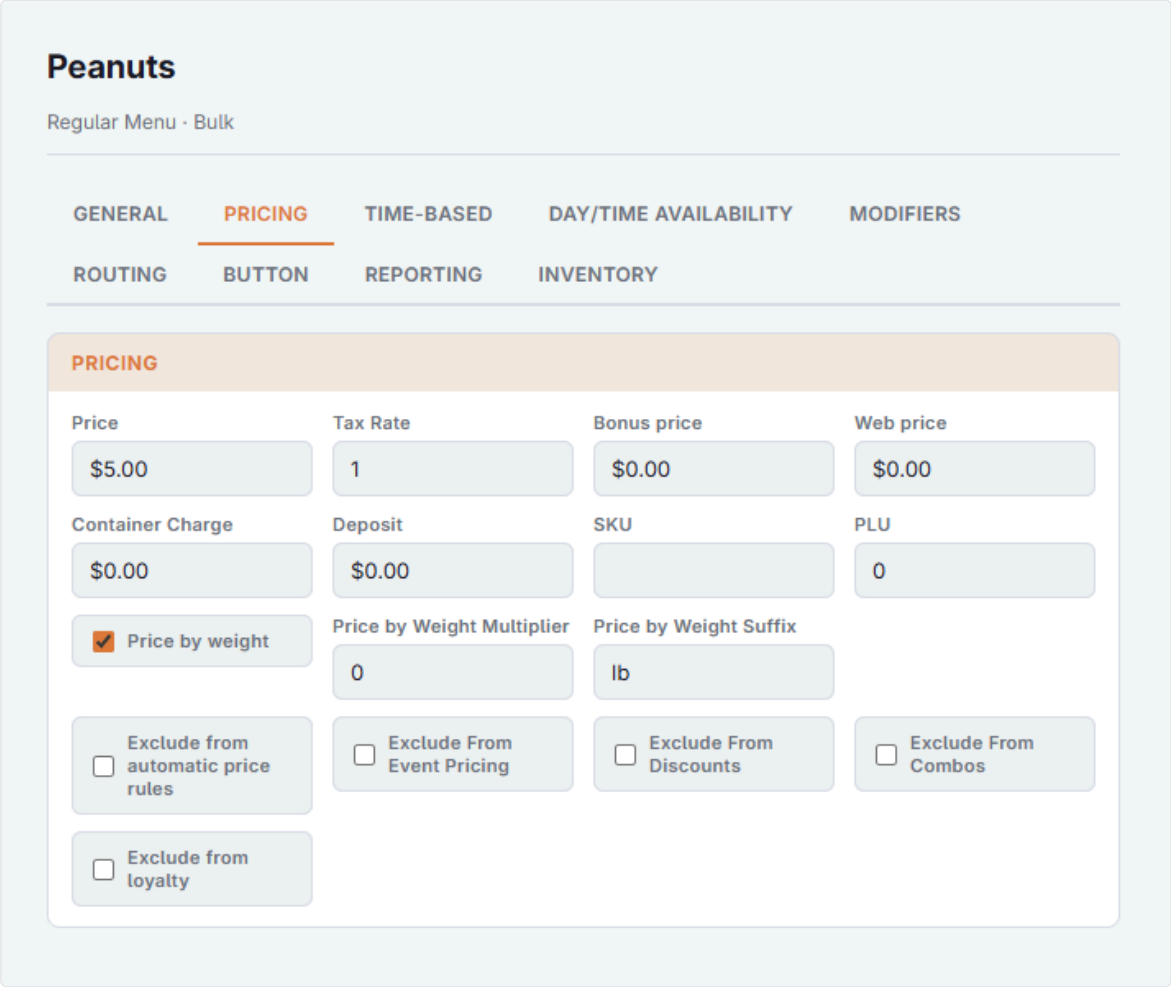
A scale lets the register price bulk items by what they actually weigh. The cashier taps the item, the weight appears, and the line is priced at the item price multiplied by the weight. Deli counters, produce, coffee beans, pick-and-mix and anything else sold loose work this way.

Set up the item first

An item only asks for a weight when it is configured to be priced by weight. In Back Office, open **Menu › Menu Setup › Menu Items**, pick the item and go to the **Pricing** tab.

1. Tick **Price by weight**.
2. Set **Suffix** to the unit the price is quoted in, such as lb or kg. This is what prints beside the weight.

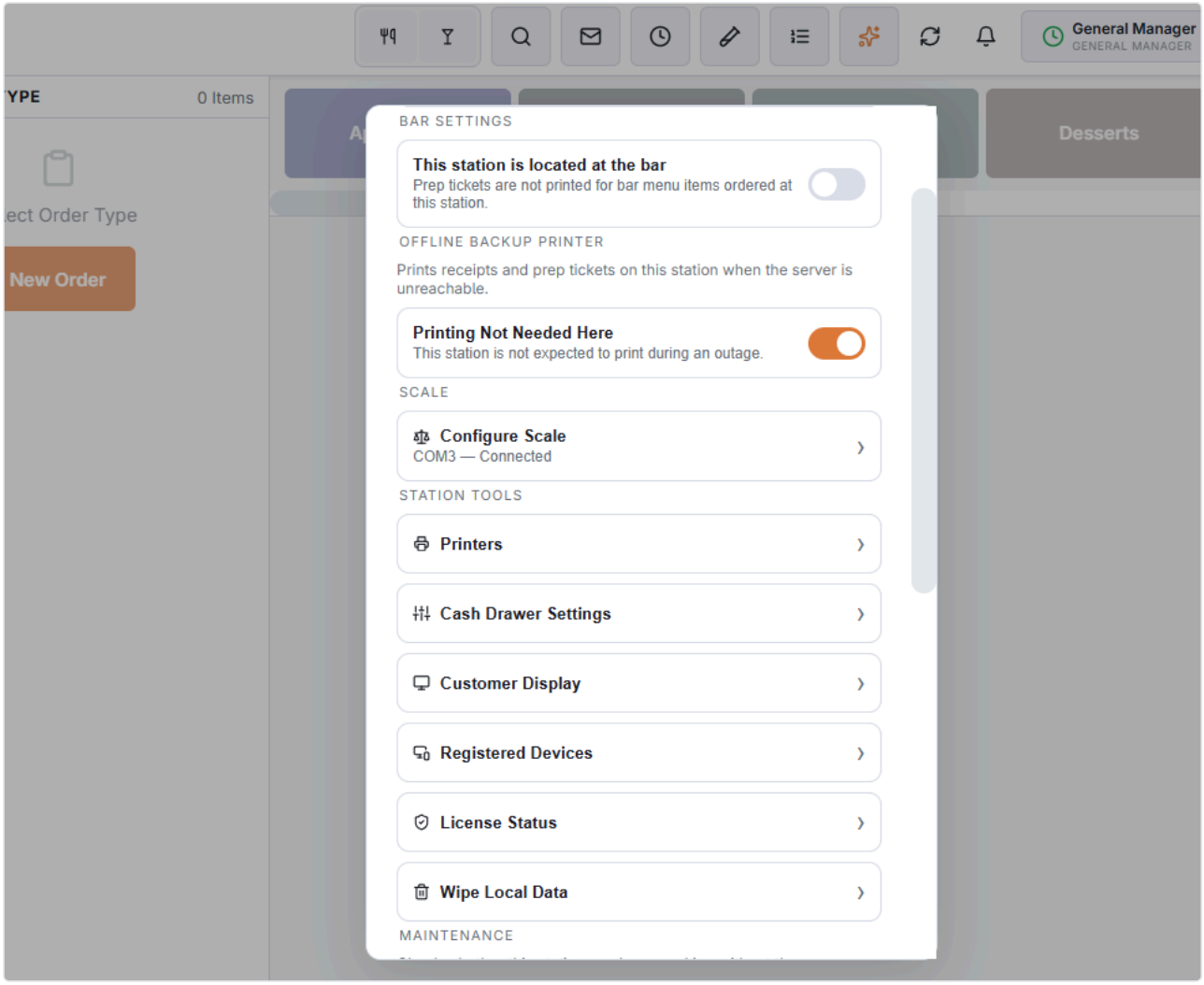
3. Leave **Multiplier** at 0 unless the price is quoted in a different unit from the one the scale reports. A price per 100 g read from a scale that reports kilograms needs a multiplier of 10.
4. Set the item **Price** to the price for one unit of weight, not the price of a package.



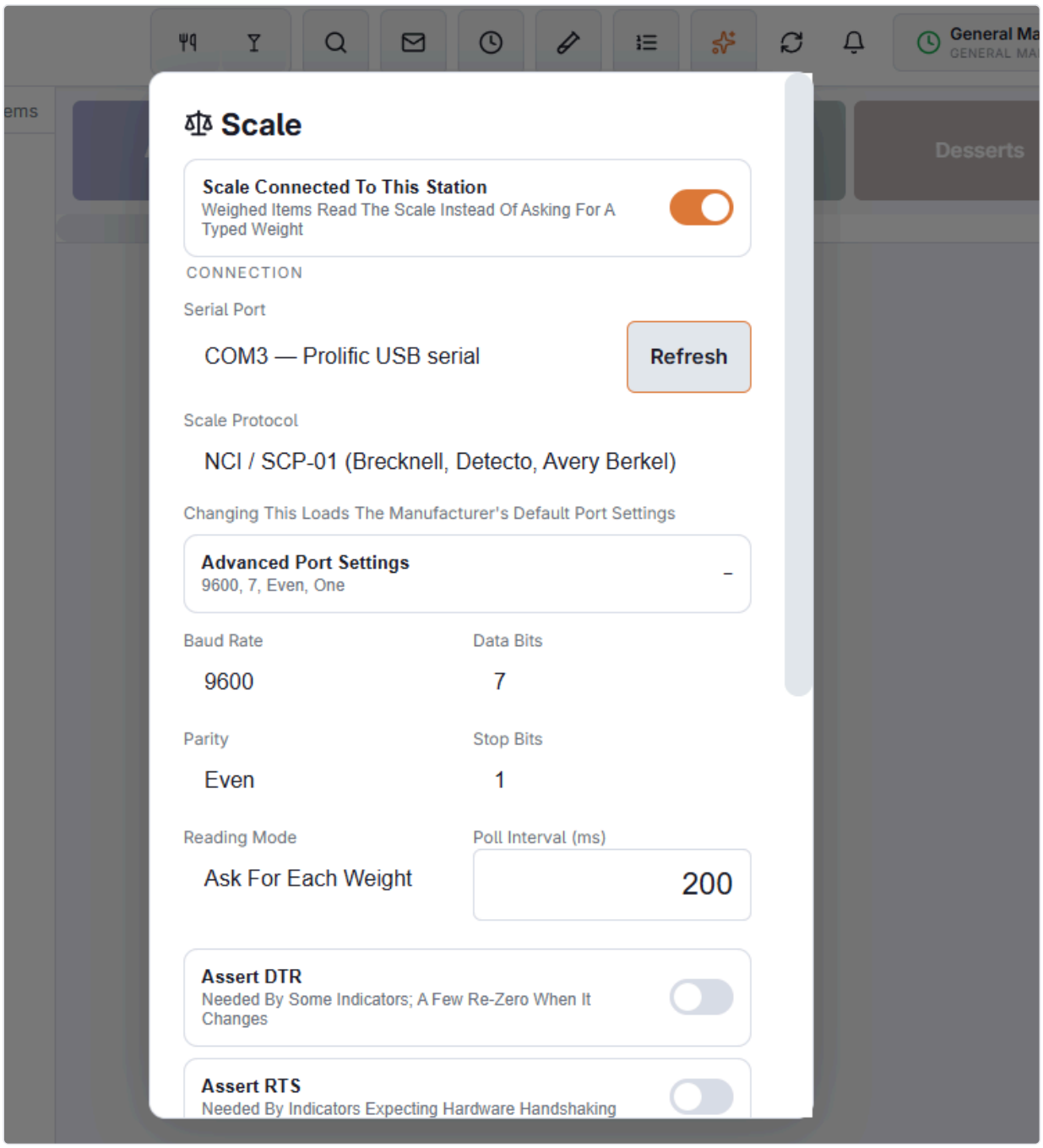
> Items priced by weight are not consolidated on the check. Two bags that happen to cost the same stay as two lines, because each one was weighed separately.

Connect the scale

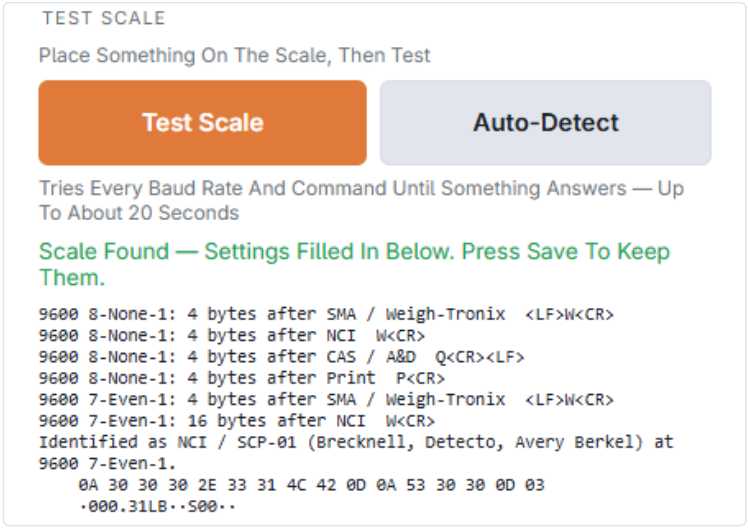
The scale is set up per station, like a printer, because it is plugged into one till. Open the **More** menu, choose **Settings**, then scroll to **Scale** and tap **Configure Scale**.



1. Turn on **Scale connected to this station**.
2. Choose the **Serial port** the scale is on. USB scales appear here once their driver is installed, usually described as a USB serial port.
3. Tap **Auto-Detect**. It tries every speed and every supported protocol until the scale answers, which takes up to about twenty seconds, then fills in everything it found.
4. Tap **Save**.



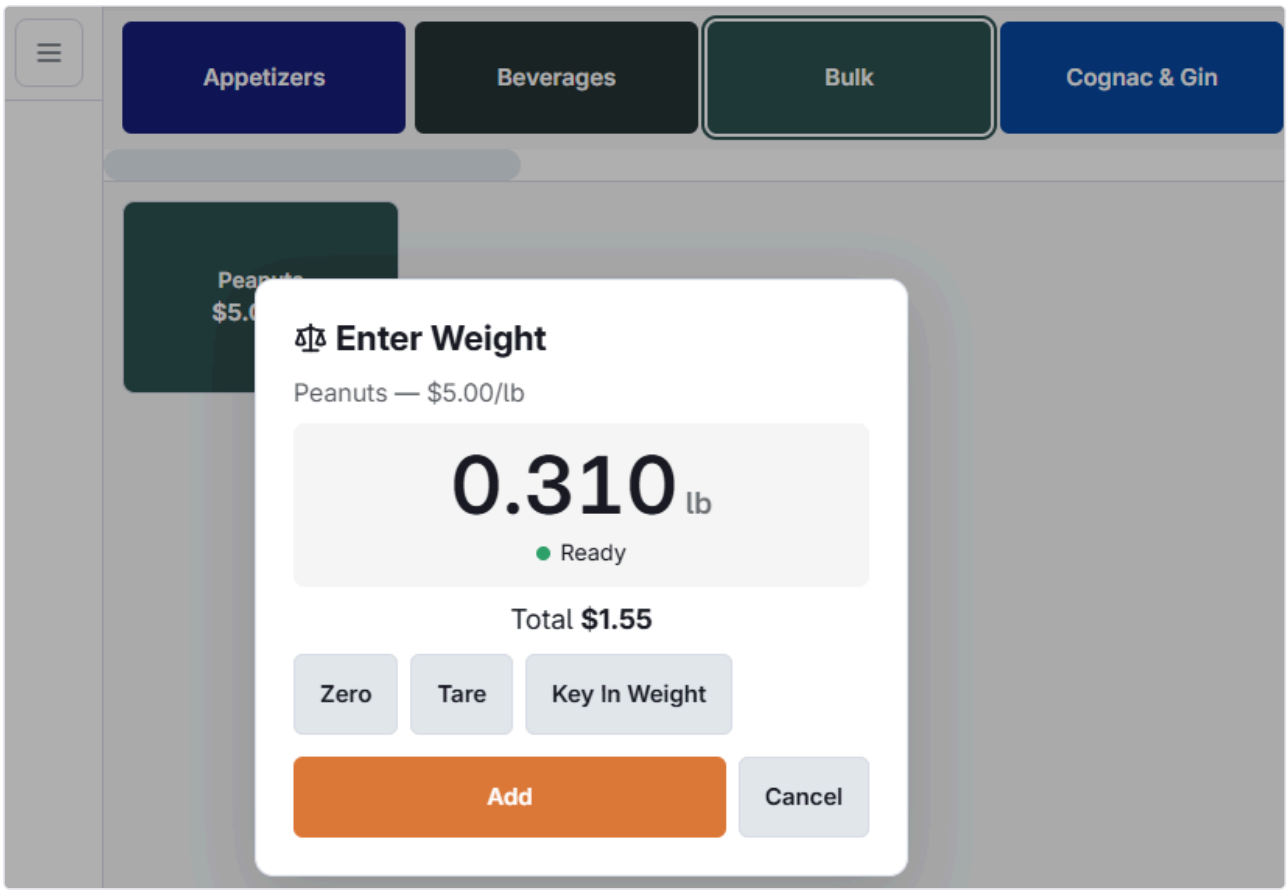
Auto-Detect only fills the form in. Nothing is kept until Save is pressed, and until then the station keeps using its previous settings.

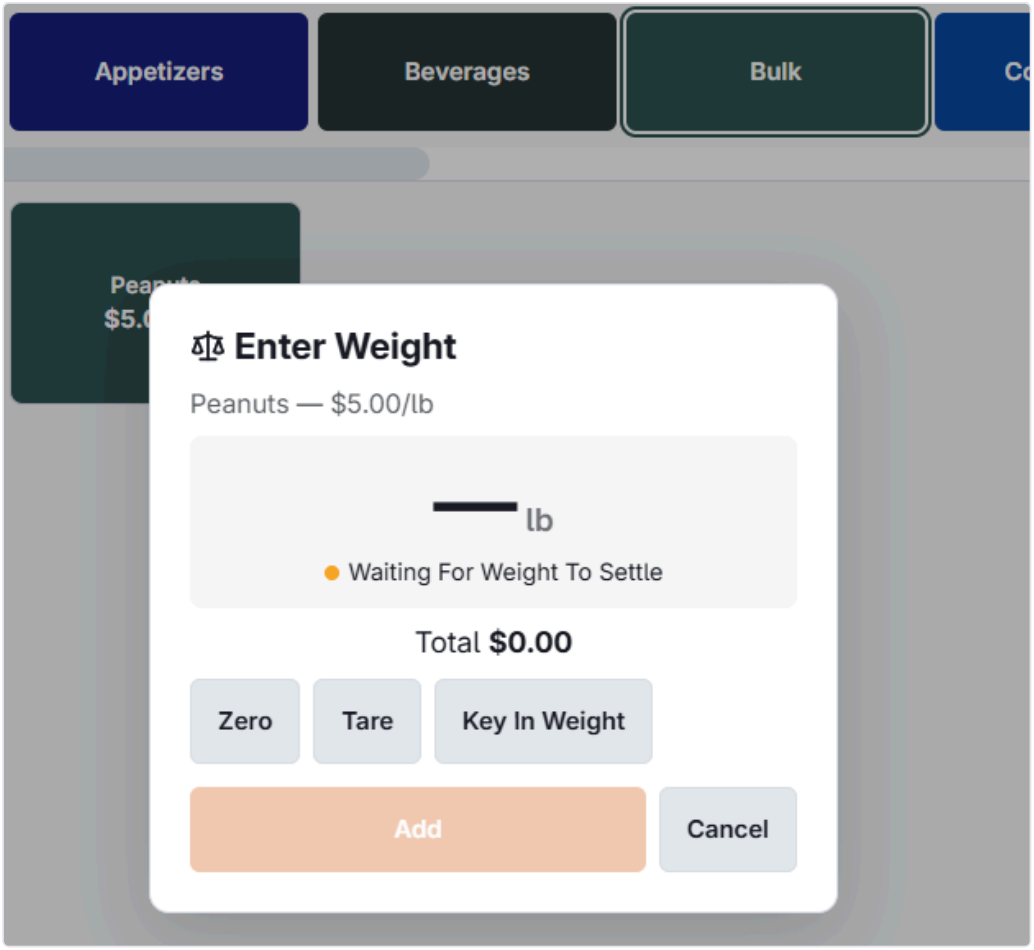


Weighing an item

Tap the item as normal. The weight window opens with a live reading already on screen, because the station reads the scale continuously rather than waking it up on demand.

- **Ready** with a green dot means the weight has settled and can be charged for.
- A dash instead of a number means the platter is still moving. Many scales refuse to report a weight at all while it is, which is deliberate on their part.
- **Tare** subtracts the weight of a container. It applies to this line only, so the next item starts from a clean slate.
- **Zero** resets the scale itself. Use it when an empty platter does not read zero.
- **Key in weight** switches to typing the weight by hand, so a scale problem can never stop a sale. It needs the **Manual Weight Entry** permission: without it, a manager approves, and the scale stops reading while they are asked. While the register is offline it is not asked.

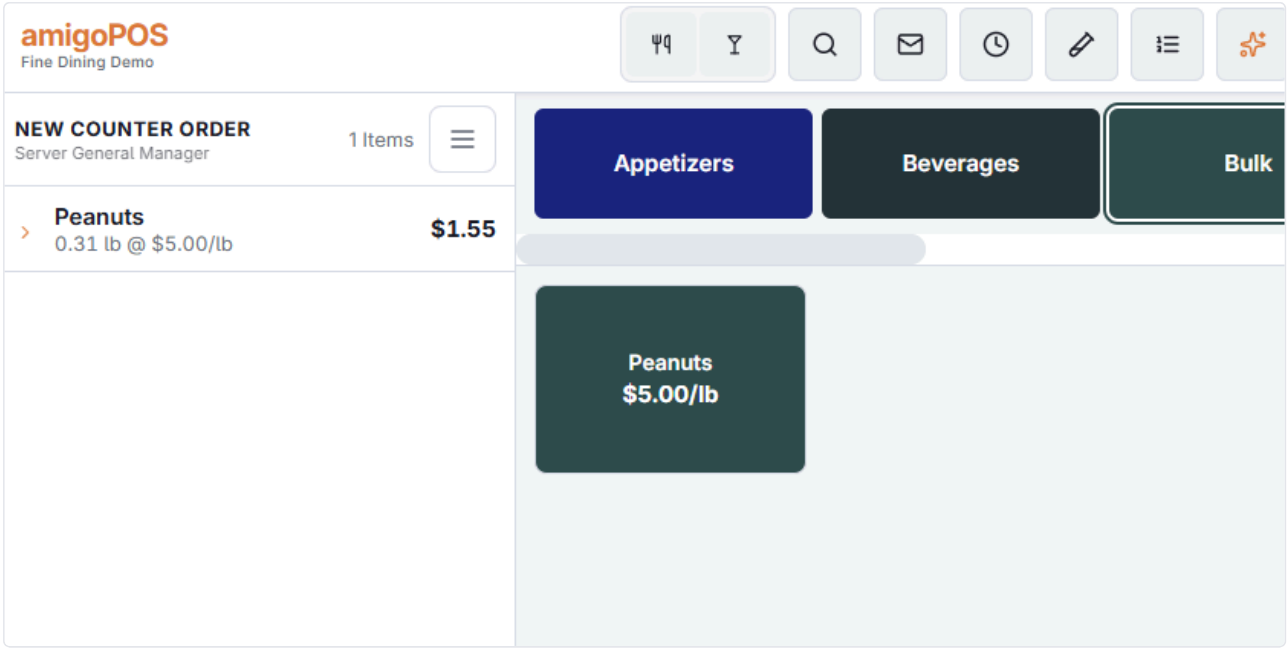

Appetizers
Beverages
Bulk
Cognac & Gin
Enter Weight
Peanuts — $5.00/lb
0.310 lb
Ready
Total $1.55
Zero
Tare
Key In Weight
Add
Cancel



When **Add automatically** is on, the line is added as soon as the weight settles, with no extra tap. If staff are still filling a container when it fires, raise **Settle time** in the scale settings, or turn the option off for that station.

What the customer sees

The check line shows the weight and the price per unit underneath the item name, and the customer receipt prints the same detail under the item. Both come from the weight recorded at the moment of weighing, so a reprinted or recalled order shows exactly what was charged.



Supported scales

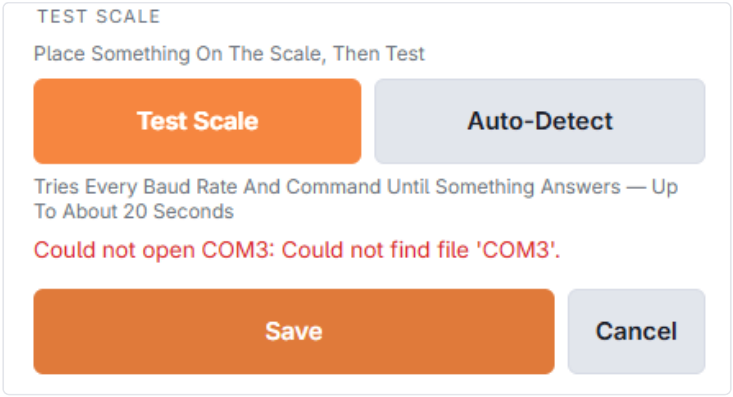
Auto-Detect recognises the protocols below. If the scale is not on the list it can still be used: choose **Other (custom pattern)** and describe its output.

- **NCI / SCP-01** — the retail standard, used by most counter scales.
- **SMA Level 1** — common on industrial indicators.
- **Mettler Toledo 8213** continuous output.
- **CAS / A&D** line output, shared by several makes.
- **Avery Weigh-Tronix** indicator output.

> Scales are supported on Windows stations. On tablets the weight window opens straight into keyed entry, so weighed items can still be sold, just not read from the scale.

If something is wrong

Auto-Detect finds nothing. Run **Test Scale**. It reports whether any bytes arrived at all, which separates three different faults: a scale waiting to be asked, a scale on the wrong settings, and a cable that is not carrying anything.



- **Nothing arrived, asked or unasked.** The cable or the scale itself. Check that the scale is switched on, that its serial output is enabled in its own menu, and that the cable suits it — some scales need a null-modem adapter rather than a straight-through lead.
- **Bytes arrived but nothing could read them.** The test shows what came back. That output is enough to build a custom pattern from.
- **The port cannot be opened.** Another program has it. Close anything else that talks to the scale.

- **The weight never settles.** Something is touching the platter, or the station is on a surface that carries vibration. Raising **Settle time** helps once the cause is dealt with, not instead of it.
- **The weight looks wrong.** Check the item's multiplier and suffix. A price quoted per 100 g against a scale reporting kilograms is the usual cause.

Print Agent

Print Agent overview

View online ↗

The app that owns the store's printers: where it runs, what it does, and a tour of its screens.

The **Print Agent** is a small app that runs on a computer or tablet in the store and owns the store's printers. Registers never talk to printers directly: they send each job to the AmigoPOS Cloud server, the server pushes it to the agent that owns the printer, and the agent prints it.

That has three consequences worth remembering:

- **Printers are created in the agent**, nowhere else. Back Office only decides what prints where (Print Routing).
- **An agent belongs to one store.** Its printers exist only in that store.
- **The agent's device must be on** for its printers to print. Jobs sent while it is off wait and print when it comes back.

Windows or Android

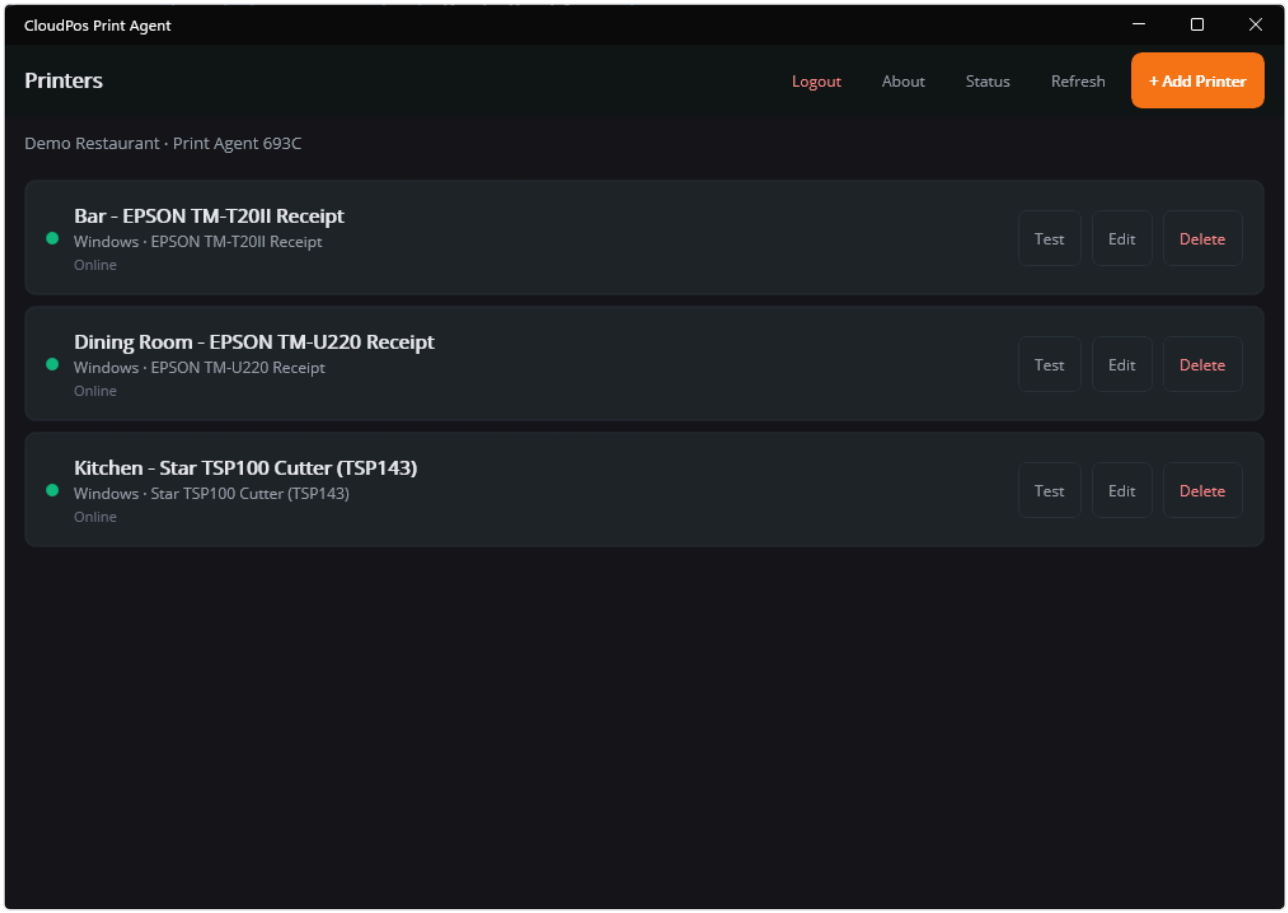
- **Windows** — drives network printers and any printer installed in Windows, including USB printers. The usual choice when there is a PC near the receipt printer.
- **Android** — drives network printers only. A cheap tablet or Android box makes a good print server for a kitchen full of network printers.

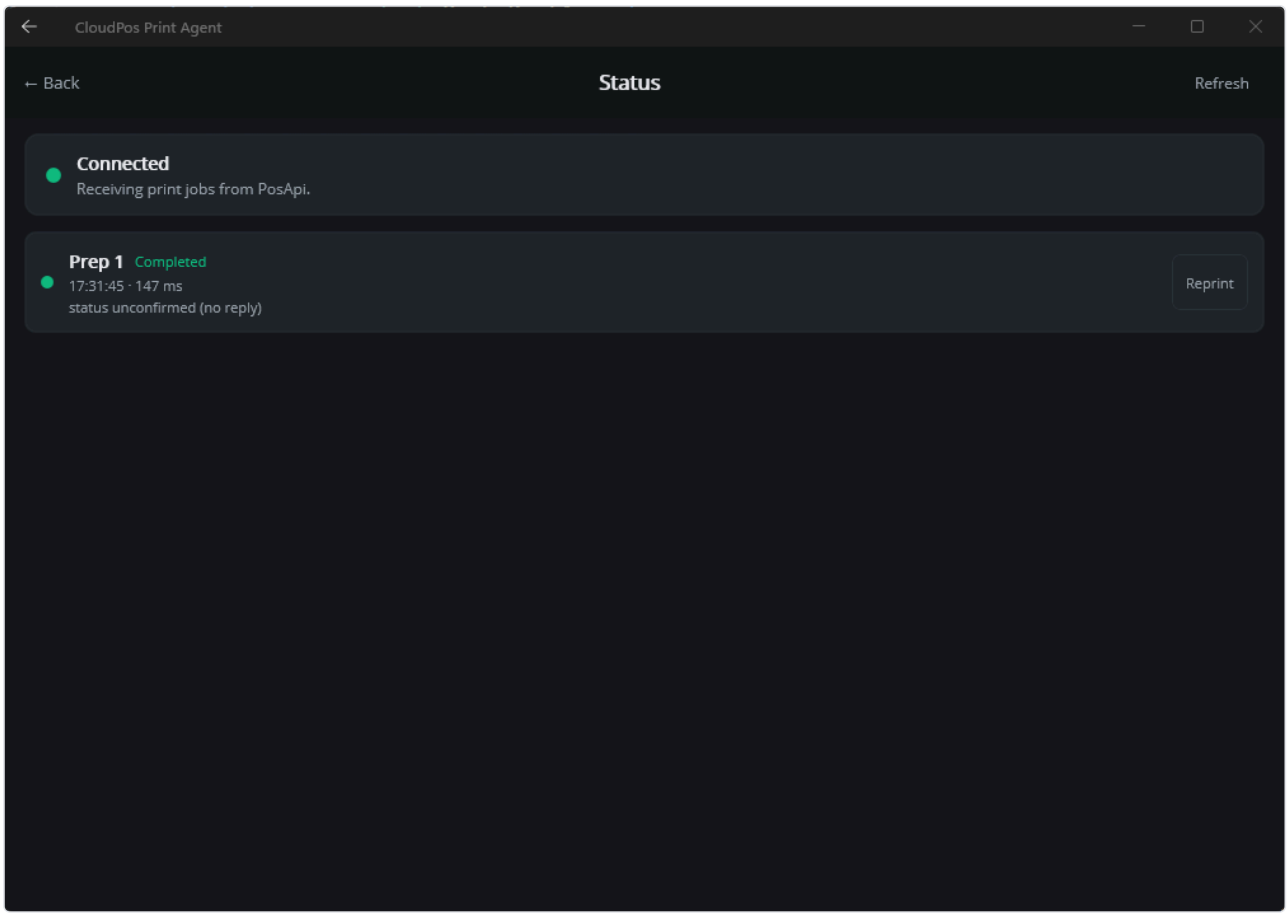
A store can run several agents — one on the counter PC for the USB receipt printer and one on a kitchen tablet for the network kitchen printers is common. Each printer belongs to the agent that added it.

The screens

Printers is the home screen. The line under the title shows the store and the agent's name. Each printer shows a coloured dot (green: online; amber: its last test result; grey: not tested yet), its connection, and **Test**, **Edit** and **Delete**. Across the top:

- **+ Add Printer** — add a printer; see *Adding printers to the agent*.
- **Refresh** — reload the list and each printer's state.
- **Status** — the connection to the server and the recent print jobs, with Retry and Reprint; see *Status screen, alerts and retries*.
- **About** — version, the device, the store it belongs to, and diagnostics for support; see *Updates and the About screen*.
- **Logout** — disconnects the agent from the store, for instance to activate it for another store. Its printers stop printing until it is activated again.


CloudPos Print Agent
Printers
Logout
About
Status
Refresh
+ Add Printer
Demo Restaurant · Print Agent 693C
Bar - EPSON TM-T20II Receipt
Windows · EPSON TM-T20II Receipt
Online
Test
Edit
Delete
Dining Room - EPSON TM-U220 Receipt
Windows · EPSON TM-U220 Receipt
Online
Test
Edit
Delete
Kitchen - Star TSP100 Cutter (TSP143)
Windows · Star TSP100 Cutter (TSP143)
Online
Test
Edit
Delete



Setting one up

1. Install it — *Installing the Print Agent on Windows* or *on Android*.
2. Activate it for the right store — *Activating an agent for the right store*.
3. Add its printers and test each one — *Adding printers to the agent* and *Printer settings explained*.
4. Route them in Back Office — *Print routing*.

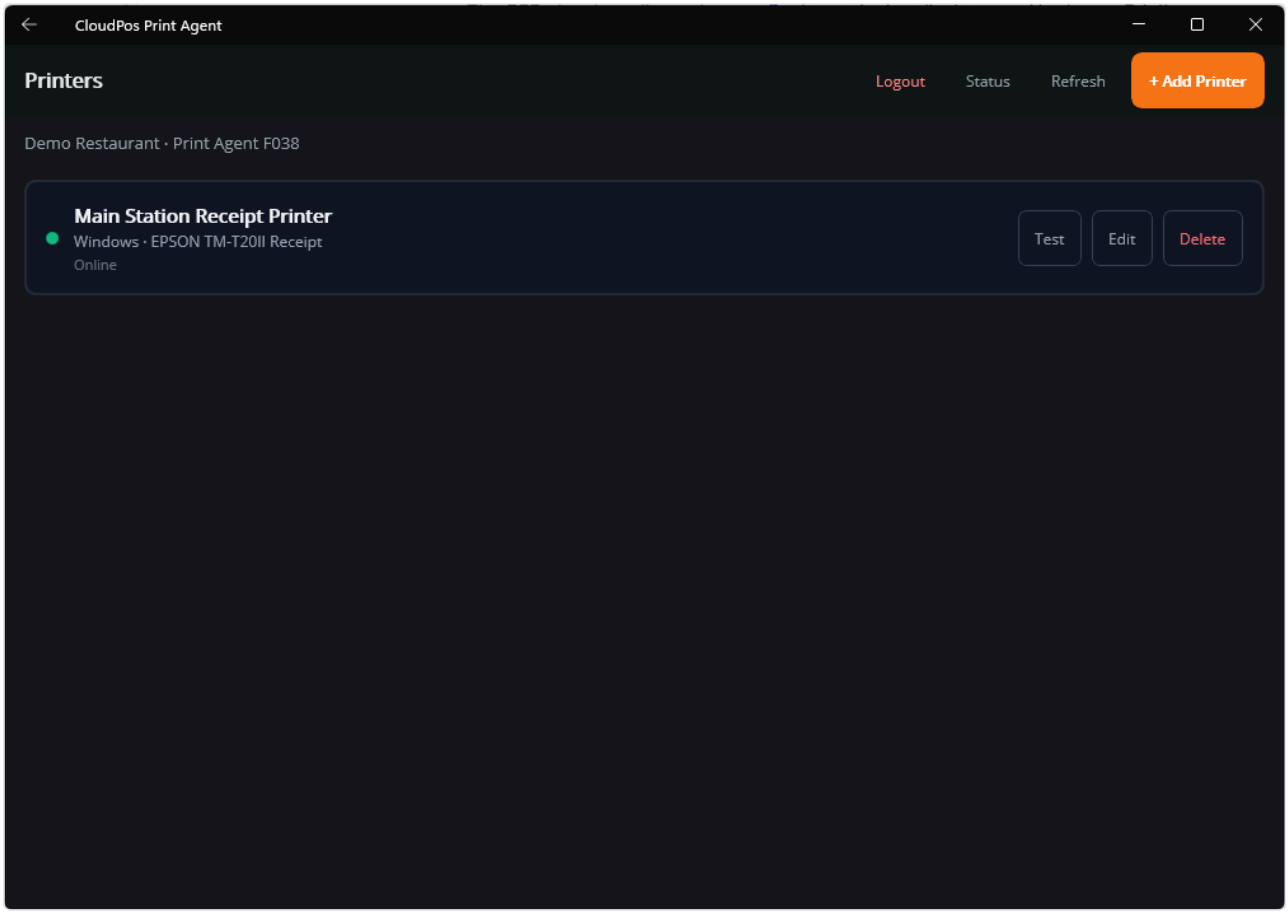
The complete walkthrough, with every screen, is *Setting up printing, start to finish*.

What it does on its own

- Receives jobs the moment they are sent, and collects anything still waiting each time it connects.
- Reconnects by itself after a server restart, a network drop or a device reboot.
- Retries a failed job once, then marks it **Failed** and raises an alert on the device.
- Updates itself.

> Put the agent on a device that stays on, not on a laptop that goes home at night. Most “the kitchen is not printing” calls are an agent whose device is switched off or asleep.

> The agent’s screens are in English on every system language.

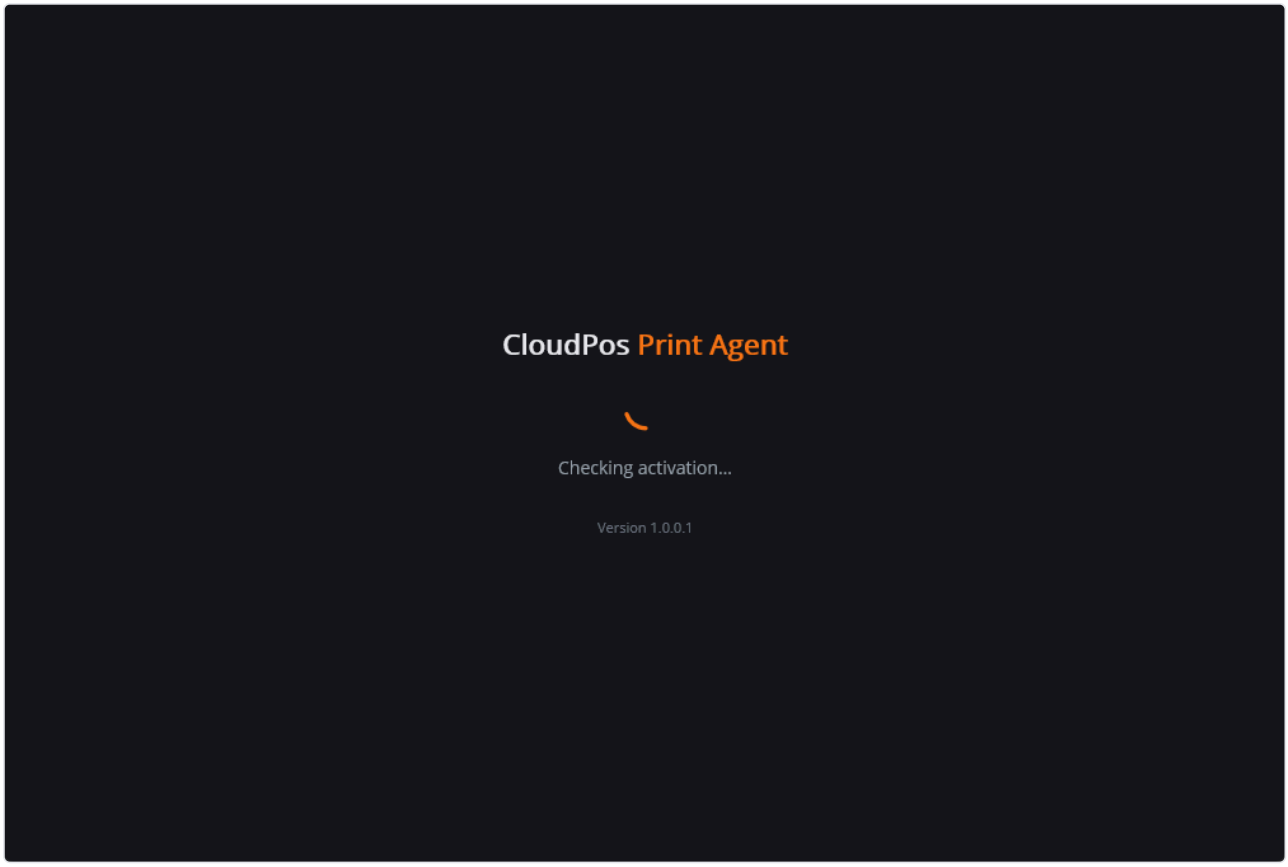


The agent also switches lights

If the store uses CloudPos lighting control, the Print Agent is also what switches the relays: the server sends it the commands and it calls each relay on the local network. A relay device names the agent that runs it (**Runs On**), so keep that agent running, on the same network as the relays. See Lighting control overview.

When it starts

The agent opens on a short start-up screen — **Starting…**, then **Checking activation…** — while it checks that the device is still activated. The activation page appears only when the device really needs to be activated; otherwise the Printers screen follows.



Keeping tickets moving

- Jobs normally arrive over a live connection. The agent also asks the server for waiting jobs every 30 seconds, and every 10 seconds while the live connection is down, so tickets keep coming as long as the internet works.
- A network printer that has been idle for 20 seconds gets a fresh connection before the next ticket, so a printer that was switched off and on does not lose that ticket.
- On Windows the agent watches each printer's Windows queue and alerts when tickets stop leaving it (Status screen, alerts and retries).
- A slow answer from the server no longer holds up the other tickets of that printer.

Installing the Print Agent on Windows

Hardware & Printing › Print Agent

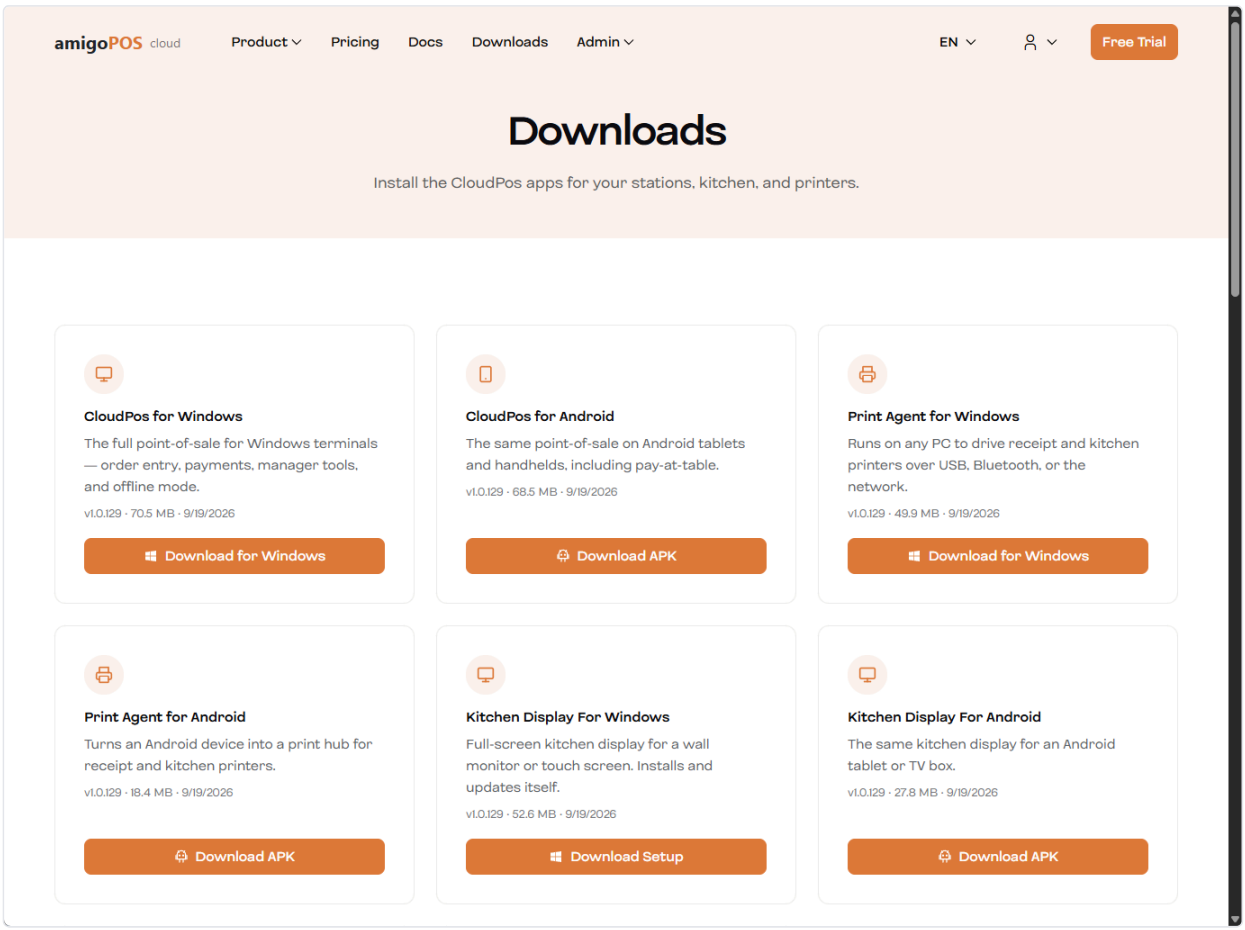
View online ↗

Download, install and activate the Windows agent, get USB printers ready in Windows, and keep the PC from sleeping.

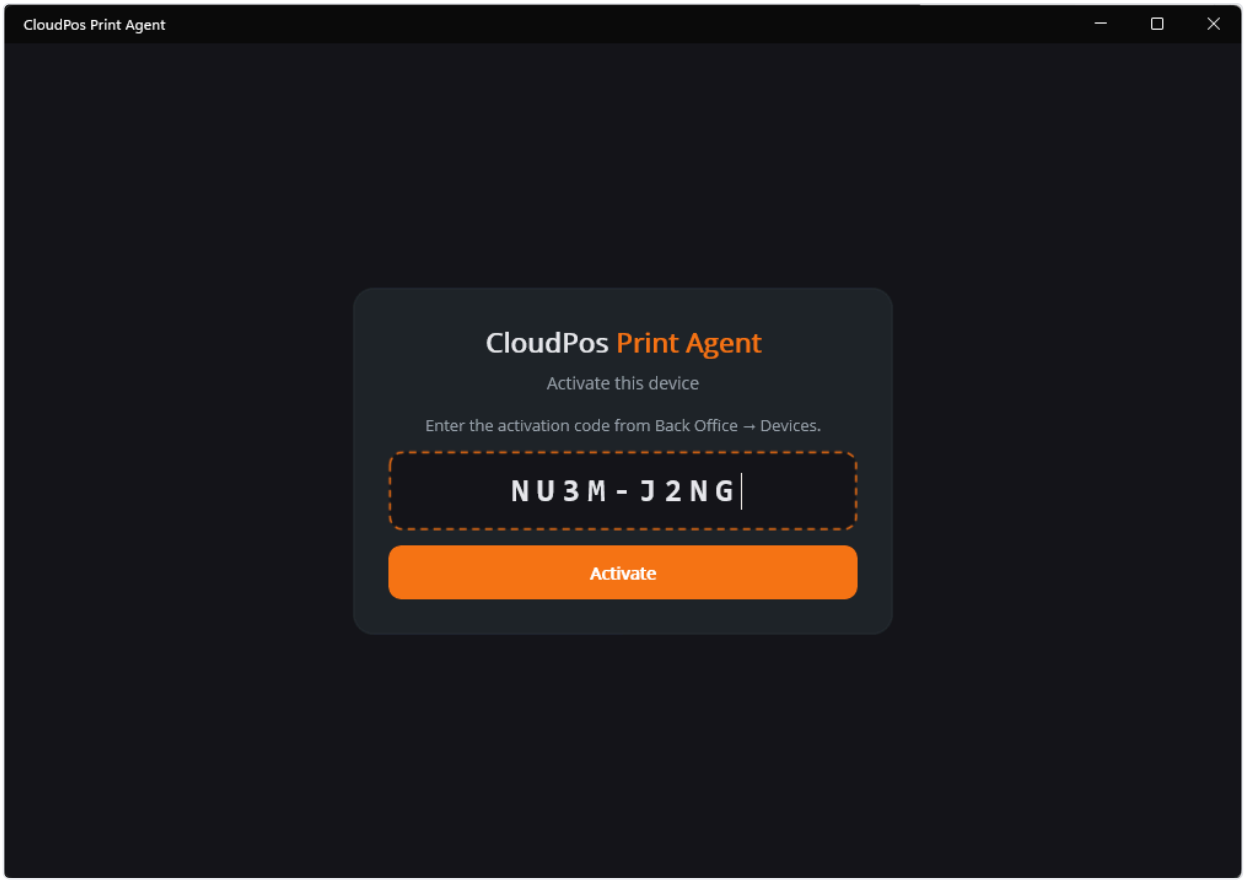
The Windows agent is the right choice when the receipt printer is plugged into a PC by USB, or when there is a PC near the printers that stays on anyway. It drives network printers and every printer installed in Windows.

Install

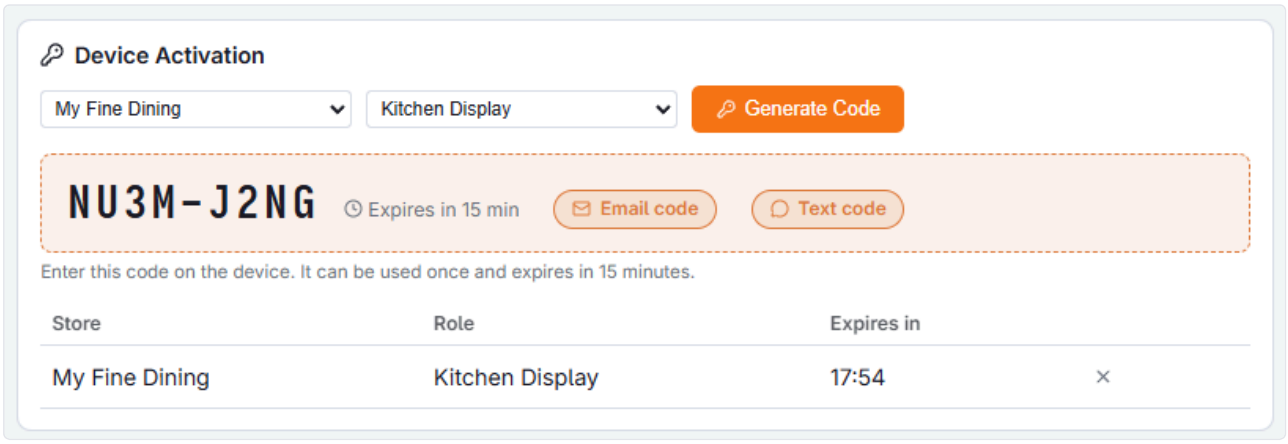
1. On the PC, open the **Downloads** page of the AmigoPOS Cloud web site and download **Print Agent for Windows**.



2. Run the installer. It installs for the current Windows user, needs no administrator rights, and opens the agent when it finishes.
3. The agent asks for an activation code. Generate one in **Back Office › Hardware & Printing › Registered Devices** for the **Print Agent** role and the right store, type it in and press **Activate**. See *Activating an agent for the right store*.



4. Add the printers — *Adding printers to the agent*.



USB printers: set them up in Windows first

The agent prints to USB printers through Windows' own list of printers, sending the printer's commands straight through. So a USB printer must first work as a Windows printer:

1. Install the maker's driver (for example Epson Advanced Printer Driver, or the Star Windows driver) and plug the printer in.
2. Check it appears in **Windows Settings › Bluetooth & devices › Printers & scanners**. The name shown there is the one the agent needs; **Scan** in the agent lists these names so you do not have to type them.

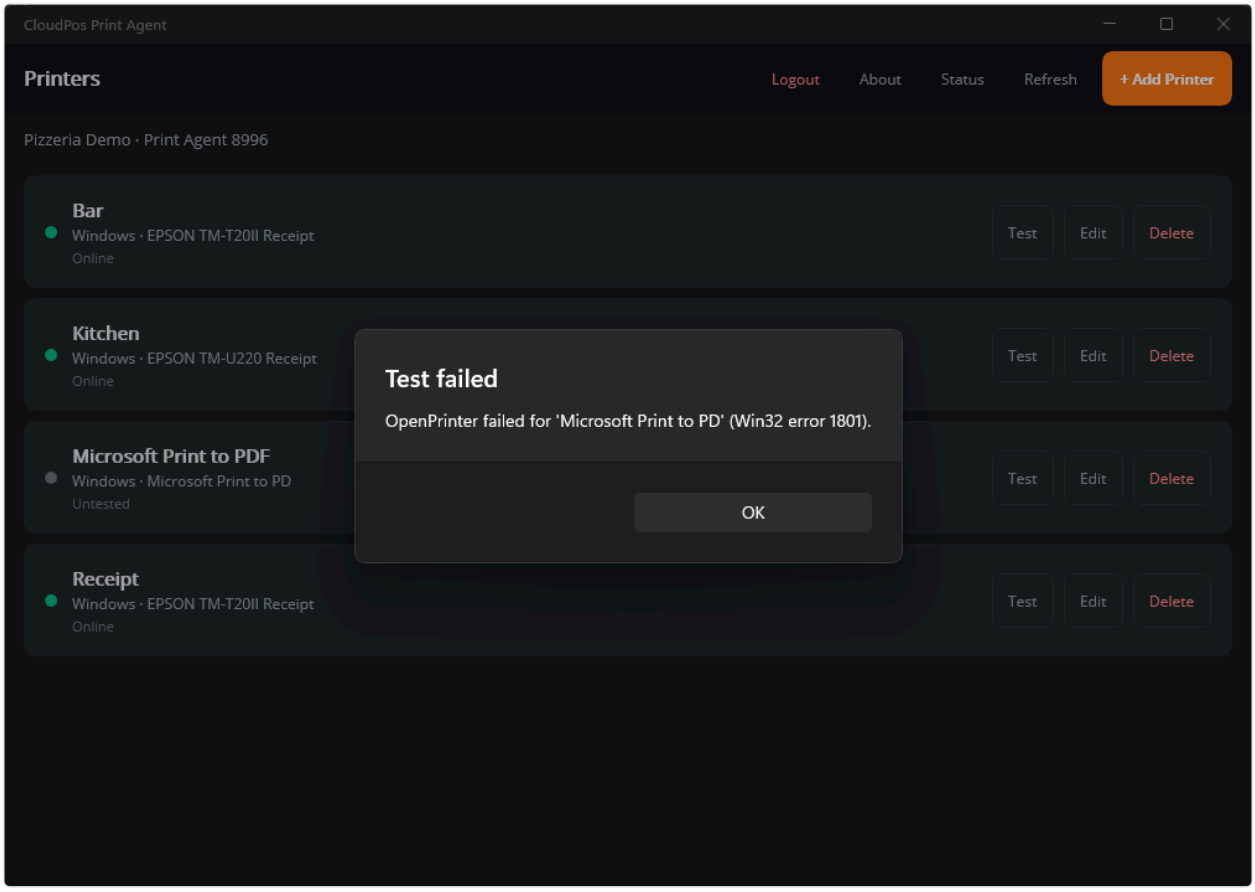


3. Printing a Windows test page is not needed; use the agent's **Test print** instead.

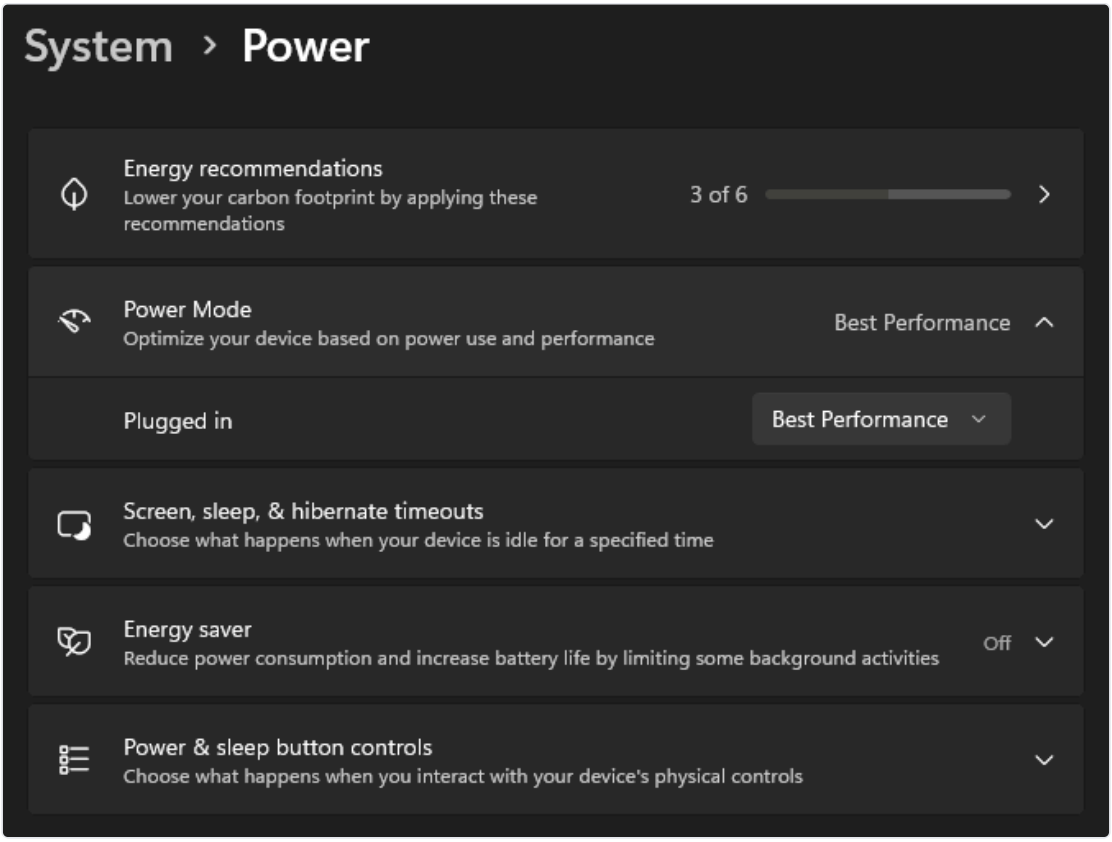
> If the maker has no driver for your Windows version, the built-in **Generic / Text Only** driver works for printing, because the agent sends the printer's own commands. Logos and QR codes then depend on the printer understanding them, which ESC/POS printers do.

Afterwards

- The agent starts with Windows, next to the clock and without opening its window, and keeps printing in the background. Closing its window only hides it — see *Next to the clock* below.
- It updates itself — see *Updates and the About screen*.
- Failed jobs, unreachable printers and a lost server connection appear as Windows **notifications**, even while the agent is minimised.



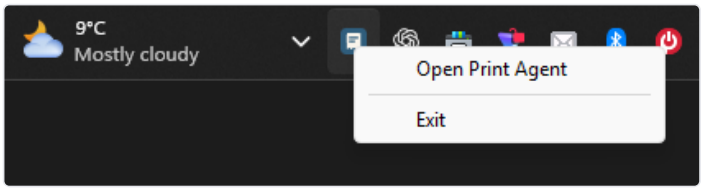
Sleep stops printing. A PC that goes to sleep stops its agent exactly like a PC that is switched off. In **Windows Settings › System › Power**, set sleep to **Never** when plugged in. The screen may still turn off.

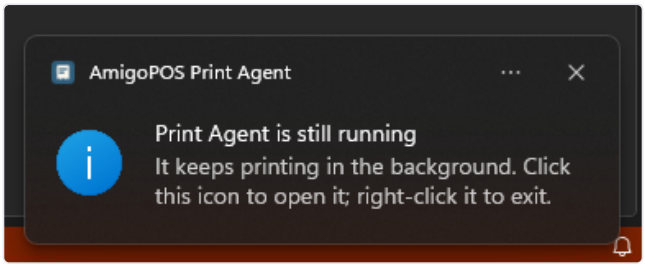


Next to the clock

On Windows the agent lives in the notification area next to the clock (it may be under the **^** arrow).

- **Click the icon** to open the agent's window.
- **The window's X** hides the window. The agent stays next to the clock and keeps printing. The first time, Windows shows *Print Agent is still running*.
- **To stop it**, right-click the icon and choose **Exit**, or open **About** and press **Exit Print Agent**. It asks *Close Print Agent?* first: **Close anyway** stops it, and nothing prints on this computer until it is started again; **Keep running** leaves it as it is.
- When someone signs in to Windows, the agent starts next to the clock without opening its window.
- Only one copy runs for each Windows user. Starting it again from the Start menu just brings up the copy that is already running.
- After an update the agent comes back the same way, next to the clock.





> Where Windows cannot show the icon, the X closes the agent as it did before, so keep its window open there.

Activating an agent for the right store

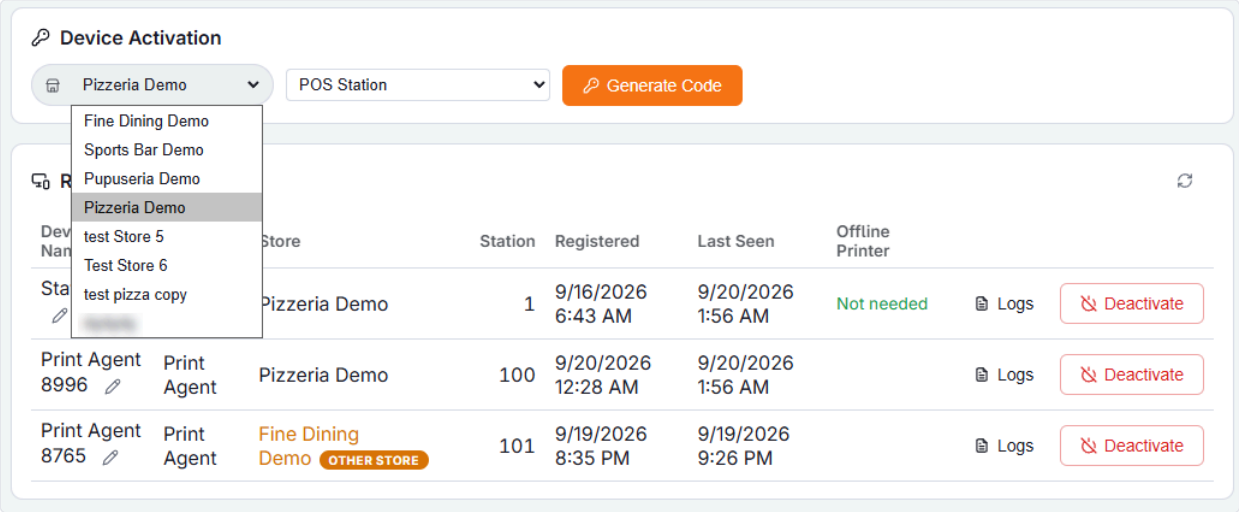
View online ↗

Generate the activation code for the right store and role, activate the agent, rename it, and move it to another store.

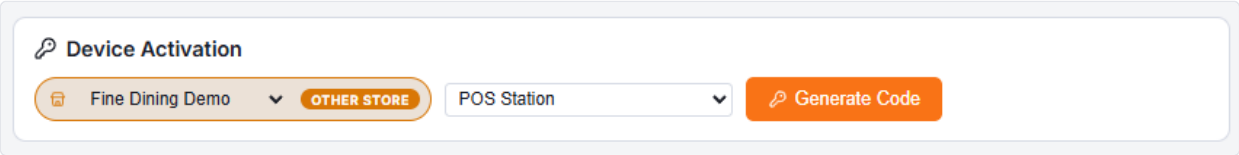
An agent is connected to a store with a one-time **activation code**. The code decides the store, so this is the step where most mix-ups begin — especially for accounts that manage several stores.

Generate the code

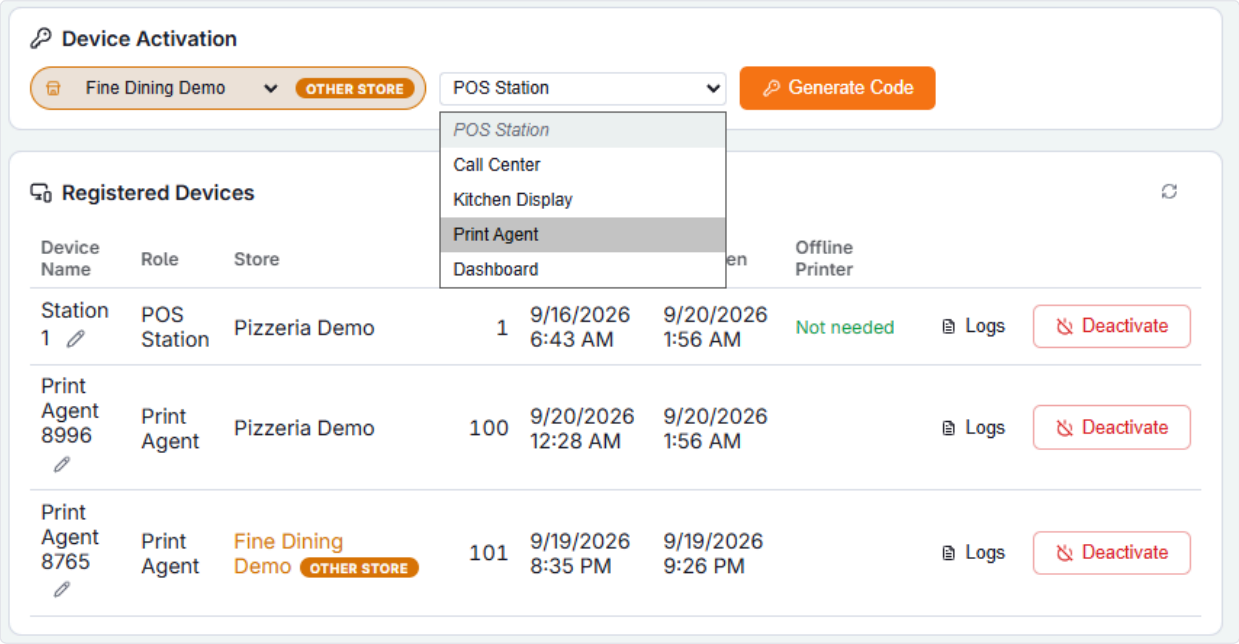
1. Open **Back Office › Hardware & Printing › Registered Devices**.
2. In **Device Activation**, the **store** starts on the store Back Office is editing. Check it.



3. If you choose a different store, the chip turns amber with an **Other Store** tag, as a reminder that the device will belong to that store, not the one on screen.

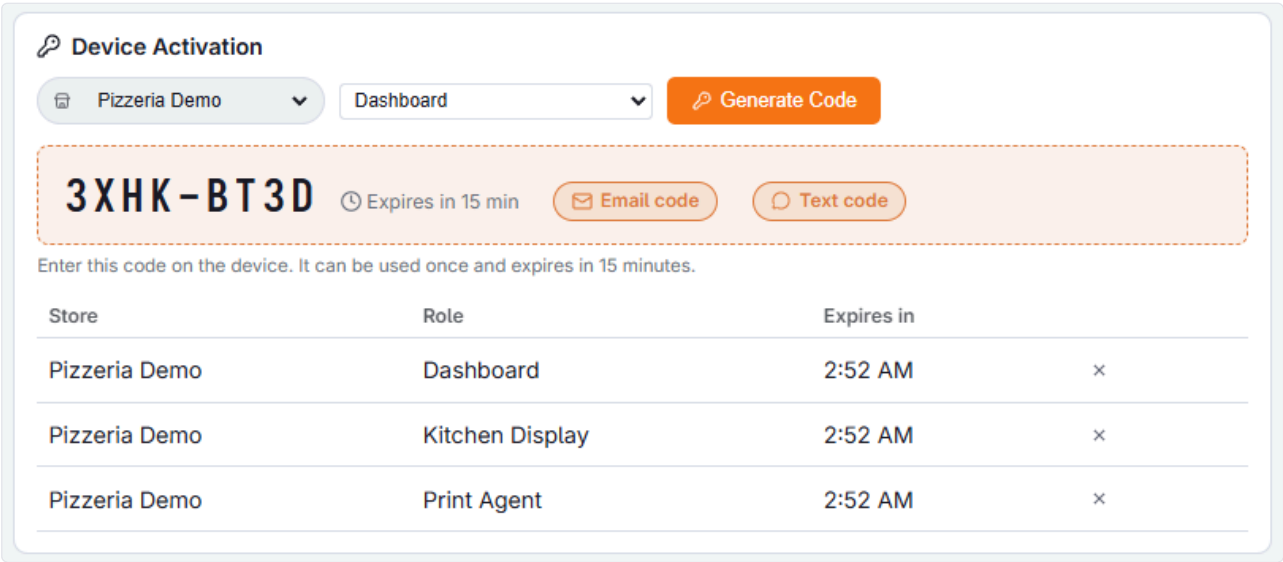


4. Set the role to **Print Agent**. The same card also activates registers (POS Station), call center stations and kitchen displays, so the role matters.



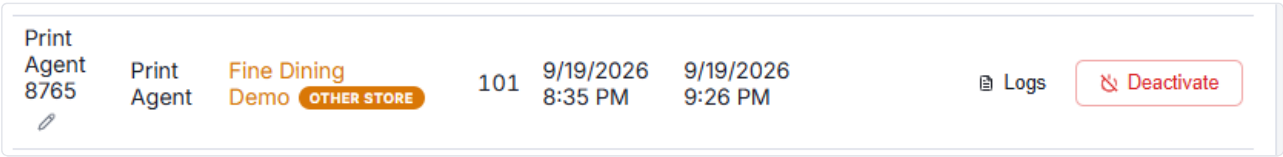
5. Press **Generate Code**. The code works **once** and expires after **15 minutes**. **Email code** or **Text code** sends it to you if you are not at the device.

Codes not used yet are listed under the card with their store, role and time left. Press **×** to cancel one you no longer need.



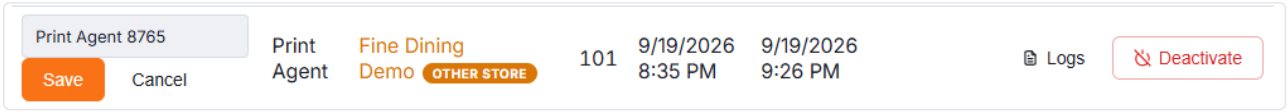
Activate the agent

1. On the agent, type the code and press **Activate**.
2. **Setup complete** shows the merchant and the store. If the store is wrong, press Logout and start again with a new code.
3. The agent appears in the Registered Devices list with the role **Print Agent** and a name such as *Print Agent 8765*.



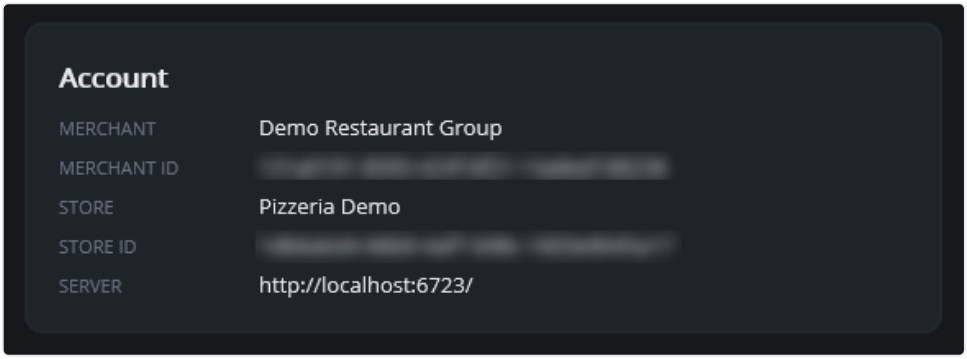
Name it

Rename the agent with the **pencil** next to its name in Registered Devices — *Counter PC*, *Kitchen tablet*. The name is what appears on the agent's own header and what support will ask for.



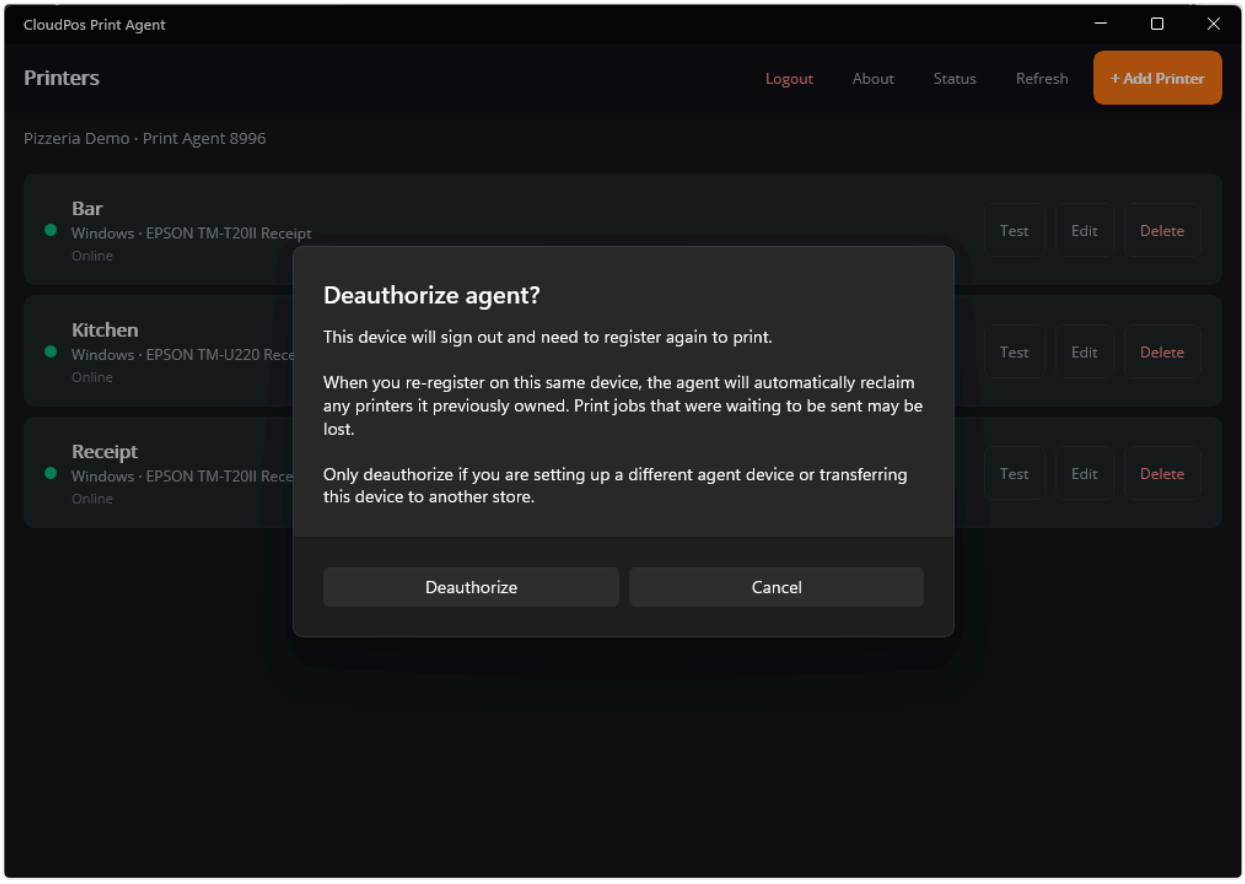
Checking which store an agent belongs to

- **On the agent**: the line under **Printers**, or **About › Account**, which lists merchant, store and store ID.
- **In Back Office**: the Store column of Registered Devices. Devices of a store other than the one you are editing carry the **Other Store** tag.



Moving an agent to another store

1. On the agent, press **Logout** and confirm.



2. Generate a code for the other store, activate, and add the printers again — printers belong to the store they were added to.
3. Route them in that store's Print Routing.
4. In Registered Devices, **Deactivate** the old entry so it no longer counts as a device of the first store.

Deactivating

Deactivate in Registered Devices disconnects the agent from the store; its printers stop printing immediately. Use it for a device that is lost, replaced or retired. To bring a device back, activate it again with a new code; if its printers do not reappear, add them again and route them.

> One agent serves one store. If two stores need printing from the same place, each store needs its own agent on its own device — see *Printing questions and answers*.

Installing the Print Agent on Android

Hardware & Printing › Print Agent

View online ↗

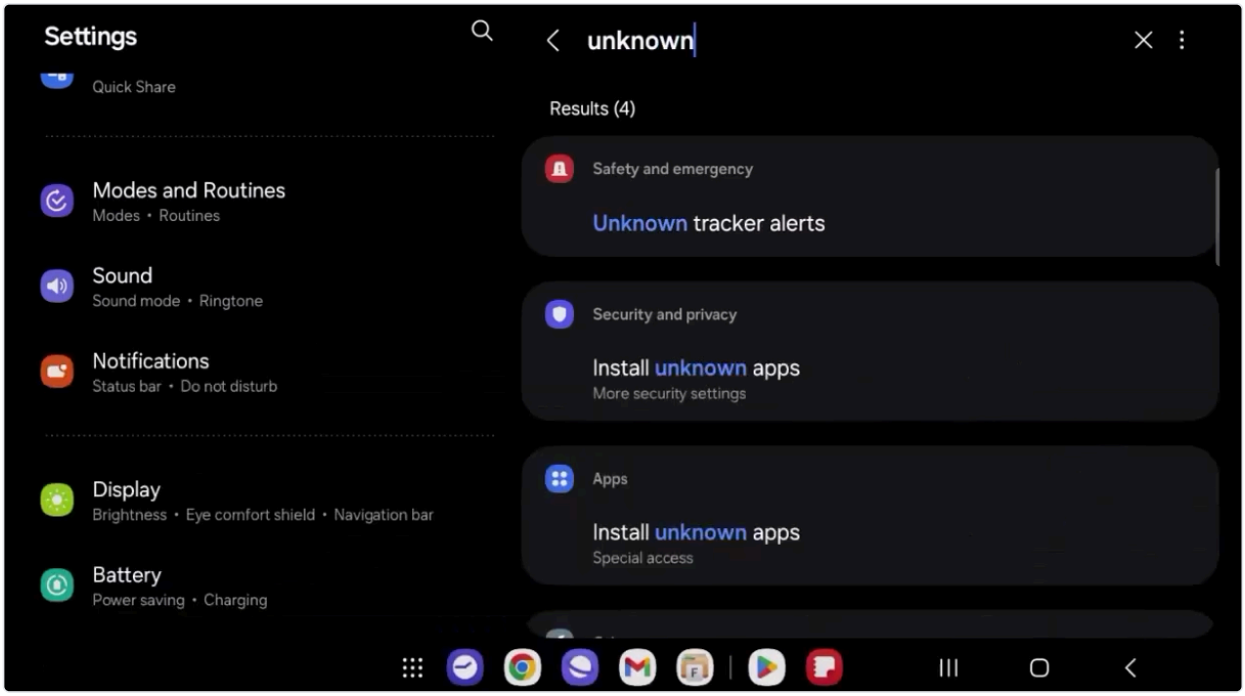
Install the APK, grant notifications and battery permission, activate, and keep Android from putting the agent to sleep.

The Android agent turns a tablet or Android TV box into a print server for network printers. It needs no PC and keeps running with the screen off.

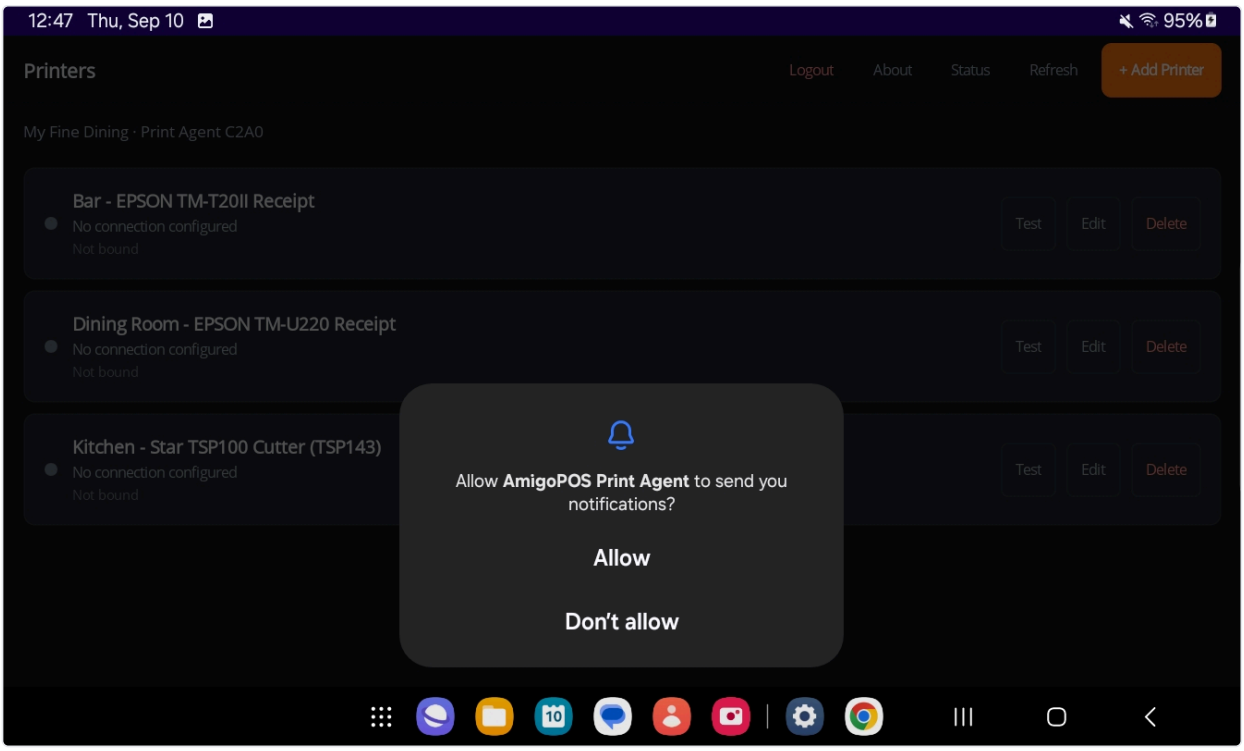
> On Android the agent drives **network printers only** — printers with an Ethernet or Wi-Fi port, reached by IP address. USB and Bluetooth printers cannot be driven from Android. For a USB-only printer, use the *Windows agent*, or fit the printer with a network interface.

Install

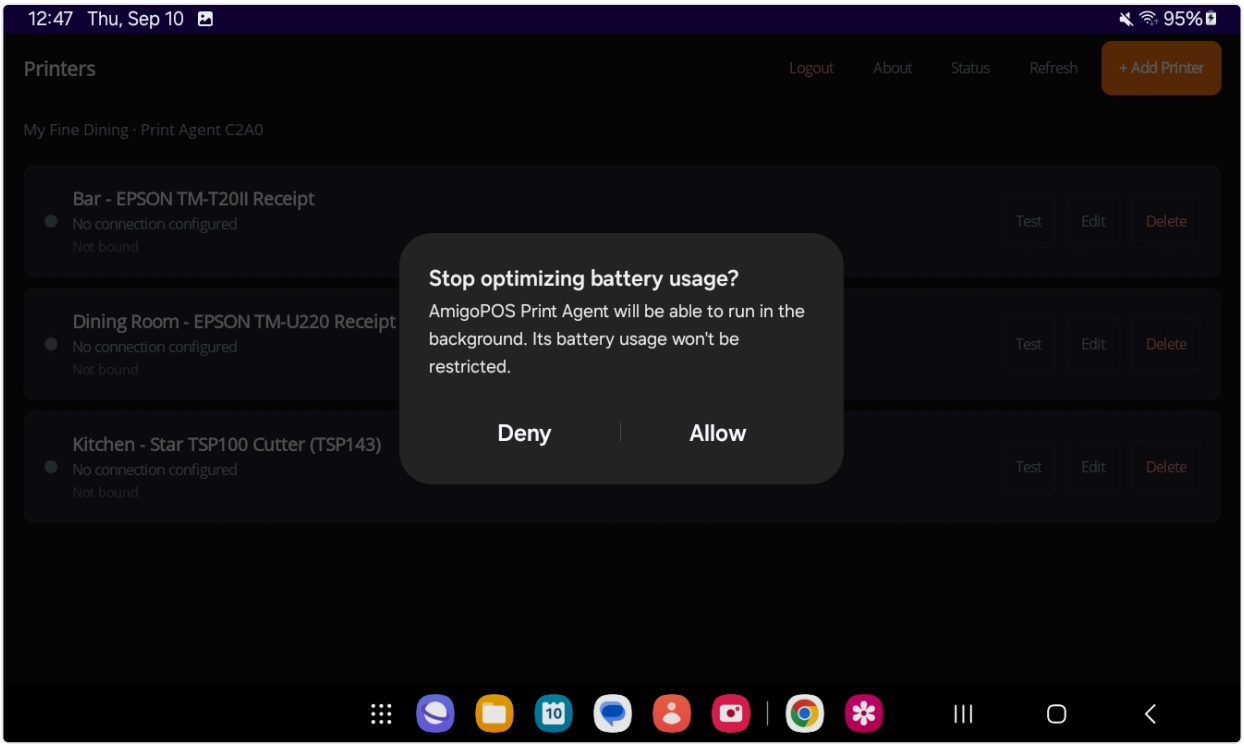
1. On the device, open the **Downloads** page of the AmigoPOS Cloud web site and download **Print Agent for Android**.
2. Android asks whether the browser may install apps. Allow it for this source.



3. Open the downloaded file, install, and open the app.
4. Allow **notifications** when asked. The agent keeps a permanent notification while it runs — that is what stops Android from closing it — and uses notifications for its alerts.

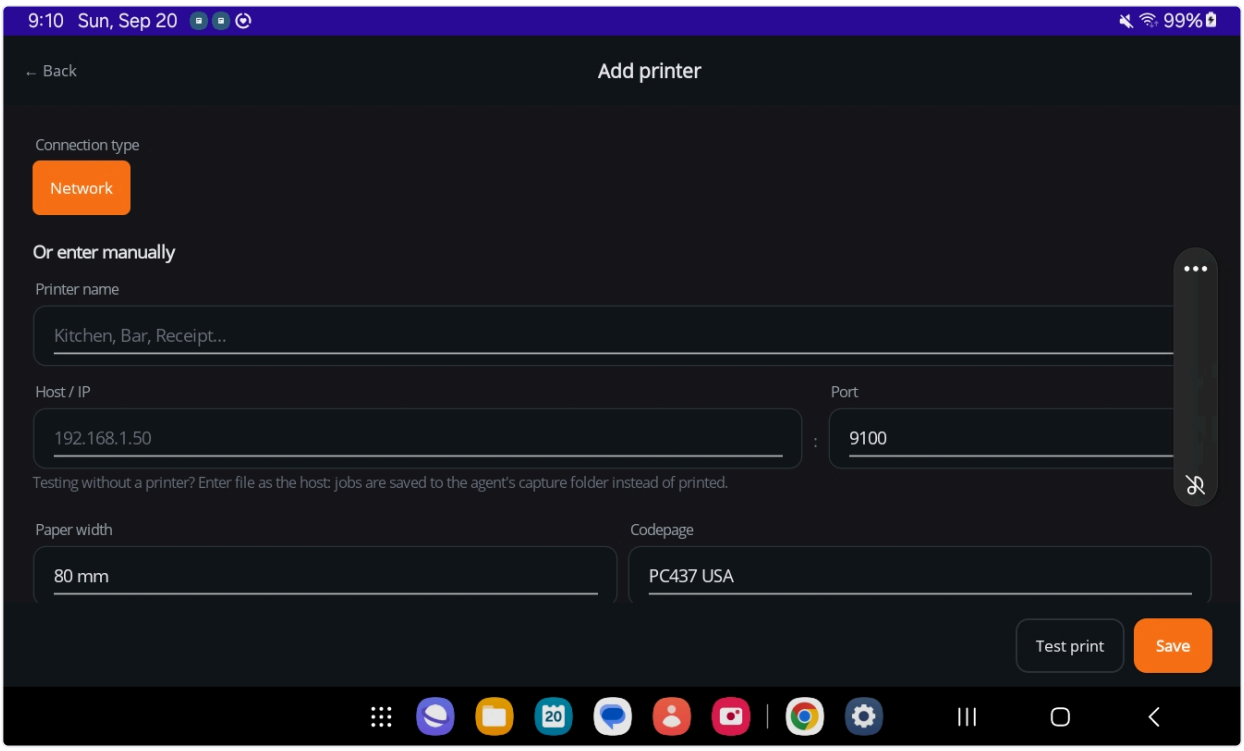


5. Allow the app to **stop optimising battery usage** when asked. Without it Android pauses the agent after the screen has been off a while.



Activate and add printers

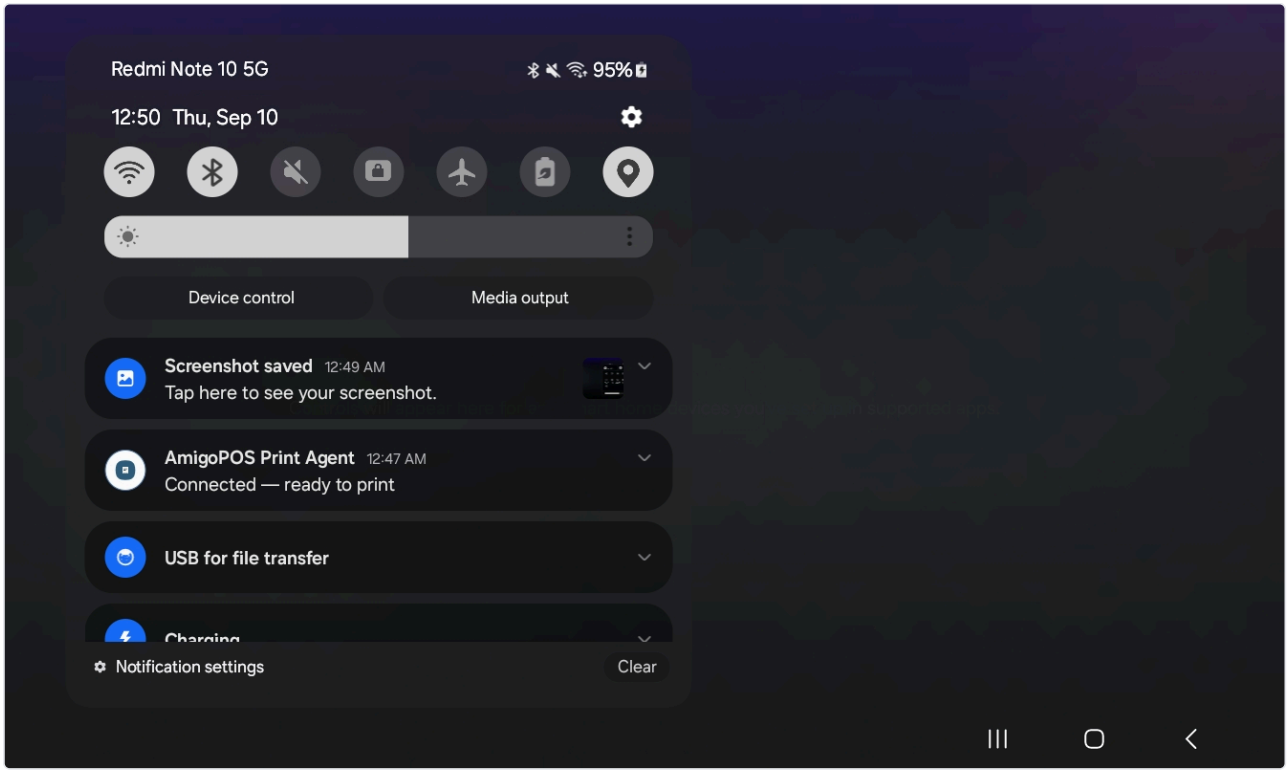
1. Generate a **Print Agent** code for the right store in **Back Office › Hardware & Printing › Registered Devices**, type it in and press **Activate** — see *Activating an agent for the right store*.
2. Press **+ Add Printer**. Android offers the **Network** connection only, and has no Scan: type the printer's IP address and keep port 9100. Find the address on the printer's self-test page.



3 Test print, save, and route the printers in Back Office.

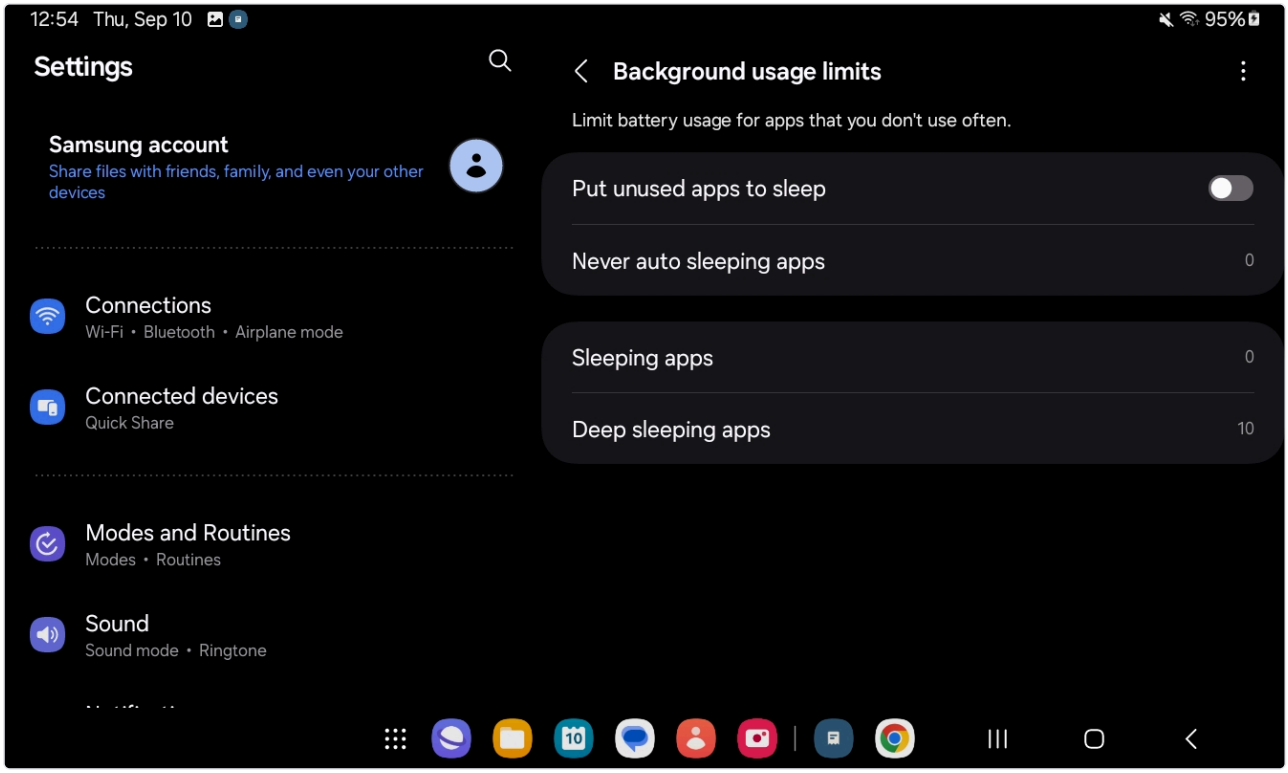
What keeps it running

Once activated, the agent runs as a background service with a permanent notification that shows its state — *Connected*, *Reconnecting* and so on. It keeps Wi-Fi awake, starts again by itself after a reboot or an update, and reconnects whenever the connection drops. The screen can be off; the device should stay on power.



Samsung and other strict battery managers

Some makers add their own sleep rules. On Samsung, open **Settings › Battery › Background usage limits**, add the Print Agent to **Never sleeping apps**, and make sure it is not under *Sleeping apps* or *Deep sleeping apps*. Other brands have a similar setting under battery or app settings.



Managed devices

On a device set up as a managed (kiosk) device by your reseller, updates install silently. On an ordinary device Android asks you to confirm each update; see *Updates and the About screen*.

> A wired Ethernet adapter on the Android box beats Wi-Fi in a kitchen. If Wi-Fi is the only option, place the box where the signal is strong, not behind the line.

Adding printers to the agent

Hardware & Printing › Print Agent

View online ↗

Add a Windows or network printer on the agent step by step, test it, and manage the printer list.

Every printer the store uses is added on the Print Agent that can reach it. Once saved, it appears in **Back Office › Hardware & Printing › Print Routing** for that agent's store, under the name you gave it.

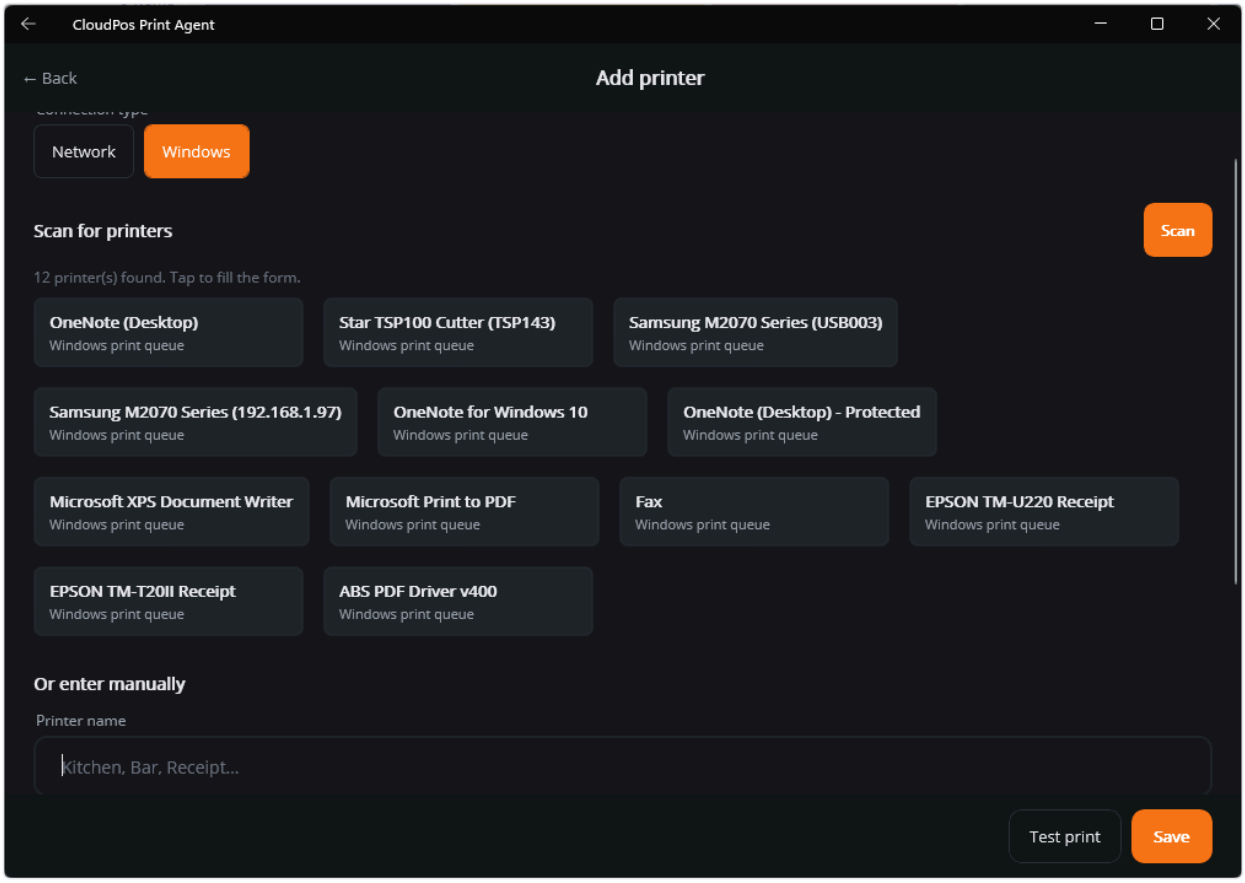
Which connection type?

Type	Windows agent	Android agent	Use it for
Windows	Yes	—	Any printer installed in Windows: USB printers, and printers shared from another PC. Install the maker's Windows driver first.
Network	Yes	Yes	Printers with an Ethernet or Wi-Fi port, reached by IP address on port 9100. Give them a fixed IP or a router reservation.

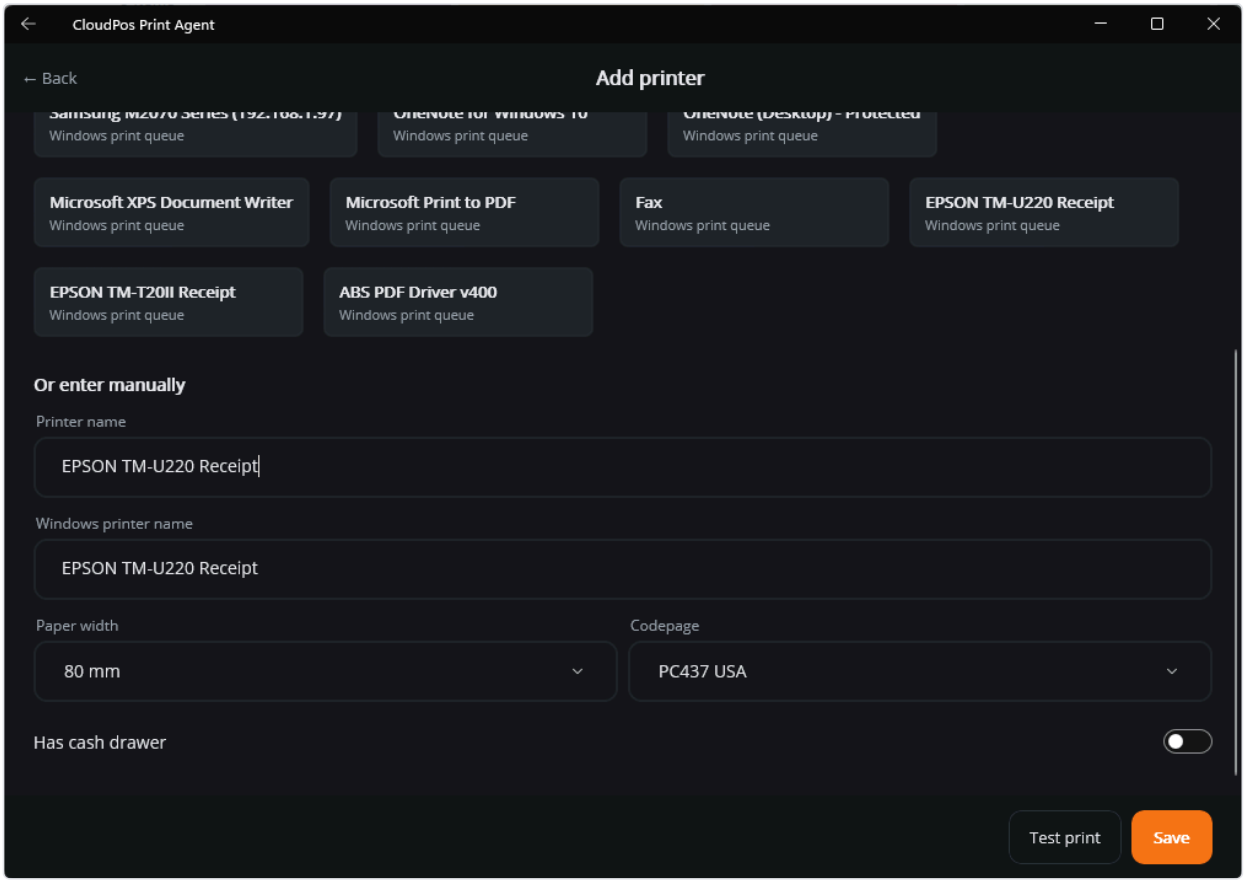
Bluetooth printers, and USB printers on Android, are not supported. The capture-to-file test printer is a Network printer with the address `file`; see *Testing without a printer*.

Add a Windows printer (USB or installed in Windows)

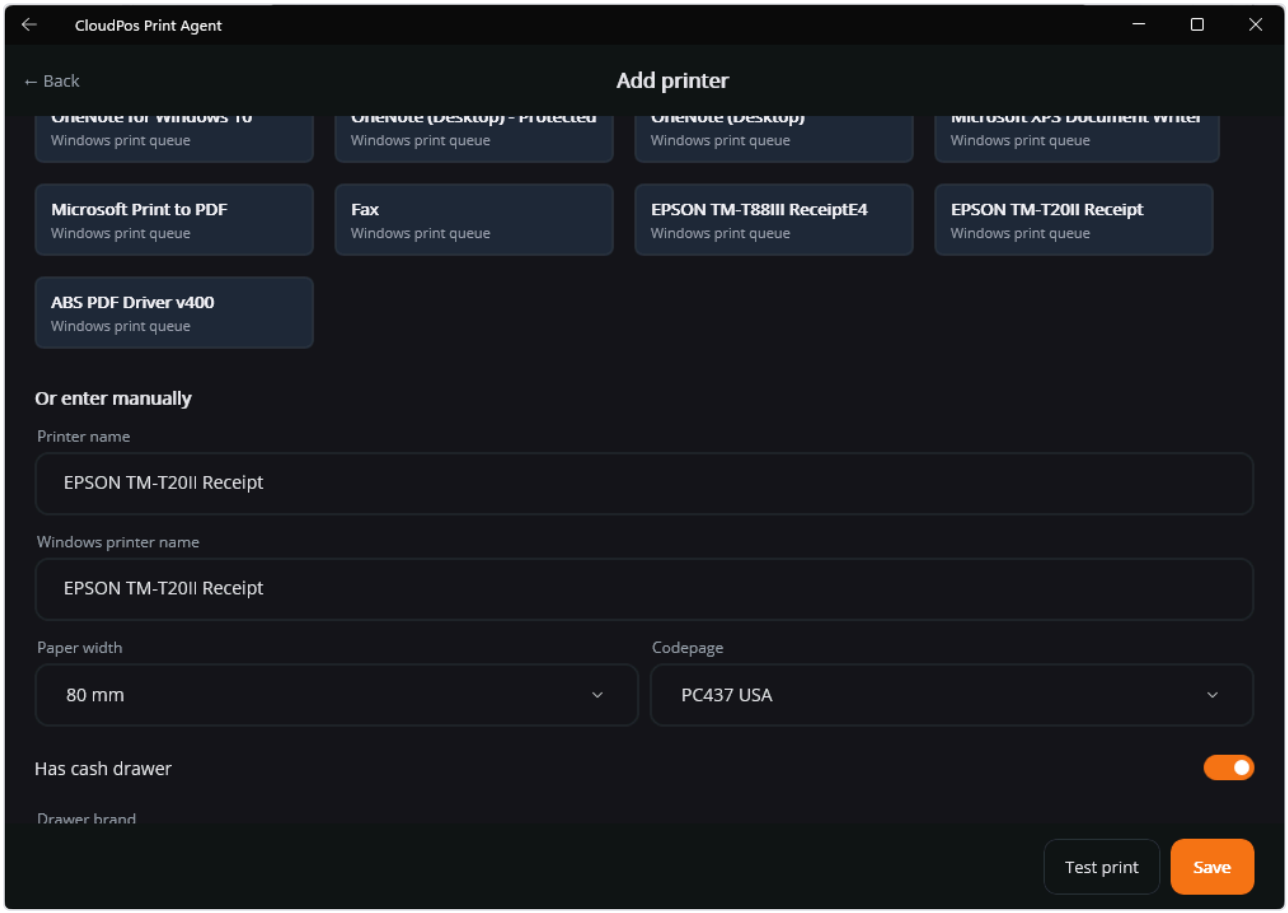
1. Press **+ Add Printer** and choose **Windows**.
2. Press **Scan**. Every printer installed in Windows is shown as a tile.



3. Tap the printer. **Printer name** and **Windows printer name** are filled in. Change **Printer name** to where it is — *Receipt*, *Kitchen* — but leave **Windows printer name** exactly as it is: it must match the name in Windows character for character.

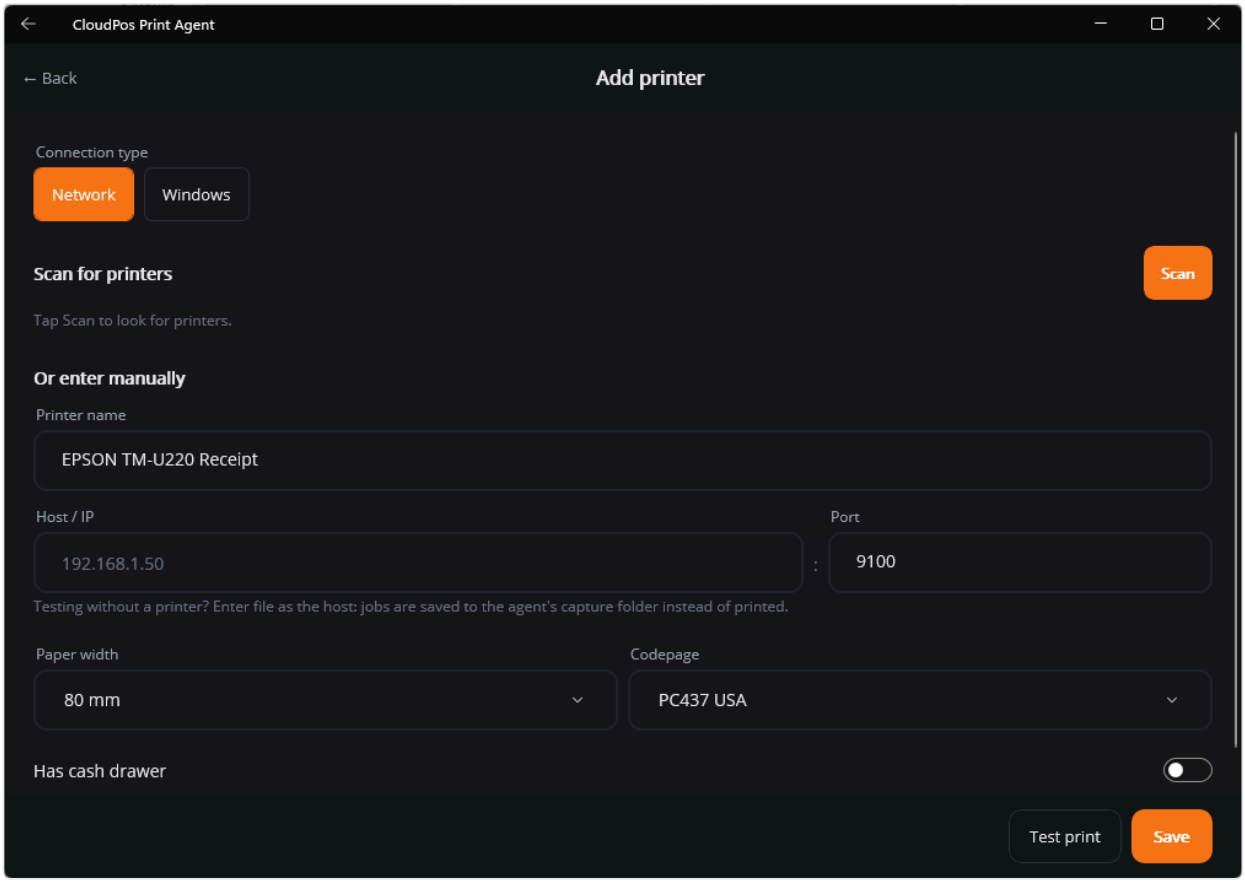


4. Set **Paper width** and **Codepage**, and **Has cash drawer** if a drawer is plugged into this printer.
5. Press **Test print**, check the slip, then **Save**.

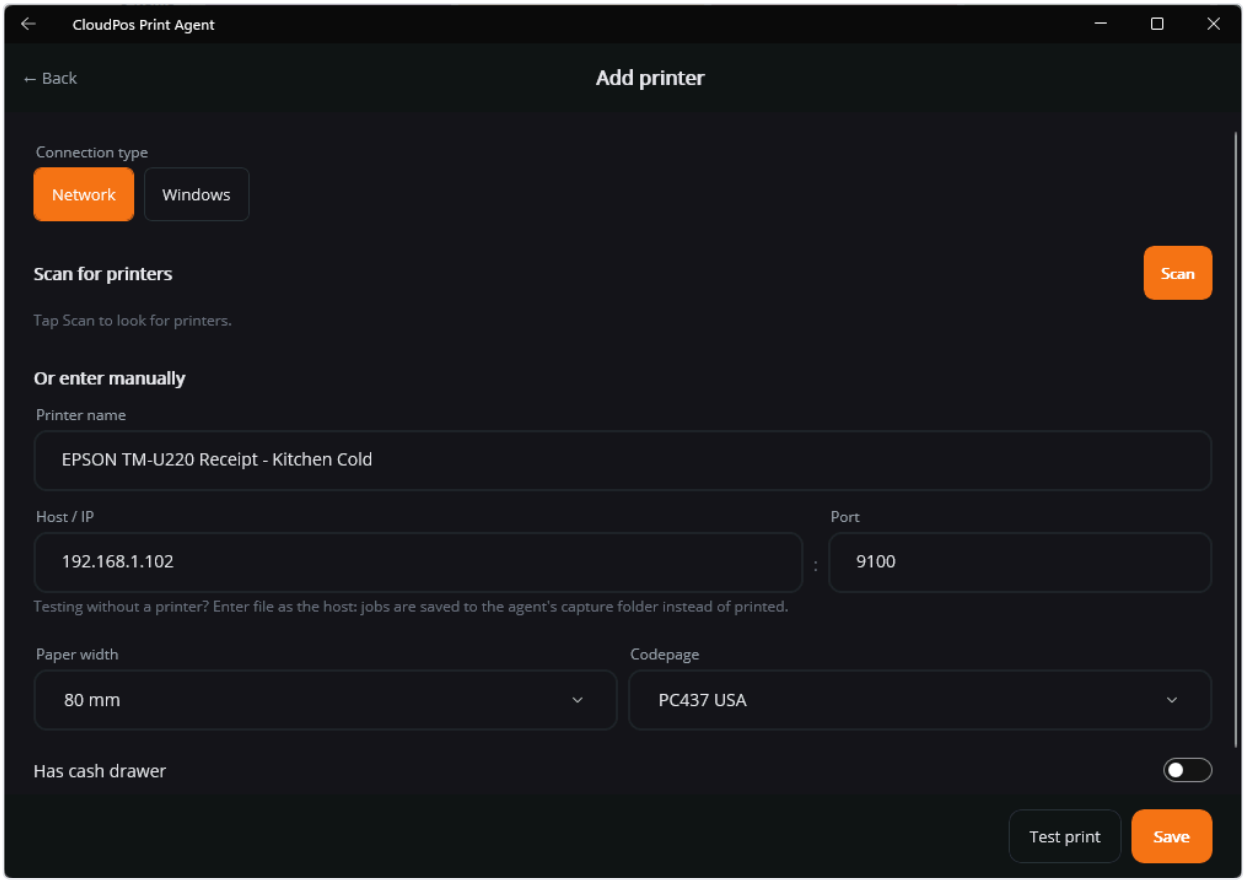


Add a network printer

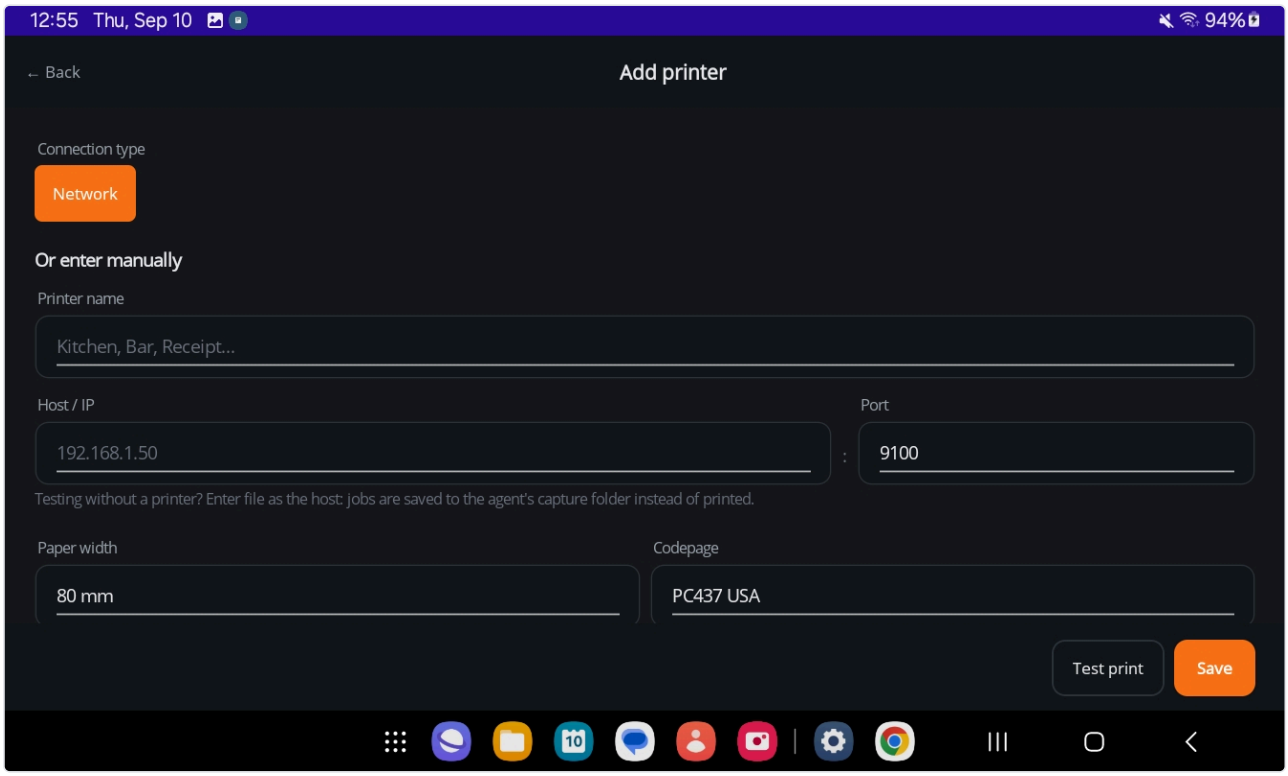
1. Press **+ Add Printer** and choose **Network**.
2. On Windows, press **Scan**: the agent looks for printers answering on port 9100 on the local network and lists them; tap one to fill the form.



3. Otherwise, under **Or enter manually**, type a **Printer name**, the printer's **Host / IP**, and keep **Port** 9100 unless the printer's manual says otherwise.



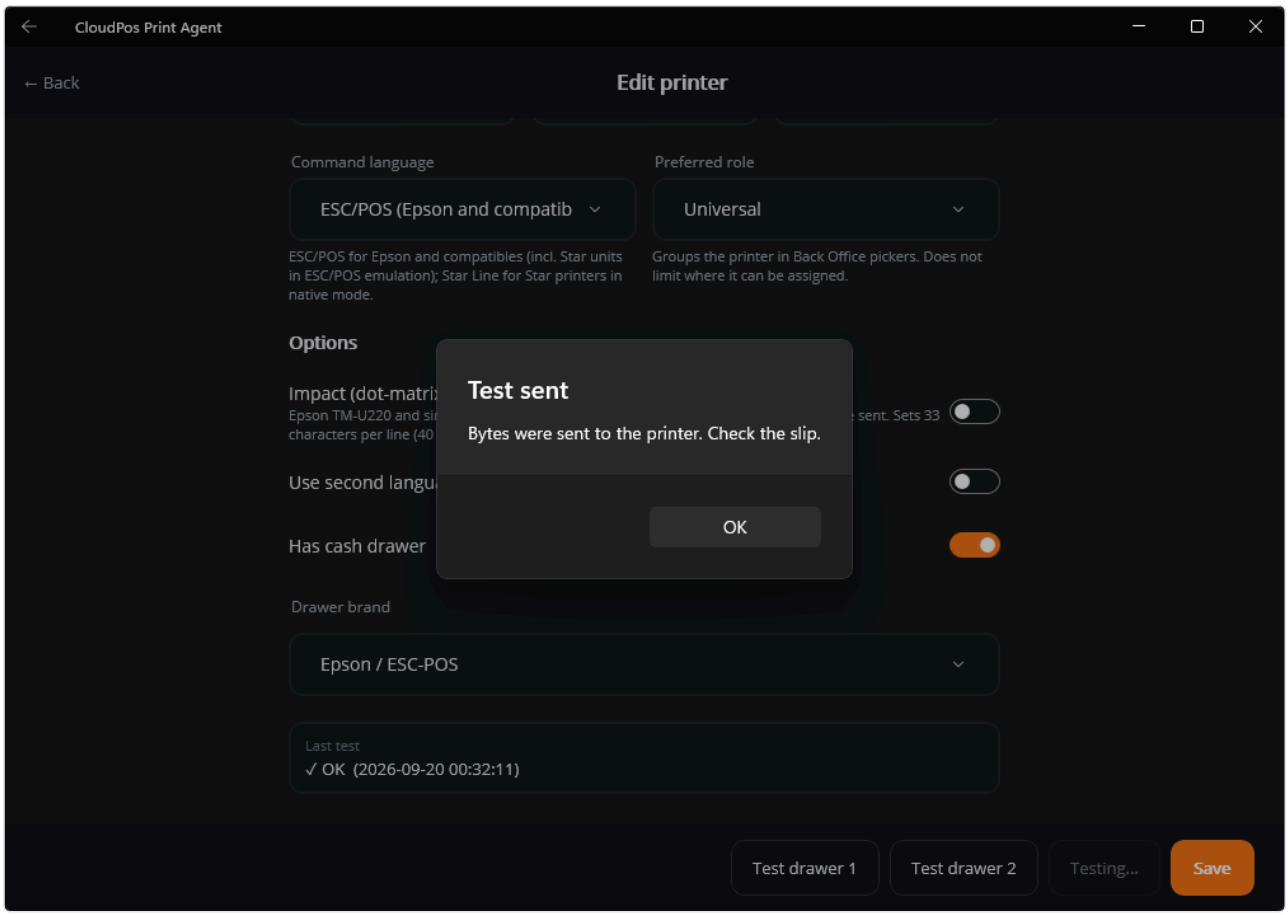
4 Set paper width, codepage and cash drawer, **Test print**, **Save**.



> Scan finds nothing? The printer may be on another network segment, or switched to a different port. Its self-test page (hold the feed button while switching it on) prints its IP address; type that in by hand.

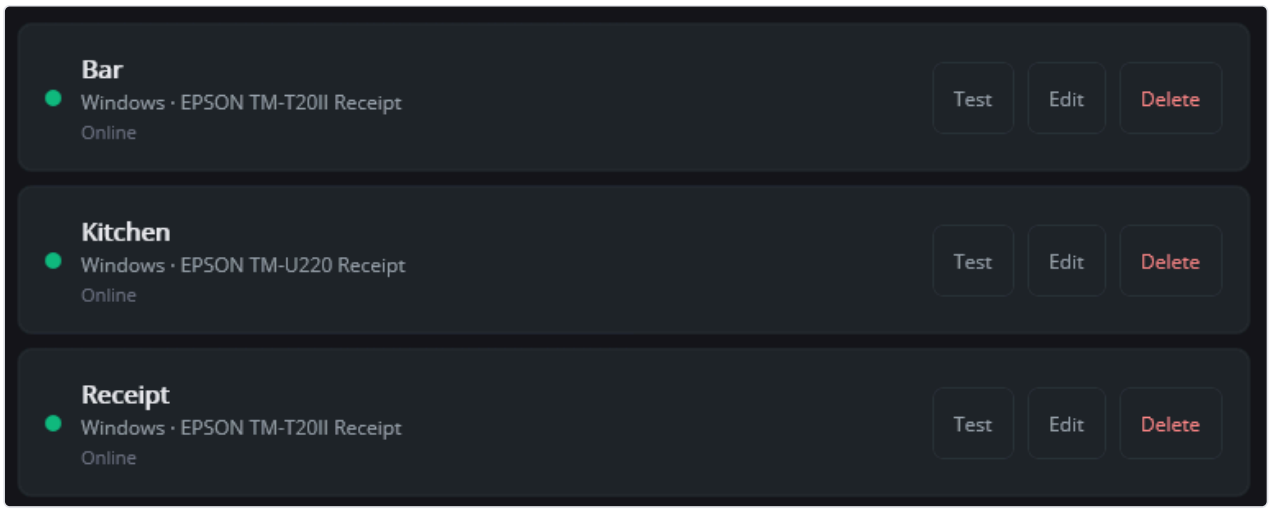
Test print

Test print sends a short slip straight from the agent to the printer, using what is on the screen even before you save. A slip proves the connection, the paper width and the codepage are right. If nothing comes out, the message says why: the address cannot be reached, the Windows printer name does not exist, and so on.

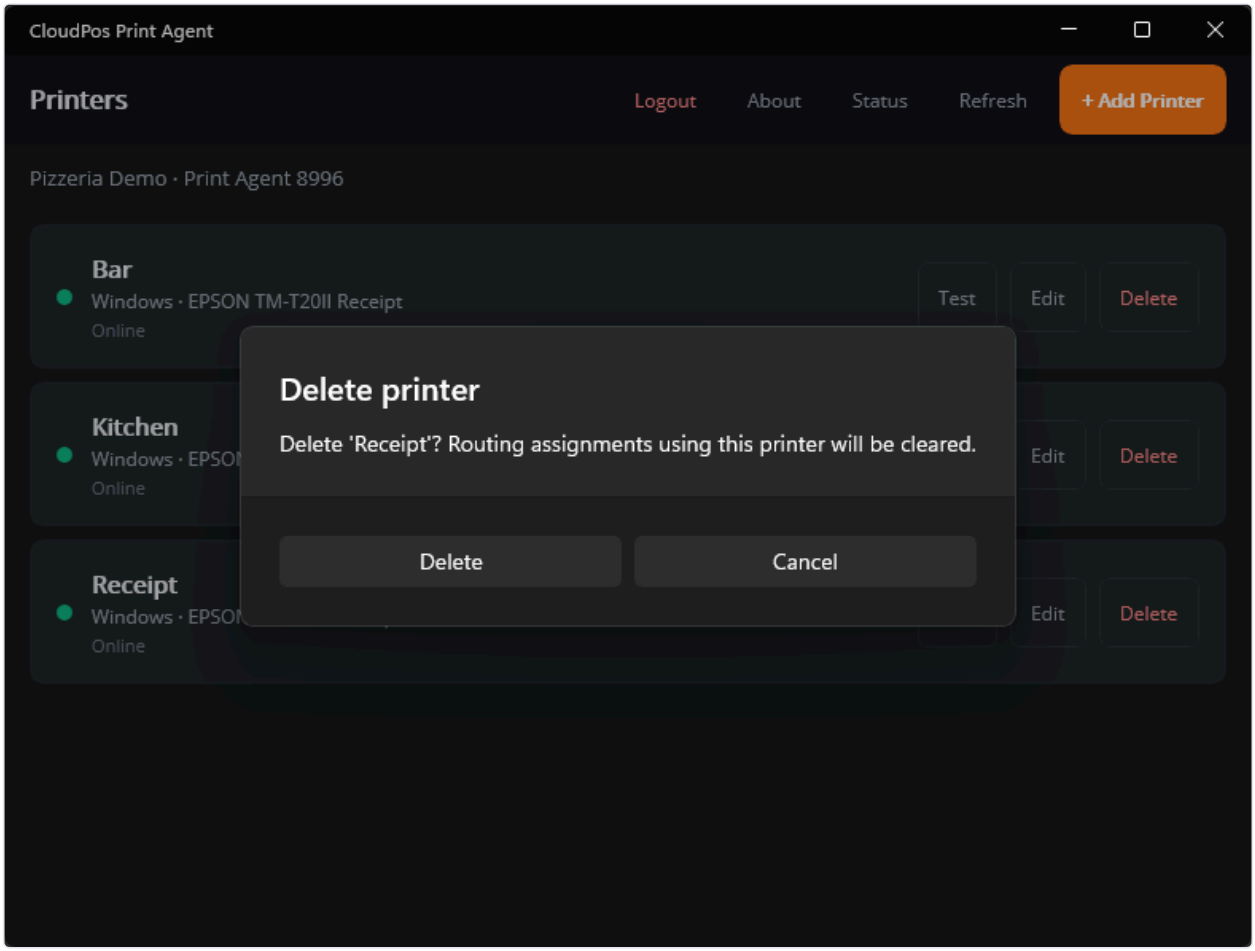


After saving

The printer appears in the list. The dot is green once it is **Online**; amber shows its last test result; grey means it has not been tested. The line under the name shows its connection: *Windows · queue name* or *TCP · address:port*.



- **Test** — prints a test slip from the agent with the saved settings, and records the result as the printer's last test. The slip waits its turn behind any tickets printing on that printer, and a network printer gets a fresh connection for it.
- **Edit** — changes the name, address and every setting, including the ones not on the Add screen: command language, characters per line, impact printer, preferred role and second language. See *Printer settings explained*.
- **Delete** — removes the printer. Every Print Routing row that used it is cleared, so prefer **Edit** when a printer only changed address or was swapped for another.



Next: route it

A new printer prints nothing until a slot points at it. Open **Back Office › Hardware & Printing › Print Routing** and choose it in the right rows — see *Print routing*.

Printer settings explained

Hardware & Printing › Print Agent

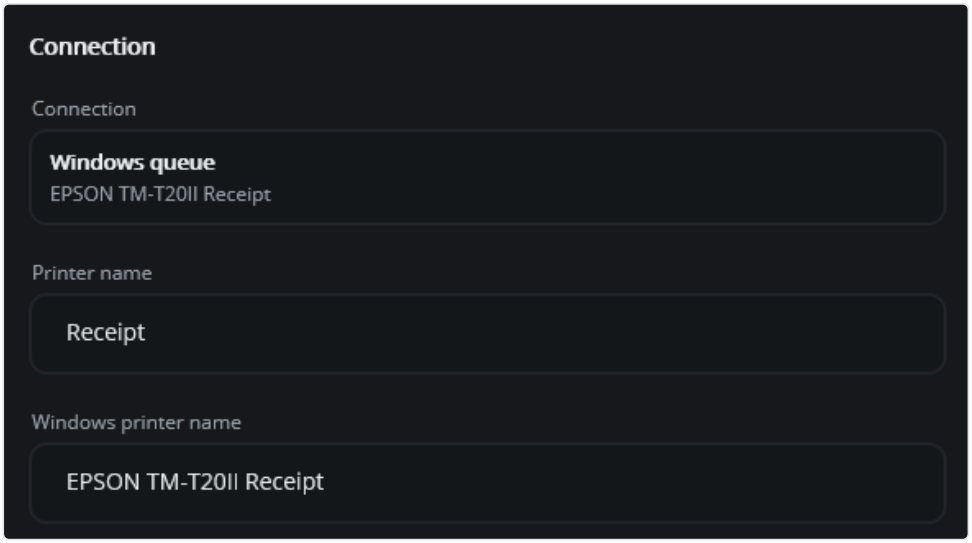
View online ↗

Every setting on the agent's Edit printer screen: paper, characters per line, codepage, command language, impact printers, role, second language and cash drawers.

Open a printer with **Edit** on the agent's Printers screen. Everything about the printer is set here; nothing about the printer itself is set in Back Office.

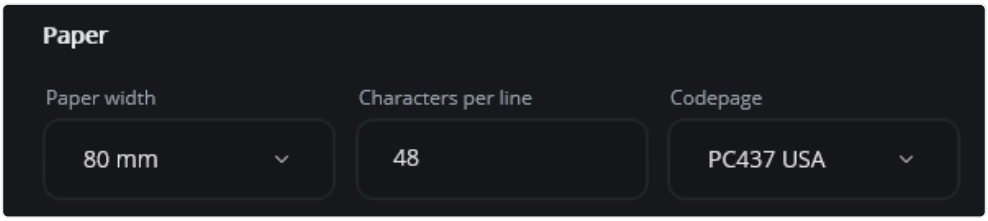
Connection

The top of the page shows how the printer is connected. The connection type cannot change after the printer is added, but its details can: the **Host / IP** and **Port** of a network printer, or the **Windows printer name**. Change them when a printer gets a new address or is replaced by another of the same kind; routing is kept. **Printer name** is the name shown in Back Office.



Paper

- **Paper width** — **80 mm** for almost every receipt and kitchen printer, **58 mm** for small portable ones.
- **Characters per line** — how many characters fit across the slip. Changing the paper width suggests the usual value: 48 for 80 mm, 32 for 58 mm, 33 for impact printers. Change it only when lines wrap too early or run off the edge.
- **Codepage** — the character set. **PC437 USA** suits English; **PC850 Multilingual** or **PC858 Euro** for Spanish and other accented text (PC858 adds the euro sign); **CP1252 Windows** for printers set to that table. If accented letters come out as other symbols, try another codepage and test print again.



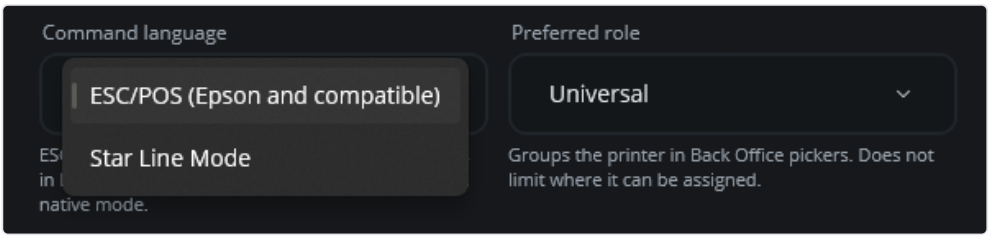
Command language

The language the printer understands:

- **ESC/POS (Epson and compatible)** — Epson printers and the great majority of other thermal printers, including Star printers switched to ESC/POS emulation. The default.

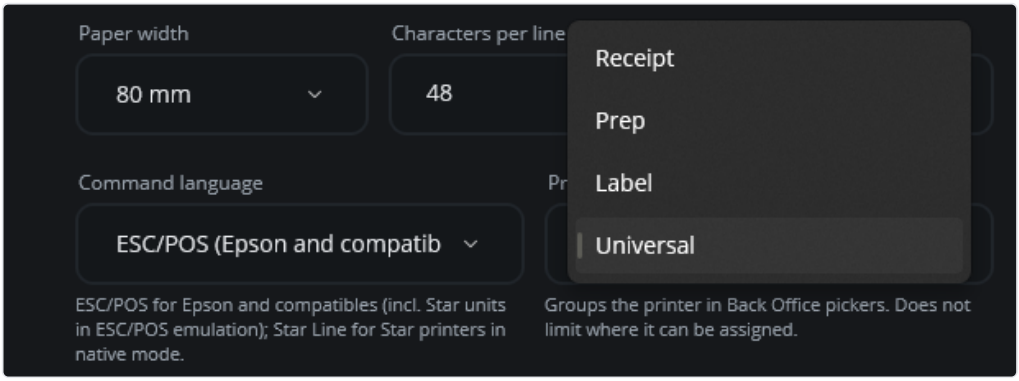
- **Star Line Mode** — Star printers running in their native mode. Text sizes, bold and the drawer pulse are translated automatically.

The wrong language shows up at once: the test slip prints strange characters, or nothing at all.



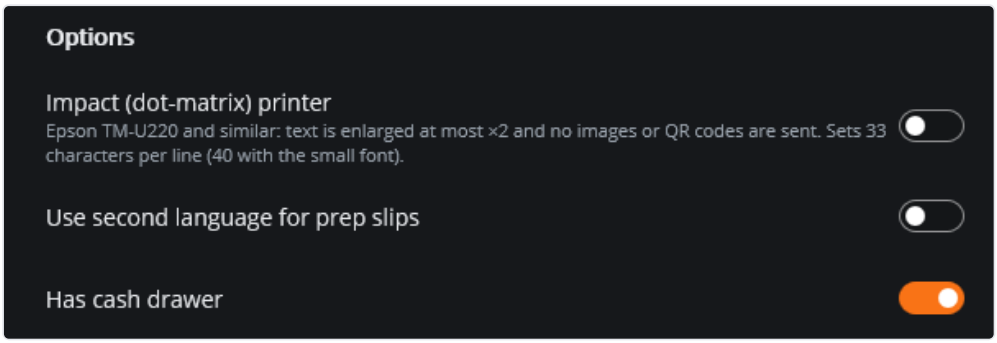
Preferred role

Receipt, **Prep**, **Label** or **Universal**. It only groups the printer in Back Office lists; it does not limit where the printer can be used. Routing is what decides that.



Options

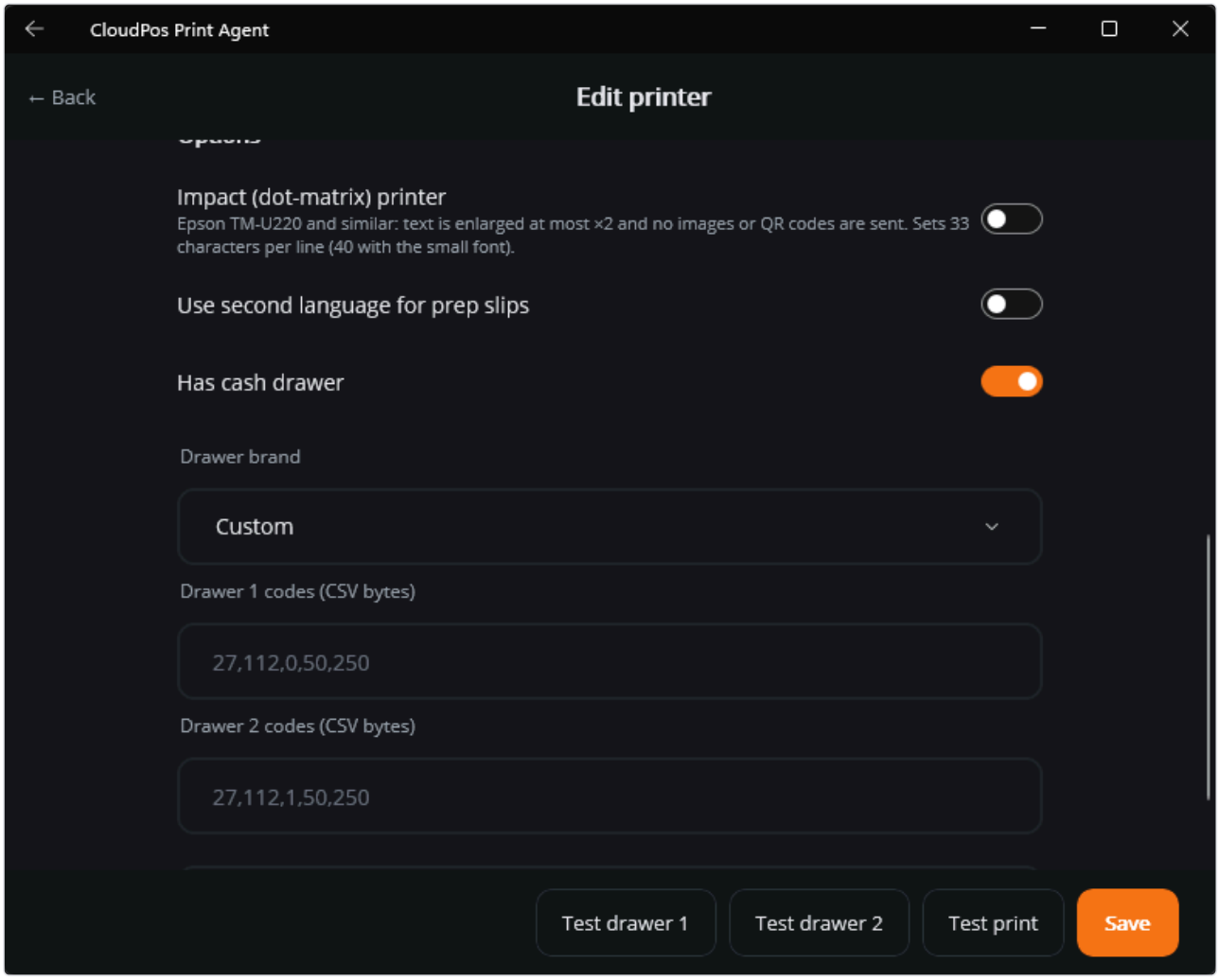
- **Impact (dot-matrix) printer** — for the Epson TM-U220 and similar noisy kitchen printers. Text is enlarged at most double size and images and QR codes are left out, because these printers cannot print them. Switching it on sets 33 characters per line (40 with the small font).
- **Use second language for prep slips** — kitchen tickets on this printer use each item's second-language prep text where the menu has one. Useful when the kitchen reads a different language from the menu.
- **Has cash drawer** — a cash drawer is plugged into this printer's drawer (DK) port. The drawer settings and test buttons appear as soon as it is switched on.



Cash drawer

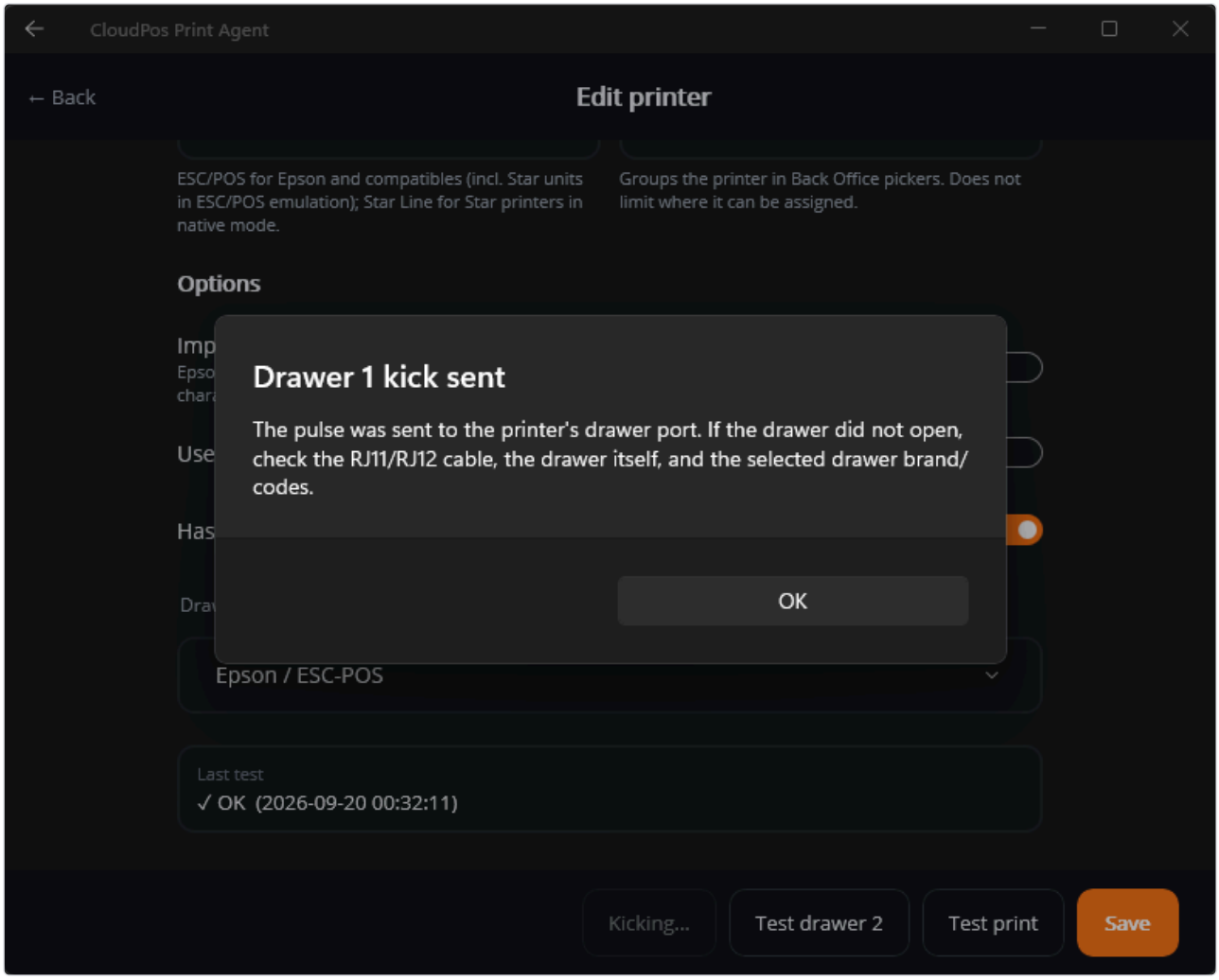
Drawer brand chooses the pulse the printer sends:

- **Epson / ESC-POS** — Epson and most other printers.
- **Star** — Star printers.
- **Custom** — type the exact bytes from the drawer or printer manual, as comma-separated numbers, in **Drawer 1 codes** and **Drawer 2 codes** (for example `27,112,0,50,250`).



Test drawer 1 and **Test drawer 2**, at the bottom, send only the drawer pulse, using what is on the screen even before saving. Use them to separate the two halves of a drawer problem: if the test opens the drawer but a cash sale does not, the printer is fine and the problem is in Back Office (Print Routing's Receipt Printer row, the drawer record or the Cash payment method). If the test does not open it either, check the cable, the drawer's key and the brand.

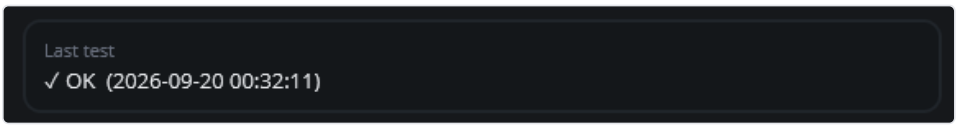




Two drawers on one printer use a Y-cable in the DK port; drawer 1 and drawer 2 are chosen by the drawer number in each drawer record. See *Cash Drawer Quick Setup & Troubleshooting*.

Last test, Test print, Save

Last test shows the result and time of the printer's last test. **Test print** prints a slip with the settings on screen, saved or not; **Save** stores them. Nothing changes for real printing until you save.



Testing without a printer (capture to file)

Hardware & Printing › Print Agent

View online ↗

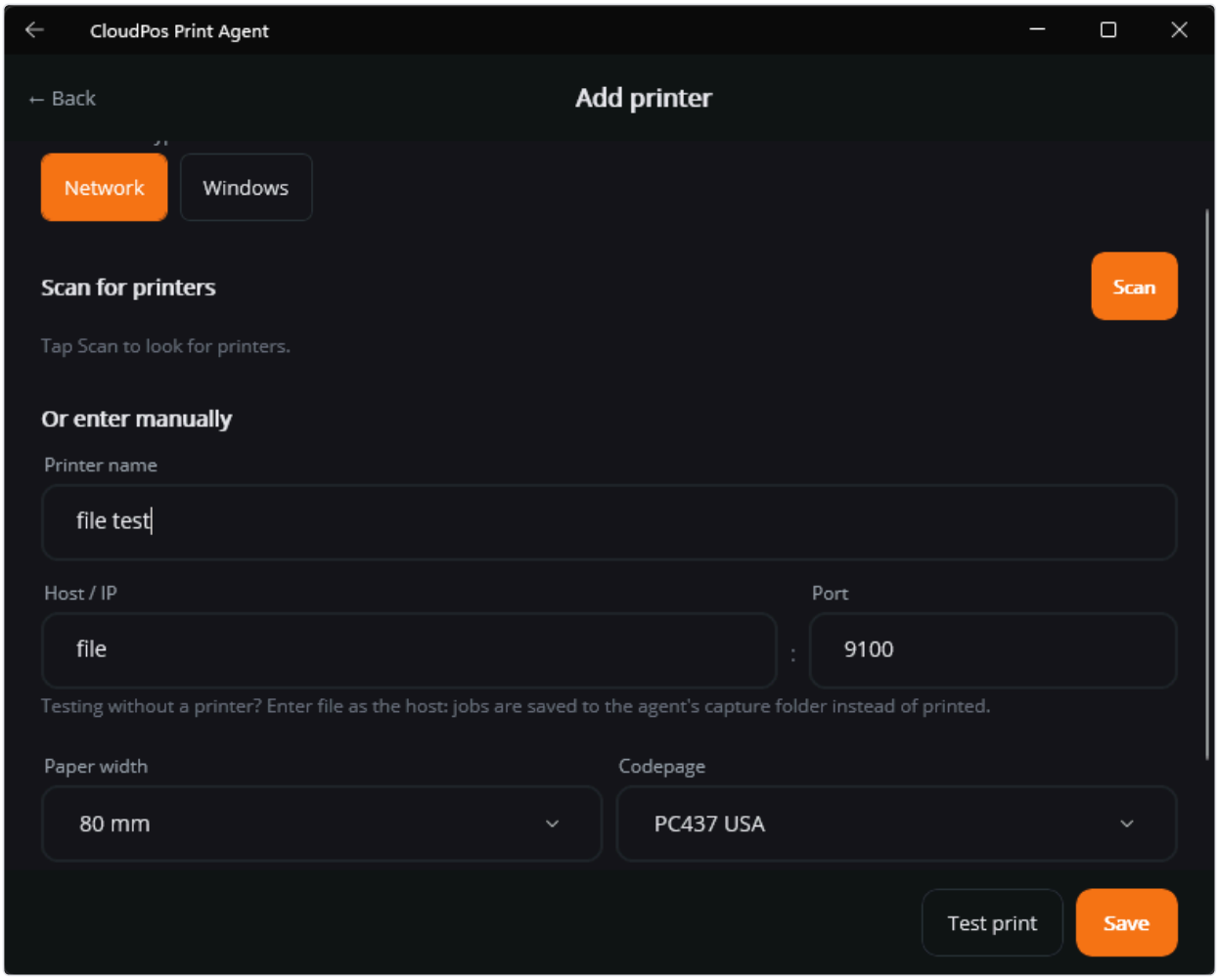
A pretend printer that saves each job as a file, for checking routing and templates before the real printers are in place.

The capture-to-file printer is a pretend printer. Instead of printing, the agent writes every job it receives to a file you can open and read. Use it to check routing, templates or a brand-new agent before the real printers arrive, or to prove that a problem lies with a printer and not with the setup.

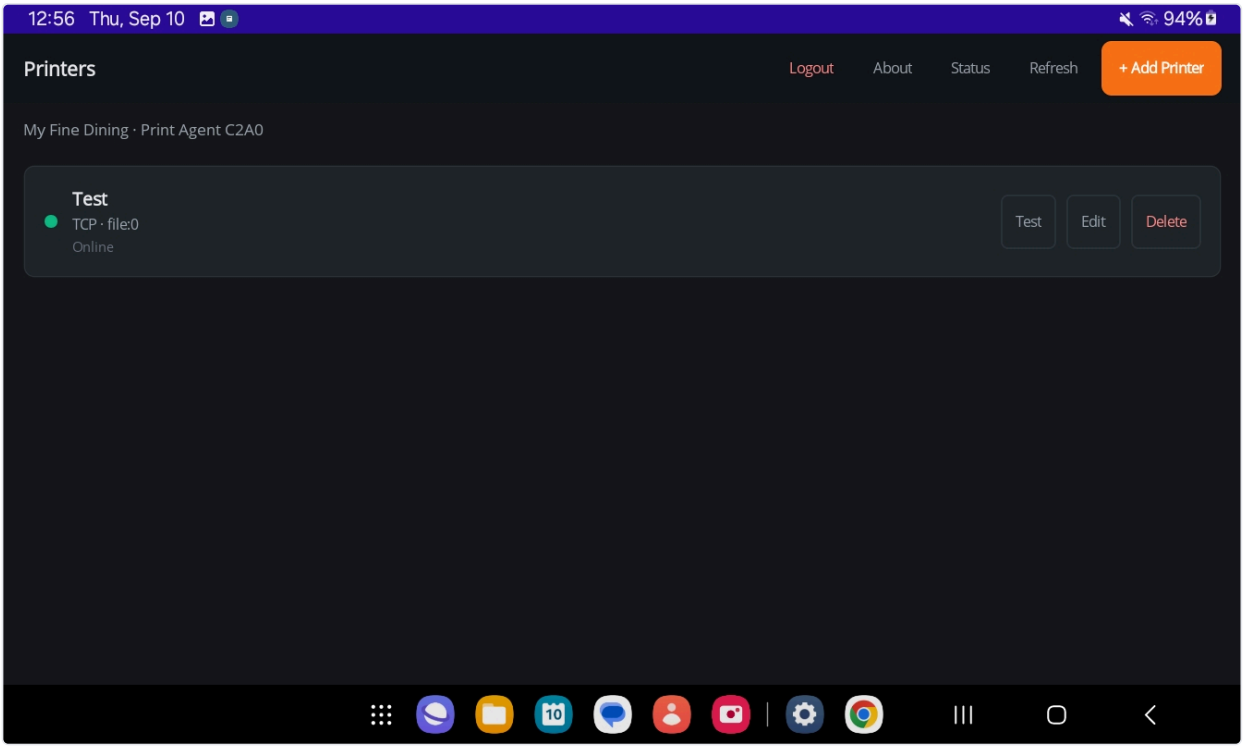
Add one

1. On the agent, press **+ Add Printer** and choose **Network**.
2. Name it clearly — *Test capture* — so nobody routes live tickets to it by mistake.

3. Type the word `file` in **Host / IP**. The port does not matter.



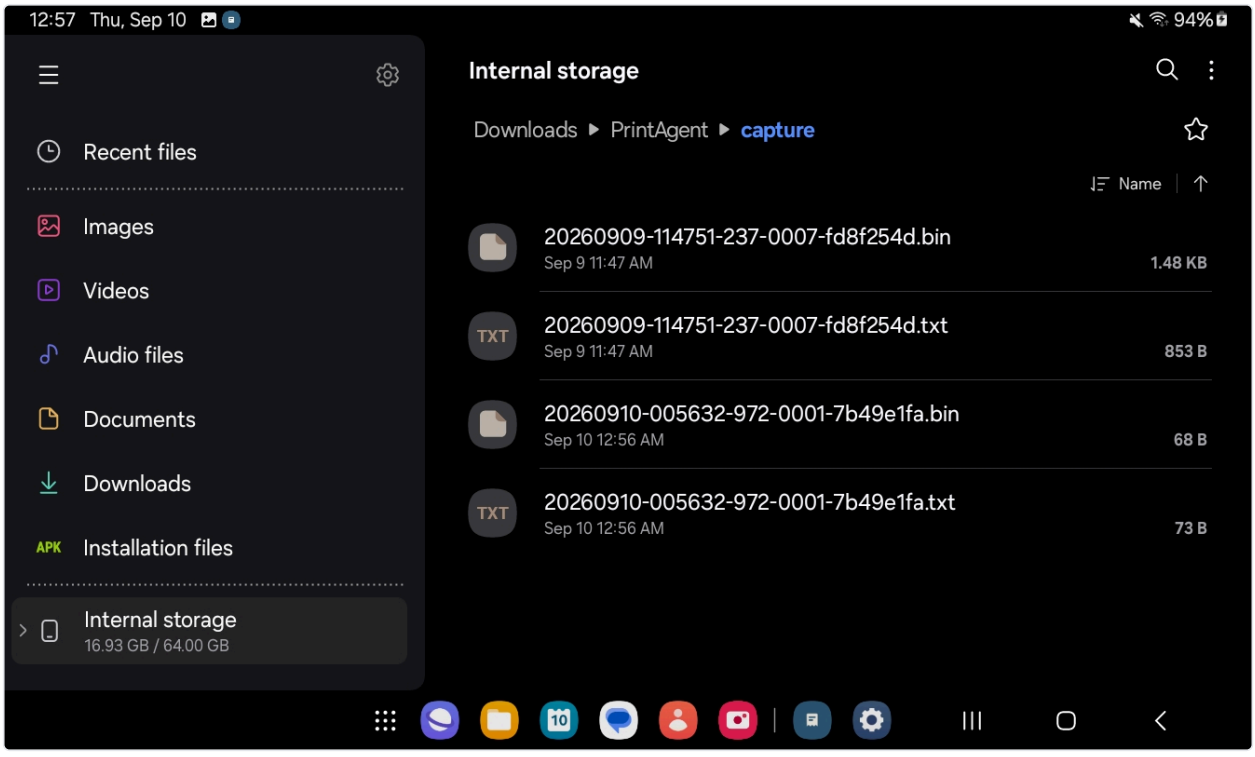
4. Save. It shows as **Online** straight away and is offered in Print Routing like any printer.



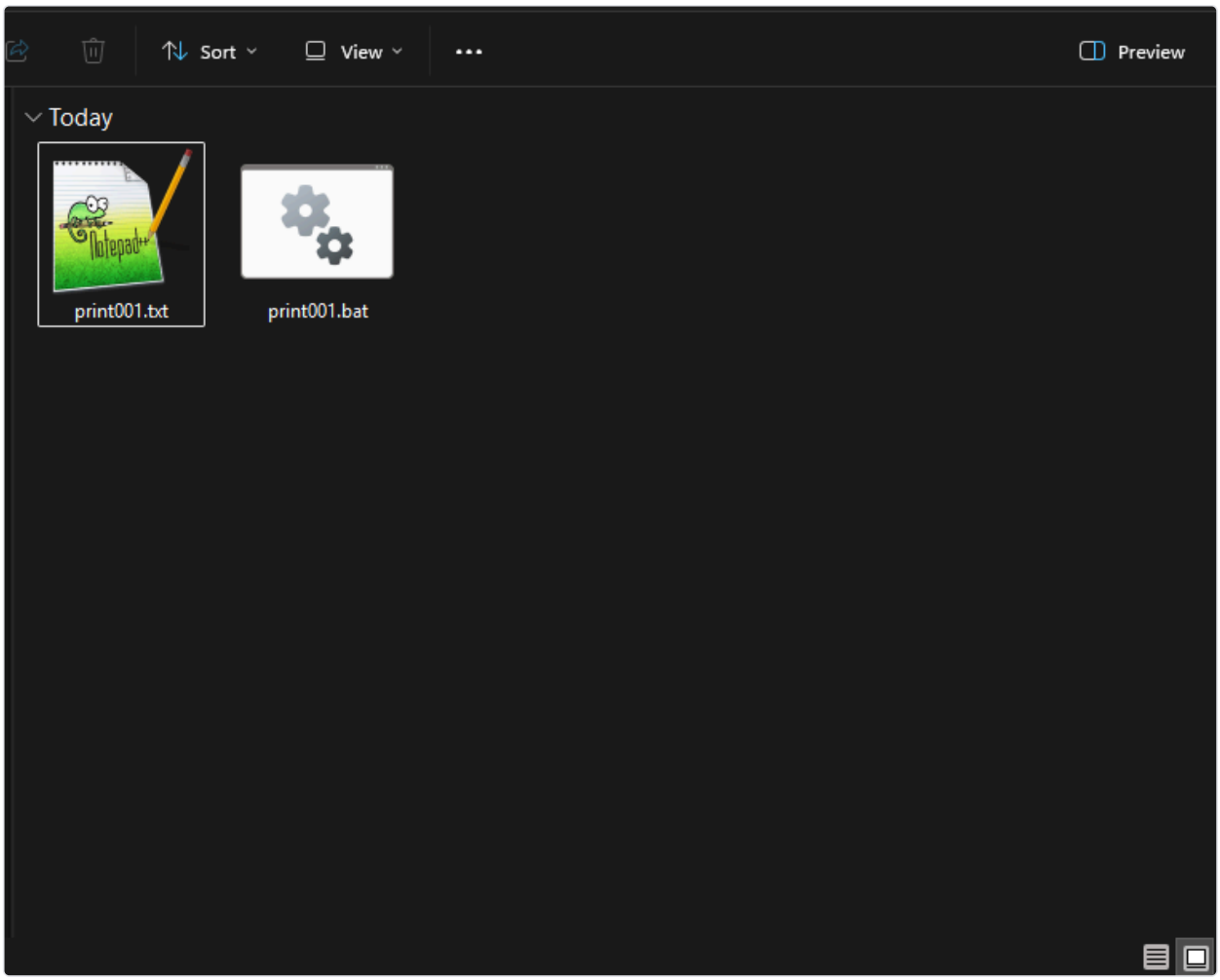
Use it

1. In Print Routing, point the slot you want to check at the capture printer — for example Prep 1.
2. Ring an order with an item for that slot and send it.
3. Open the capture folder. Each job is saved twice: a `.bin` file with the exact bytes, and a `.txt` file with the printer codes removed, readable in any text editor.

- **Android**: **Download › PrintAgent › capture**, visible in the Files app and over USB.



- **Windows**: the agent's capture folder in the current user's app data.



Reading the result

- **The file is there and the right lines are in it** — routing and the template are right. If the real printer still prints nothing, the problem is that printer: its connection, paper or settings.
- **There is no file** — the job never reached this agent. Check the slot in Print Routing, the item's prep number, and that the agent belongs to the store you rang the order in.
- **The wrong lines are in it** — the item is assigned to a different prep number, or the template leaves the line out.

> Point the slot back at the real printer when you are done. A kitchen slot left on the capture printer prints nothing during service.

Updates and the About screen

View online ↗

How the agent updates itself on Windows and Android, and what the About screen shows for support.

You never reinstall the agent to get a new version. Each agent checks for updates by itself, downloads them in the background, and applies them when no job is printing.

Windows

The Windows agent updates like the POS: it downloads the new version quietly and installs it as soon as nothing is printing and nobody is in the middle of editing a printer. The Printers screen shows **Updating — restarting in a few seconds…** for a moment; the agent comes back next to the clock and carries on. Nothing is asked.

Android

1. The agent downloads the new version and checks it before doing anything with it.

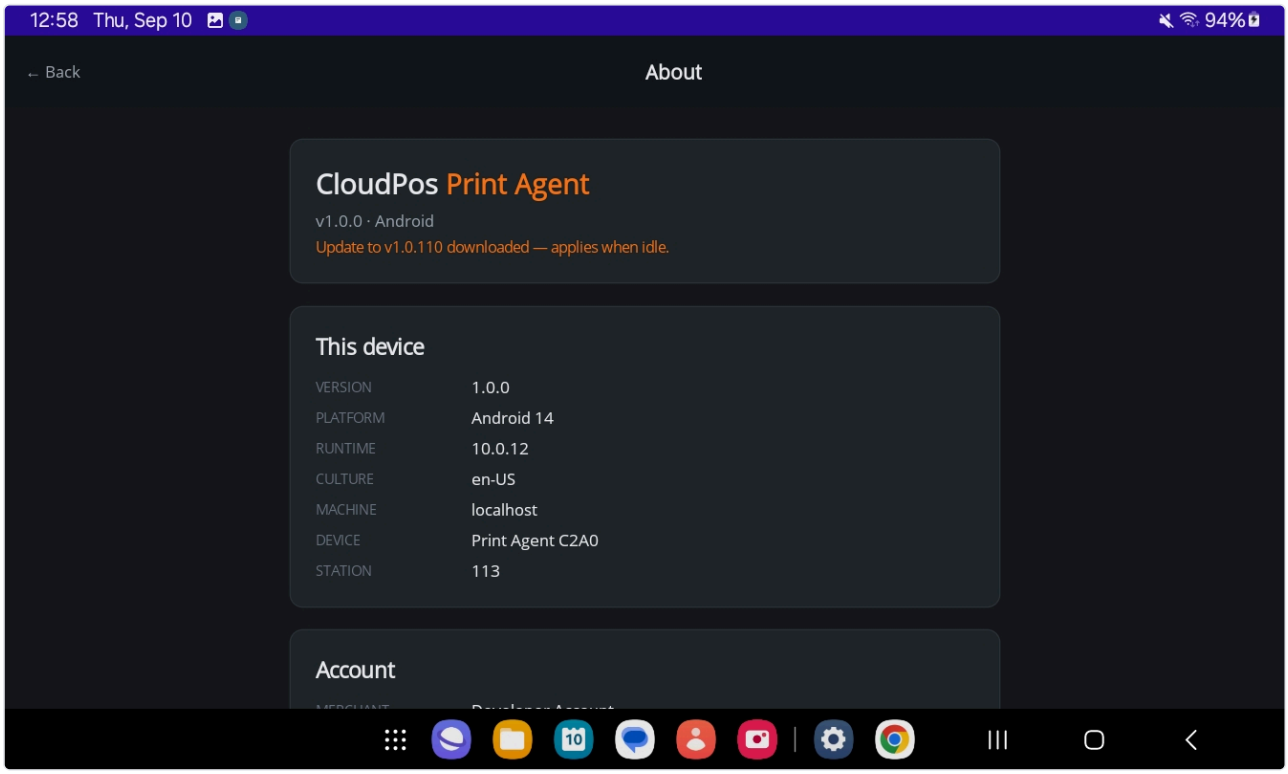
2. It waits until it is idle — no job printing.
3. On a **managed device** (set up as a kiosk by your reseller) it installs silently and restarts on its own.
4. On an ordinary device Android does not allow silent installs, so the agent posts a notification: **Update ready — tap to install**. Tap it, confirm Android's prompt, and the agent comes back up by itself, connected and printing.

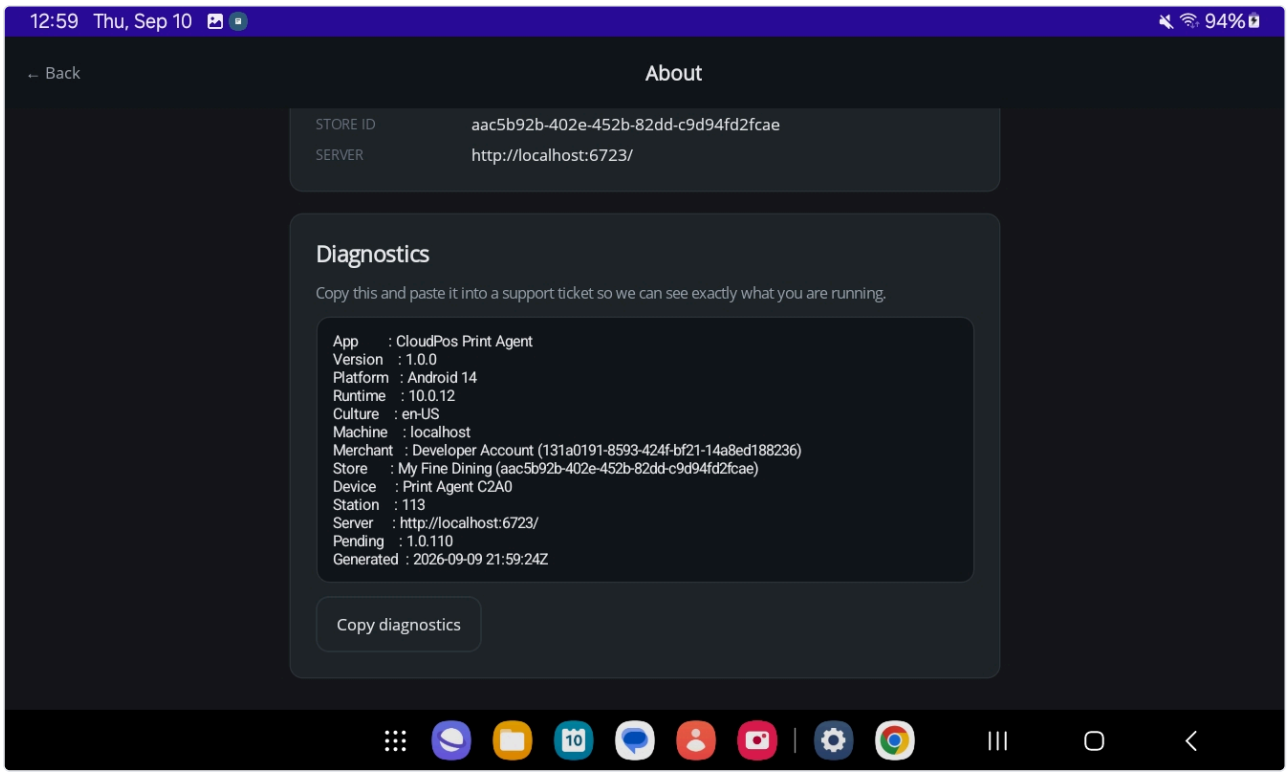
> A waiting update never stops printing. Jobs keep printing on the current version until someone taps the notification.

The About screen

About, on the Printers screen, shows:

- The **version** and platform, and a line such as *Update to v1.0.110 downloaded — applies when idle* when an update is waiting.
- **This device** — version, platform, machine name, the agent's device name and station number.
- **Account** — the merchant and **store** the agent belongs to, and the server it talks to. This is the quickest way to confirm which store an agent prints for.
- **Diagnostics** — everything above in one block, with **Copy diagnostics** to paste into a support ticket.



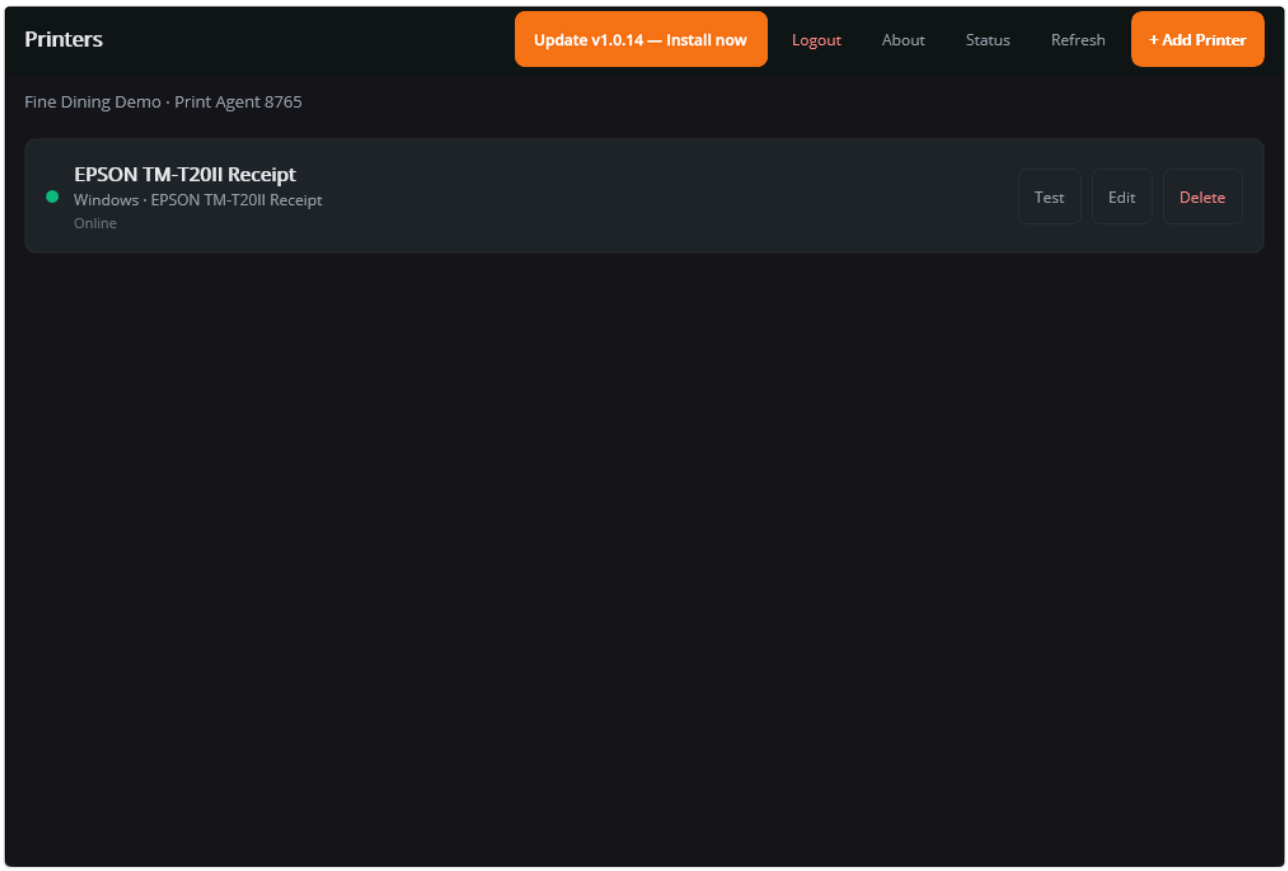


The update button

When a new version is available, a pulsing button appears at the top of the Printers screen:

- **Update vX available** — a new version exists; press it to download and install it now.
- **Downloading update vX…** — it is on its way.
- **Update vX — Install now** — it is downloaded and will install by itself when the agent is idle; press it to install now.
- **Installing vX…** — the agent is about to restart.

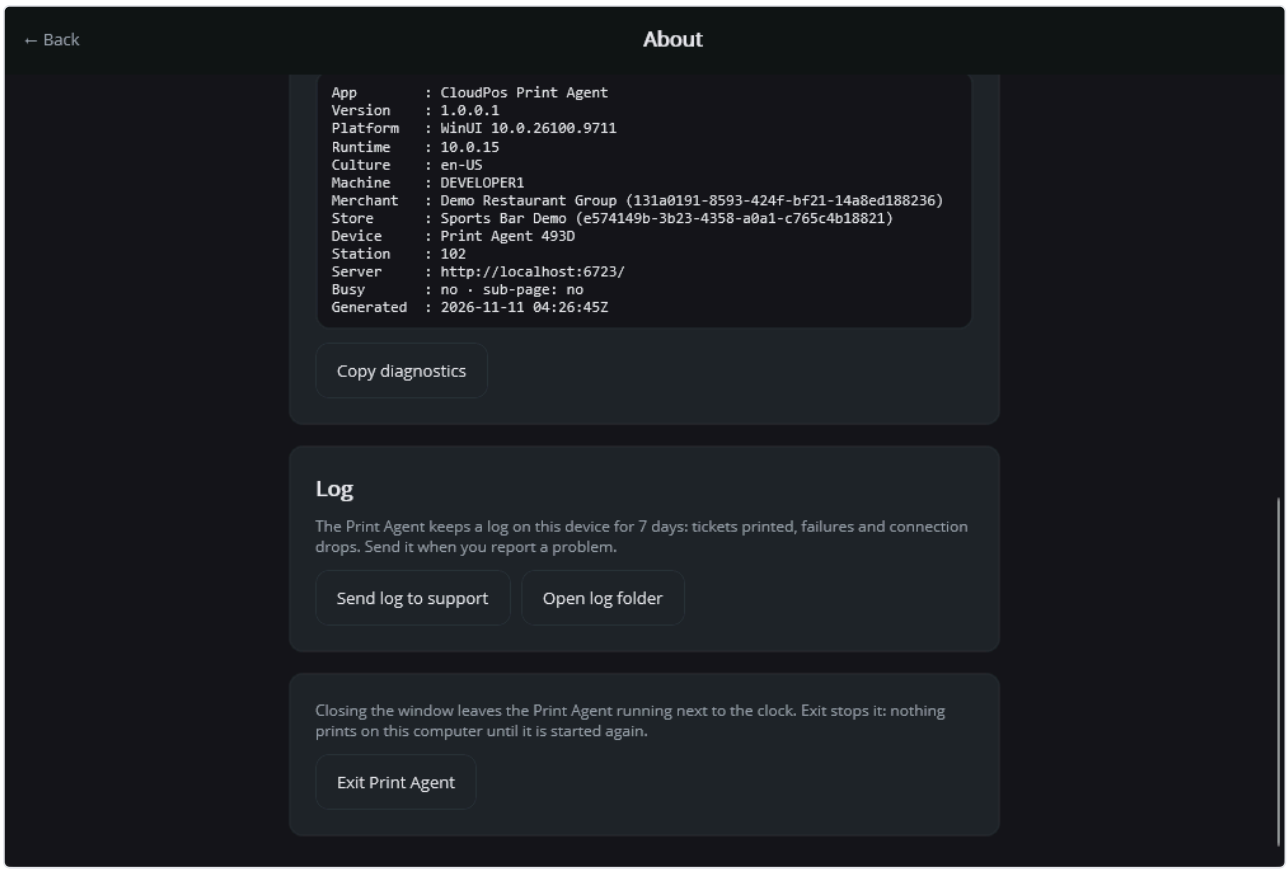
Pressing it asks *Install update*: **Install now** or **Later**. On an Android tablet that is not a managed device, Android then asks to confirm the install, so press the button when someone can tap through.



Sending the log to support

The agent keeps a log on the device for 7 days: tickets printed, failures, connection drops and printer alerts. When something goes wrong, open **About** and, in the **Log** card, press **Send log to support**. A box asks for a short note — what went wrong and roughly when; it is optional — and the log is sent to us with the device's details. *Log sent* confirms it.

On Windows, **Open log folder** shows where the files are. Under it, **Exit Print Agent** stops the agent (Installing the Print Agent on Windows).



Status screen, alerts and retries

Hardware & Printing › Print Agent

View online ↗

The agent's Status screen, what each job state means, Retry and Reprint, and the alerts the agent raises when something fails.

The **Status** screen, opened from the Printers screen, is the agent's record of what it has been asked to print. When something did not print, look here first.

Connection

The top of the screen shows the connection to the server:

- **Connected** — receiving print jobs.
- **Reconnecting** — the connection dropped and the agent is retrying. Jobs sent meanwhile wait on the server and print when it is back.
- **Disconnected** — no jobs are received until it reconnects. Check the device's network.

Recent jobs

Each job shows what it was — *Receipt*, *Prep 1*, *Label 2*, *Drawer kick*, *Reprint*, *Test print*, *Gift card slip*, *Coupon*, *Trip ticket*, *Guest Wi-Fi slip* — the printer, the time, and its state:

- **Pending** — received, not printed yet.
- **Printing…** — being sent to the printer.
- **Completed** — printed. A note may say the printer did not confirm; that is normal for printers that cannot report status.
- **Failed** — could not be printed after a retry; the reason is shown.

Retry and Reprint

- **Retry** appears on failed jobs (and on waiting jobs that have already been tried). Fix the cause first — paper, power, cable, address — then press it to send the same job again.
- **Reprint** appears on completed order jobs and prints another copy, marked as a reprint.



> If a job you expected is not in the list at all, it never reached this agent. That points at Print Routing, or at an agent that belongs to a different store — not at the printer.

What happens when a job fails

1. The agent opens a fresh connection to the printer and tries once more.
2. If that fails too, the job is marked **Failed** with the reason.
3. The agent raises an **alert** on the device naming the printer and the job.

A failed job is not retried again on its own; use **Retry** here, or reprint from the register.

Alerts

The agent also alerts when a printer it drives cannot be reached, and when it has been out of contact with the server for **more than two minutes** — by then tickets are waiting on the server and someone should check the network. The alert clears when the connection is back.

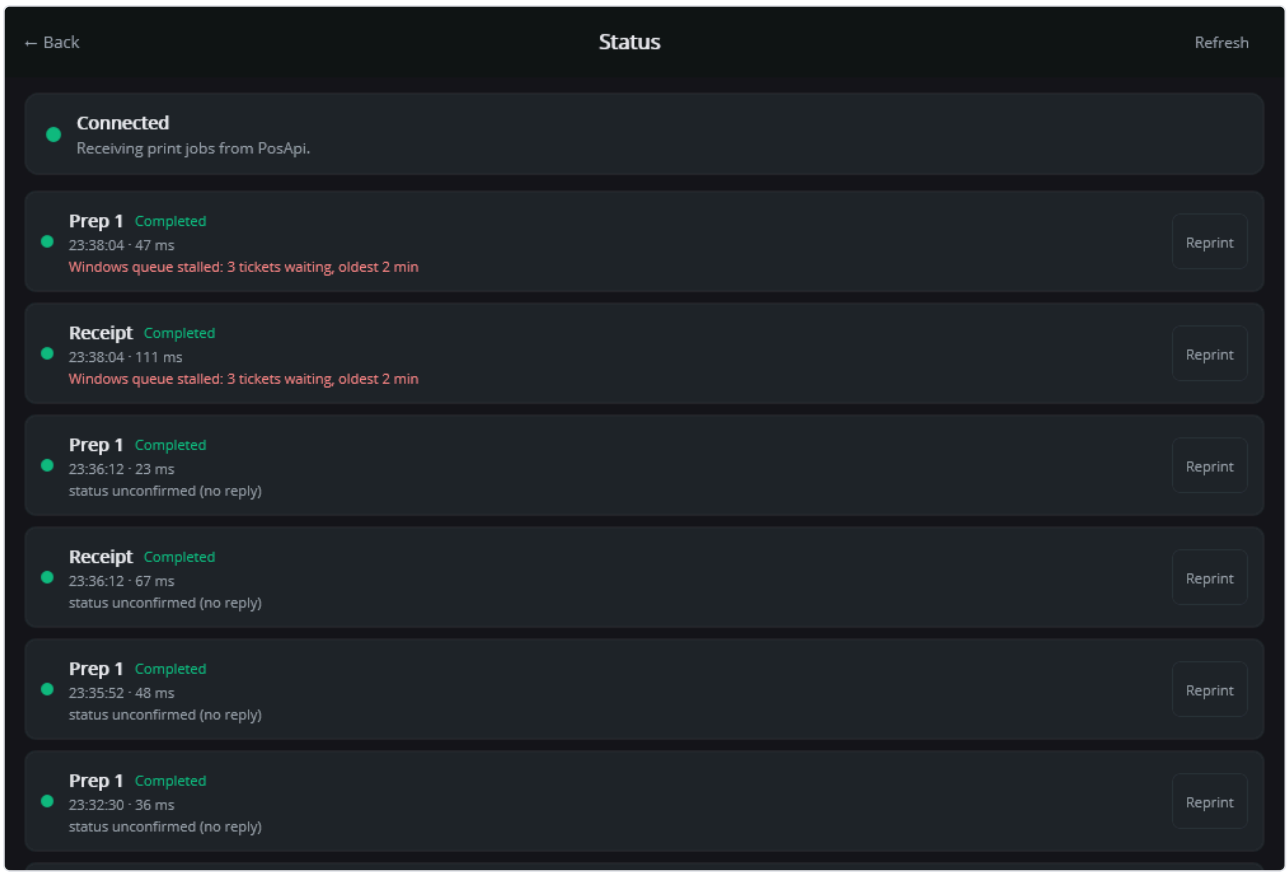
- **Android** — heads-up notifications that stay in the notification shade; the permanent notification's text changes with the state.
- **Windows** — notifications in the corner and in the notification centre, even while the agent is minimised.

> Alerts appear on the device the agent runs on. A box hidden in a cupboard alerts nobody — put it where someone will see its screen, or run the agent on a tablet at the pass.

A Windows printer that stops printing

A printer installed in Windows that is switched off, paused, offline or out of paper does not refuse tickets: Windows accepts each one and holds it in the printer's queue, and the agent reports the job as completed. To catch that, the agent watches the Windows queue of every printer it prints to.

- When tickets are still waiting after about a minute and a half, the computer shows **Printer problem** with the printer's name, the number of tickets waiting, how long the oldest has waited and the reason Windows gives — for example *Windows queue stalled: 7 tickets waiting, oldest 4 min (paused)*.
- It repeats every two minutes while the tickets are stuck and stops by itself once they print.
- Fix it in Windows: switch the printer on, add paper, or open the printer's queue and resume it. The waiting tickets then print in order.



A receipt or kitchen printer on the network prints more reliably added to the agent as a **Network** printer than through a Windows driver: the agent then talks to it directly and knows at once when it does not answer (Adding printers to the agent).

Print Agent troubleshooting

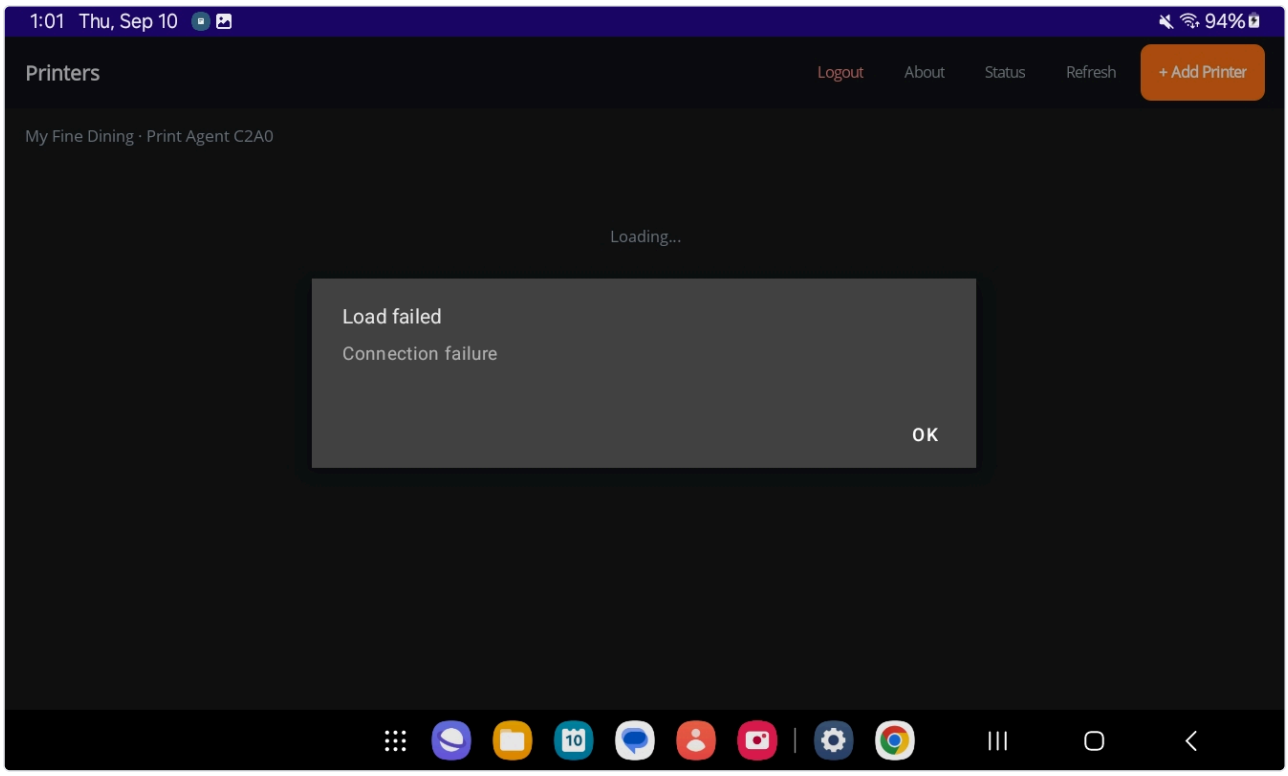
Hardware & Printing › Print Agent

View online ↗

The agent is not printing, stops overnight, shows the wrong store, or its printers are missing in Back Office. Work down the list.

Nothing prints from this agent

1. Open the agent's **Status** screen. Does it say **Connected**? If not, the device cannot reach the server: check its network first.
2. Is the job in the recent jobs list? If **not**, it never reached this agent: check **Print Routing** in Back Office, and that the slot points at a printer on *this* agent.
3. If the job is **Failed**, read the reason. Network printer: check its power and cable, that its address has not changed (self-test page), and that the port is 9100. Windows printer: check the printer still appears in Windows and that the name in the agent matches it exactly.
4. Press **Test** on the printer. If the test prints but tickets do not, the printer is fine and the problem is routing.
5. Replace the printer with the *capture-to-file printer* for one order. If the file appears, the agent and routing are fine and the fault is the printer or its cable.



The printers are not in Print Routing

The agent belongs to a different store. Compare the store under **Printers** on the agent (or **About › Account**) with the store Back Office is editing. See *Activating an agent for the right store*.

It works during the day and is dead in the morning (Android)

Android put it to sleep. Check the battery-optimisation exemption was granted (the agent asks again on next start if not), and on Samsung that the app is in **Never sleeping apps**. Check the device stays on mains power. A device that reboots overnight restarts the agent by itself; one that is powered off does not.

It stops when the PC is left alone (Windows)

The PC is going to sleep. Set sleep to **Never** when plugged in, in Windows' power settings.

No permanent notification on Android

Notifications were declined. In the device's app settings for Print Agent, allow notifications and restart the app. Without the notification Android may stop the agent.

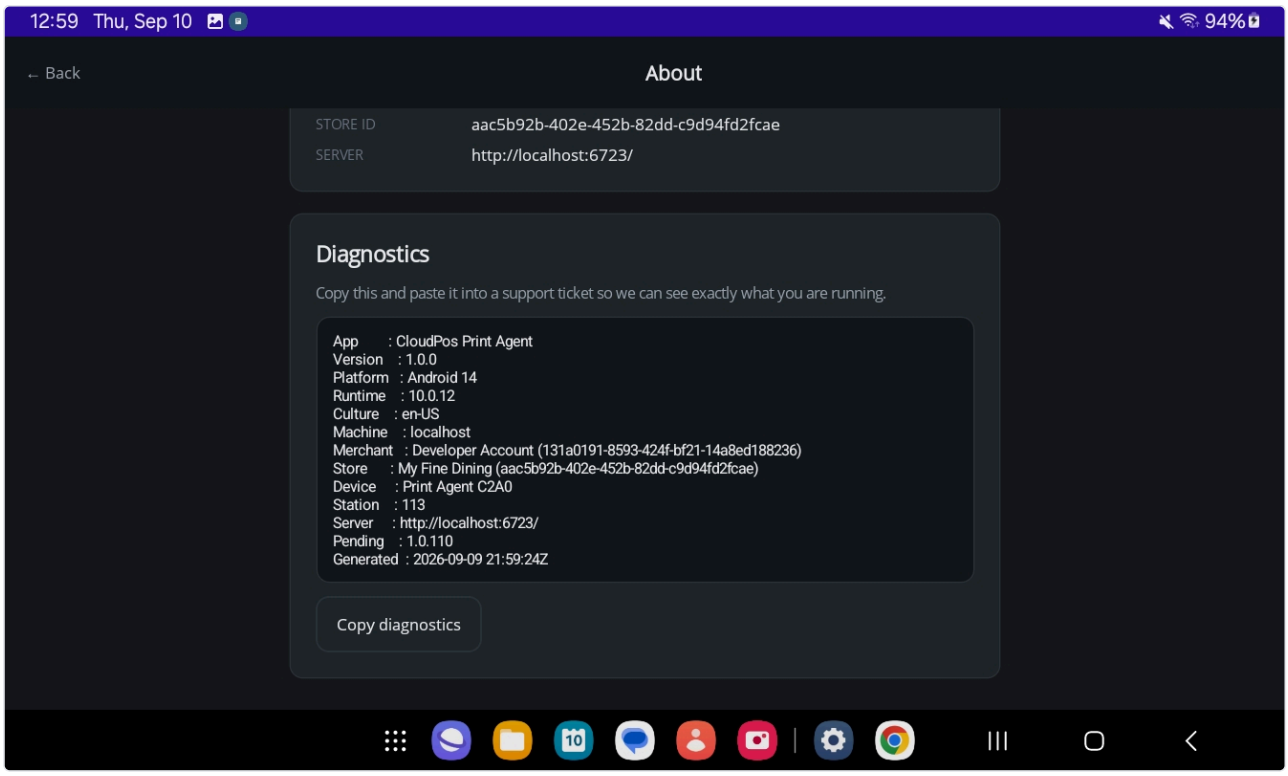
The agent is not in Registered Devices

It was never activated, or was deactivated. Generate a new **Print Agent** code for the right store and activate it. If its printers do not reappear, add them again and route them.

An update is stuck (Android)

On an ordinary device the update waits for a tap on the *Update ready* notification. If it was swiped away, it comes back at the next check. If Android refuses the install, allow installs from this app in the device's security settings.

> Before contacting support, open **About** and press **Send log to support**, with a note of the printer and roughly when a ticket should have printed. That is usually enough to find the problem. **Copy diagnostics** copies the device's details for a support ticket.



Status says Completed, but nothing came out (Windows)

For a printer installed in Windows, *Completed* means Windows took the ticket. If the printer is off, paused or out of paper, the ticket waits in its Windows queue, and after about a minute and a half the agent shows **Printer problem**. Open the printer's queue in Windows, fix the printer and resume the queue; see *A Windows printer that stops printing* in Status screen, alerts and retries.

The window is gone, but tickets still print (Windows)

That is expected: closing the window only hides it. The agent is next to the clock; click its icon to open it again.

Starting the agent again only shows its window (Windows)

Also expected: only one copy runs, and starting another brings up the one already running. To restart it, right-click the icon, choose **Exit** and **Close anyway**, then start it from the Start menu.

Customer Display

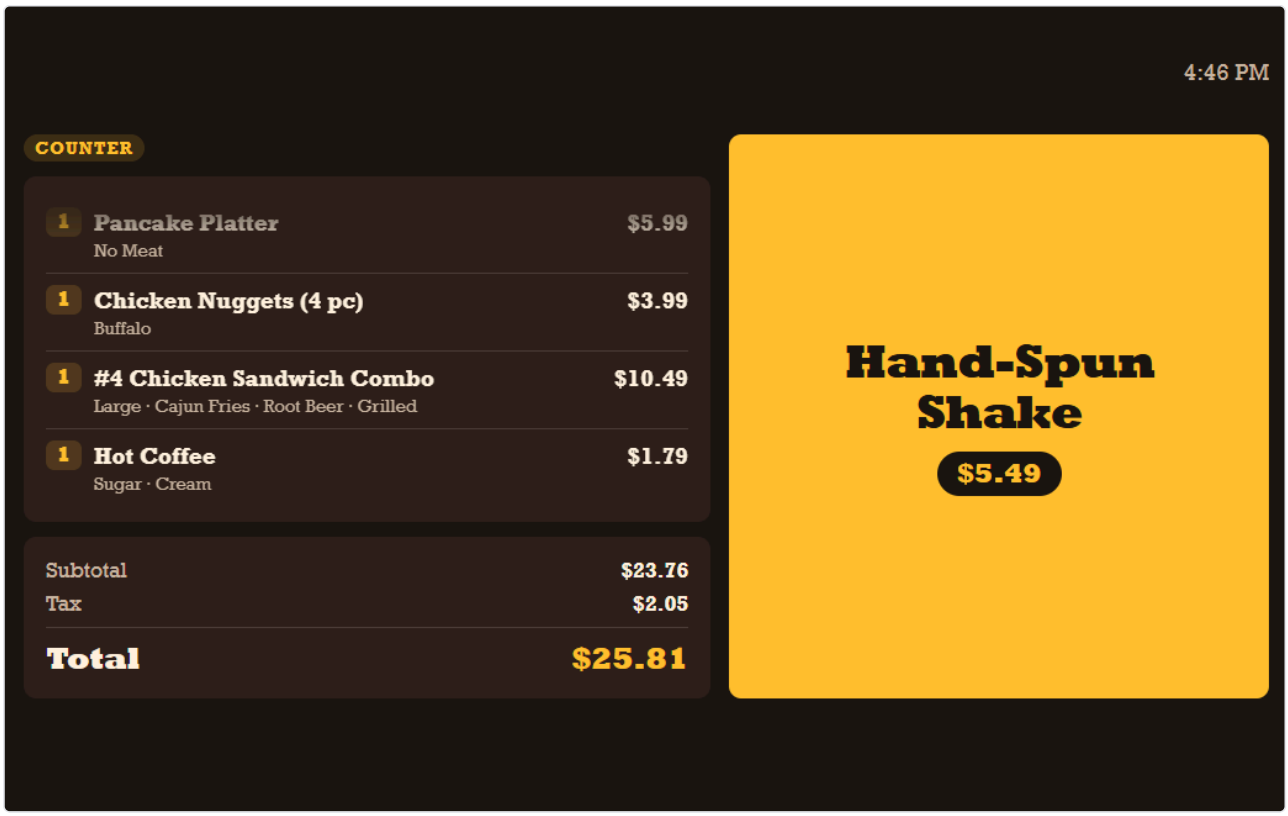
Customer display overview

Hardware & Printing › Customer Display

View online ↗

What the customer display shows, the two ways to connect one, and where each part is set up.

The customer display is the screen that faces your guests. It shows the order as it is rung in, the totals, payment progress, tip and loyalty prompts, and a thank-you with the change due and a receipt QR code. Between sales it plays your promotions.



Two ways to connect a display

- **This device's second screen** — a second monitor on a Windows station, or the customer screen of an Android dual-screen terminal. See Using this device's second screen.
- **A paired display** — a separate tablet, phone or PC running AmigoPOS, paired to one station with a one-time code. See Pairing a separate display.

A station can use both at the same time.

What you can design

Designs are made in **Back Office › Hardware & Printing › Customer Display**: the layout of every screen, colours and fonts, logo and background, a promotions playlist with schedules, the wording guests read, and how the display behaves. Each store has a default design, and any station can use a different one. See Designing the display, Promotions playlist and Design with AI.

During a sale

The screens a guest sees from greeting to goodbye are described in What guests see during a sale.

> A display never needs its own sign-in: it shows what its station is doing. Card payments are still taken on the card terminal — the display only shows their progress.

Using this device's second screen

Hardware & Printing › Customer Display

View online ↗

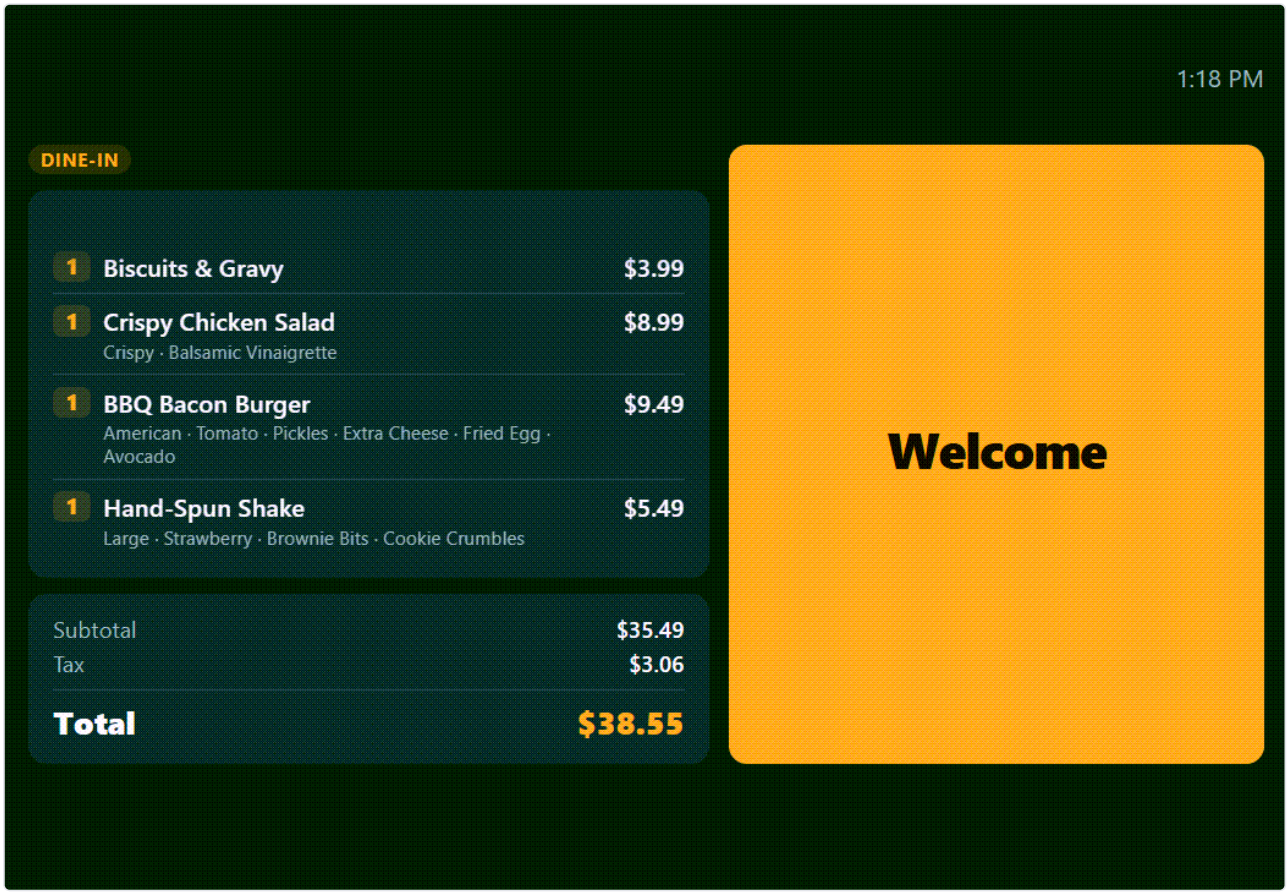
Show the customer display on a second monitor (Windows) or on the customer screen of a dual-screen Android terminal.

A station can show its customer display on a screen of its own device. The display runs full screen on that screen while the POS keeps working on the main one.

Windows: a second monitor

1. Connect the monitor and set Windows to **Extend** the displays (not Duplicate).
2. On the POS, open **More › Customer Display**.

3. If there is more than one other monitor, pick it in the list, then tap **Show Customer Display**.
4. The display opens full screen on that monitor.



The station remembers: the display reopens by itself the next time the POS starts. **Hide Customer Display** closes it and turns that off.

Android: dual-screen terminals

Terminals with a built-in customer screen show it as a second screen. Open **More › Customer Display**, pick the screen and tap **Show Customer Display**. The display stays on, reopens by itself if the screen is disconnected and reconnected or the app restarts, and plays promotion videos without sound.

> To try it on an ordinary tablet, turn on Developer options and choose **Simulate secondary displays** (for example 1280×720). A small window appears and works like a customer screen.

Touch screen or not

If the second screen does not take touch, untick **Touch Screen** in the design's Settings tab so tip and loyalty prompts stay on the POS. See Wording, behavior and stations.

Pairing a separate display

Hardware & Printing › Customer Display

View online ↗

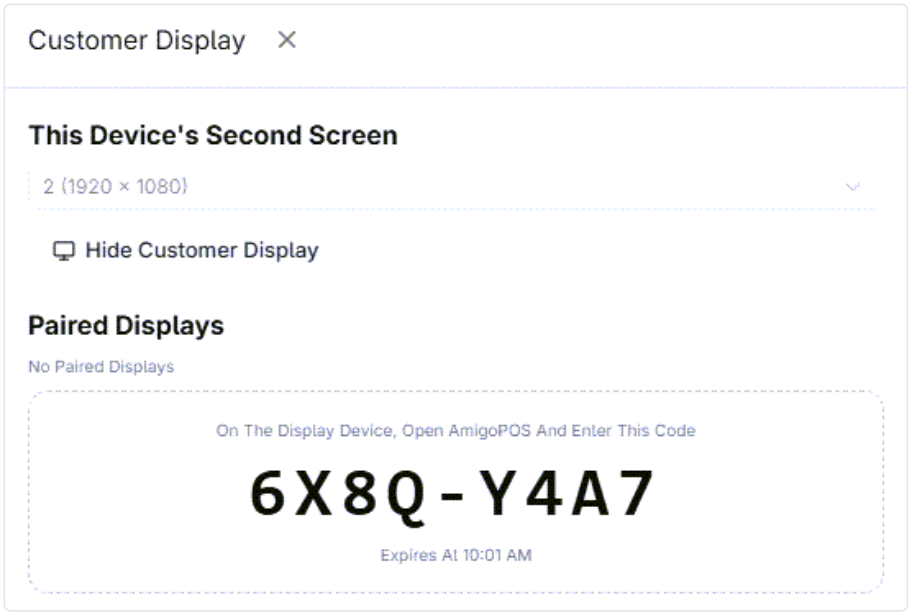
Turn a tablet, phone or PC into the customer display of one station with a one-time code.

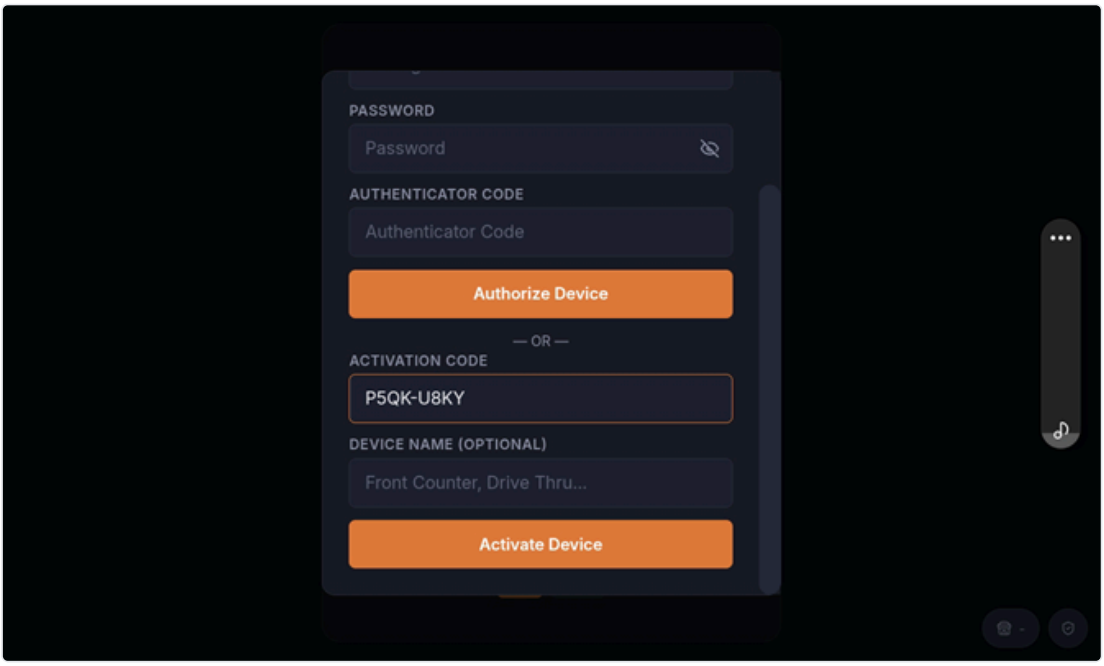
Any device that runs AmigoPOS can be a customer display: a tablet on a stand facing the guest, or a PC with a monitor. It is paired to one station and follows that station.

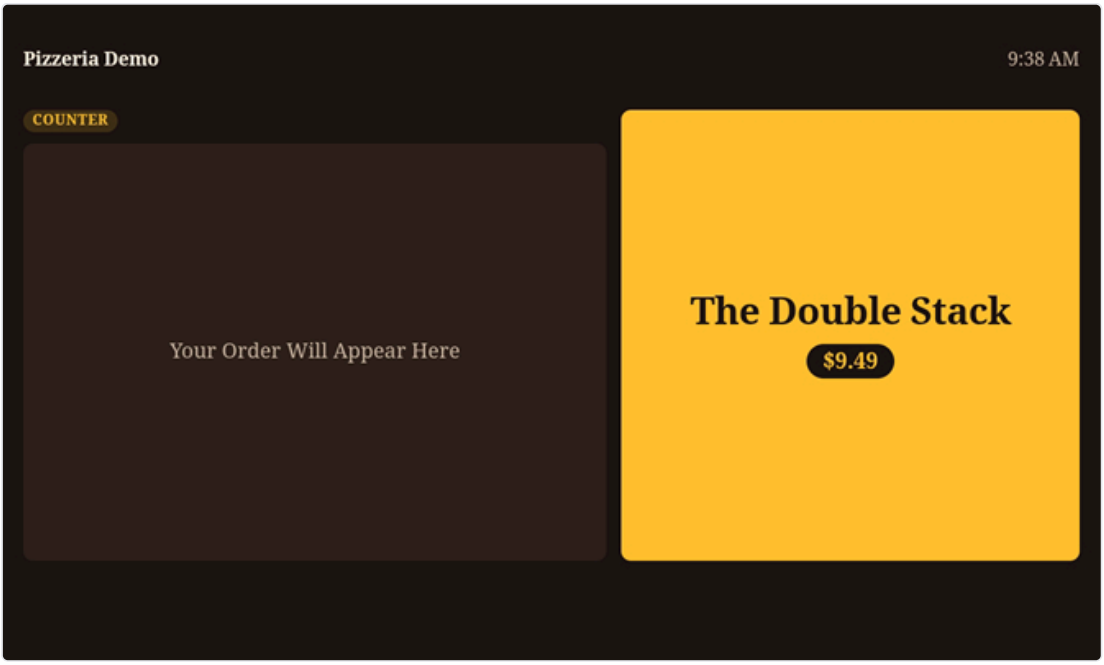
Pair a display

1. On the station the display belongs to, sign in and open **More › Customer Display**.
2. Tap **Pair A Display**. An 8-character code appears. It can be used once, within 15 minutes.

3. On the display device, install and open AmigoPOS and enter the code on the activation screen.
4. The device becomes that station's customer display: it opens the display full screen, keeps the screen on, and shows the station's sales from then on.







Pairing needs a user who is allowed to register devices. If Pair A Display says you can't, ask a manager.

Unpair a display

Any of these does it:

- At the station: tap **Unpair** next to the display in **More › Customer Display**, or in **Back Office › Hardware & Printing › Customer Display** › Settings › Paired Displays.
- In Registered Devices: **Deactivate** the display's row. A display that was paired more than once has one row per pairing; the live one is the row whose Last Seen keeps moving.
- On the display itself: press and hold the top-left corner of the screen for about four seconds. A small panel shows the store, device, station and connection; enter a manager PIN (a job allowed to register devices, or a manager) and tap **Unpair This Display**.

The display shows **This Display Was Deactivated** (**This Display Is No Longer Paired** if it is restarted later) with a **Pair Again** button, which takes it back to the activation screen for a new code. A running display picks this up on its own, at once while it is connected and within a minute otherwise; it does not need to be restarted.

Good to know

- A paired display needs internet like the POS. If the connection drops it keeps showing its design and promotions and catches up when it reconnects; a small red dot means it is reconnecting.
- A paired display does not count as a station.
- A paired display can show the design in another language than the POS — see Wording, behavior and stations.

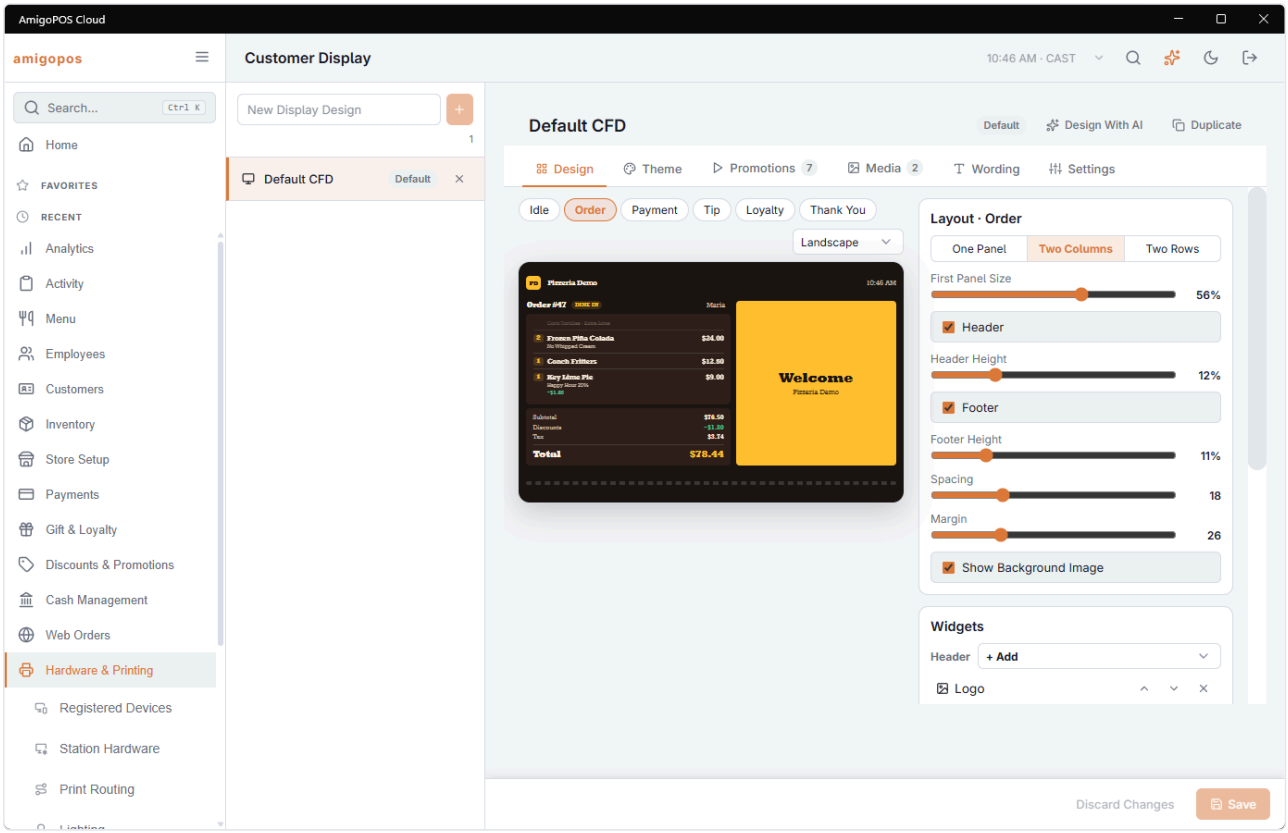
Designing the display

Hardware & Printing › Customer Display

View online ↗

Create display designs in the Back Office, preview every screen and arrange its widgets.

Open **Back Office › Hardware & Printing › Customer Display**. The list on the left holds the store's designs; the tabs on the right edit the one you select.



Designs

- **New design**: type a name at the top of the list and tap +. It starts from the built-in design.
- **Default**: used by every station that has no design of its own. **Make Default** sets it.
- **Duplicate** copies the saved design (save your changes first).
- **Save** sends your changes to the displays; **Discard Changes** goes back to the last saved version. Nothing reaches a display until you save.

Screens

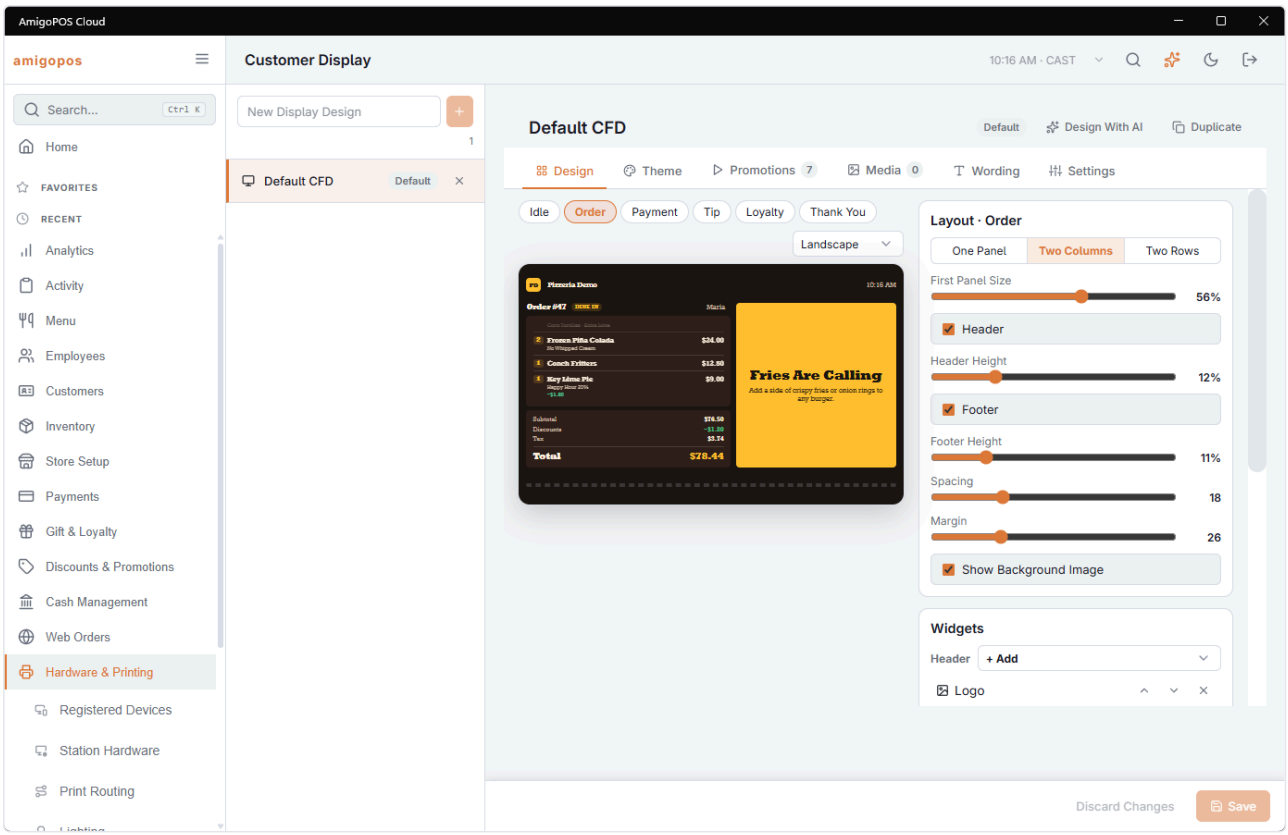
A display moves through six screens: Idle (between sales), Order, Payment, Tip, Loyalty and Thank You. The chips above the preview switch between them. Landscape, Widescreen and Portrait preview different screen shapes, and on Payment you can preview each step (Card Reader, Processing, Approved…).

Layout

Each screen has One Panel, Two Columns or Two Rows, with an optional Header and Footer. Set their sizes, the spacing and the margin. **Show Background Image** decides whether the theme's background picture shows on that screen.

Widgets

Panels hold widgets from top to bottom (the header and footer from left to right). **+ Add** adds one, the arrows reorder them and × removes one. Tap a widget in the preview or in the list to edit it: **Fill Space** lets it take the free space (1×, 2×, 3× share it), **Move To** moves it to another panel, and its own settings follow. See Widgets reference.



Only widgets that make sense on a screen can be added to it — for example Tip Buttons only on the Tip screen.

Widgets reference

Hardware & Printing › Customer Display

View online ↗

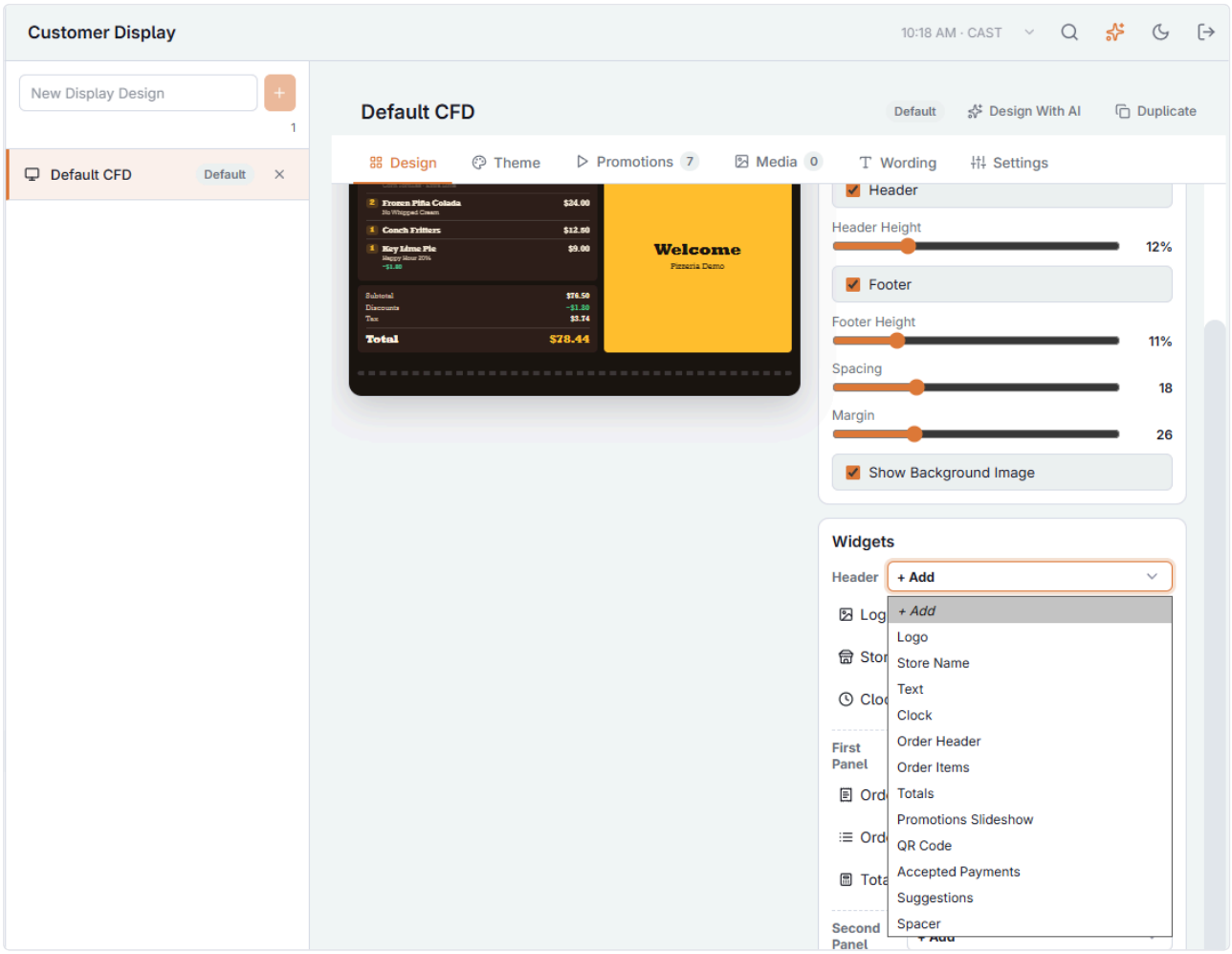
Every widget you can place on the customer display and what its settings do.

These are the widgets the designer offers. Add them with + Add in the Design tab; see Designing the display.

Widget	What it shows	Main settings
Logo	The store logo or another picture	Picture, size, alignment
Store Name	The store's name	Size, alignment, weight
Text	Any message: a greeting, today's special, the Wi-Fi password	Text (line breaks kept), size, Plain or Banner, color
Clock	Store time and/or date	Time, Date, or Date And Time
Order Header	Order number, order type and guest name	Which parts to show; the name follows the Guest Name setting
Order Items	The items as they are rung in; the newest always in view	Modifiers, quantities, highlight new items, card or plain
Totals	Subtotal, discounts, service charges, tax, tip and total	Which lines to show, a You Saved line
Promotions Slideshow	Plays the promotions playlist	Only These Tags, transition, position dots, card or edge to edge
QR Code	A code guests can scan: menu, reviews, Wi-Fi…	Link, caption, size
Payment Status	Amount due, insert card, processing, approved, declined, change	Paid and remaining amounts
Tip Buttons	Tip choices for card payments (Tip screen)	Size

Widget	What it shows	Main settings
Loyalty Keypad	Phone keypad for loyalty check-in (Loyalty screen)	Message
Thank You Message	Thank-you, change due and the receipt QR (Thank You screen)	Message, Change Due, Receipt QR Code
Accepted Payments	The payment types you accept	The list, in the order shown
Suggestions	"You might also like" items from suggestive selling	Heading, how many
Spacer	Empty space	Size

Widgets hide themselves when they have nothing to show — no suggestions, no guest name, no logo — so the rest of the screen closes up.



Guest survey QR

The Thank You widget also shows the guest survey QR when the store's survey is on (**Show Survey QR Code**, on by default), next to the receipt QR. See Survey slip and customer display.

Theme, pictures and videos

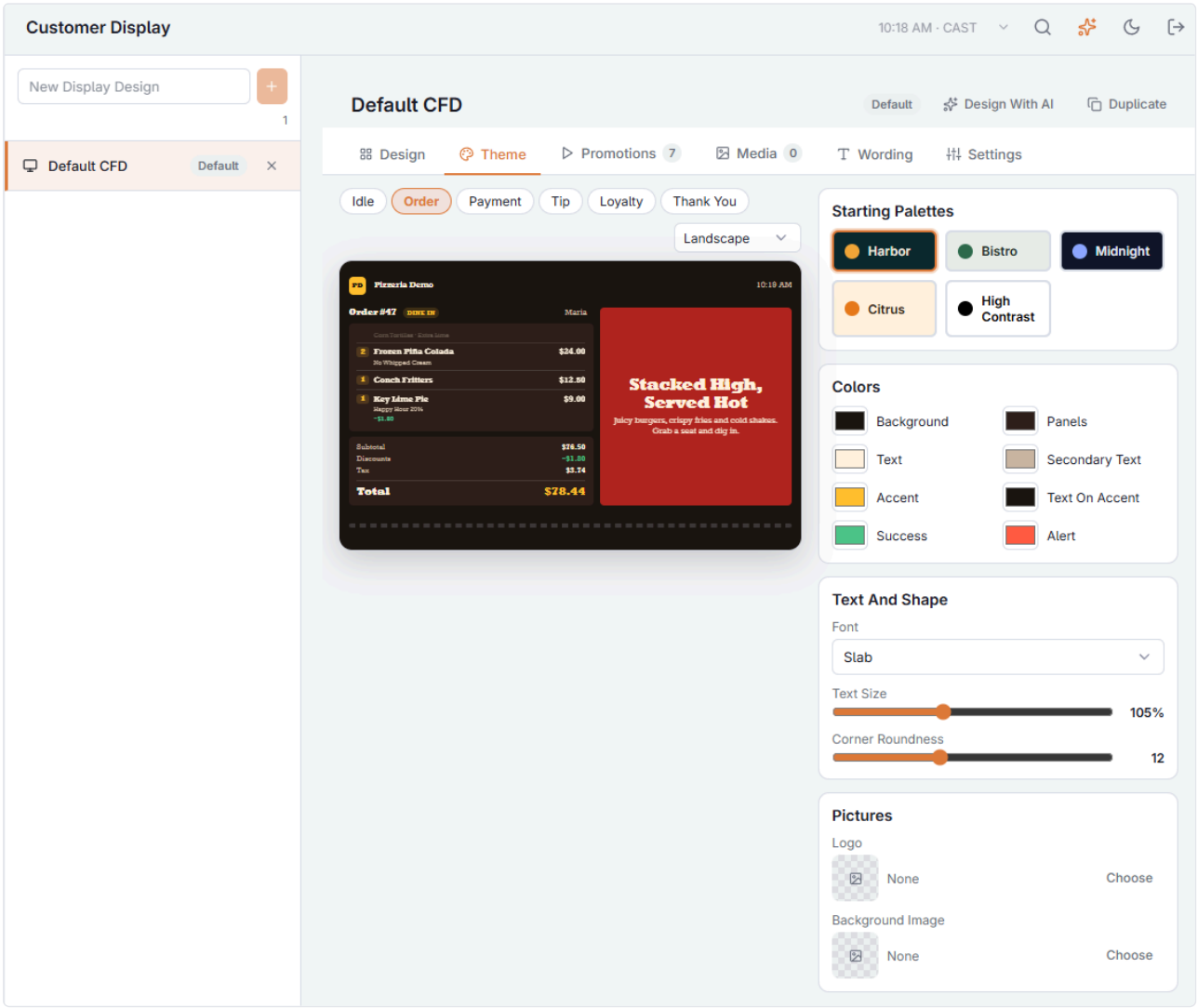
Hardware & Printing › Customer Display

View online ↗

The colours, font and shape of the display, and the pictures and videos it uses.

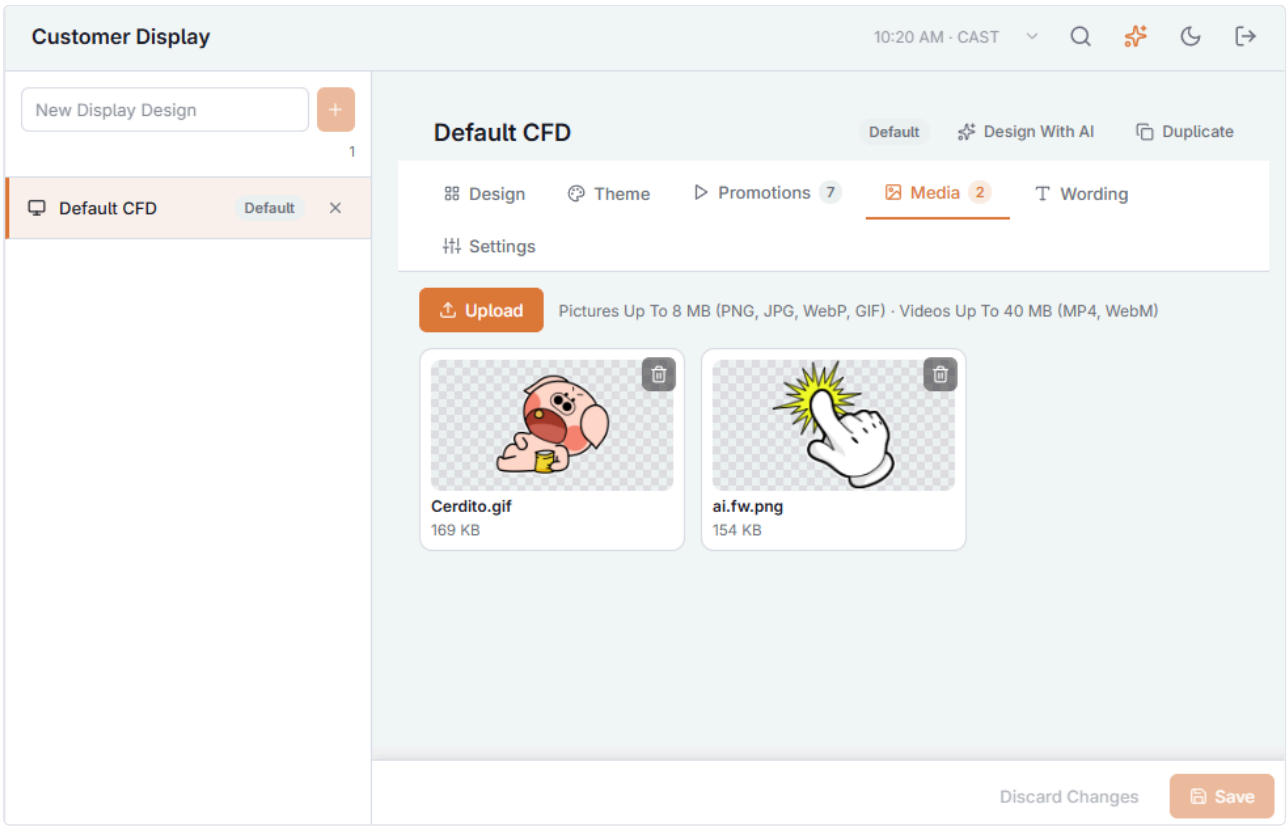
Theme

- **Starting Palettes** (Harbor, Bistro, Midnight, Citrus, High Contrast) set all colours, the font and the corners at once. Your logo and background are kept.
- **Colors**: Background, Panels, Text, Secondary Text, Accent, Text On Accent, Success and Alert. Keep Text easy to read on Background, and Text On Accent easy to read on Accent.
- **Font**, **Text Size** (70–160%) and **Corner Roundness**.
- **Logo** and **Background Image** come from the Media tab; **Background Darkening** keeps text readable over a photo.



Pictures and videos

- The Media tab uploads pictures (PNG, JPG, WebP, GIF, up to 8 MB) and videos (MP4, WebM, up to 40 MB).
- Files are kept in the cloud and saved on every display, so promotions keep playing if the internet drops.
- Deleting a file removes it from every design that uses it; that spot then shows nothing.



Displays size everything to the screen, so one design fits a 7-inch customer screen and a 24-inch monitor. For backgrounds, use landscape pictures of about 1920×1080.

Promotions playlist

Hardware & Printing › Customer Display

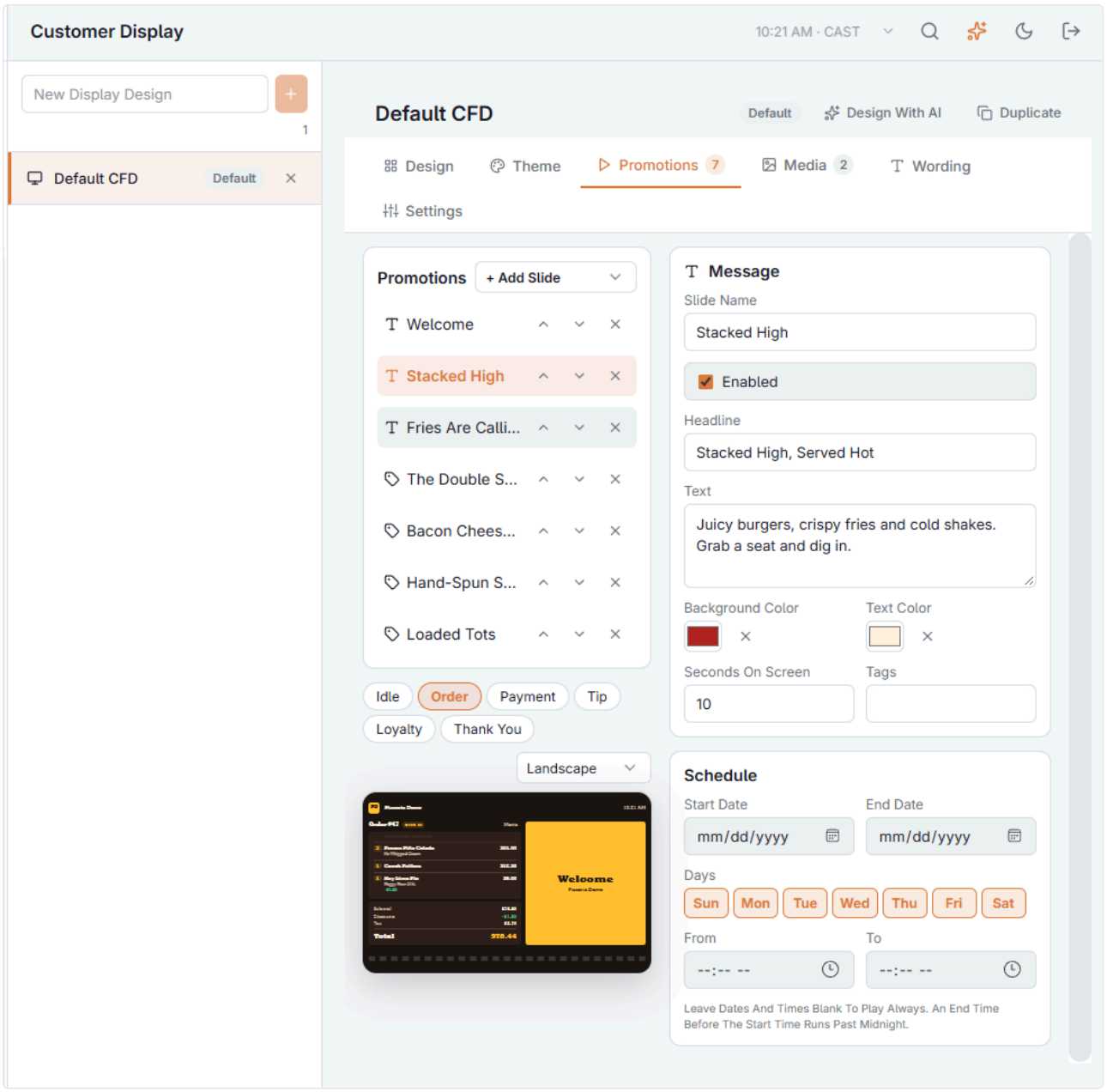
View online ↗

Pictures, videos, specials and QR codes that play on the display, with dates, days and times.

The Promotions tab holds the playlist. Every Promotions Slideshow widget plays it: on the Idle screen it usually fills the screen, and on Order it sits beside the order.

Slide types

- **Picture** and **Video** — from the Media tab. Videos play to the end, without sound.
- **Message** — a headline and text on a colour.
- **Menu Item** — the item's name, description and live price from your menu; change the price in the menu and the slide follows. Add a picture if you like.
- **QR Code** — a headline, a code and a line of text.

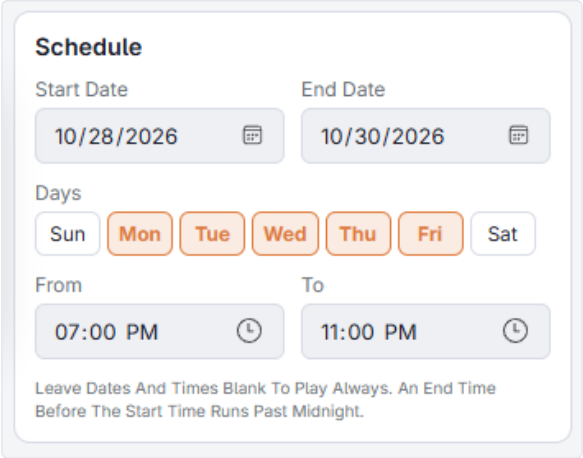


Timing and order

Seconds On Screen sets how long each slide stays (videos play to the end). The arrows change the order, and **Enabled** turns a slide off without deleting it.

Schedules

Set start and end dates, the days of the week and a From–To time. An end time earlier than the start runs past midnight (for example 22:00 to 02:00). Leave everything blank to play always. A calendar icon marks slides with a schedule.



Tags

Give slides tags (for example drinks or kids) and set a slideshow's **Only These Tags** to play just those — useful for one playlist on Idle and another on Order.

> When no slide can play, the display shows the Welcome message and the store name.

Quiet hours offer slide

Discounts & Promotions › Guest Offers › Quiet Hours › Apply can add a text slide for your quiet hours offer at the top of the playlist of every design (tag *offers*), and replaces it the next time. Edit or remove it here like any slide. See Filling your quiet hours.

Wording, behavior and stations

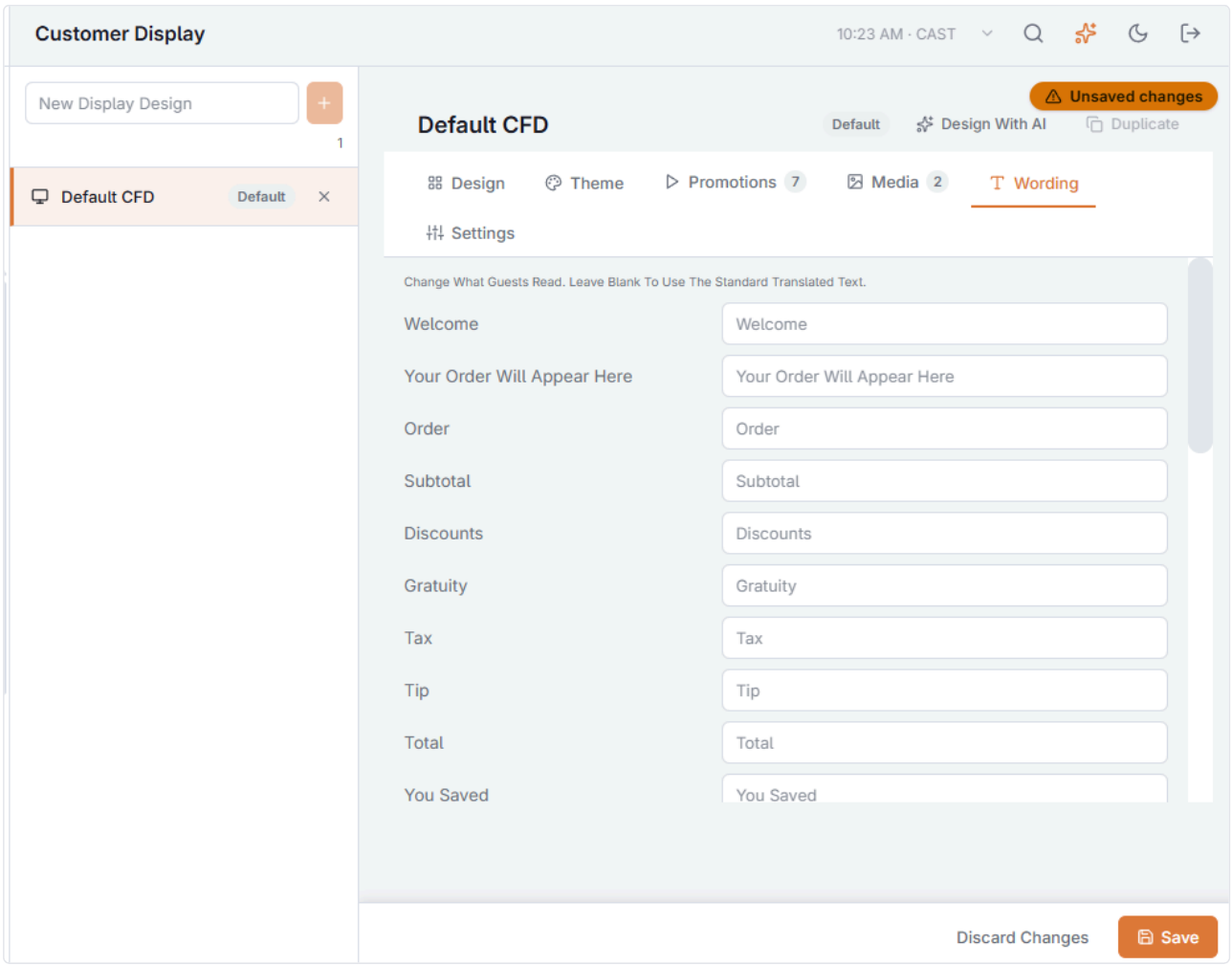
Hardware & Printing › Customer Display

View online ↗

Change what guests read, how the display behaves, and which stations use which design.

Wording

The Wording tab lists every sentence the display shows guests, with the standard text as a hint. Type your own wording to replace one; leave it blank to keep the standard text and its translations.



Behavior (Settings tab)

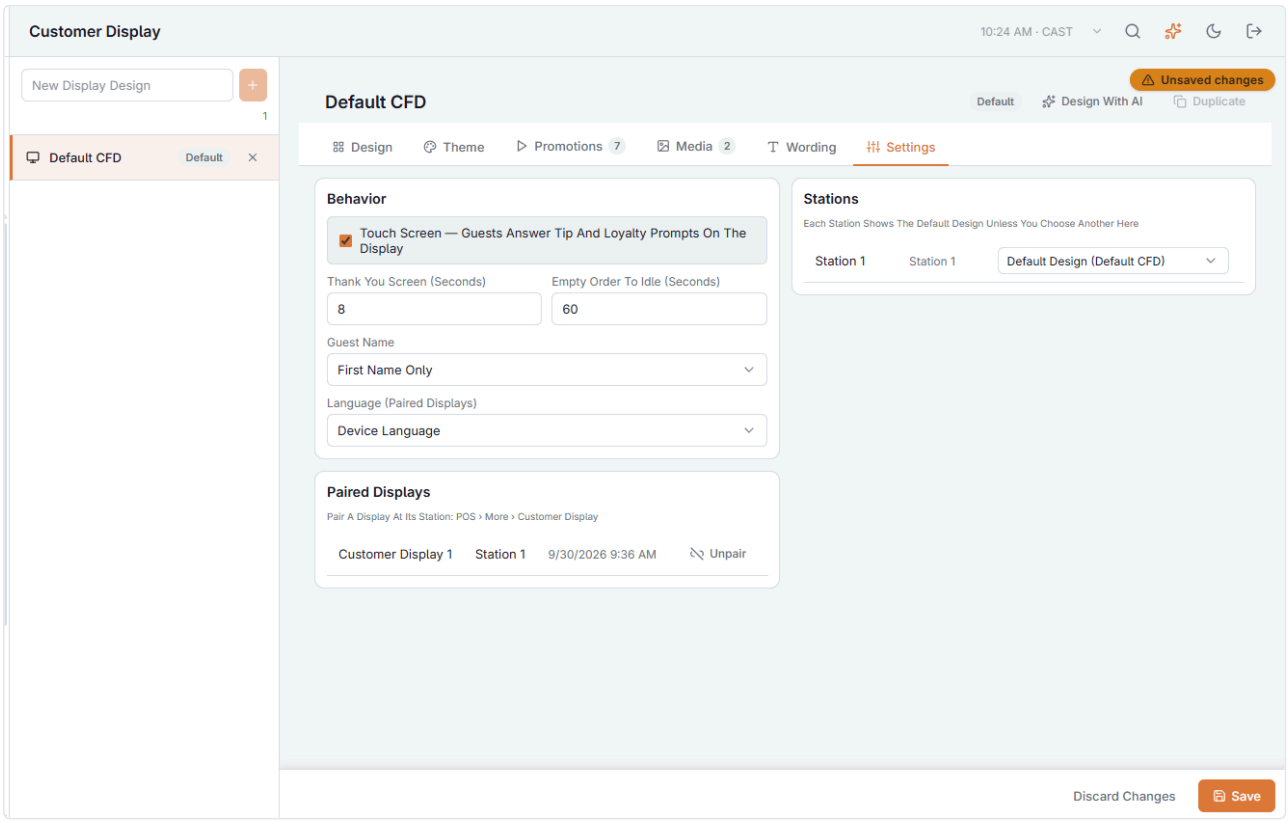
- **Touch Screen** — guests answer tip and loyalty prompts on the display. Untick it for screens that do not take touch; the prompts then stay on the POS.
- **Thank You Screen (Seconds)** — how long the goodbye stays (at least 30 seconds while a receipt QR is shown).
- **Empty Order To Idle (Seconds)** — an open order with no items returns to Idle after this.
- **Guest Name** — Hidden, First Name Only or Full Name.
- **Language (Paired Displays)** — a paired display can show the design in another language. A display on the POS device uses the POS language; use Wording to change its text.

Stations

Each station shows the default design unless you choose another one here. This applies straight away — no Save needed.

Paired Displays

Lists the store's paired displays with an Unpair button; see Pairing a separate display.



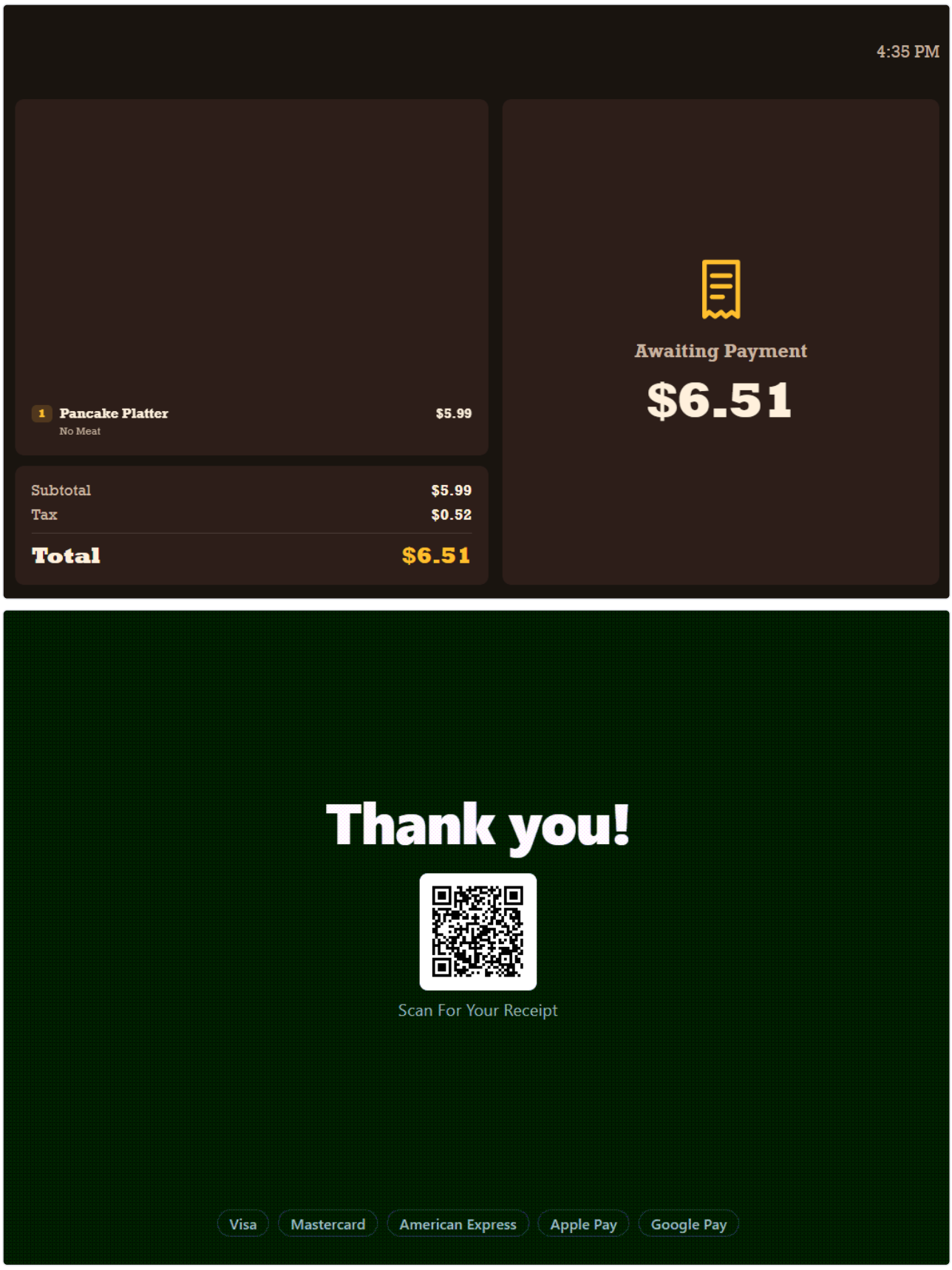
What guests see during a sale

Hardware & Printing › Customer Display

View online ↗

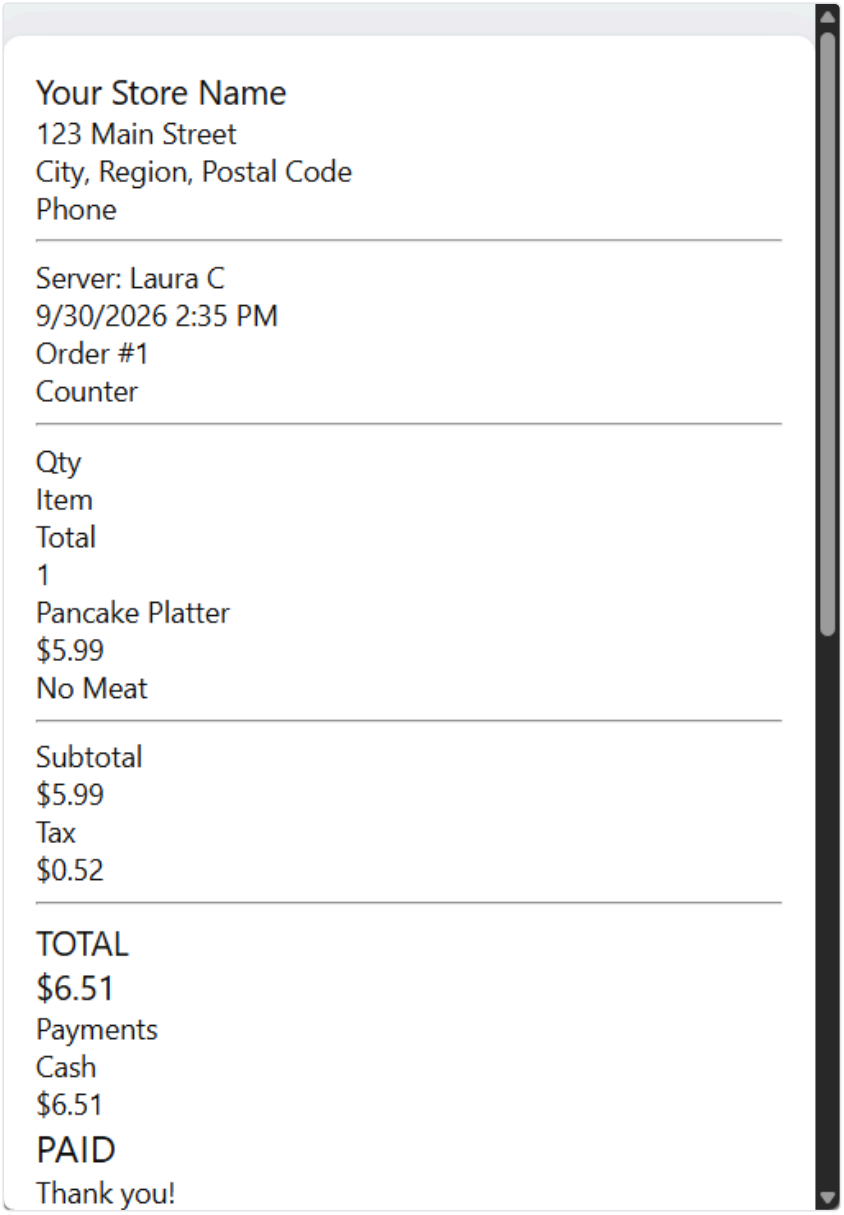
The display's screens from greeting to goodbye, including suggestions, tips, loyalty and the receipt QR.

1. **Idle** — promotions between sales.
2. **Order** — items appear as they are rung in, and new ones flash in. Discounts show on the line and in the totals.
3. **Suggestions** — when suggestive selling offers an item, it can appear under "You Might Also Like" (if the design has the Suggestions widget). Accepted offers drop off.
4. **Payment** — opening payment shows the amount due. A card payment shows Insert, Tap Or Swipe Your Card; if the card attempt ends without a payment, the display goes back to the amount due. Part payments show what is paid and what is left.
5. **Tip** — for card payments that allow tips, the guest picks a tip or no tip on a touch display, then the card terminal charges the total.
6. **Loyalty** — when the store asks for loyalty on the customer display and the order has no loyalty card, the guest types a phone number or skips.
7. **Thank You** — the change due after cash and a QR code for the digital receipt, then back to Idle.


4:35 PM
1
Pancake Platter
No Meat
$5.99
Subtotal
$5.99
Tax
$0.52
Total
$6.51
Awaiting Payment
$6.51
Thank you!
Scan For Your Receipt
Visa
Mastercard
American Express
Apple Pay
Google Pay

The digital receipt QR

When a sale is fully paid, the station makes a digital copy of the receipt — your receipt template, exactly as it prints — and shows its QR code. Guests open it on their phone with no app and no sign-in. Links work for 90 days. To turn it off, untick **Receipt QR Code** on the design's Thank You Message widget.



> The display only shows what the cashier does; it never takes a payment itself.

Pairings from the order screen

The items the order screen suggests as you ring (what guests most often add, tonight's push items) also show under **You Might Also Like**, after any Suggestive Selling offers. Turn it off with Show The Instant Suggestions On The Customer Display (Store Setup › Order Entry Screen › Guests).

Design with AI

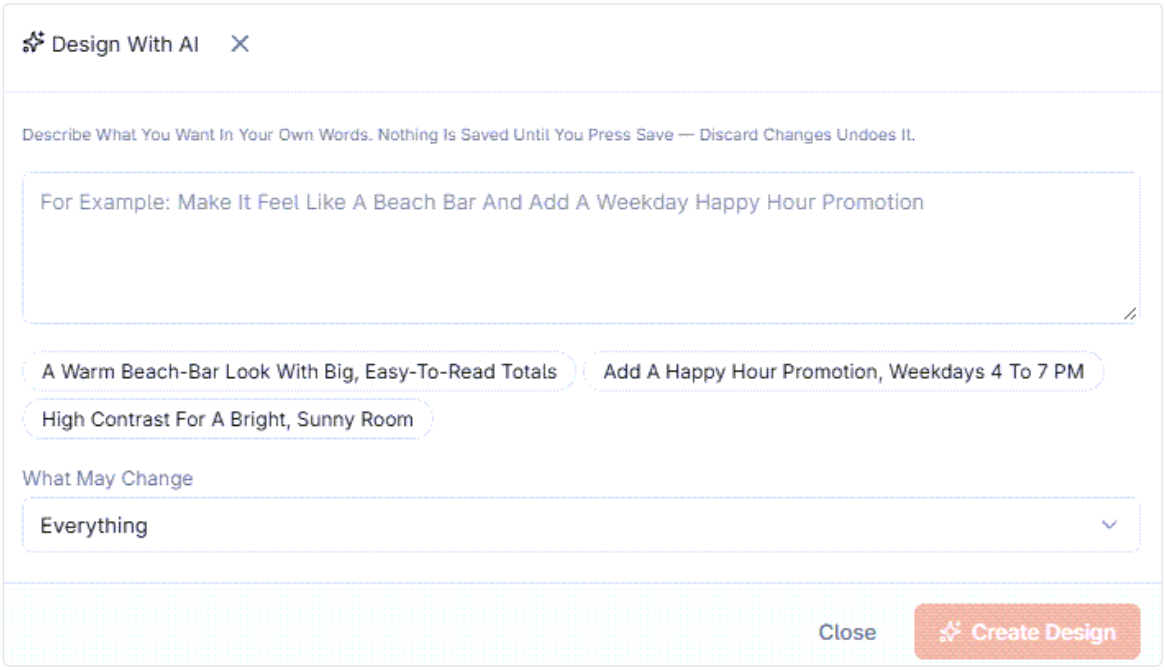
Hardware & Printing › Customer Display

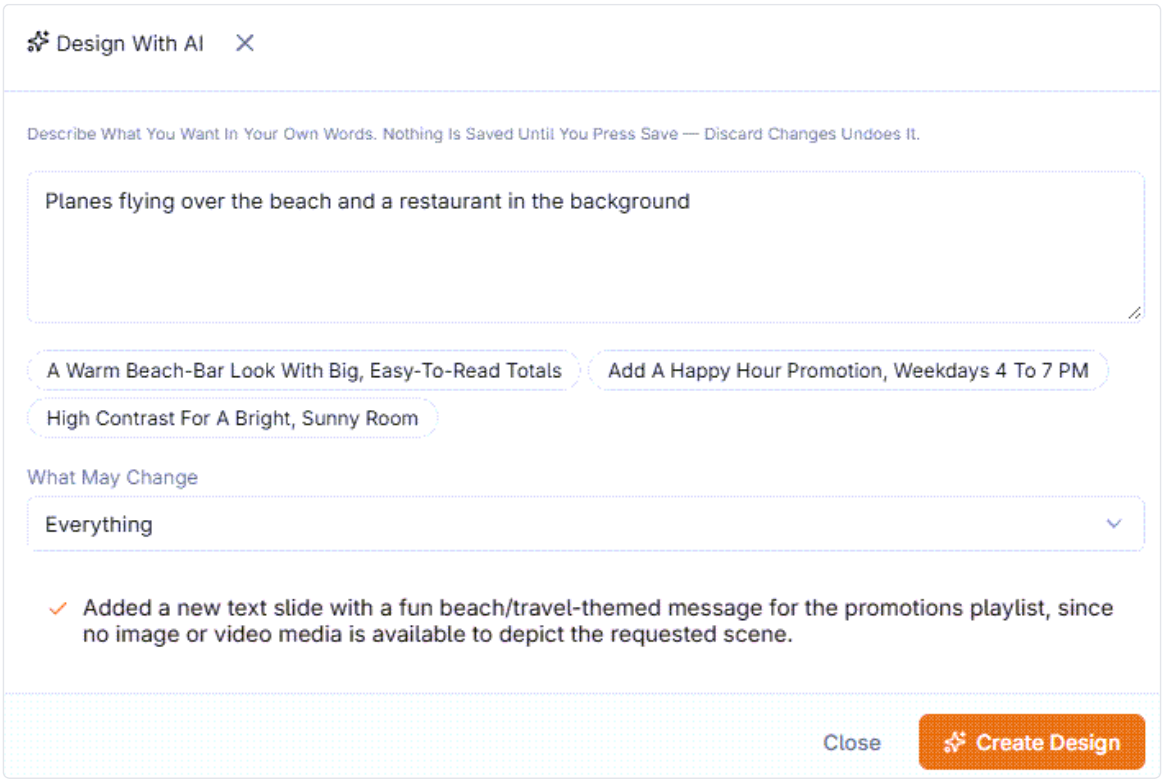
View online ↗

Describe the display you want in your own words and let AI change the design for you to review.

Design With AI, at the top of the designer, changes a design from a plain request — for example "a warm beach-bar look with big totals" or "add a happy hour promotion, weekdays 4 to 7 pm".

1. Open a design and tap **Design With AI**.
2. Describe what you want, or tap one of the examples.
3. Choose **What May Change**: Everything, only the current screen, Only The Theme or Only The Promotions.
4. Tap **Create Design**. The preview shows the new version, with a short summary of what changed.
5. Look through the screens. **Save** keeps it; **Discard Changes** undoes it.





What the AI works with

- Your design as it is in the editor, unsaved changes included.
- Your pictures and videos — it can only use files already in the Media tab.
- Your menu items, for menu-item slides that show the live price.

What it won't do

- It never writes allergen, dietary or health claims.
- It never types prices; menu-item slides show the live price by themselves.
- It never uses pictures you don't have.

Check the result — especially the wording — before you save.

> Each request counts as one AI action on your plan. Only managers can use Design With AI.

Customer display troubleshooting

Hardware & Printing › Customer Display

View online ↗

Fixes for displays that do not show, do not update, or show the wrong thing.

A paired display says Connecting, or shows a red dot with No Connection

It is reconnecting. Check the device's Wi-Fi or internet. It keeps showing its last screen and catches up by itself. A display that starts with no connection comes up on its last design the same way, with No Connection in the corner, and catches up when the connection returns.

A paired display says This Display Was Deactivated or This Display Is No Longer Paired

It was unpaired at the station, deactivated in Registered Devices, or unpaired on the display itself. Tap **Pair Again** and enter a new code from the station — see Pairing a separate display. If nobody meant to do that, look in Registered Devices for who deactivated it.

No second screen found

- Windows: set the displays to Extend, not Duplicate.
- Android: the terminal must offer a customer screen to apps. To test the app itself, use Simulate secondary displays — see Using this device's second screen.

Design changes do not show

- Save the design — nothing reaches the displays before that.
- Paired displays update right away. A display on the POS device updates within 15 minutes, or at once if you hide it and show it again.
- Check that the station is not using a different design (Settings › Stations).

Pictures or videos are missing

- The file was deleted from the Media tab, or the display has not downloaded it yet (it needs internet the first time).
- Videos must be MP4 or WebM, up to 40 MB.

No tip or loyalty prompt on the display

- **Touch Screen** must be ticked in the design's Settings tab.
- Tips are asked only for card payment methods that allow tips.
- Loyalty is asked only when the store setting for the customer display is on and the order has no loyalty card.

No receipt QR

- The sale must be fully paid.
- The Thank You Message widget must have **Receipt QR Code** ticked.

I deactivated the display in Back Office and nothing happened

A connected display is told the moment its row is deactivated, and every display also checks its registration once a minute, so Pair Again should appear within a minute. If the display keeps running:

- You deactivated another row of the same device. A display that was paired more than once has one row per pairing in Registered Devices; deactivate the row whose Last Seen keeps moving.

- The display has no connection (red dot and No Connection in the corner). It finds out as soon as it reconnects. To stop it now, unpair it on the display itself, below.

Getting out of the display on the device itself

Press and hold the top-left corner of the screen for about four seconds. A small panel shows the store, device, station and connection. Enter a manager PIN and tap **Unpair This Display**: the pairing ends and the device returns to the activation screen, ready for a new code or to become a register. The PIN must belong to a job allowed to register devices, or to a manager, and the display needs a connection to check it. Guests tapping the corner get nothing; only a long hold opens the panel.

Lighting and Last Call

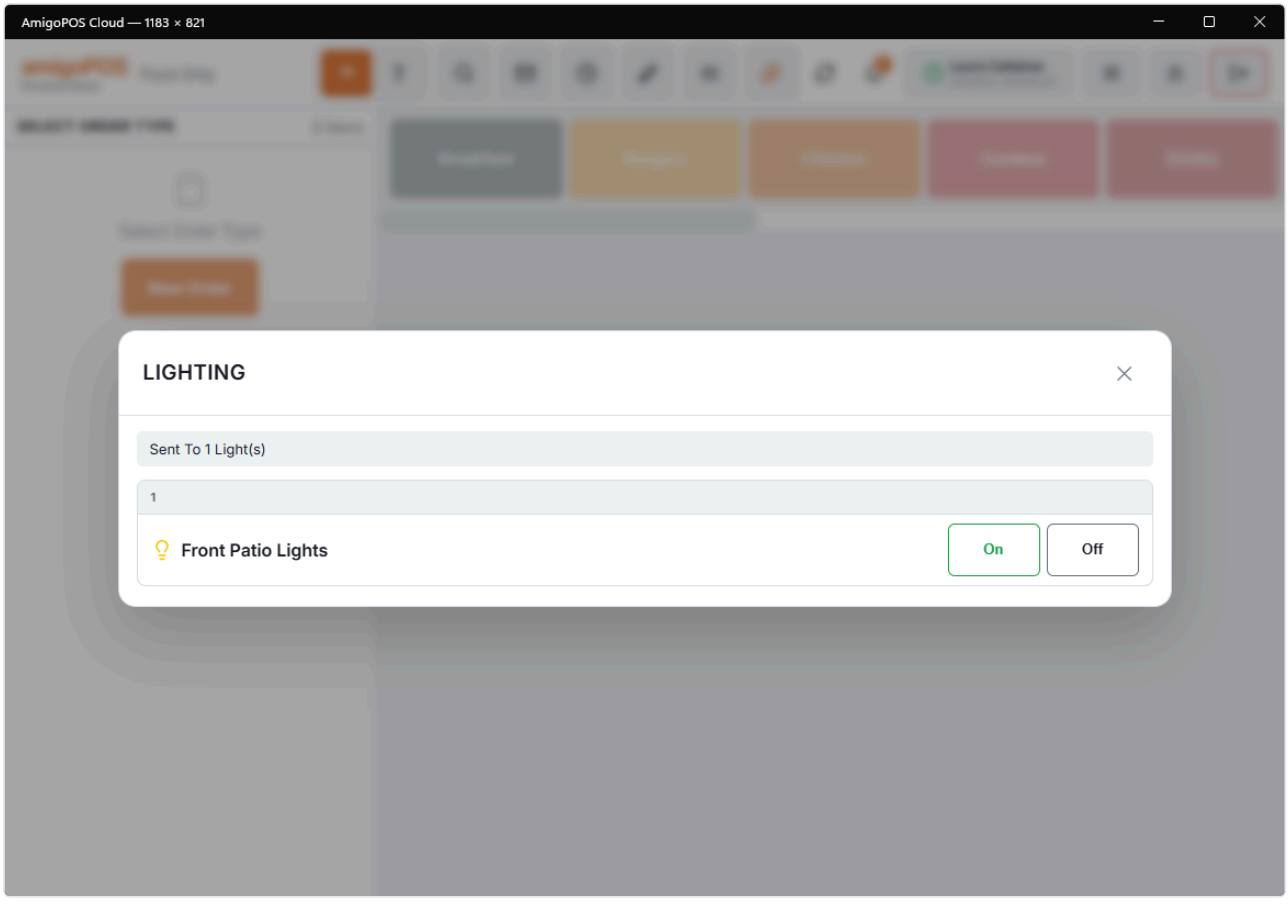
Lighting control overview

View online ↗

Switch the store's lights from CloudPos: pool-table lamps that follow the timer, zones on and off from the POS, and a Last Call flash — with any network relay.

CloudPos can switch lights through **network relays** — small Wi-Fi or wired switches an electrician fits on a lighting circuit. With them you can:

- Turn the lamp over a pool table **on when a game starts and off when it ends**.
- Switch any light or group of lights (**zones**) on and off from the POS.
- Run **Last Call**: flash the room lights for a moment, the classic bar signal.



How it works

1. You add the relays and lights in **Back Office › Hardware & Printing › Lighting**.
2. A command — a tap on the POS, a timer starting — goes to the CloudPos server.

3. The server works out the exact commands and sends them to the store's **Print Agent**.
4. The Print Agent, on the store's own network, switches the relays.

> The Print Agent is the only thing that talks to the relays, and only on the local network. The CloudPos server never contacts them, so the relays do not need to be reachable from the internet — and should not be.

Not tied to any brand

CloudPos has ready-made settings for **Shelly** (older and newer models) and **Tasmota**, and a **Custom** type for anything else that switches with a web address — relay boards and most smart switches. Buy what is sold locally. See Choosing relays and wiring safely.

Setting it up, in order

1. Choose and install the relays (an electrician for anything on mains power).
2. Add the relay devices and pick the Print Agent that runs them.
3. Add the lights and zones and test each one.
4. Optional: Last Call, table lights and the POS Lights panel permission.

> Only switch circuits meant for it. Never put emergency or exit lighting on a relay.

Choosing relays and wiring safely

Hardware & Printing › Lighting and Last Call

View online ↗

Which relays work with CloudPos, what to ask your electrician, and the network they need.

What works

Kind	Examples	Choose in CloudPos
Wi-Fi relays (newer)	Shelly Plus, Pro and later	**Shelly (Plus / Pro)**
Wi-Fi relays (older)	Shelly 1, 2.5 and similar first-generation models	**Shelly (Gen 1)**
Relays or plugs running Tasmota	Many low-cost relays and plugs, flashed with Tasmota	**Tasmota**
Network relay boards and anything switched by a web address	Multi-channel relay boards, most smart switches with a local web API	**Custom (URLs)**

Multi-channel devices (a 4-channel Shelly Pro, an 8-relay board) are one device with several channels: each channel is one light in CloudPos.

What the device must do

- Be switched by a plain web address on the local network (for Custom: one address for on, one for off).
- Sit on the **same network as the store's Print Agent**, with a local address such as `192.168.1.50`. A fixed address (a DHCP reservation in the router) keeps it from changing.
- If it has a login, CloudPos can send it — see Adding relay devices.

> Devices that can only be switched through their maker's cloud app, or that need a different kind of request than a plain web address, are not supported yet.

Wiring

- Anything on mains power is a job for a licensed electrician. Show them which light each channel should switch and label the relays.
- Leave each light's normal wall switch in a sensible state: if someone switches a circuit off at the wall, CloudPos cannot turn it on.
- Keep emergency, exit and safety lighting off the relays entirely.

> Last Call turns the chosen lights off for a moment. Put only lights on it that are safe to turn off in a full room.

Before buying for a whole room, test one relay on the bench: add it, add a light, and use the On / Off / Flash test buttons. See What CloudPos sends, and testing on the bench.

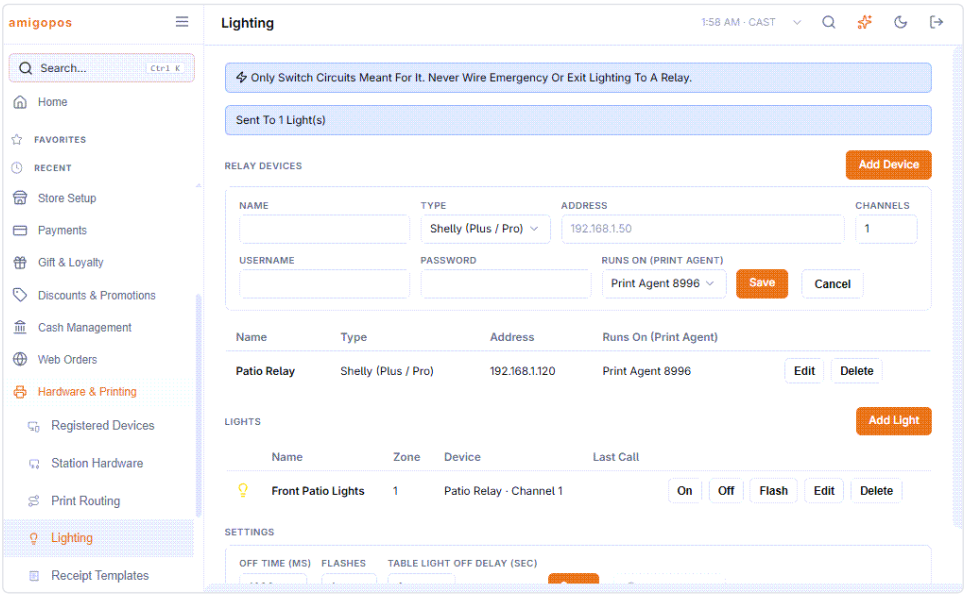
Adding relay devices

Hardware & Printing › Lighting and Last Call

View online ↗

Back Office › Lighting › Relay Devices: the device's type, address, channels, login, and the Print Agent that runs it.

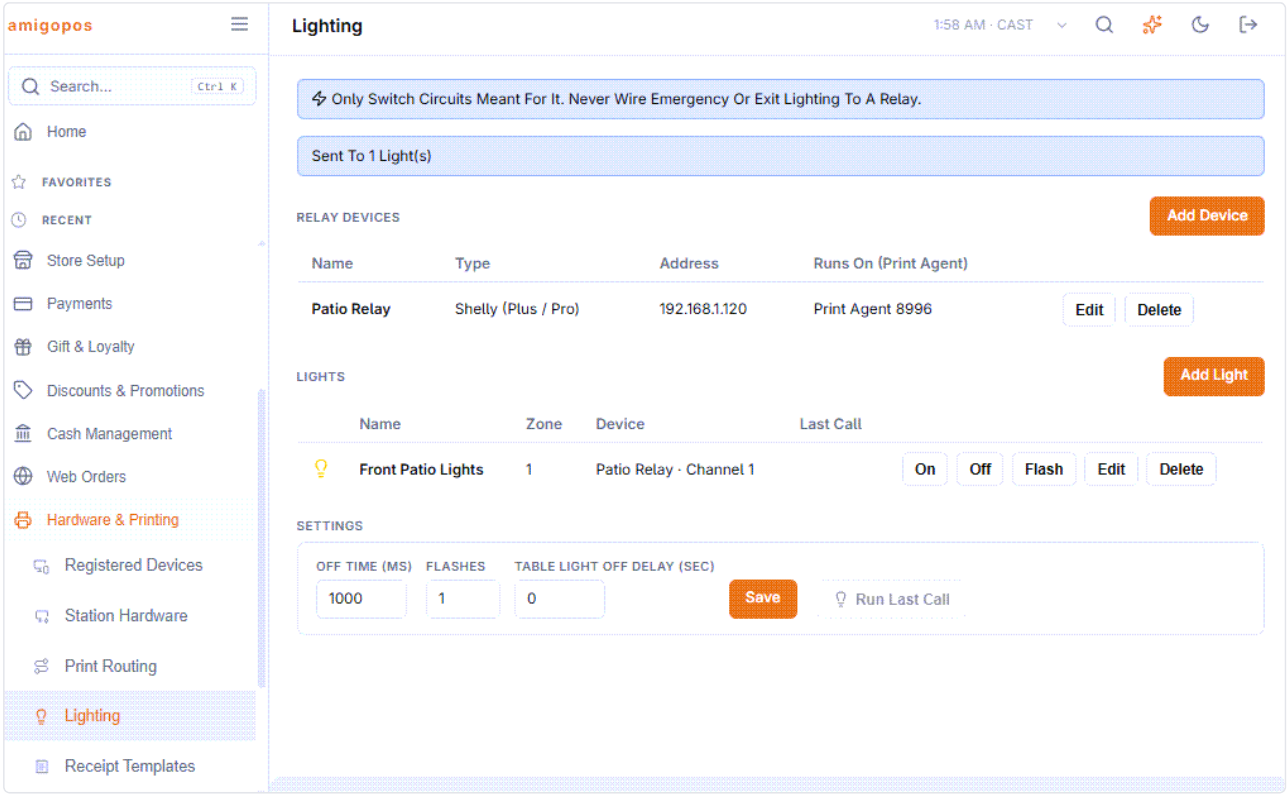
Open **Back Office › Hardware & Printing › Lighting** and tap **Add Device** under **Relay Devices**.



The fields

Field	What to enter
Name	Anything staff will recognise: *Pool room relay*, *Bar ceiling*.
Type	**Shelly (Plus / Pro)**, **Shelly (Gen 1)**, **Tasmota** or **Custom (URLs)**. See Choosing relays.
Address	The device's local address, for example `192.168.1.50`. Not asked for Custom devices, whose addresses are on each light.
Channels	How many relays the device has (1 to 32). Not asked for Custom.
Username / Password	Only if the device has a login set. Leave blank otherwise.
Runs On (Print Agent)	The store's Print Agent that sends this device its commands. It must be on the same network. If the store has one agent, it is chosen for you.

Save. The device appears in the list with its type, address and agent.



Things to know

- A device with no Print Agent shows **No Print Agent** in red: its lights cannot be switched until you choose one.
- Deleting a device deletes its lights too, after a confirmation.
- Passwords are stored for the store and sent only to its Print Agent.
- Editing, adding and deleting devices needs **Back Office Config** or manager access.

> Set the device's address as a reservation in the router first. A relay that changes address after a power cut silently stops answering.

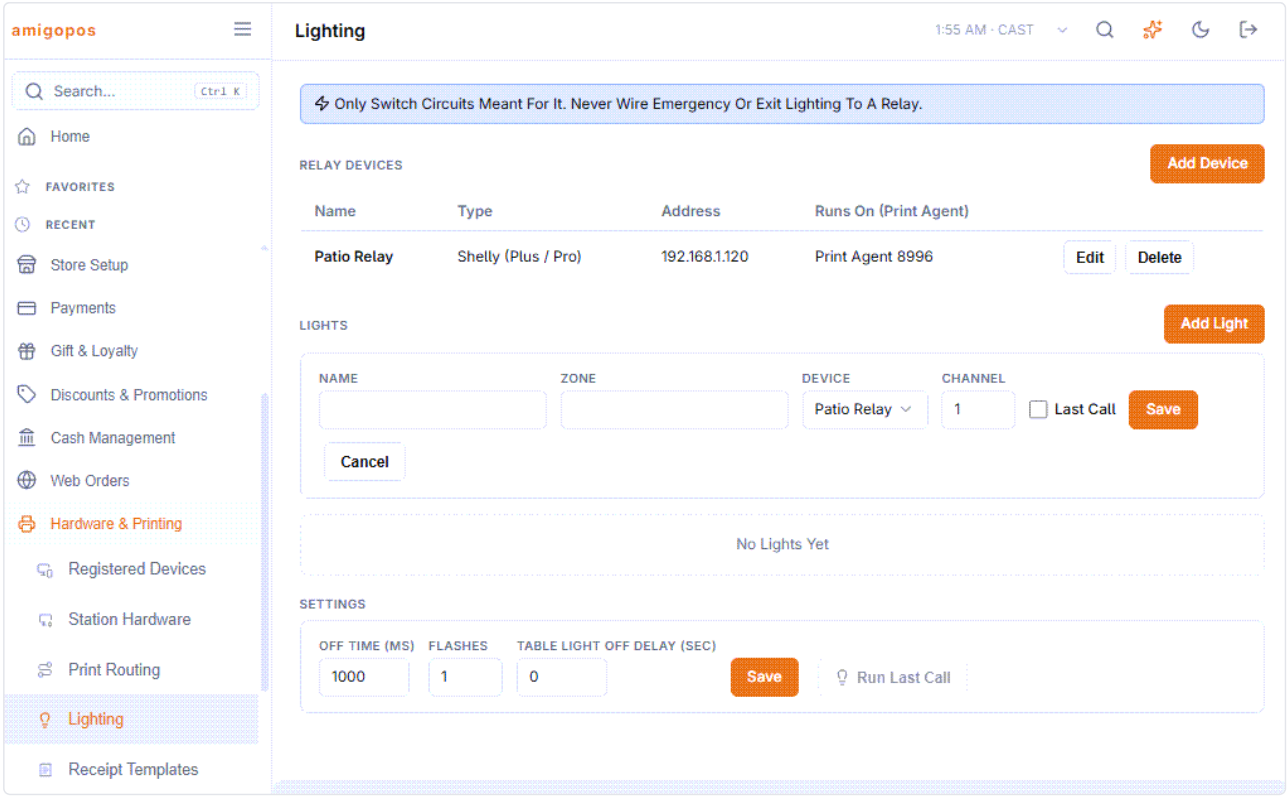
Adding lights and zones

Hardware & Printing › Lighting and Last Call

View online ↗

A light is one channel on a device. Name it, group it into a zone, mark it for Last Call, and test it with the On, Off and Flash buttons.

Under **Lights**, tap **Add Light** (available once there is a device).

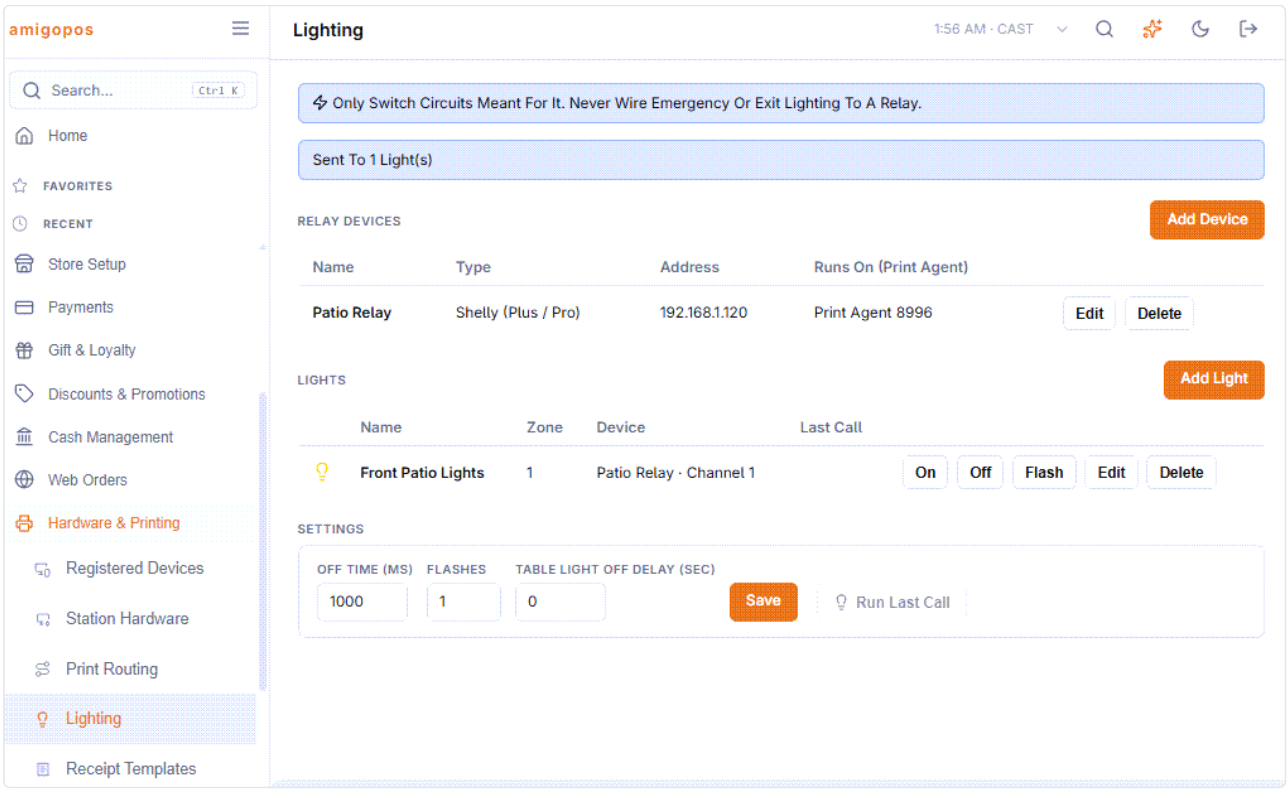


The fields

Field	What to enter
Name	What staff see on the POS: *Pool Table 3*, *Patio string lights*.
Zone	A group name — *Main Room*, *Patio*, *Pool Hall*. Lights with the same zone can be switched together. Existing zones are suggested as you type. Leave blank for none.
Device	Which relay device the light is on.
Channel	Which relay on that device, starting at 1. A new light takes the next free channel.
On URL / Off URL	Custom devices only, instead of Channel: the full addresses that switch this light on and off.
Last Call	Tick for lights that should flash at Last Call.

Testing

Every light in the list has **On**, **Off** and **Flash** buttons. Use them after adding each light: the status line above says how many lights the command went to.



- *Sent To 1 Light(s)* — the command reached the Print Agent. If the light did nothing, see Lighting troubleshooting.
- *1 Light(s) Skipped: Their Device Has No Print Agent* — choose a Print Agent on the device.
- *You Don't Have Permission To Control The Lights* — see The Lights panel at the POS.

The bulb icon

The bulb beside each light is **yellow** when it was last switched on, **dim** when last switched off, and **faint** when CloudPos has never switched it. It shows what CloudPos last sent, not a reading from the light: a wall switch or a power cut is not seen.

Zones

A zone is just the shared name. There is nothing else to set up: type the same zone on each light. On the POS, a zone with more than one light gets **All On** and **All Off**.

Last Call

Hardware & Printing › Lighting and Last Call

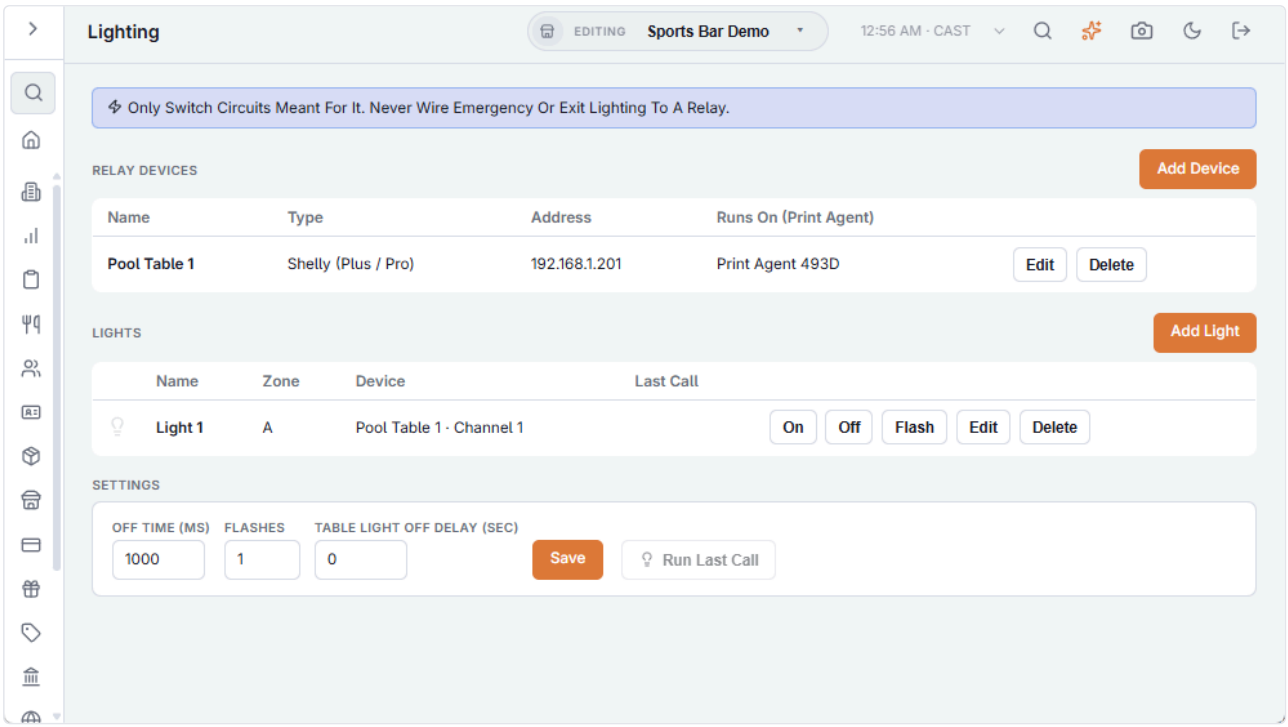
View online ↗

Flash the room lights for a moment to call last orders: which lights flash, how long, how many times, and how it keeps the room from being left dark.

Last Call turns the chosen lights off for a moment and back on — the signal every regular in a bar knows.

Setting it up

1. In **Back Office › Hardware & Printing › Lighting**, edit each light that should flash and tick **Last Call**.
2. Under **Settings**, set **Off Time (Ms)** — how long the lights stay off in each flash, 200 to 5000 milliseconds (1000 is one second) — and **Flashes**, 1 to 5.
3. Save, then tap **Run Last Call** to see it.



Running it during service

1. On the POS, open **More › Lights**.
2. Tap the orange **Last Call** button.
3. Confirm *Flash The Last Call Lights Now?*

The confirmation is there so a stray tap never flashes a full room.

The room is never left dark

- **Shelly and Tasmota** get one command per flash: “off, then back on by yourself after the off time”. The relay does the timing, so the lights come back even if the network drops in the middle.
- Shelly (Gen 1) can only count whole seconds; a shorter off time is rounded up to one second.
- **Custom** devices get “off”, a wait, then “on”; the “on” is retried up to three times.
- With several flashes, the lights stay on for the same time between flashes.
- Every flash ends with the light on — including a light that was off before.

> Put only lights on Last Call that are safe to turn off with a full room. Never emergency or exit lighting.

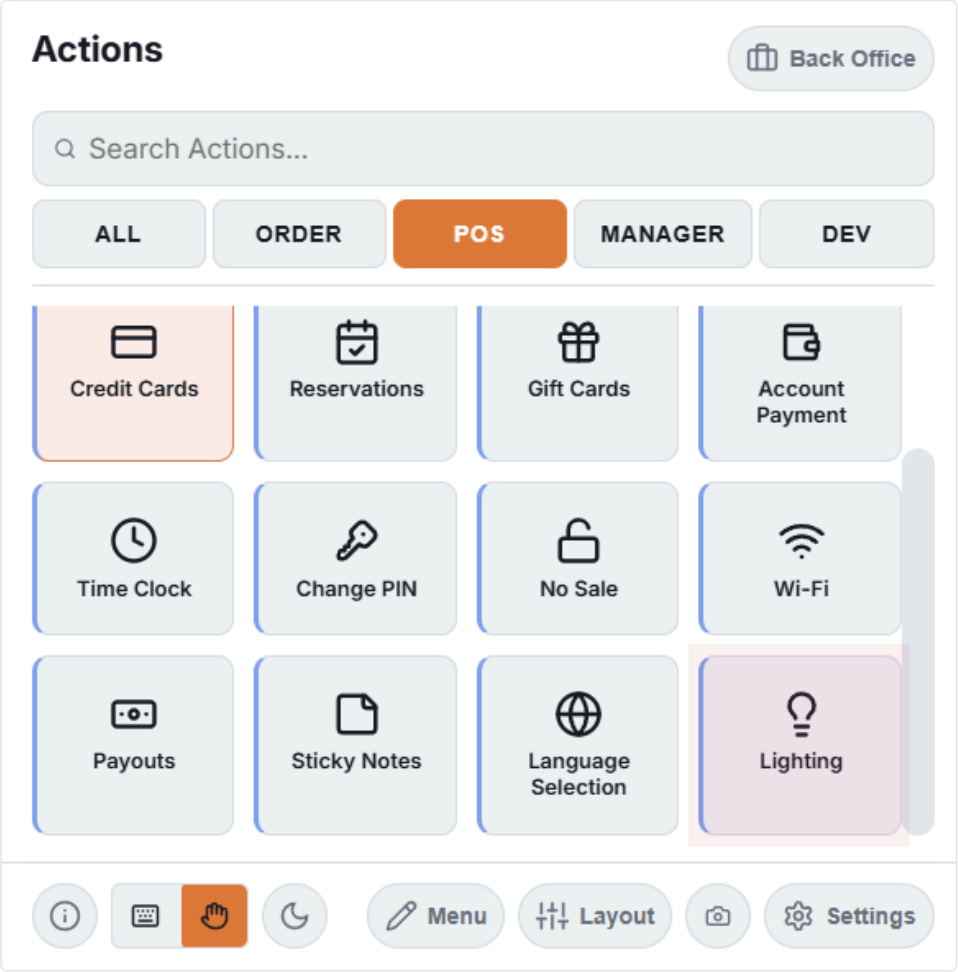
The Lights panel at the POS

Hardware & Printing › Lighting and Last Call

View online ↗

More › Lights: Last Call, All On / All Off per zone, On / Off per light, what the bulbs mean, and who can use it.

Open **More › Lights** (in the POS group of the More menu).



What is on it

- **Last Call** — the large orange button at the top, shown when at least one light is marked for Last Call. See Last Call.
- One box per **zone**, with **All On** and **All Off** when the zone has more than one light. Lights without a zone are listed last under **Other Lights**.
- **On** and **Off** for each light.
- A status line after each command: how many lights it went to, or why it did not go.

The bulbs

Yellow: last switched on. **Dim**: last switched off. **Faint**: never switched from CloudPos. The bulb is what CloudPos last sent, not a reading, so a light switched at the wall still shows its last CloudPos state.

Who can use it

- **Managers** always see Lights.
- Anyone else needs the **Light Control** permission on their job (Manager Screen group in the permission editor) — for example the bartender who calls last call.
- The server checks the permission too, not just the menu.

> Table lights that follow a pool timer need no permission: they switch for whoever starts or stops the game. See Table lights that follow the timer.

Table lights that follow the timer

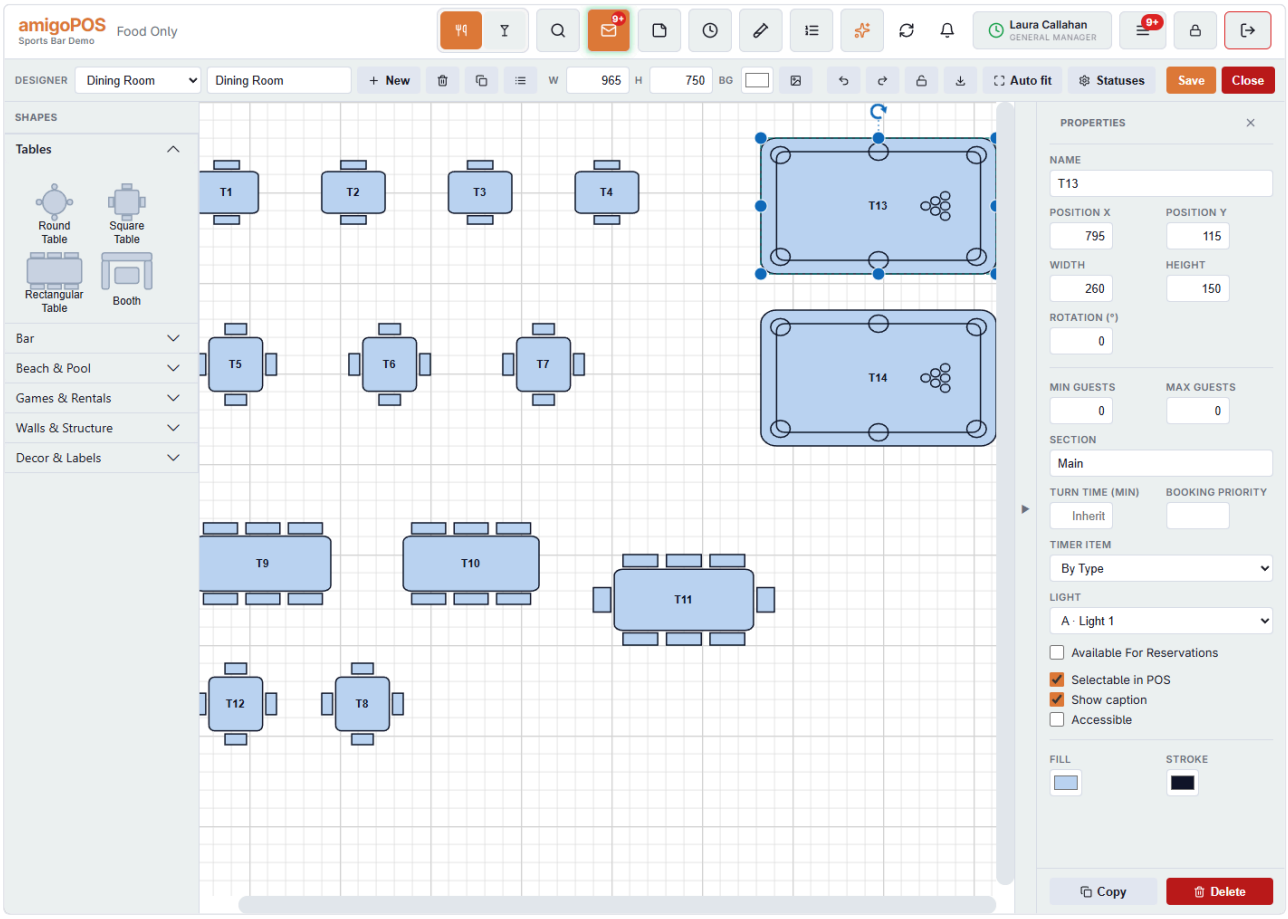
Hardware & Printing › Lighting and Last Call

View online ↗

Link a light to a pool table or lane: it turns on when a game starts and off when the last timer on the check stops, optionally after a delay.

Linking the light

1. Add the light in **Back Office › Hardware & Printing › Lighting** (see Adding lights and zones).
2. Open the seating designer, select the pool table (or lane, room…), and choose the lamp in **Light** — lights are listed as *Zone · Name*.
3. Save the room.



Light appears with Timer Item, on timed shapes. Copying a table does not copy its light, so two tables never share a lamp by accident.

What happens

- **On** when a timer starts at that table — from Start Timer, from the time-based menu, or when a reservation is seated.
- **Off** when the **last** running timer on the order stops — with Stop Timer, or when the POS stops the timers to settle.
- **Pause** leaves the light on.
- Nothing happens for an order with no table, or a table with no light.

Keeping the light on a little longer

Table Light Off Delay (Sec) in the Lighting Settings card keeps the light on for that long after the last timer stops (0 to 1800 seconds; 0 turns it off at once). It gives players time to gather their things.

- A new game at the same table during the wait cancels the pending off, so the light never goes out mid-game.
- The wait happens on the Print Agent and does not hold up other light commands.
- If the Print Agent restarts during the wait, the light simply stays on.

> A lit table also tells staff across the room which tables are in play — and a table that is lit with no timer running is worth a look.

What CloudPos sends, and testing on the bench

View online ↗

The exact web addresses sent to each type of relay, how Custom devices work, and how to test with LEDs before touching the lights.

For each command CloudPos builds a web address from the device's **Type** and **Address**, the light's **Channel**, and the action. The Print Agent sends it as a plain web request on the store network.

The addresses (device at 192.168.1.50, channel 1)

Type	On	Off	Flash (off 1 second)
Shelly (Plus / Pro)	`/rpc/Switch.Set?id=0&on=true`	`…&on=false`	`…?id=0&on=false&toggle_after=1`
Shelly (Gen 1)	`/relay/0?turn=on`	`…?turn=off`	`…?turn=off&timer=1`
Tasmota	`/cm?cmnd=Power1%20On`	`…Power1%20Off`	`/cm?cmnd=Backlog Power1 Off;Delay 10;Power1 On`
Custom	the light's On URL	the light's Off URL	Off URL, wait, On URL

Channel 2 becomes id 1 on Shelly and Power2 on Tasmota, and so on. Each address starts with `http://` and the device address.

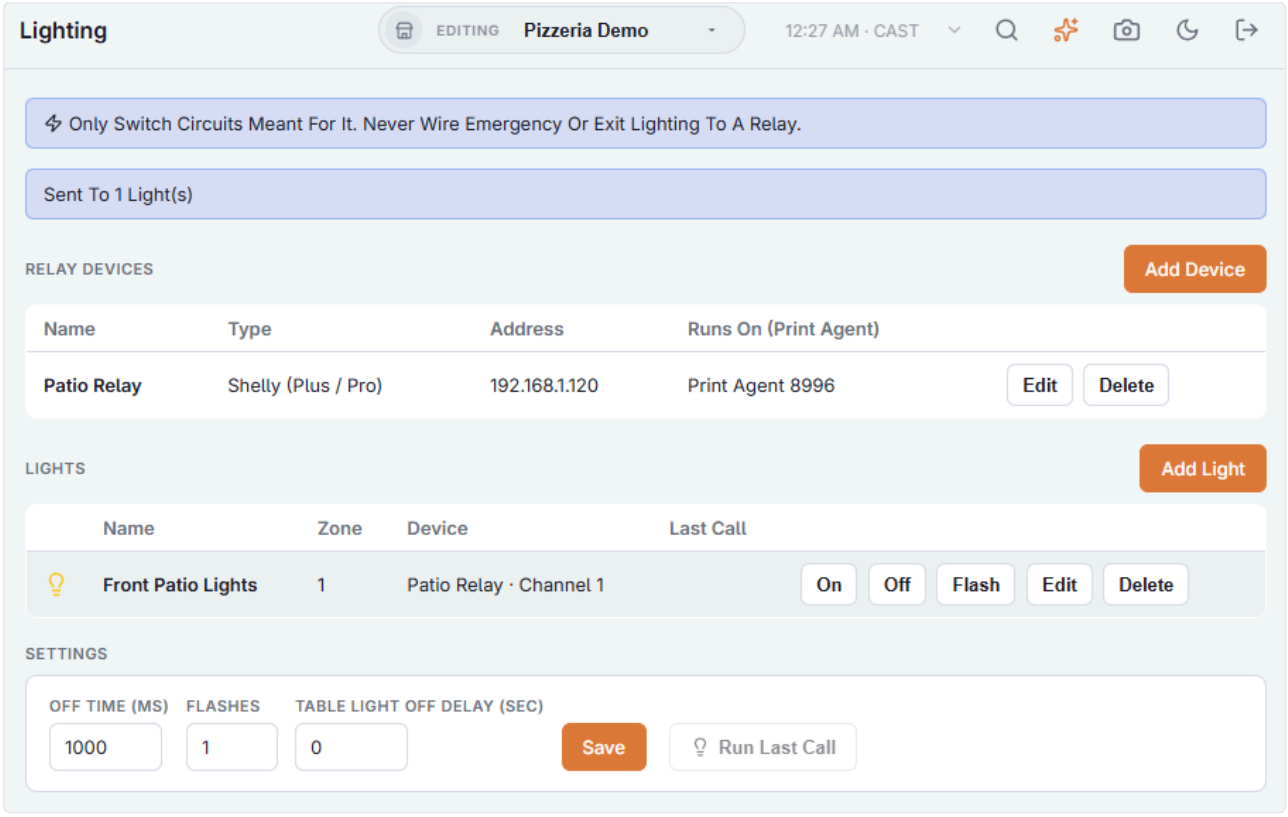
- **Logins:** Shelly and Custom devices get the username and password as a normal web login; Tasmota gets them in the address, the way Tasmota expects.
- **Custom devices** take any address that switches the light with a plain web request. If the device wants its login in the address, put it in the URLs.
- Each request waits up to three seconds for an answer.

Testing on the bench

You can prove the whole chain with LEDs on a breadboard before an electrician touches the lights:

- An **ESP8266 or ESP32** board flashed with Tasmota, with a few pins set as Relay1–4 and an LED on each. Add it as type **Tasmota**.
- Or any microcontroller with Wi-Fi programmed to answer the Shelly addresses above, then added as **Shelly (Plus / Pro)**.

Add the board as a device (it must be on the same network as the Print Agent, with a local address), add one light per LED, and use the On / Off / Flash buttons and Run Last Call.



Lighting troubleshooting

Hardware & Printing › Lighting and Last Call

View online ↗

Nothing happens, some lights skipped, permission messages, bulbs that do not match the room, and lights left on.

The status says Sent, but nothing happened

- **The Print Agent is offline** — check it is running and connected (its Status screen).
- **Wrong network** — the agent and the relay must be on the same local network. The agent refuses any address that is not local, and records the refusal in its log.
- **Wrong address** — the relay's address changed after a power cut. Give it a fixed address in the router and update the device.
- **Wrong channel** — try the other channel numbers with the test buttons.
- **Wrong type** — a newer Shelly set as Gen 1 (or the reverse) ignores the command.
- **Login** — the device has a password set that is not entered in CloudPos, or the reverse.

Skipped: their device has no Print Agent

Edit the device and choose **Runs On (Print Agent)**.

You Don't Have Permission To Control The Lights

The signed-in employee needs the **Light Control** permission, manager access or Back Office Config. See The Lights panel at the POS.

The bulb does not match the room

The bulb shows what CloudPos last sent. A wall switch, a power cut or the relay's own button are not seen. Tap On or Off to bring them back in step.

A light came on during Last Call

Every flash ends with the light on, including lights that were off. Untick Last Call on lights that are normally off at closing time.

A table light stayed on

- Another timer on the same order is still running.
- A **Table Light Off Delay** is set: the light turns off when it runs out.

- The Print Agent restarted during the delay: switch the light off from the Lights panel.

The Lights button is missing on the POS

It only shows for managers and for jobs with the Light Control permission.

The designer shows no Light setting

- Light only appears on timed shapes (pool tables, lanes, rooms…).
- The store has no lights yet, or the signed-in employee may not list them (manager, Light Control or Back Office Config).

CHAPTER 23

Integrations

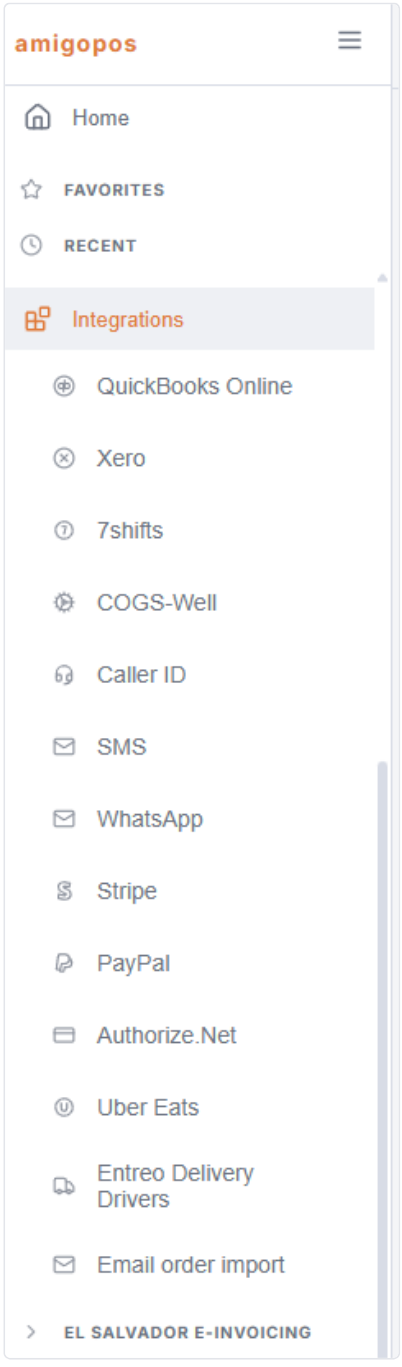
Integrations Overview

Integrations

View online ↗

What each integration does, what it needs, and where to configure it.

Back Office › Integrations holds one page for each outside service the store can connect to: accounting, scheduling, food cost, phones, messaging, online payments, delivery platforms and electronic invoicing. Each store connects on its own, with its own accounts and keys. The section is for jobs with the **Configuration** permission.



The pages

Page	What it does	When it runs
QuickBooks Online	Posts one journal entry per business day to the connected QuickBooks company. See QuickBooks Online Overview.	At End of Day, or by hand
Xero	Posts a daily sales invoice with one payment per tender, a credit note on days with refunds, and optionally supplier bills and a payroll journal. See Xero Overview.	At End of Day, or by hand
7shifts	Sends time punches and sales receipts to 7shifts, links employees and jobs, and can check the 7shifts schedule at clock-in. See 7shifts Overview.	As things happen
COGS-Well	Builds the day's per-item sales mix, which COGS-Well collects. See COGS-Well Overview.	At End of Day; COGS-Well collects once a day
Caller ID	Shows incoming calls on the registers, from FreePBX, 3CX or a CallerID.com box. See How caller ID works.	While the phone rings
SMS	Turns text messages on for the store and chooses which actions may send one. See SMS settings. Texts are charged per message and listed on the SMS log and message costs.	When an action sends a text
WhatsApp	Sends pay links, confirmations, reservation and order messages from the store's own WhatsApp Business account. See WhatsApp: how it works.	When a message is sent
Stripe	Card payments at web checkout, with Apple Pay and Google Pay, and QR pay at the table. See Integrations: Stripe, PayPal, Authorize.Net.	When a guest pays
PayPal	PayPal at web checkout.	When a guest pays
Authorize.Net	Card payments at web checkout.	When a guest pays
Uber Eats	Publishes the menu, receives orders, keeps hours and availability in step, and pulls payout reports. See Uber Eats — overview.	As things happen
Entreo Delivery Drivers	Hands delivery orders to Entreo's drivers and shows their progress. See How Entreo deliveries work.	As things happen
Email order import	Turns DoorDash and Grubhub confirmation emails into tickets that wait for approval at the POS. See Email order import — overview.	When an email arrives
El Salvador e-Invoicing	Five pages that issue electronic documents signed by the store and sealed by Ministerio de Hacienda. See Electronic invoicing overview.	When a sale is settled, voided or refunded

> DC Direct card terminals are set up on a card payment method under **Back Office › Payments › Payment Methods**, not here. See DC Direct card terminals: how they work.

Good to know

- **One store at a time.** Settings, keys and connections belong to the store you are working in. With several stores, choose the store first and repeat the setup for each.
- **Keys stay on the server.** Access tokens and secret keys are saved with the store and are not sent to the registers.
- **Queued, then retried.** QuickBooks, Xero and 7shifts put their work in a queue. A failed request is tried again on its own, with longer waits each time, for about eight hours before it is marked as failed. A QuickBooks day that fails because accounts are not mapped is marked as failed at once, with a single alert. Each page has an **Activity** tab that shows the queue.
- **Charges.** Text messages are charged per message and billed monthly; see the SMS Log. WhatsApp messages are billed to the store by Meta.

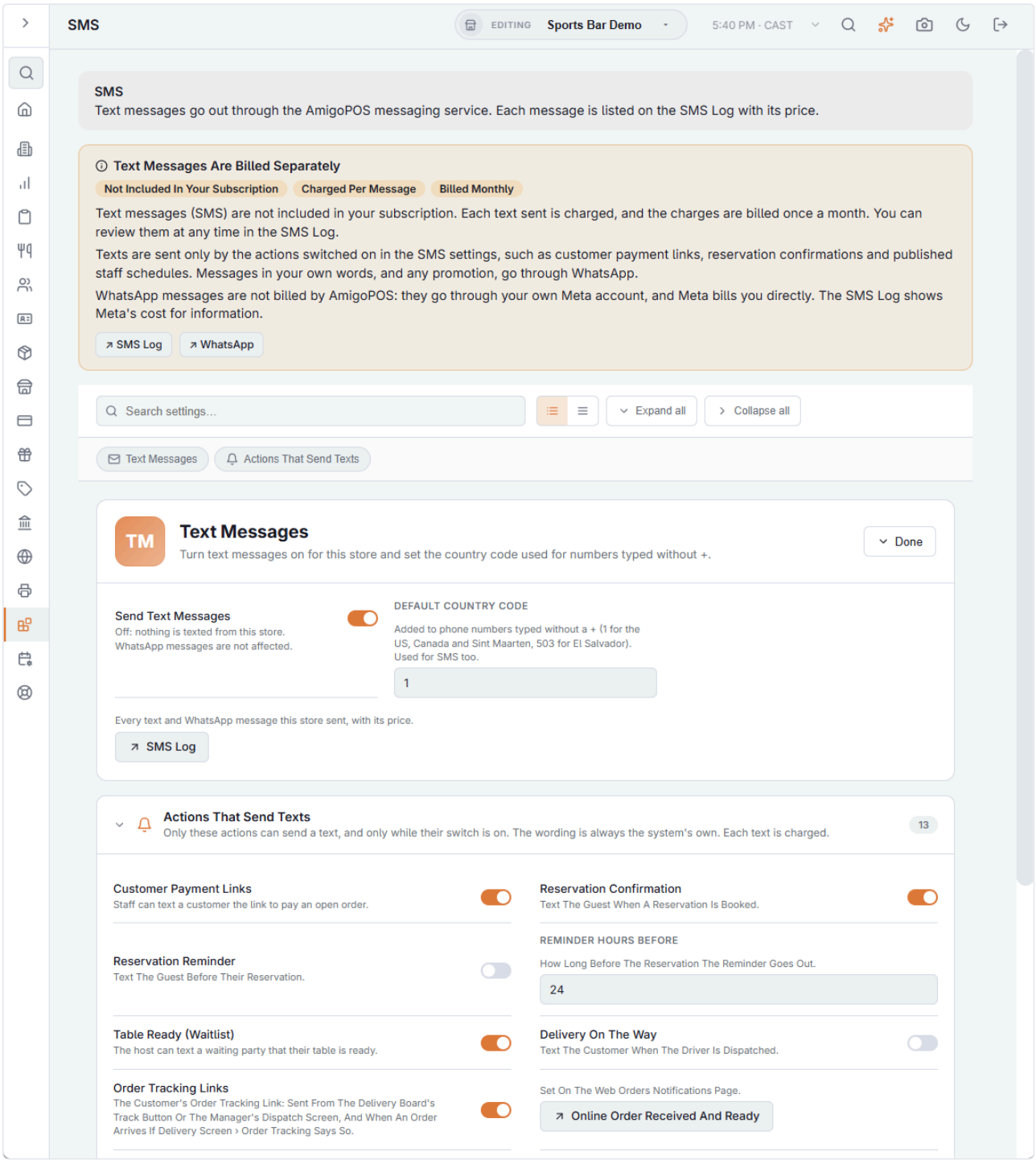
SMS settings

Integrations

View online ↗

Turn text messages on for the store, choose which actions may send one, and send a test.

Back Office › Integrations › SMS turns text messages on or off for the store and shows every action that can send one. Texts go out through the AmigoPOS messaging service: there are no accounts or keys to enter. Each text is charged and listed with its price on the SMS log and message costs.



What texts cost

The banner at the top says it plainly: text messages are **not included in your subscription**, are **charged per message** and are **billed monthly**. WhatsApp messages are not billed by AmigoPOS; they go through the store's own Meta account and Meta bills the store directly. The buttons on the banner open the SMS Log and the WhatsApp page.

Text Messages

- **Send Text Messages** — the store's master switch. Off, nothing is texted from the store. WhatsApp messages are not affected.

- **Default Country Code** — added to phone numbers typed without a `+`: 1 for the US, Canada and Sint Maarten, 503 for El Salvador. WhatsApp uses it too.
- **SMS Log** — opens the list of every text and WhatsApp message the store sent, with its price.

Each setting saves as soon as it is changed.

Actions That Send Texts

Only the actions in this list can send a text, and only while their switch is on. The wording is always the system's own; there is no free-text SMS.

Action	What it sends	Starts
Customer Payment Links	Staff text a customer the link to pay an open order.	On
Reservation Confirmation	A text to the guest when a reservation is booked.	On
Reservation Reminder	A text before the reservation. **Reminder Hours Before** (1 to 168) sets how long before.	Off
Table Ready (Waitlist)	The host texts a waiting party that their table is ready.	On
Delivery On The Way	A text to the customer when the driver is dispatched.	Off
Order Tracking Links	The customer's order tracking link, from the delivery board's track button or the manager's dispatch screen, and when an order arrives if the Delivery Screen's order tracking setting says so.	On
Online Order Received And Ready	Set on the Web Orders Notifications page; the row opens it. See Notifications (email/SMS).	—
Card Payment Approvals (Credomatic)	Staff text a customer the approval of a card-not-present payment.	On
Digital Gift Cards	A digital gift card sent by text: the amount, the card number and the Activate link.	On
Schedule Published	Each employee's shifts when a week is published.	Off
Employee Phone Access Invites	A manager texts an employee their invite to the staff site.	On

The last row, **WhatsApp**, opens the WhatsApp page: messages in the store's own words, and promotions, go through its WhatsApp templates.

> Pay links, reservation messages and order messages can go by WhatsApp instead of text. That choice is made on the WhatsApp page; see Choosing which messages go by WhatsApp.

Send A Test Message

1. Check the country code beside the number box. It starts as the store's default; it is ignored when the number starts with `+`.
2. Type a **Mobile Number** and press **Test SMS**.
3. When it is sent, check the phone, then press **SMS Log** to see the delivery status.

> The test sends one real text. It is charged and listed on the SMS Log like any other.

Credomatic (card not present)

Integrations

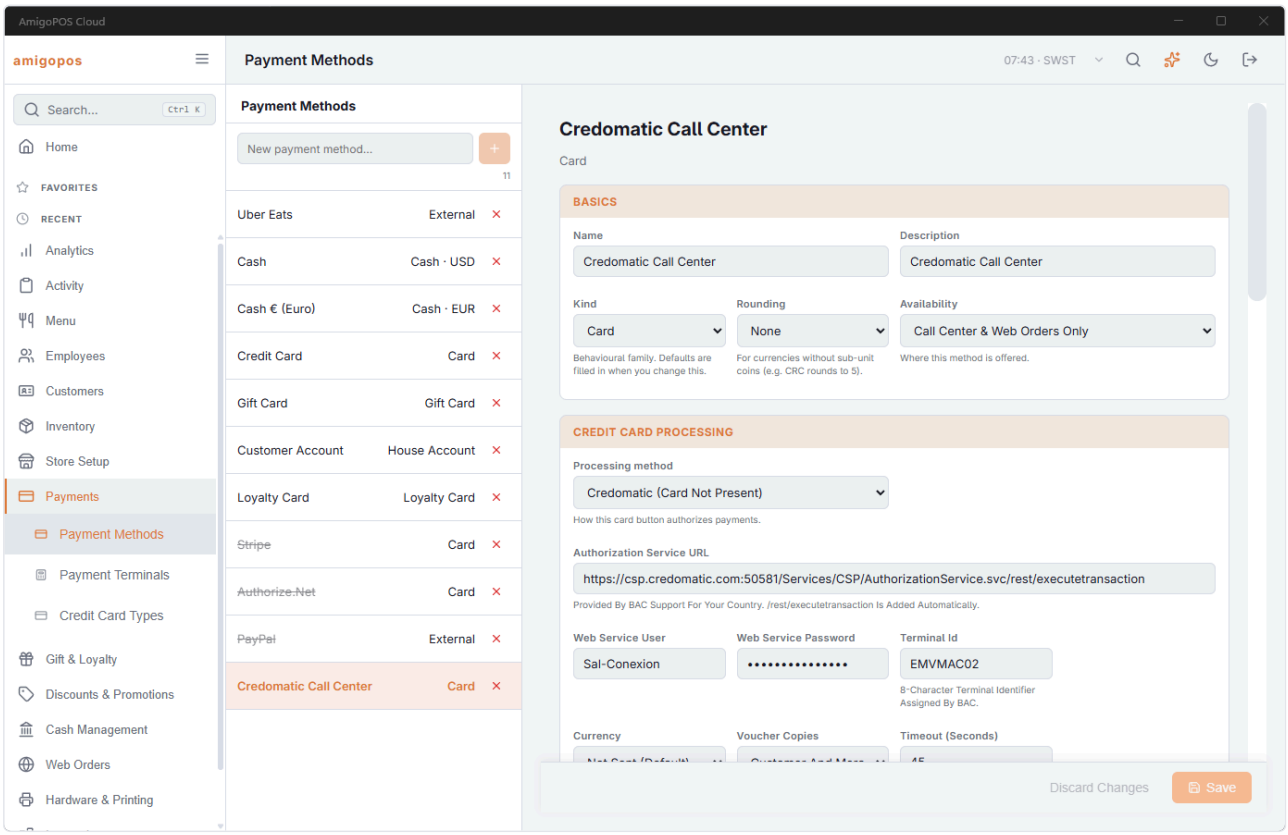
View online ↗

Take card payments over the phone through BAC Credomatic: setup, the call-center flow, vouchers, voids and batch settlement.

Credomatic (BAC) card-not-present processing lets the call center charge a card the customer reads over the phone. The card number never touches the station: it is sent once to the server, which talks to Credomatic and keeps only the masked number and the bank's reference codes. A separate card-present (terminal) integration may be added later; this topic covers keyed, card-not-present payments only.

Setup

1. Open **Back Office › Payments › Payment Methods** and add a **Card** method (for example “Credomatic Call Center”).
2. Set **Availability** to *Call Center & Web Orders Only* so it is not offered on the in-store settle screen.
3. Under **Credit Card Processing** choose **Credomatic (Card Not Present)** and enter the values BAC support provides for your country: the authorization service URL, web-service user and password, and the 8-character terminal id.
4. Turn on **Show on quick-pay overlay** so the method appears on the call-center Submit Order screen.
5. Save.

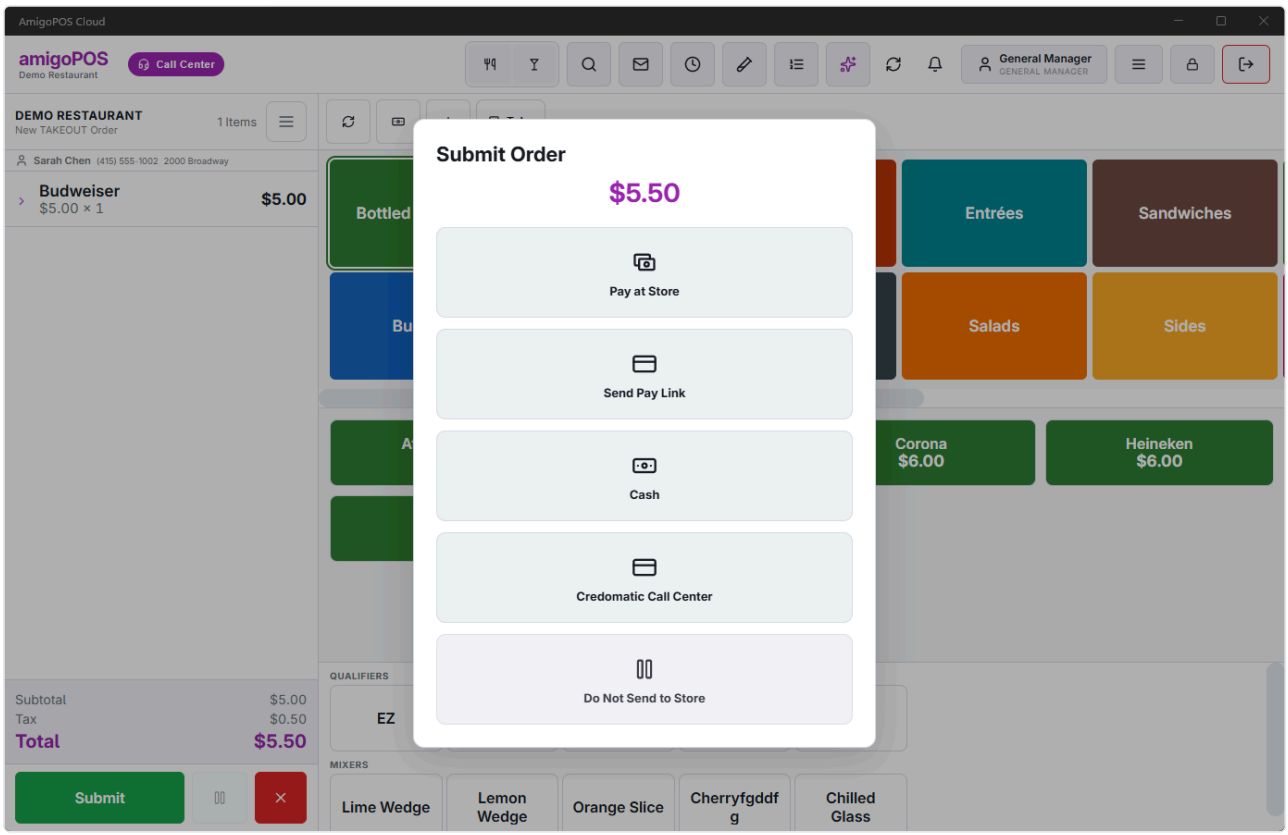


Leave **Currency** on *Not Sent* and **Send Tax Amount** off unless BAC asks for them; some hosts reject a sale that carries either field. **Fetch Voucher After Approval** retrieves the printable voucher for every approved payment. **Reverse On Timeout** sends a reversal when the bank does not answer, so an unconfirmed sale cannot stay on the customer’s card.

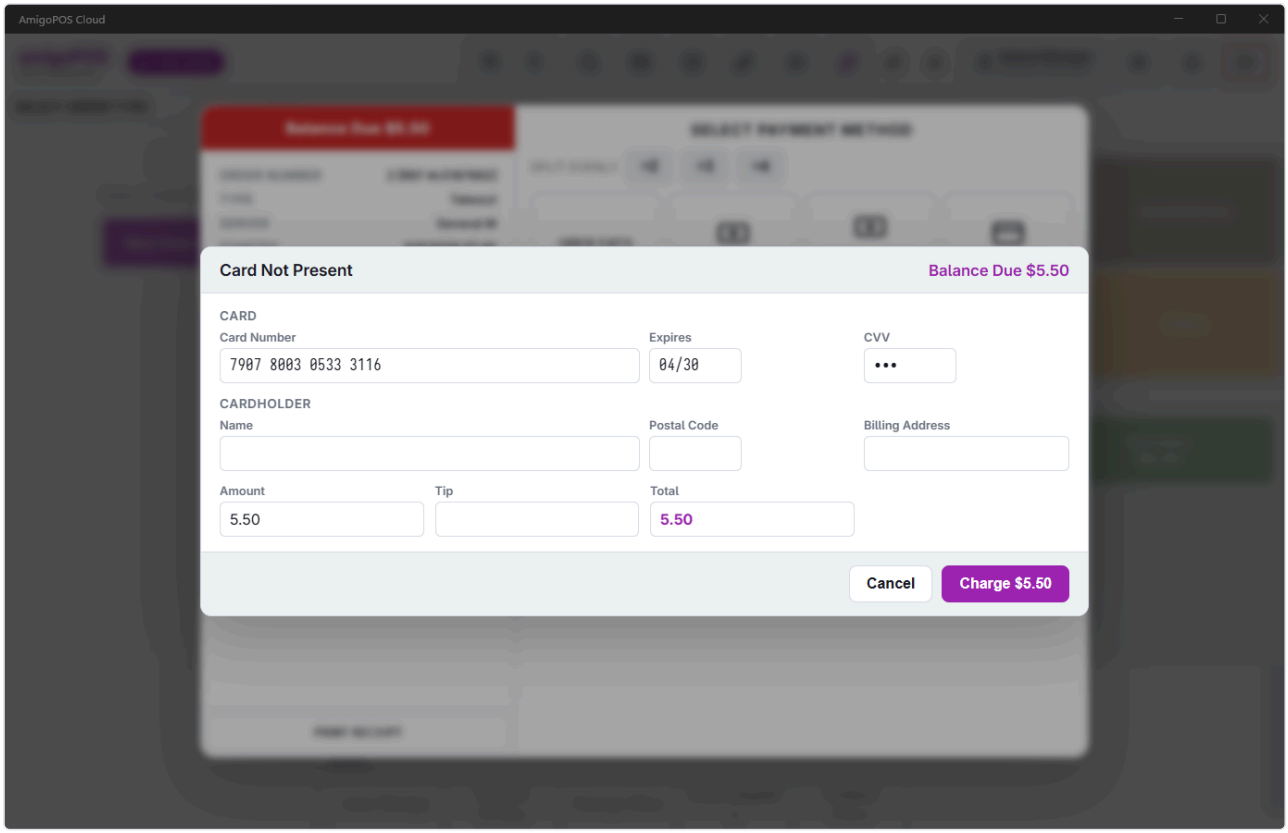
> Test credentials only work against the bank’s development host and are shared with other developers. Ask BAC for production credentials before the store goes live.

Taking a payment from the call center

Enter the order as usual and press **Submit**. The Submit Order screen shows the Credomatic method next to *Pay at Store* and *Send Pay Link*.

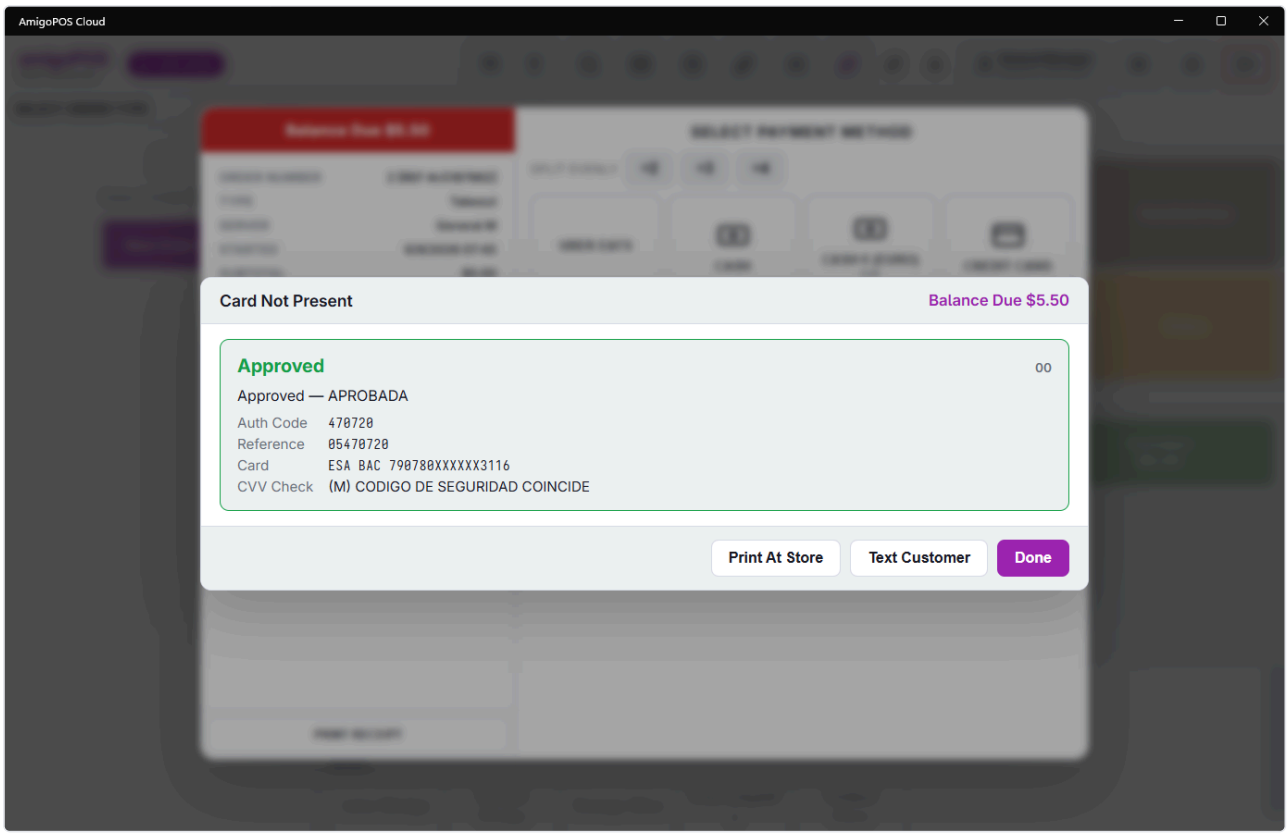


1. Tap the Credomatic button. The order is saved *on hold* — nothing reaches the kitchen yet.
2. Key the card number, expiry (MM/YY), security code, cardholder name and, if you have them, postal code and billing address. If the method allows tips, enter the gratuity; the total updates as you type.
3. Press **Charge**. The screen shows *Contacting Credomatic…* until the bank answers.



Reading the result

- **Approved** — the auth code, reference and masked card are shown, plus the bank's security-code and address checks when they were sent. Tap **Done**: the payment is recorded, the order is released to the store and its prep tickets print there.
- **Ask For Identification** — the bank approved the payment but wants the cardholder's identity verified. Ask the customer for identifying details; if anything is doubtful, void the payment from the Credit Cards screen.
- **Partial approval** — the bank approved less than the total. The approved amount is recorded and the remaining balance stays on the order for another tender.
- **Declined** — the bank's reason is shown. **Try Again** returns to the card fields; **Cancel** leaves the order in the held list so nothing was sent to the kitchen.



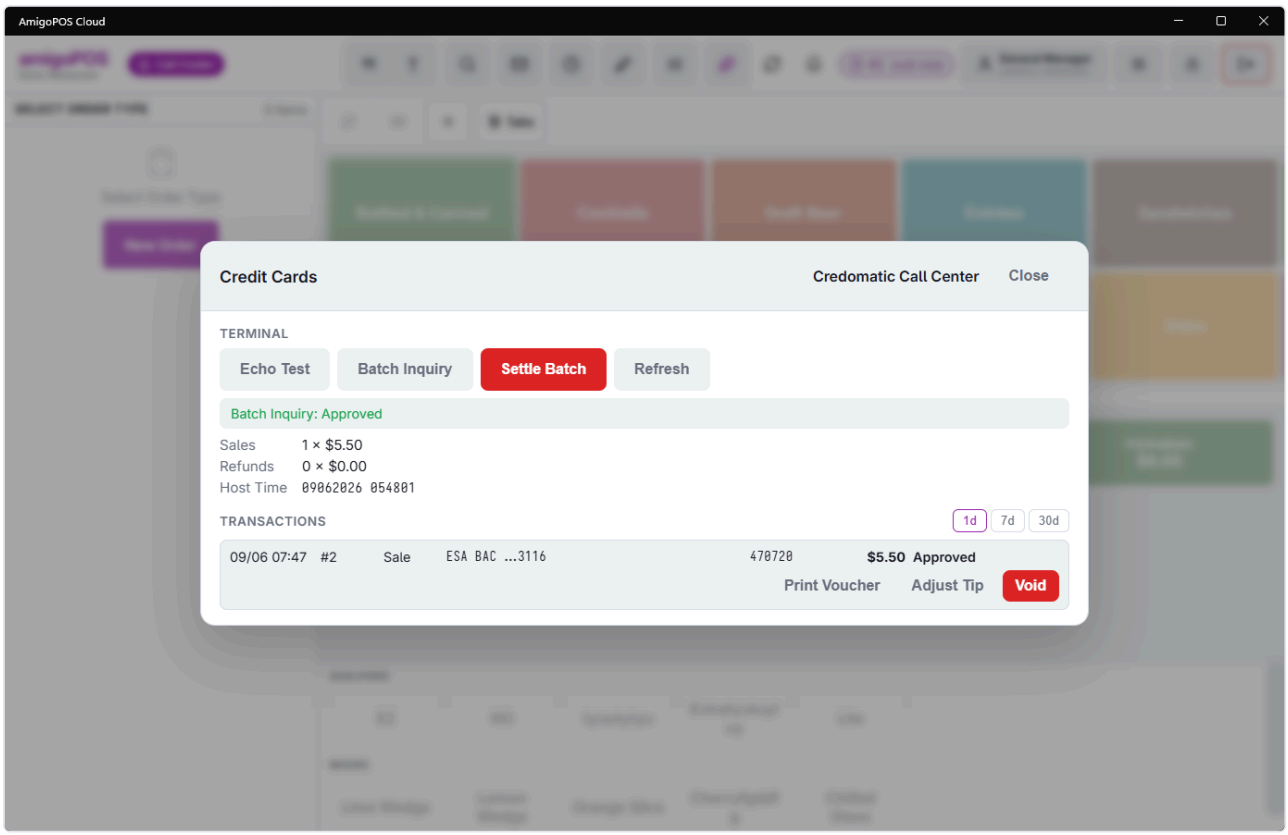
Vouchers

The merchant copy of the voucher prints automatically on the store's receipt printer when the order is released. From the approved screen, **Print At Store** prints it again and **Text Customer** sends a short approval message (amount, card, auth code) to the customer's mobile through the store's text-message service. Leave the number blank to use the one on the customer's record.

Credit Cards screen

On the POS, open **More › Credit Cards**. It works on a store station and on a call-center station.

- **Echo Test** — confirms the terminal can reach the bank.
- **Batch Inquiry** — the open batch totals (count and amount of sales and refunds).
- **Settle Batch** — closes the batch and submits it for deposit. Ask BAC whether your terminal settles automatically before using this. It needs the **Credit Card Batch** permission, or a manager's approval.
- The transaction list shows each card payment with **Print Voucher**, **Adjust Tip** (only for methods that allow tips) and **Void**. Void requires the **Void Transactions** permission, voids the payment at the bank first and then on the order; if the bank refuses, nothing changes.
- **Adjust Tip** needs **Adjust Credit Card Tip**, and voiding or changing the tip on a payment another employee took also needs **Other Users' Credit Cards**. Without them, a manager approves; a refused tip change shows **Permission required**.



A card payment can also be voided from the settle screen's transaction list; the same bank-first rule applies.

> Refunds to a card need the card number again — Credomatic does not keep the card on file. Same-day cancellations should be voids, not refunds.

Integrations: Stripe, PayPal, Authorize.Net

Integrations

View online ↗

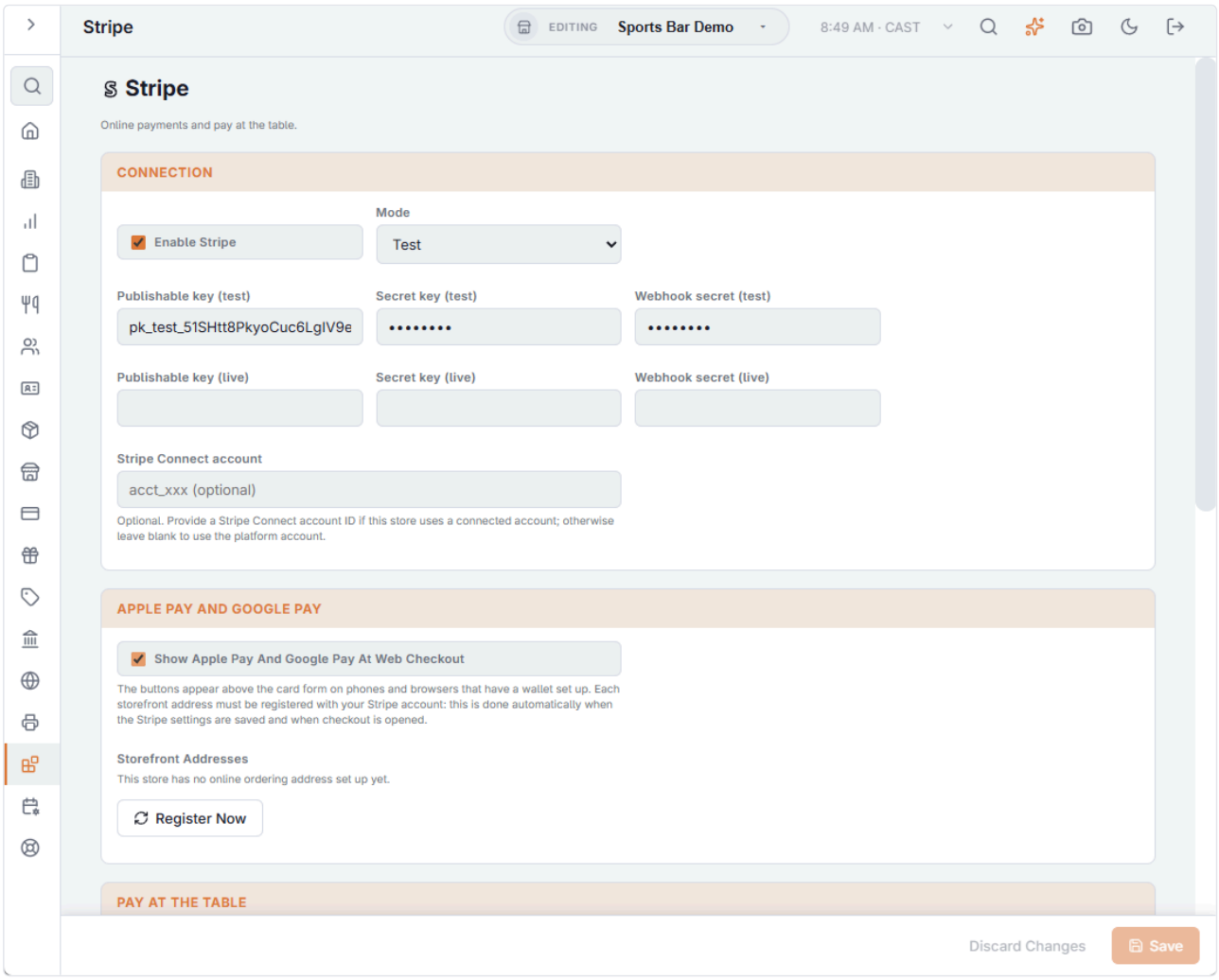
The Stripe, PayPal and Authorize.Net pages, what each processor is used for, and what the guest is offered at web checkout.

Back Office › Integrations › Stripe, **PayPal** and **Authorize.Net** hold the store's accounts with these three payment processors. All three take payments at web checkout; Stripe also runs QR pay at the table. Card terminals at the register are set up separately, on Payment methods.

How the three pages work

- Each page has an on/off switch and a **Mode**: test (**Test** on Stripe, **Sandbox** on PayPal and Authorize.Net) or **Live**. Each mode has its own keys. The keys of the mode not in use are dimmed but kept, so you can switch back.
- Each page links a **payment method**. The money taken through the processor is recorded against that payment method on the order and on the sales reports. A **Create** button makes the payment method and links it in one step. While a payment method is linked, Create is greyed out; to make a new one, choose **— not set —**, press **Save**, then press Create.
- Changes are kept with **Save** at the top of the page; **Discard Changes** puts back the saved values. The Create button and the Stripe logo take effect at once, without Save.

Stripe



Connection

- **Enable Stripe** — turns on Stripe card payments at web checkout. QR pay at the table has its own switch, below.
- **Mode** — **Test** or **Live**.
- **Publishable key**, **Secret key** and **Webhook secret**, one row for test and one for live. The keys come from the Stripe dashboard; the webhook secret comes from the webhook you create there. See Stripe setup for pay at the table.
- **Stripe Connect account** — optional. Leave it blank unless the store uses a Stripe Connect account (acct_…).

Apple Pay And Google Pay

- **Show Apple Pay And Google Pay At Web Checkout** — on by default. The wallet buttons appear above the card form on phones and browsers that have a wallet set up.
- **Storefront Addresses** — each address of the store's online ordering site, with its status for Apple Pay and Google Pay: **Active**, **Not Active** or **Not Registered**. The line under the table shows which Stripe mode was checked.
- **Register Now** registers the addresses with the store's Stripe account. It is available once Stripe is on and the page is saved. Registration also happens by itself when the Stripe settings are saved and when checkout is opened.

Pay at the table

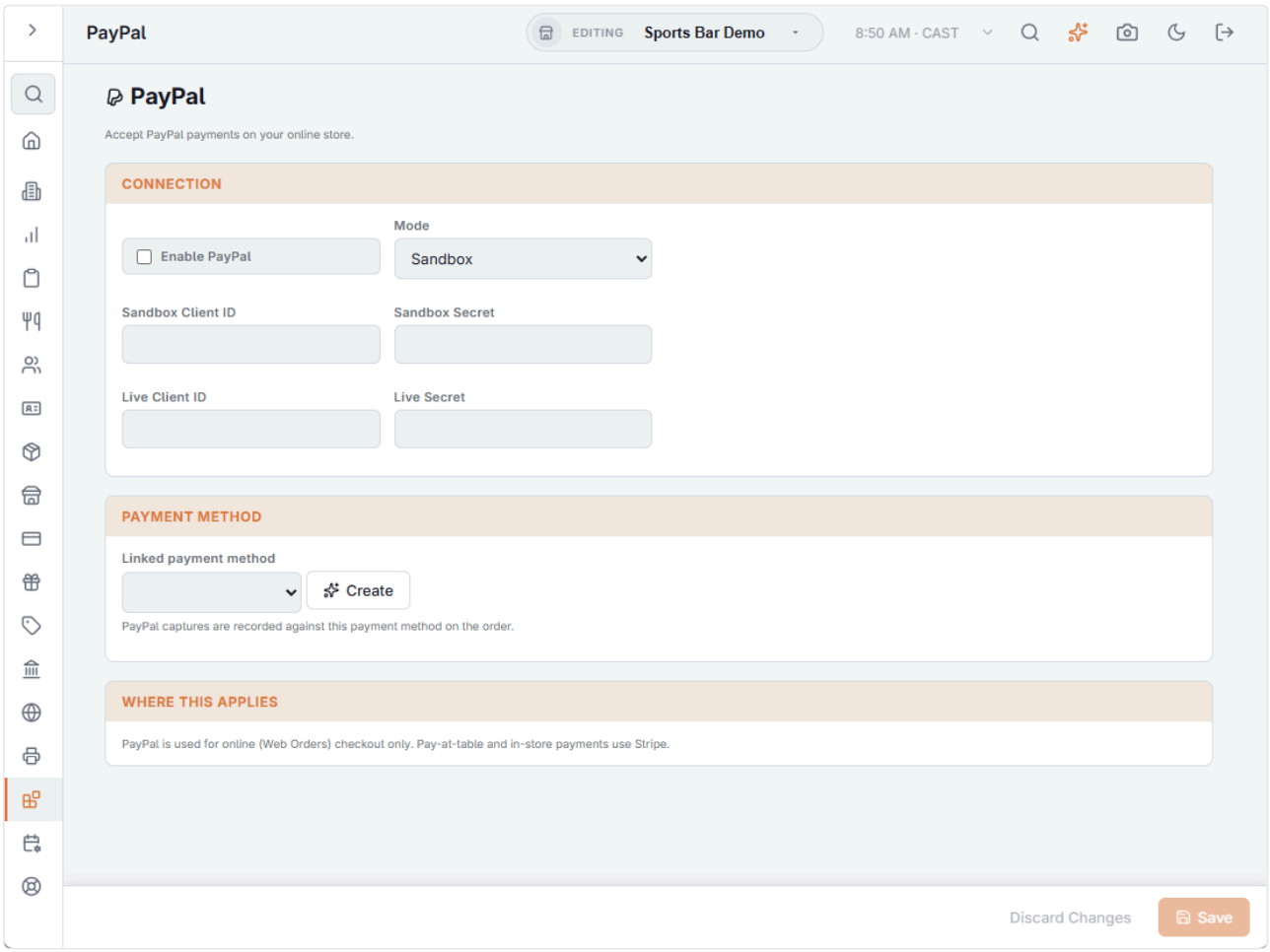
- **Enable QR pay at the table** — prints a pay QR on customer receipts of unpaid orders. See QR pay at table.
- **Public base URL** — the web address guests reach. Guest links for pay links, bookings and order tracking use it too. Left blank, the system's own address is used; the empty box shows it in grey. Typing an address overrides it.
- **Tip presets (%)** — the tip buttons on the guest pay page, separated by commas. The default is 15,18,20.

- **Session TTL** — how many minutes a guest's payment session stays open (5 to 240, default 30).
- **Logo** — **Choose file** uploads a PNG, JPG or WebP up to 1 MB for the guest pay page; **Delete** removes it.
- **Receipt footer text** — a line of text for the guest pay page.
- **Payment method (for webhook)** — the card payment method that Stripe payments are recorded against. **Create Stripe payment method** makes one named *Stripe (QR Pay)* and links it. Until a payment method is linked, Stripe payments cannot be posted to the order.

Webhook endpoint

The address to enter in the Stripe dashboard under Developers › Webhooks, and the events to send. The address is built from the public base URL, or from the system's own address while that box is blank. If neither exists, it reads **(Enter The Base URL Above First)**.

PayPal



- **Enable PayPal** and **Mode** (**Sandbox** or **Live**).
- **Sandbox Client ID** and **Sandbox Secret**, **Live Client ID** and **Live Secret**, from the PayPal developer dashboard.
- **Linked payment method** — **Create** makes a payment method named *PayPal* and links it.

PayPal shows at web checkout when it is on, the client ID for the current mode is filled in and a payment method is linked. It is for web checkout only. PayPal charges in the store's **Base Currency** (**Back Office › Store Setup › General Settings**) when PayPal supports that currency, and in US dollars otherwise.

Authorize.Net

- **Enable Authorize.Net** and **Mode** (**Sandbox** or **Live**).
- For each mode: **API Login ID**, **Transaction Key** and **Public Client Key**, from the Authorize.Net merchant interface.
- **Linked payment method** — **Create** makes a payment method named *Authorize.Net* and links it.

Authorize.Net card payments show at web checkout when it is on, the API Login ID and Public Client Key for the current mode are filled in and a payment method is linked. It is for web checkout only. The charge is in the currency of the Authorize.Net account.

What the guest is offered at web checkout

There is no separate payments page for the online ordering site. Checkout offers every processor that is switched on above with a payment method linked, plus a pay-at-the-store option when a cash payment method allows it.

- **Card** — through Stripe or Authorize.Net. The guest pays at checkout and the order reaches the register prepaid.
- **PayPal** — when the PayPal page is on with a linked payment method.
- **Pay at the store or on delivery** — offered when a cash payment method on Payment methods is available for tender and its **Availability** is not *Store only*. Nothing is paid online; the order settles normally when it is picked up or delivered. It is pre-selected when offered, and a QR table that requires payment never offers it. Offering it alongside online payment brings more orders, at the cost of no-shows on unpaid ones.

How prepaid orders settle

A prepaid web order carries its payment: recalling it at the register shows the balance already covered, and settling closes it against the online transaction — no double charge is possible. Refunds on prepaid web orders run through the normal refund flow and return to the original online payment.

> Test-mode keys with a live storefront is the classic “payments fail for customers but worked for me” misconfiguration.

Apple Pay and Google Pay at checkout

When the storefront takes cards through Stripe, checkout can also show an **Apple Pay** or **Google Pay** button above the card form, with *Or Pay By Card* under it. The customer approves the payment in their phone’s wallet instead of typing a card.

- The button only shows on a phone or browser that has a wallet set up — for example Safari with a card in Apple Wallet, or Chrome with a card saved to Google Pay. Everywhere else checkout looks as before.
- It is on by default; **Show Apple Pay And Google Pay At Web Checkout** in the Stripe section above turns it off.
- The order is placed only when the customer approves in the wallet; closing the wallet sheet places nothing. The order then reaches the register prepaid, like a typed card.
- If the total changed in the meantime (tax rounding, for example), nothing is charged: checkout shows the new total and the customer taps the button again.
- A wallet payment is never kept as a saved card.
- No Apple or Google account is needed: Stripe handles both.

Apple Pay and Google Pay only work on web addresses registered with your Stripe account. The **Storefront Addresses** table in the Stripe section above shows each address with its status, and **Register Now** registers them on the spot; registration also happens by itself when the Stripe settings are saved and when checkout is opened.

> Keys in test mode register the addresses for test mode only; live keys cover both. If an address will not turn Active, check that Stripe is on with the secret key for the current mode, and that the store has its online ordering address set up.

> Live keys take real money. Test with the test or sandbox keys first, then switch **Mode** to **Live** and save.

Stripe setup for pay at the table

Integrations

View online ↗

End-to-end setup of Stripe for QR pay at the table: the webhook, the API keys, the Back Office fields and how to test it.

Stripe lets a guest pay a ticket from their own phone by scanning the QR code printed on the receipt. Stripe holds the card details and tells AmigoPOS Cloud when the payment succeeds, so the order settles on its own. The settings are on **Back Office › Integrations › Stripe**; see Integrations: Stripe, PayPal, Authorize.Net for every field on that page.

Setting this up is a one-time job in three places: your Stripe account, your Stripe account again for the keys, and the Stripe page in Back Office. Allow about fifteen minutes.

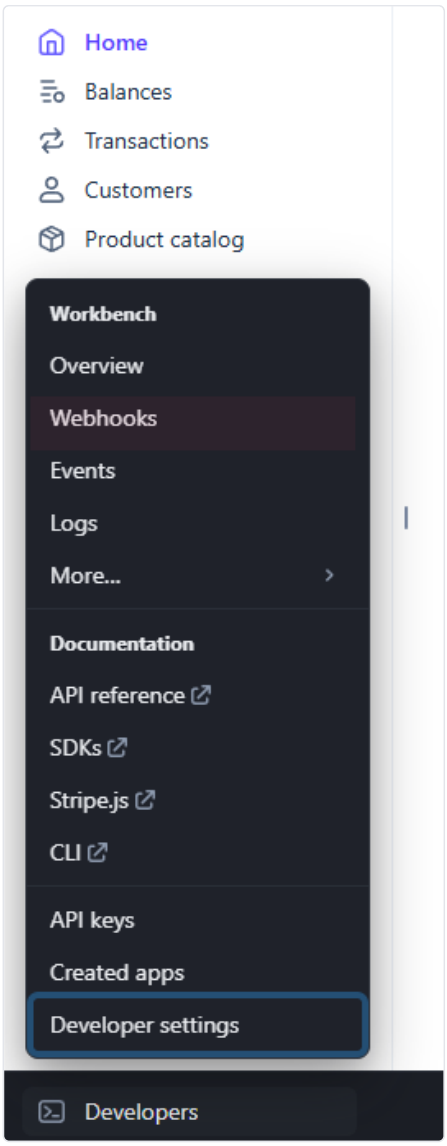
Before you start

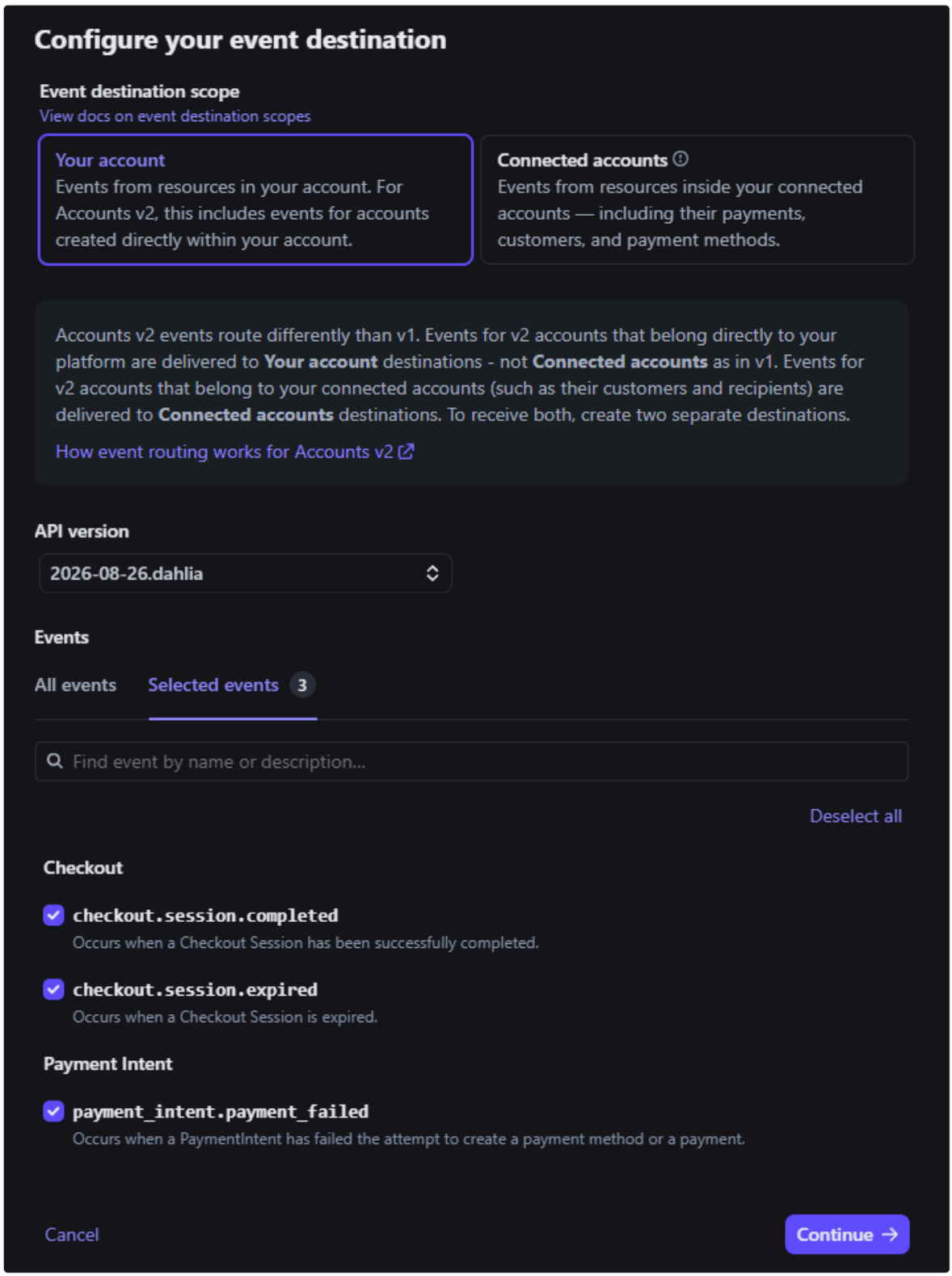
- A Stripe account that has finished activation and can accept live payments.
- Sign in to Stripe on a computer, not the Stripe mobile app.
- Make sure the **Test mode** toggle at the top right of the Stripe dashboard is **off**, so you are working in live mode. Test-mode keys never take real payments, and live and test keys are not interchangeable.

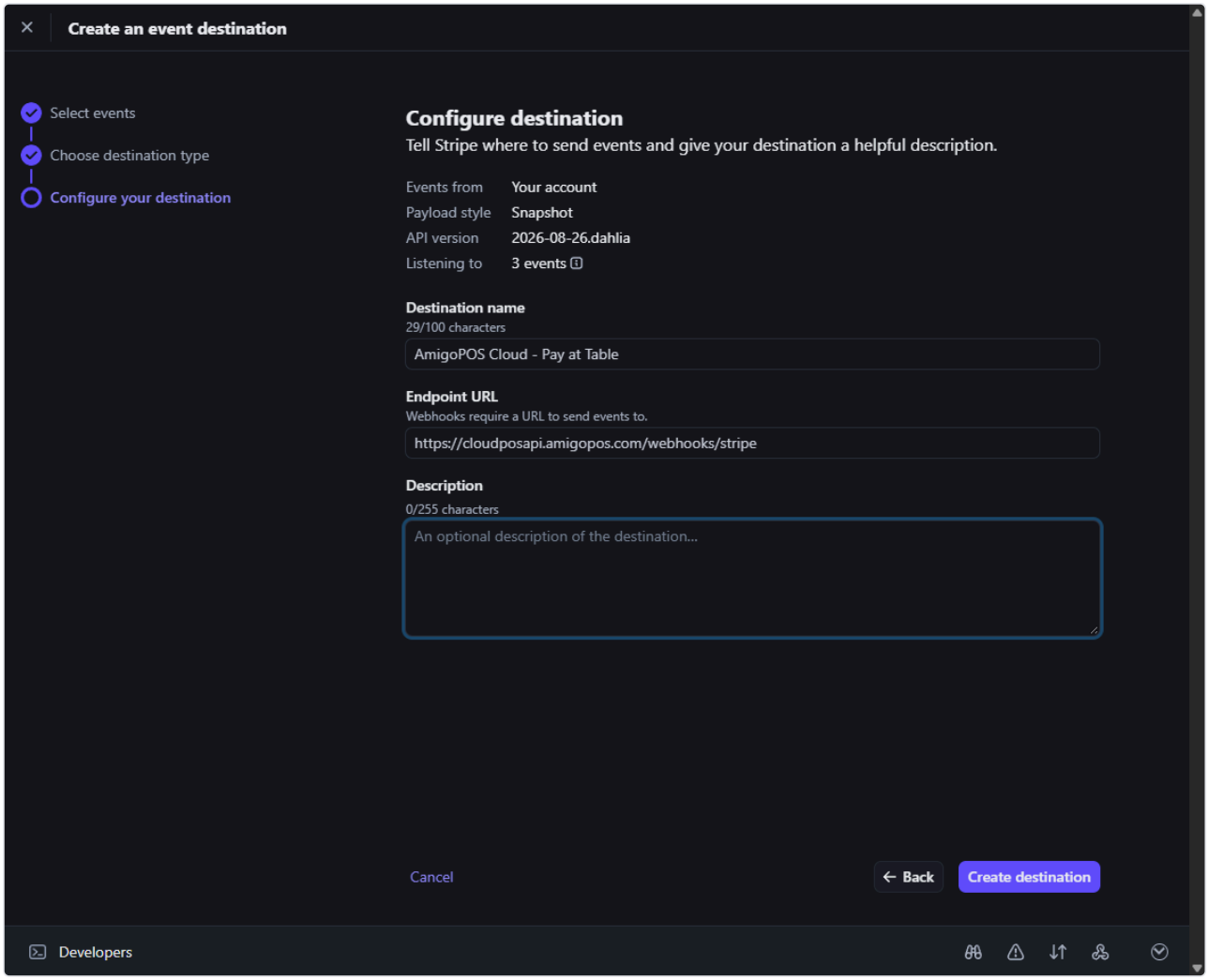
Step 1 — Create the webhook in Stripe

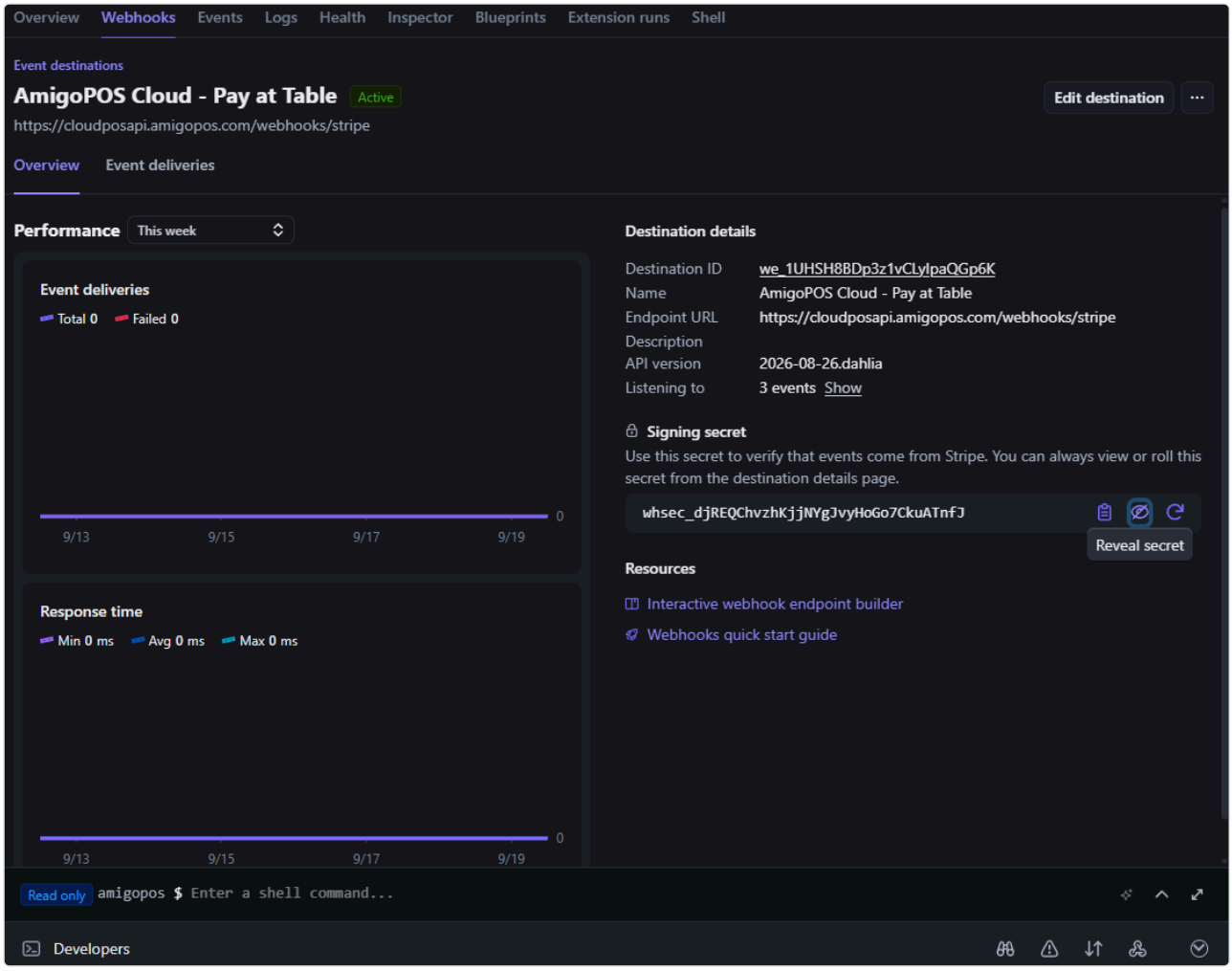
A webhook is the message Stripe sends to AmigoPOS Cloud the moment a guest pays. Without it a payment succeeds at Stripe but the ticket stays open on the POS.

1. In the Stripe dashboard click **Developers** at the bottom left, then **Webhooks**.
2. Click **Add destination**.
3. On the events step leave **Your account** selected. In the **API version** list choose the newest version that is not marked as a preview.
4. In the event search box, find and tick each of these: `checkout.session.completed`, `checkout.session.expired`, `payment_intent.payment_failed` and `charge.refunded`. If the store also takes Stripe card payments at web checkout, tick `payment_intent.succeeded` as well.
5. Open the **Selected events** tab, confirm they are all listed, then click **Continue**.
6. Choose **Webhook endpoint** as the destination type and click **Continue**.
7. Give the destination a name you will recognise later, such as *AmigoPOS Cloud pay at table*. In **Endpoint URL** enter exactly:
   `https://cloudposapi.amigopos.com/webhooks/stripe`
   Then click **Create destination**.
8. On the destination page click the eye icon beside **Signing secret** and copy the value. It starts with `whsec_`. Keep it for step 3.


Home
Balances
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Customers
Product catalog
Workbench
Overview
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Events
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More...
Documentation
API reference
SDKs
Stripe.js
CLI
API keys
Created apps
Developer settings
Developers

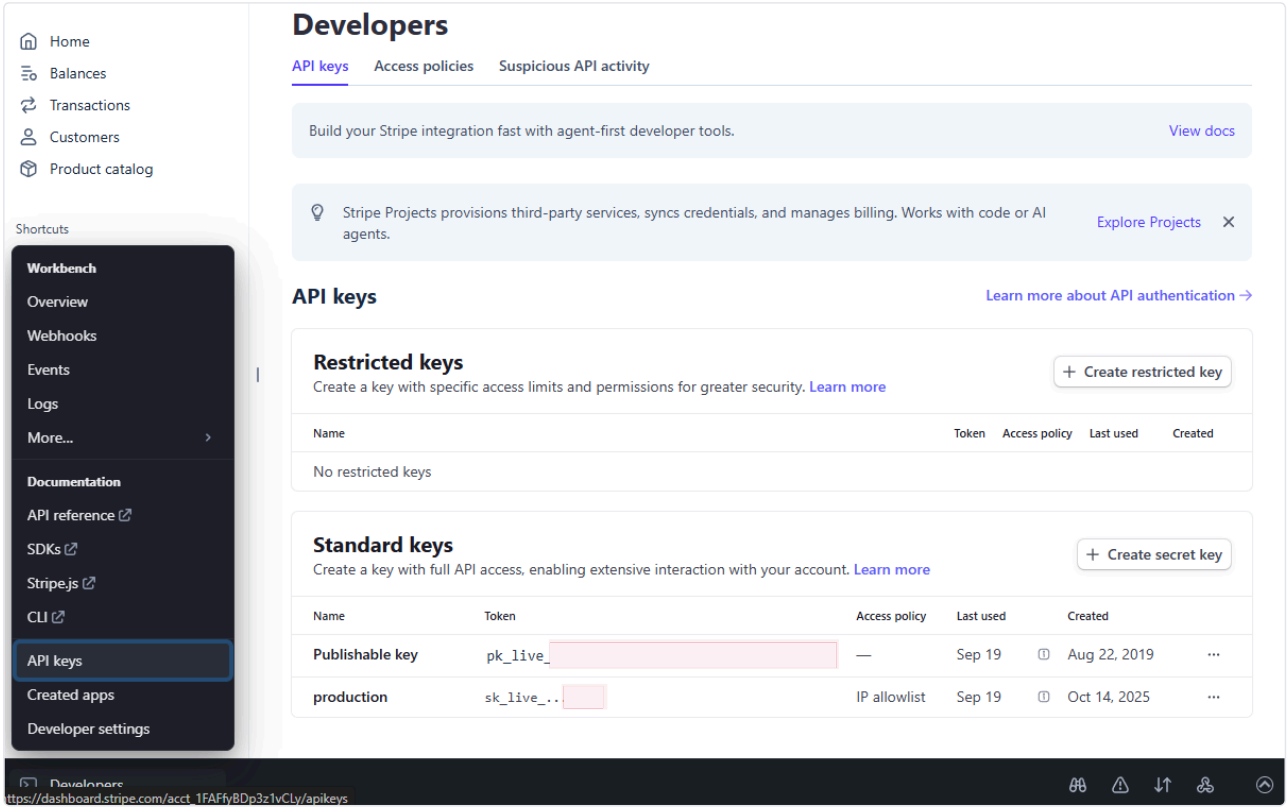

Configure your event destination
Event destination scope
View docs on event destination scopes
Your account
Events from resources in your account. For Accounts v2, this includes events for accounts created directly within your account.
Connected accounts
Events from resources inside your connected accounts — including their payments, customers, and payment methods.
Accounts v2 events route differently than v1. Events for v2 accounts that belong directly to your platform are delivered to Your account destinations - not Connected accounts as in v1. Events for v2 accounts that belong to your connected accounts (such as their customers and recipients) are delivered to Connected accounts destinations. To receive both, create two separate destinations.
How event routing works for Accounts v2
API version
2026-08-26.dahlia
Events
All events
Selected events 3
Find event by name or description...
Deselect all
Checkout
checkout.session.completed
Occurs when a Checkout Session has been successfully completed.
checkout.session.expired
Occurs when a Checkout Session is expired.
Payment Intent
payment_intent.payment_failed
Occurs when a PaymentIntent has failed the attempt to create a payment method or a payment.
Cancel
Continue


Create an event destination
Select events
Choose destination type
Configure your destination
Configure destination
Tell Stripe where to send events and give your destination a helpful description.
Events from
Your account
Payload style
Snapshot
API version
2026-08-26.dahlia
Listening to
3 events
Destination name
29/100 characters
AmigoPOS Cloud - Pay at Table
Endpoint URL
Webhooks require a URL to send events to.
https://cloudposapi.amigopos.com/webhooks/stripe
Description
0/255 characters
An optional description of the destination...
Cancel
Back
Create destination
Developers



Step 2 — Copy your API keys

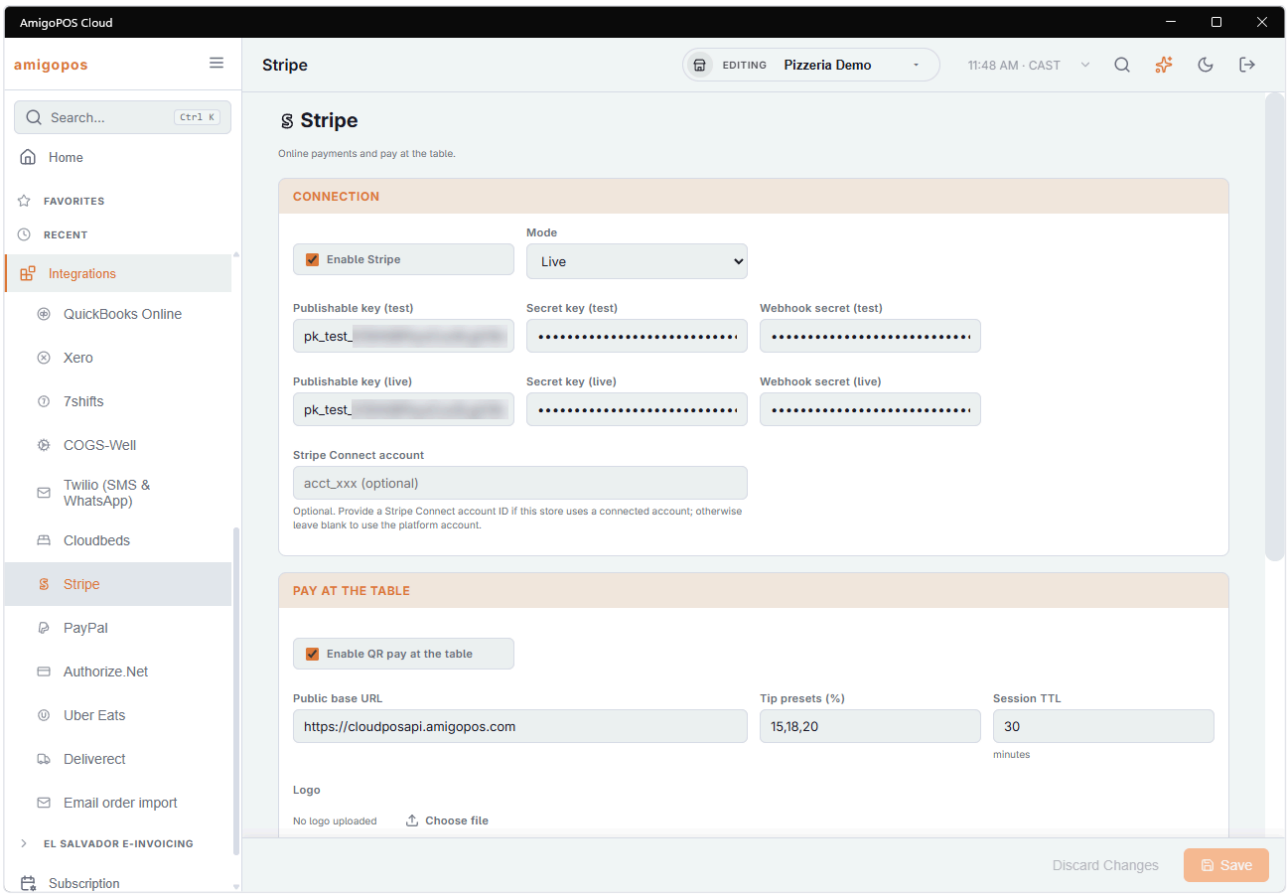
1. Click **Developers** again, then **API keys**. Check you are still in live mode.
2. **Publishable key** starts with `pk_live_` and is shown in full. Click it to copy.
3. **Secret key** starts with `sk_live_` and is hidden. Click **Reveal live key**; Stripe may ask you to sign in again. It is shown only once per reveal, so paste it into Back Office straight away.

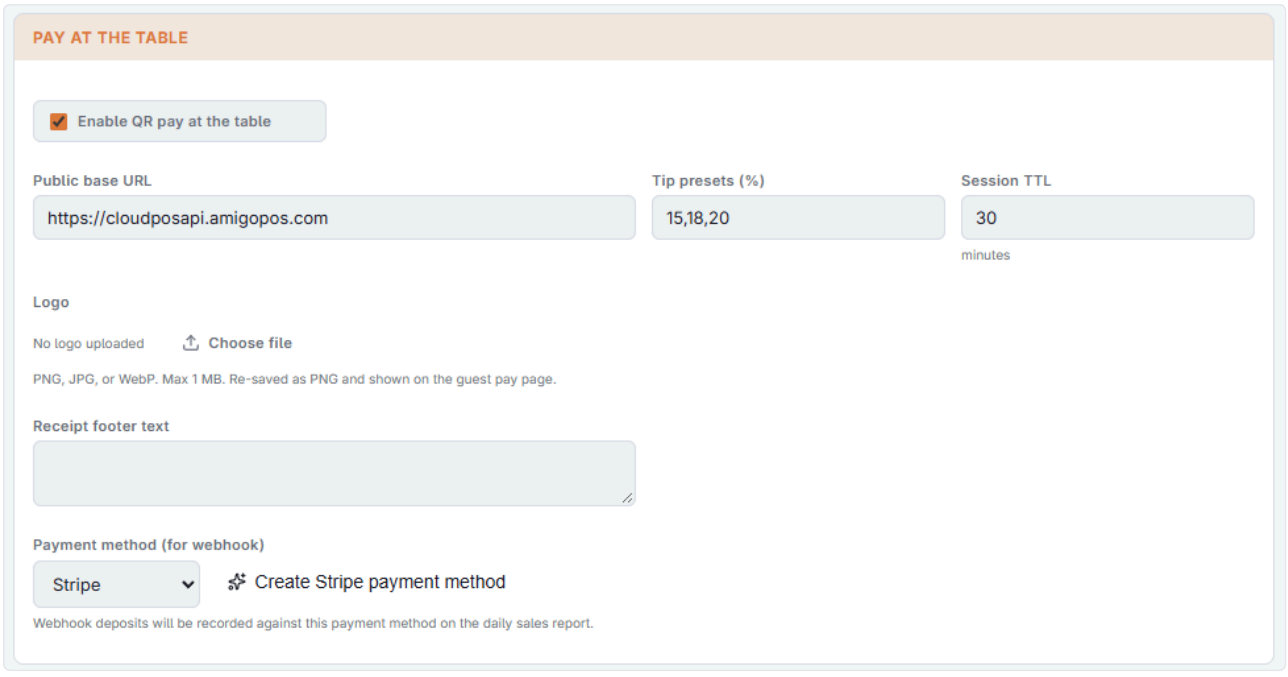


> Use the standard secret key. A *restricted key* from the same page will not work.

Step 3 — Enter the values in Back Office

1. Open **Back Office › Integrations › Stripe**.
2. Set **Mode** to **Live**.
3. Paste **Publishable key (live)**, **Secret key (live)** and **Webhook secret (live)** — the last one is the `whsec_` value from step 1.
4. Leave **Stripe Connect account** empty unless your provider has told you otherwise.
5. Under **Pay at the table**, tick **Enable QR pay at the table** and set **Public base URL** to exactly:
   `https://cloudposapi.amigopos.com`
   Left blank, the box shows the system's own address in grey, and that address is used.
6. Under **Payment method (for webhook)**, choose the card payment method Stripe payments should be recorded against, or press **Create Stripe payment method** to make one named *Stripe (QR Pay)*. The button is greyed out while a payment method is linked; to make a new one, choose **— not set —**, save, then press it.
7. Click **Save**.
8. Check that the address under **Webhook endpoint** at the foot of the page is the same one you entered in Stripe in step 1.



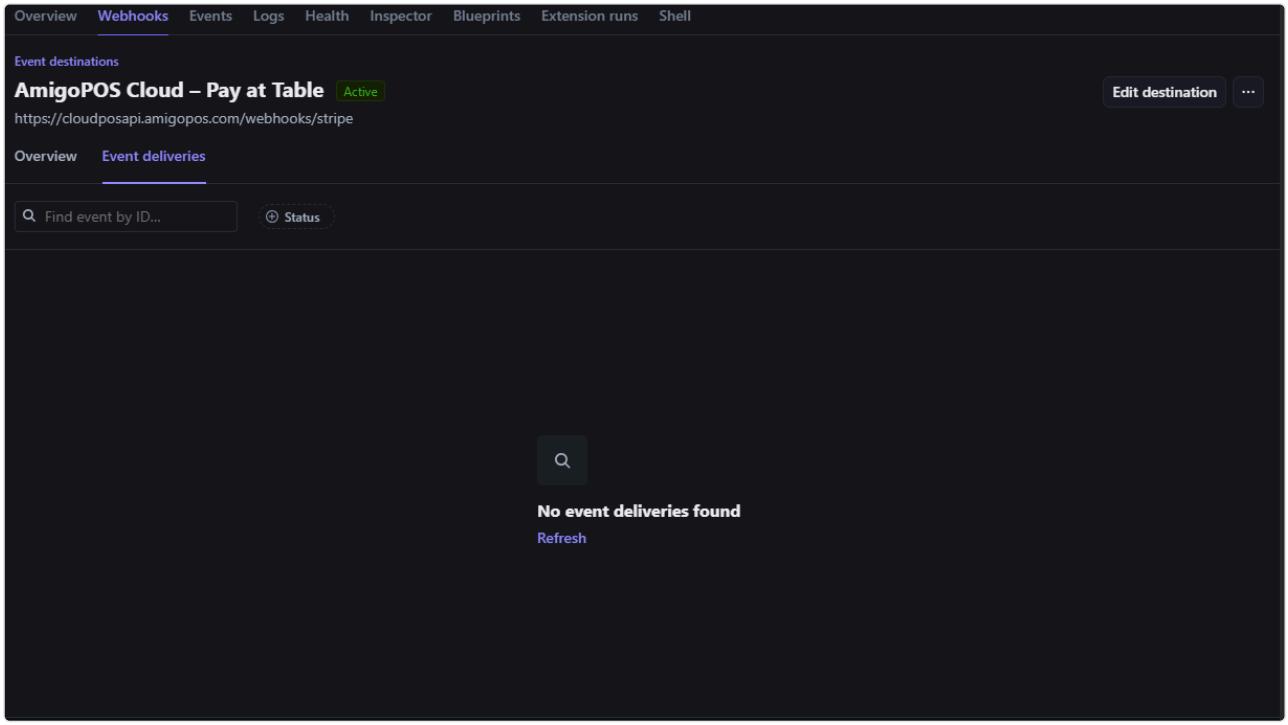


These settings belong to the store you are working in. If you run more than one location, repeat step 3 for each one. The webhook in step 1 is created once per Stripe account and covers them all.

Step 4 — Test it

1. Ring up a small order at the POS and print the receipt. If the QR code is missing from the receipt, the QR token has not been added to your receipt template — see the receipt template topics.

2. Scan the code with a phone that is on mobile data, *not* on the restaurant Wi-Fi. This proves the address works from outside the building, which is how a guest will reach it.
3. Pay the ticket on the phone.
4. Back at the POS or in **Orders**, confirm the order now shows as settled. It normally happens within a few seconds.
5. In Stripe, open the destination you created and click **Event deliveries**. The payment event should be listed as delivered successfully.



If something does not work

- **The guest paid but the ticket is still open.** Check that a payment method is chosen under **Payment method (for webhook)**. Then look at **Event deliveries** on the Stripe destination. A failed delivery points at the endpoint URL or the webhook secret; a successful one means the payment reached AmigoPOS Cloud. Stripe keeps retrying a failed delivery for up to three days, so a ticket can settle by itself once the setting is corrected.
- **Every delivery fails.** The most common cause is a webhook secret from a different destination, or a test-mode secret entered in the live field. Reveal the signing secret again and paste it fresh.
- **The QR code opens a page that says the link is not valid.** The public base URL is wrong or was left at a local address. It must be the exact address above.
- **Nothing happens when the phone scans the code.** Confirm the phone is on mobile data and the receipt is a current one; a pay link expires after the ticket is settled by other means.

> Treat the secret key and the webhook secret like passwords. If either is ever exposed, roll it in the Stripe dashboard and paste the new value into Back Office.

QuickBooks Online

QuickBooks Online Overview

Integrations › QuickBooks Online

View online ↗

How CloudPos posts a daily sales journal entry to QuickBooks Online.

Back Office › Integrations › QuickBooks Online posts one balanced **journal entry** per business day into the QuickBooks Online company the store connects. It does not create customers, invoices or products in QuickBooks: the POS keeps the order detail, and QuickBooks receives the financial summary of the day.

The page has four tabs: **Settings** (switches and the connection), **Account Mappings**, **Daily Postings** and **Activity**.

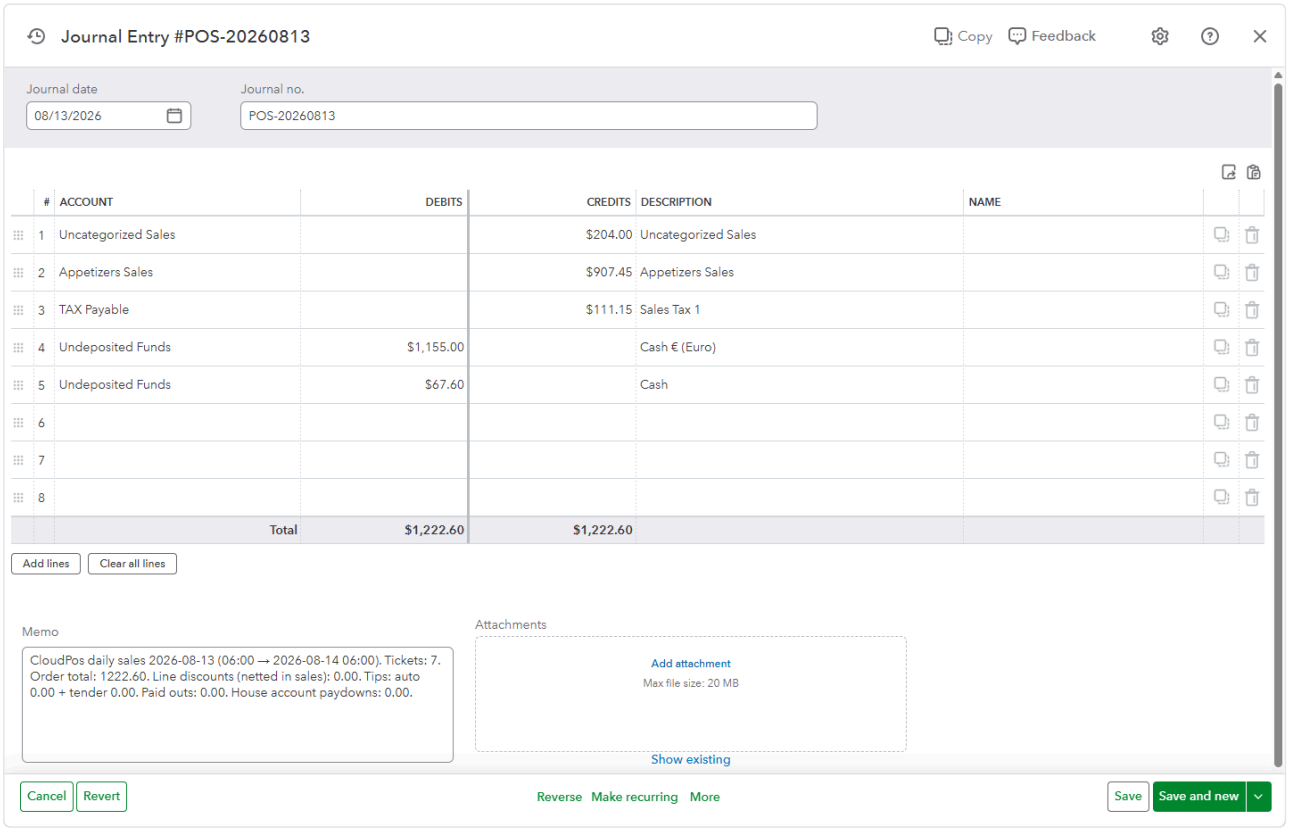
Why a journal entry?

One balanced entry per day reconciles cleanly to the bank deposit, keeps the QuickBooks customer and product lists free of thousands of tickets, and leaves sales-tax reporting in the POS, which knows the tax that was actually charged.

> Use the POS reports for item-level sales and tax detail. QuickBooks holds the ledger, not the menu.

What the entry contains

- **Credits** — sales for each menu category (or each revenue center, with **Post Sales By Revenue Center** on), sales tax for each of the three tax slots, tips and gratuities, gift cards sold, delivery charges, surcharges and house account payments.
- **Debits** — each payment method the day was paid with, cash paid outs, discounts and comps.
- **Cash Over/Short** — when the debits and credits do not agree, the difference is posted as *Cash Short* or *Cash Over* so the entry balances.
- **Document number** — the **Document number prefix** followed by the date, for example POS-20260812. It is how the day is found in QuickBooks.



Refunds, deposits and write-offs

The daily entry also carries money that moves on a different day from the sale it belongs to:

- **Refunds** given at the POS are posted on the day they were given: revenue and tax back out by category (debits) and the money leaves by the refund payment method (credit). A refund of an amount rather than items uses the **Refunds (Unallocated)** mapping.
- **Tips paid out to staff in cash** draw the tips liability down.
- **House account write-offs** move the balance to **Bad Debt (House Account Write-Offs)**.
- **Reservation deposits** taken online are credited to **Customer Deposits (Reservations)** on the day they are paid and drawn down when the party is seated or the deposit is refunded; forfeited deposits and no-show fees go to **No-Show Fees & Forfeited Deposits**.

> Card refunds made directly on a terminal, without being recorded at the POS, never reach QuickBooks.

How it runs

1. End of Day closes the business day. With **Post automatically at End of Day** on, the day is put in the QuickBooks queue.
2. A background service sends it within a minute or two. If QuickBooks cannot be reached, the request waits in the queue and is retried; End of Day is never held up.
3. The result appears on the **Daily Postings** tab: Posted, No sales, Needs Review or Failed, with the message QuickBooks returned.

Any date can also be previewed and posted by hand. See Posting Daily Sales.

Before you start

- An active QuickBooks Online subscription, and someone who can sign in to the company and approve the connection.
- Agreement with your bookkeeper on which account each line should use. **Auto-map** on the Account Mappings tab can match existing accounts and create the missing ones.
- Then: Connecting to QuickBooks Online, Account Mappings, preview a day and post it.

Connecting to QuickBooks Online

Integrations › QuickBooks Online

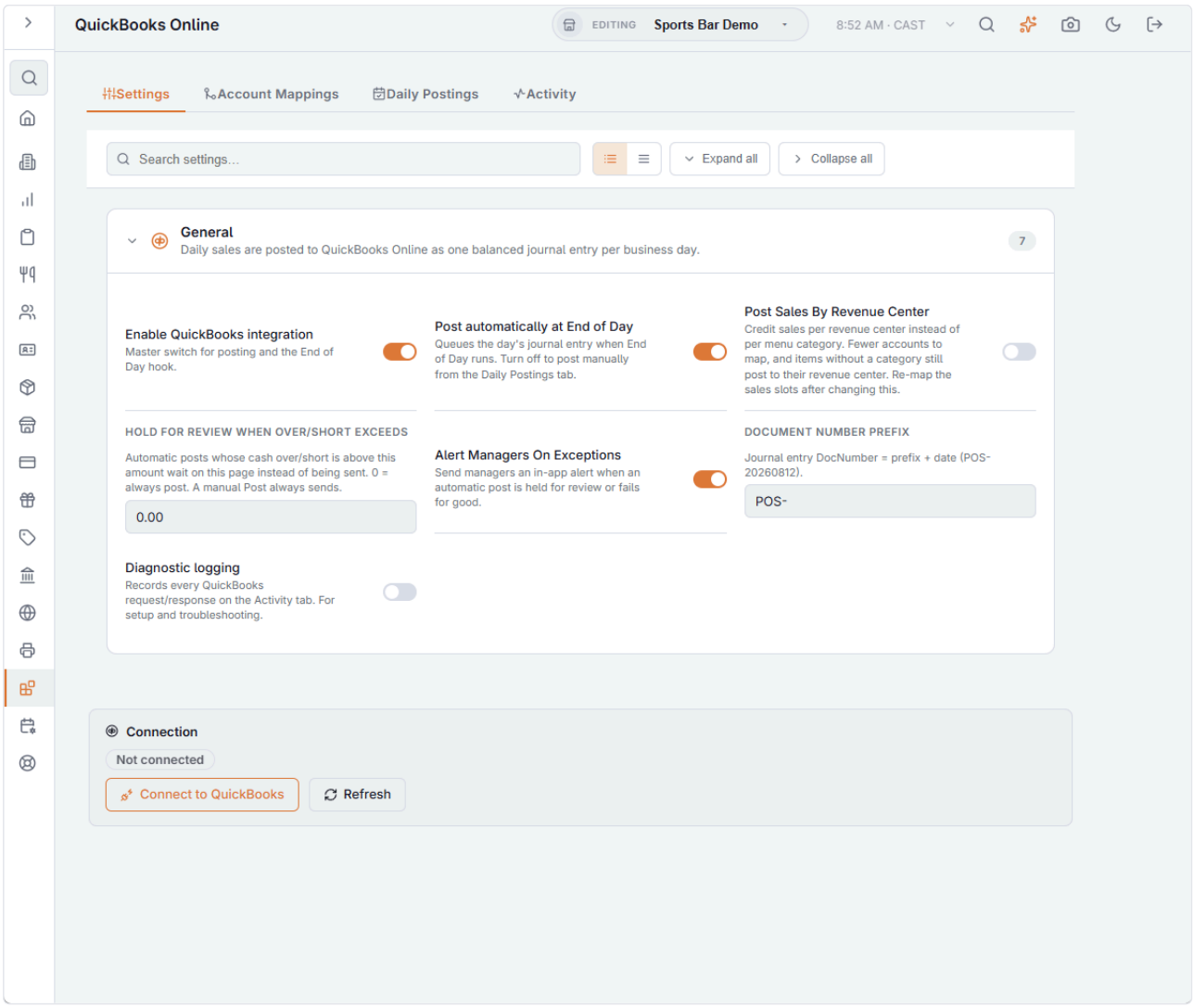
View online ↗

Authorising CloudPos against a QuickBooks company, and disconnecting safely.

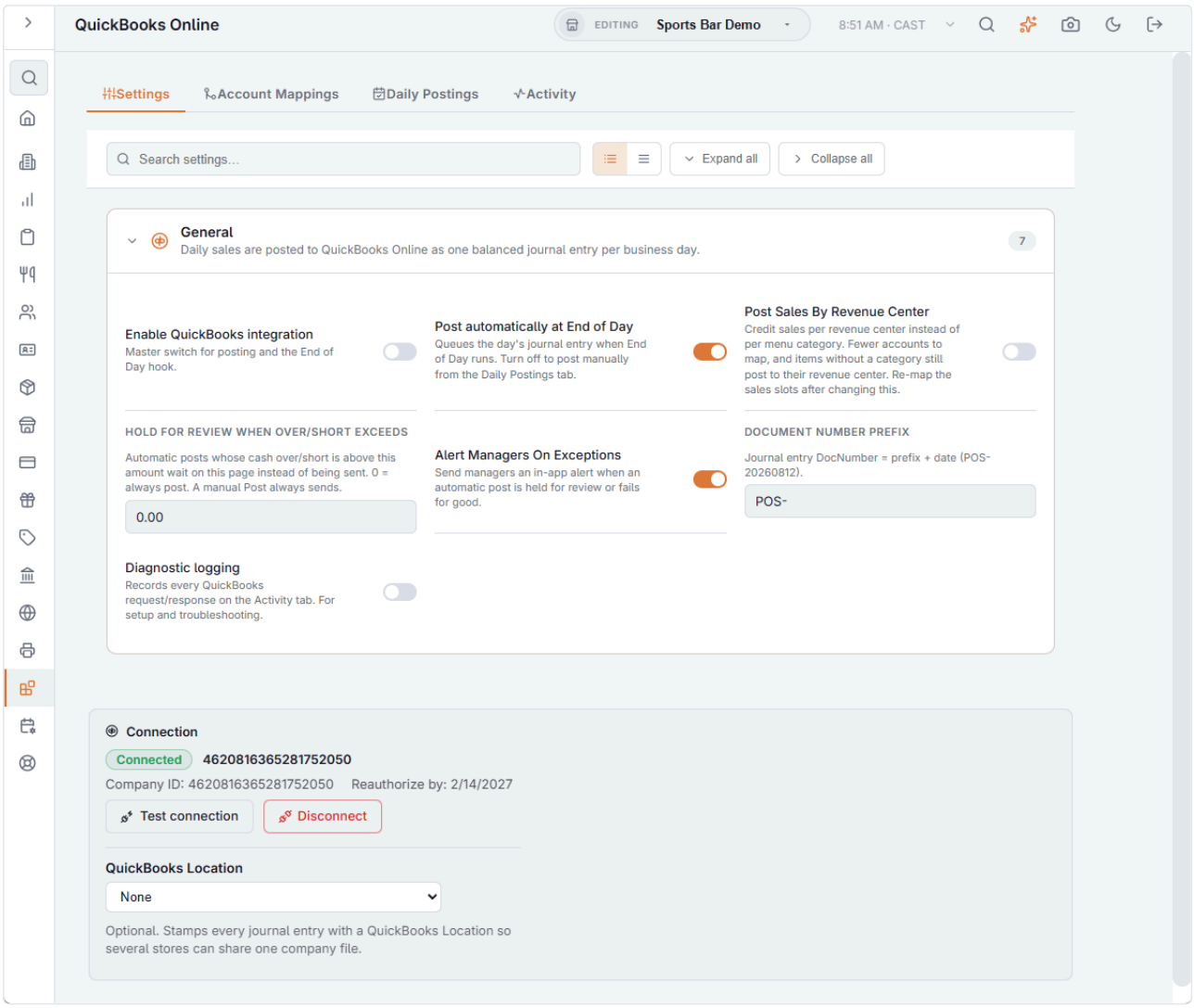
The connection is made on the **Settings** tab of **Back Office › Integrations › QuickBooks Online**, in the **Connection** panel below the settings. Someone who can sign in to the QuickBooks company needs to be at the keyboard, because Intuit asks them to approve it. Each store connects on its own.

Connect

1. Press **Connect to QuickBooks**. Intuit’s sign-in page opens in a new browser tab.
2. Sign in, choose the company the store should post to, and approve access.
3. Come back to Back Office and press **Refresh**. The panel shows **Connected** with the company name and its country.



Check the company name: it is the company every journal entry will go to. The panel also shows the **Company ID** and a **Reauthorize by** date, the last day the current sign-in is valid.



> The QuickBooks app itself is set up on the server by AmigoPOS. If **Connect to QuickBooks** is greyed out and the panel says QuickBooks is not set up yet, contact support.

Turn it on

Connecting does not start posting. The **General** section above the panel holds the switches; each one saves as soon as it is changed.

- **Enable QuickBooks integration** — the master switch for posting and for the End of Day hook.
- **Post automatically at End of Day** — queues the day's journal entry when End of Day runs. Turn it off to post by hand from the Daily Postings tab.
- **Post Sales By Revenue Center** — credits sales by revenue center instead of by menu category: fewer accounts to map, and items without a category still post. Map the sales lines again after changing it.
- **Hold For Review When Over/Short Exceeds** — an automatic post whose cash over/short is larger than this amount waits on the Daily Postings tab instead of being sent. 0 always posts. A post made by hand is always sent.
- **Alert Managers On Exceptions** — managers get an in-app alert when an automatic post is held for review or fails for good.
- **Document number prefix** — the start of each entry's document number; `POS-` gives POS-20260812.
- **Diagnostic logging** — records each request to QuickBooks and its answer on the Activity tab. For setup and troubleshooting.

Checking the connection

Test connection asks QuickBooks which company it is talking to and shows the answer under the buttons. If QuickBooks has refused the connection, the panel shows the error it returned; press **Connect to QuickBooks** again to sign in afresh. Mappings and posting history are kept.

Several stores in one company

Once connected, the **QuickBooks Location** list shows the company's locations. Choose one and every journal entry from this store is stamped with it, so several stores can share one company and still report separately. Leave it on **None** for a store with its own company.

Disconnecting

Disconnect asks for confirmation, then ends the connection and revokes it with Intuit. Automatic posting stops until the store connects again. Entries already in QuickBooks are not touched.

> Account identifiers belong to one company. If you connect the store to a different company, review every row on the Account Mappings tab, or run **Auto-map** with **Overwrite existing**, before the next post.

Account Mappings

View online ↗

Pointing each CloudPos figure at the right QuickBooks account.

The **Account Mappings** tab of **Back Office › Integrations › QuickBooks Online** lists every line the journal entry can contain and the QuickBooks account each one posts to. The account lists come from the connected company's chart of accounts. A day cannot be posted while a line it uses has no account.

The groups

Group	Rows	Usual account type
Sales Categories	One row per menu category. With **Post Sales By Revenue Center** on, this group is **Revenue Centers** instead, one row per revenue center.	Income
Payment Methods	One row per payment method the store takes, including the ones linked on the Stripe, PayPal and Authorize.Net pages.	Undeposited Funds or bank; Other Current Liability for gift cards; Other Current Asset for house accounts
Taxes	One row for each of the three tax slots, named after the store's taxes; a slot without a name reads **Tax 1**, **Tax 2** or **Tax 3**.	Other Current Liability
Other Accounts	Tips & Gratuities, Gift Cards Sold, Discounts, Comps, Cash Paid Outs, Cash Over/Short, Delivery Charges, Surcharges, Cover Charges, Uncategorized Sales, House Account Payments, Refunds (Unallocated), Bad Debt (House Account Write-Offs), Customer Deposits (Reservations), and No-Show Fees & Forfeited Deposits.	Varies by row

Each row shows the **POS Item**, its **Type** and the **QuickBooks Account**. Unmapped rows are highlighted. Choosing an account in the list saves it straight away; choose **Not mapped** to clear it.

A line the day does not use never needs an account, so a store without reservations can leave the deposit and no-show rows empty.

Auto-map

Auto-map fills in the rows for you. For each row it:

1. looks for an account whose name matches the suggested name or the POS name;
2. for a card or cash payment method, uses the company's Undeposited Funds account;
3. with **Create missing accounts** ticked, creates the account in QuickBooks when nothing matched — for example *Food Sales* (Income) for a Food category, or *Tips Payable* (Other Current Liability).

Rows that already have an account are skipped unless **Overwrite existing** is ticked. When it finishes, the message says how many rows were matched, how many accounts were created and how many rows were skipped. **Refresh** reloads the rows and the chart of accounts.

> Review what Auto-map chose before the first post, especially the payment methods: whether money goes to a bank account or to Undeposited Funds decides how the bank reconciliation works.

> A new menu category, tax or payment method appears here unmapped. Map it, or run Auto-map again, before the next day posts.

Posting Daily Sales

View online ↗

Automatic posting at End of Day, previewing a date, and posting manually.

The **Daily Postings** tab of **Back Office › Integrations › QuickBooks Online** shows what was sent to QuickBooks, day by day, and lets you preview and post any dates by hand — during setup, after a mapping correction, or for days closed before the connection existed or while automatic posting was off.

Automatic posting

With **Post automatically at End of Day** on (Settings tab), End of Day queues the business day it closes, and the background service sends it within a minute or two. The date is the business day being closed, even when End of Day runs after midnight or the next morning. If the send fails, the request stays in the queue and is retried; End of Day itself never fails because of QuickBooks.

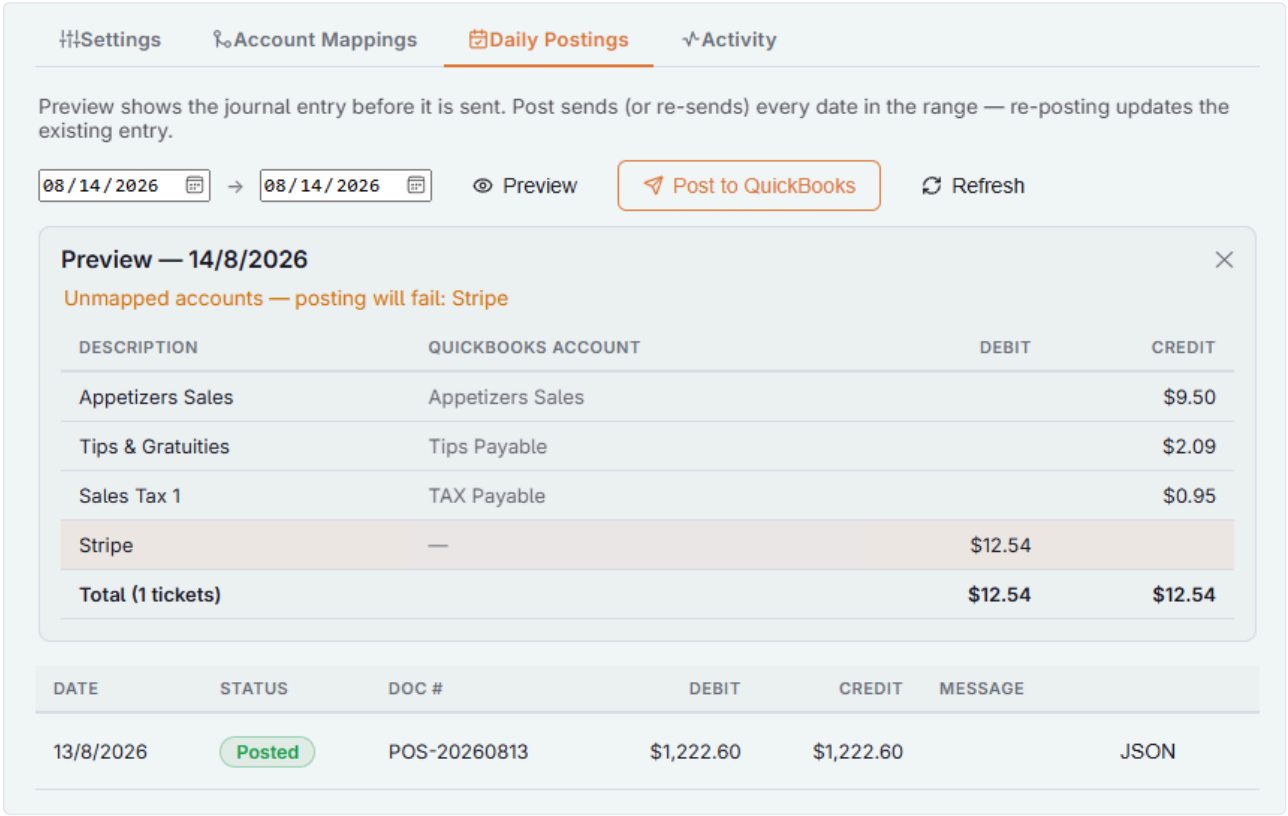
Days are not caught up later on their own: a day closed while automatic posting was off, or before QuickBooks was connected, stays unposted until you post it here.

Days waiting for review

When **Hold For Review When Over/Short Exceeds** is set, an automatic post whose cash over/short is larger than that amount is not sent. It is listed at the top of the tab under **Day(s) Waiting For Review**, together with any day that failed, each with its message and **Preview** and **Post to QuickBooks** buttons. Managers get an alert when **Alert Managers On Exceptions** is on. Check the day, then post it: a post you make yourself is always sent.

Preview, then post

The preview shows the entry as it will be posted: each line with its description, its QuickBooks account, and its debit or credit, then the totals and the number of tickets. Nothing leaves the POS until you post.



1. Set the start and end dates. Both start on yesterday.
2. Press **Preview**. It shows the **start** date only. Check the totals against the End of Day report. A warning above the lines names any line that has no account — posting would fail.

3. Press **Post to QuickBooks**. Every date in the range is sent, one entry each, so set both dates the same to post a single day. The result for each date is shown under the buttons.

The list

Below the buttons each posted date is listed with its **Status** — **Posted**, **No sales**, **Needs Review**, **Failed** or **Pending** — its **Doc #**, debit and credit totals and the **Message**. Days that need review or failed have their own **Preview** and **Post to QuickBooks** buttons. **JSON** shows exactly what was sent and what came back. **Refresh** reloads the list.

Posting a date again

Posting a date that was already posted updates that same entry in QuickBooks rather than creating a second one, so correcting a day is a matter of posting it again — after a mapping fix, or when a day was reopened and closed again. If the entry was deleted in QuickBooks, posting again creates it afresh.

Anything recorded after End of Day belongs to the next business day.

Finding the entry in QuickBooks

Journal entries do not appear on the QuickBooks dashboard. Search for the document number, run the Journal report for the date, or open the register of any mapped account.

Posting by hand and the queue

When you post a day by hand, that day's automatic post still waiting in the queue is closed, so the day is not posted again later. The integration pages and their actions need the Back Office configuration right.

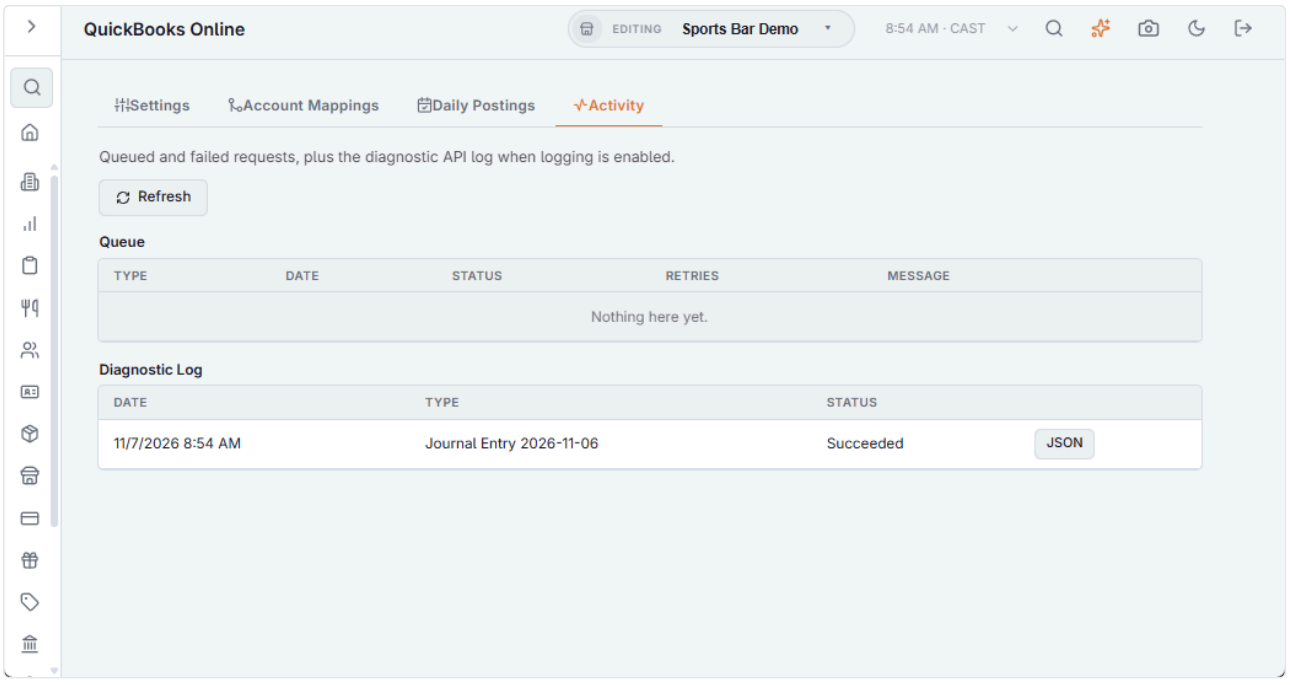
Activity: the queue and the diagnostic log

Integrations › QuickBooks Online

View online ↗

Monitoring queued posts, retrying failures and reading the diagnostic log.

The **Activity** tab of **Back Office › Integrations › QuickBooks Online** shows the work waiting to go to QuickBooks and, when diagnostic logging is on, every exchange with QuickBooks. It is what makes the integration safe to run unattended: a failed post is a queued row that is tried again, not lost data.



Queue

End of Day does not post to QuickBooks directly: it puts the day in this queue, and a background service works through it every 30 seconds. Each row shows the **Type** (**Daily Sales** and its date), the **Date** it was queued, its **Status** — **Pending**, **Retrying**, **Failed** or

Completed —, the number of **Retries** and the last **Message**.

- A failed request is tried again on its own after 1, 2, 5, 10, 30, 60, 120 and 240 minutes — about eight hours in all. After that it is marked as failed for good, and managers get an alert when **Alert Managers On Exceptions** is on.
- A day that fails because some accounts are not mapped is not retried: it is marked as failed at once, and managers are alerted once. Map the accounts, then press **Retry**, or post the day from **Daily Postings**.
- **Retry** sends a row again straight away. Use it after fixing a mapping or reconnecting.
- **Delete** removes a row without posting it. Use it for a day you have decided not to post.

Rows that went through are removed after 7 days, and rows that failed for good after 30 days.

> The result of each day is also kept on the **Daily Postings** tab, which is usually the easier place to look first. A day held for review is finished as far as the queue is concerned; it waits on Daily Postings.

Diagnostic Log

With **Diagnostic logging** on (Settings tab), each request to QuickBooks is recorded with its **Date**, **Type** (for example **Journal Entry** and the date) and **Status** (**Succeeded**, or **Error** with the code QuickBooks returned). **JSON** opens the request and the response side by side. Entries are deleted after 30 days. Nothing is recorded while the setting is off.

> When something looks wrong in QuickBooks, turn logging on and post the day again. The log tells apart the three different problems: the POS never sent it, QuickBooks refused it, or QuickBooks accepted it into a company you were not expecting.

Refresh reloads both tables.

QuickBooks Troubleshooting

Integrations › QuickBooks Online

View online ↗

The failures you are most likely to meet, and what each one means.

Start on the **Daily Postings** tab of **Back Office › Integrations › QuickBooks Online**: the message beside a day usually names the problem. The **Activity** tab shows what is still waiting in the queue.

A closed day never reached QuickBooks

Find the date on **Daily Postings**.

- **It is not in the list** — nothing was sent. Automatic posting was off when the day was closed, End of Day was not run, **Enable QuickBooks integration** was off, or the day was closed before QuickBooks was connected. Set the dates and press **Post to QuickBooks**.
- **It is under Day(s) Waiting For Review** — it failed, or it was held because its cash over/short passed the review limit. The message says which. Preview it, fix what the message names, and post it.
- **It is listed as Posted** — it is in QuickBooks; see the next question.

The date posted is always the business day being closed, including for a store that runs End of Day after midnight or the next morning.

The post succeeded but I cannot find it in QuickBooks

Journal entries never show on the QuickBooks dashboard. Search for the document number (the prefix and the date, for example POS-20260812), run the Journal report for the date, or open the register of a mapped account. If none of these find it, check the company name in the Connection panel on the Settings tab — the entry is almost certainly in a different company.

A post failed for unmapped accounts

A line the day uses has no account. The message names it. The queued day is not retried: it is marked as failed at once, and managers get one alert. Map the account on the **Account Mappings** tab, or run **Auto-map**, then post the day again — **Retry** on the Activity tab, or post it from Daily Postings. Payment methods made by the Stripe, PayPal and Authorize.Net pages have their own rows under the payment methods, so they can be mapped too.

QuickBooks refuses the connection

The Connection panel shows the error QuickBooks returned, and posts fail. Press **Connect to QuickBooks** and sign in again. Mappings and history are kept. If the button is greyed out, QuickBooks is not set up on the server: contact support.

Figures disagree with my End of Day report

- Preview the date and compare each line with the End of Day report for the same business day.
- Check the **Cash Over/Short** line. A large amount means the takings and the sales did not agree that day — look at drawer resets, paid outs and tips paid out.
- Check that two stores do not post to the same company with the same QuickBooks Location.
- Check that nothing was keyed into QuickBooks by hand for the same day.

> Nothing done on this page changes orders or payments. Deleting a queue row only abandons that post, and disconnecting only ends QuickBooks' access.

7shifts

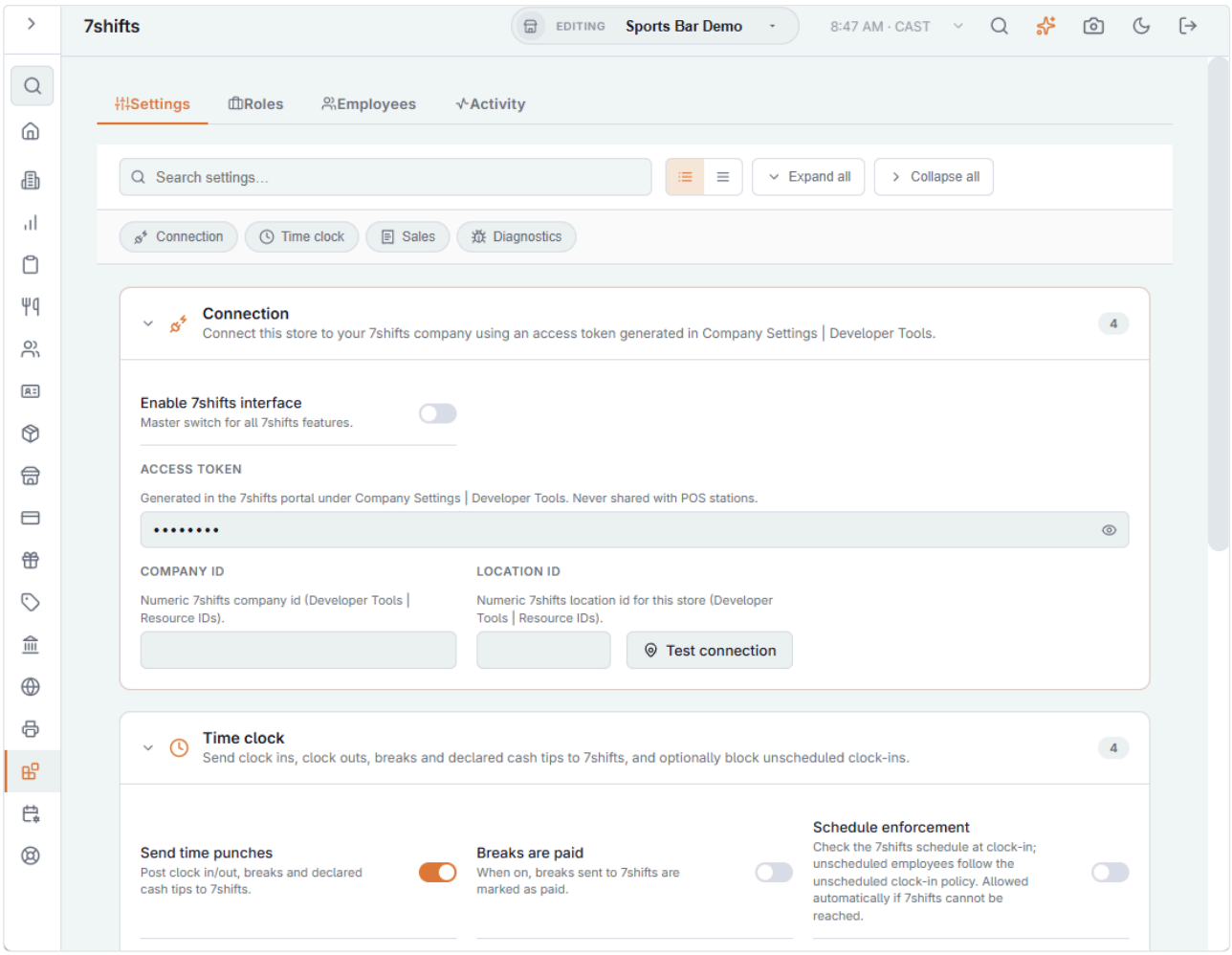
7shifts Overview

Integrations › 7shifts

View online ↗

What CloudPos sends to 7shifts, what it reads back, and how it fails.

Back Office › Integrations › 7shifts connects the store to its 7shifts location. Hours worked and sales flow from the POS to 7shifts, POS jobs and employees are matched to 7shifts roles and users, and the 7shifts schedule can be checked when someone clocks in. The page has four tabs: **Settings**, **Roles**, **Employees** and **Activity**.



What moves

What	Direction	When
Time punches, breaks and declared cash tips	POS → 7shifts	At clock in, clock out, breaks, time sheet edits and tip declarations
Sales receipts	POS → 7shifts	When an order is saved, settled, changed or voided
Jobs and employees	POS → 7shifts	When a job or employee is saved, and from the Roles and Employees tabs
Schedule	7shifts → POS	Checked at clock-in, when Schedule enforcement is on

How it behaves

- **Nothing waits for 7shifts.** Clock actions and orders finish on the POS first. What goes to 7shifts is put in a queue and sent by a background service; a failed request is tried again for about eight hours. See the **Activity** tab.
- **Links come first.** A punch is sent only for an employee linked to a 7shifts user, clocked in on a job mapped to a 7shifts role.
- **Employees follow the POS.** With the integration on, saving an employee links them to a matching 7shifts user, or creates them in 7shifts once they have an email address and a mapped job. An employee made inactive in the POS is deactivated in 7shifts. Saving a job matches it to a 7shifts role, or creates one.
- **The schedule check fails open.** If 7shifts cannot be reached at clock-in, the clock-in goes ahead.

Before you start

- An active 7shifts account with a location for this store.
- An access token, generated in 7shifts under Company Settings › Developer Tools.
- The numeric company ID and location ID, from Developer Tools › Resource IDs.
- An email address on each employee who should be in 7shifts — 7shifts requires one.

Then follow Connecting 7shifts and Linking jobs and employees.

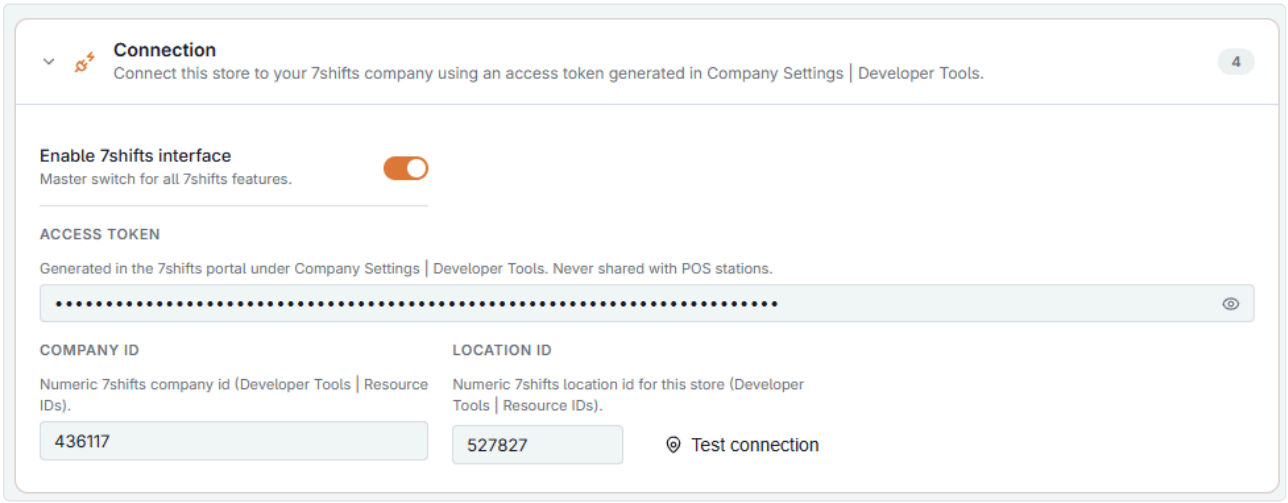
Connecting 7shifts

Integrations › 7shifts

View online ↗

Access token, company and location selection, and verifying the connection.

The connection is set on the **Settings** tab of **Back Office › Integrations › 7shifts**. Each setting saves as soon as it is changed.



Step 1 — Connection

1. In 7shifts, open Company Settings › Developer Tools and generate an access token. Under Resource IDs, note the company ID and the ID of this store's location.
2. Paste the token into **Access token**. It is kept on the server and never sent to the registers.
3. Enter the **Company Id** and the **Location Id**, both numbers.
4. Switch on **Enable 7shifts interface**, the master switch for everything on this page.
5. Press **Test connection**. A message confirms the connection and names the 7shifts account and location it reached.

> Check that the location named by the test is this store. A wrong location ID sends this store's hours and sales into another location's figures.

Step 2 — Map jobs and link employees

Before switching on any flow, map the store's jobs to 7shifts roles and link the employees. See Linking jobs and employees.

Step 3 — Switch on what you need

Each flow has its own switch, so the integration can be introduced one part at a time.

Section	Setting	What it does
Time clock	**Send time punches**	Sends clock ins, clock outs, breaks and declared cash tips. See Time Punches.
	Breaks are paid	Breaks sent to 7shifts are marked as paid.
	Schedule enforcement	Checks the 7shifts schedule at clock-in. See Schedule Enforcement.
	Grace period (minutes)	How many minutes before a scheduled shift an employee may clock in (0 to 60, default 15).
Sales	**Send sales receipts**	Sends each order as a sales receipt, for 7shifts' labour forecasting. Off by default. See Sales Receipts.
Diagnostics	**Transaction logging**	Saves each request to 7shifts and its answer in the transaction log on the Activity tab. Use it during setup only.

Verifying

Clock one linked employee in and out, then check the punch in 7shifts. If it does not arrive, open the **Activity** tab: a failed request shows the reason. See 7shifts Troubleshooting.

Linking jobs and employees

Integrations › 7shifts

View online ↗

Mapping each job to a 7shifts role and linking each employee to their 7shifts user, so punches and schedules line up.

Every flow depends on knowing which 7shifts role a POS job is, and which 7shifts user a POS employee is. The **Roles** and **Employees** tabs of **Back Office › Integrations › 7shifts** make those links. A time punch is sent only for a linked employee, clocked in on a mapped job.

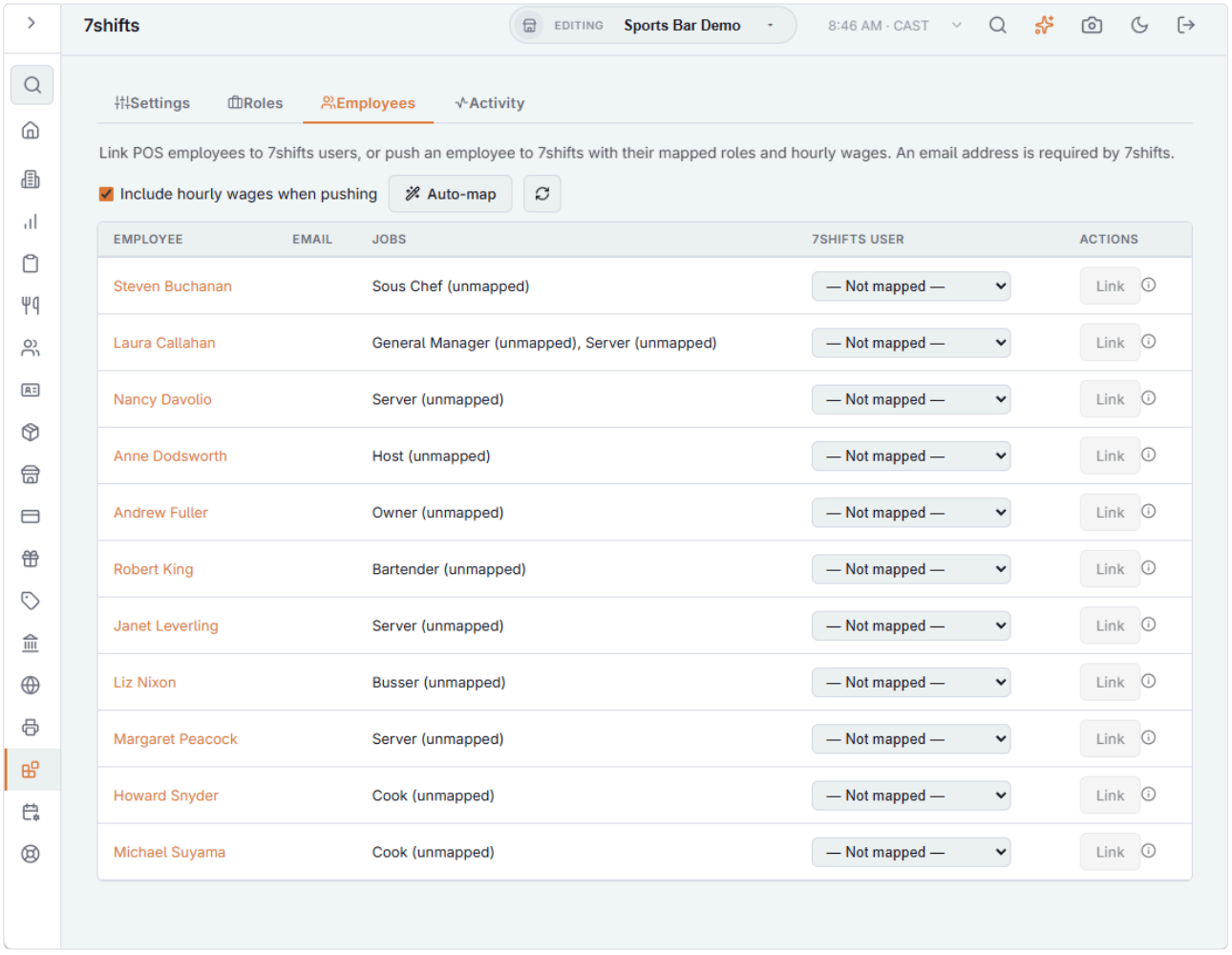
Roles: map each job

The **Roles** tab lists the store's jobs with the **7shifts role** each one is mapped to.

- Pick a role in a job's list to map it; the choice saves at once. **Not mapped** clears it.
- For an unmapped job, choose a **Department** and press **Create in 7shifts** to create a role with the job's name and map it.
- **Auto-map** maps every unmapped job: a 7shifts role with exactly the same name is used; the rest are created in 7shifts. Kitchen jobs go to a back-of-house department when 7shifts has one; everything else goes to the department chosen in **Default department**, which must be picked first.

Employees: link each person

The **Employees** tab lists the store's employees with their **Email**, **Jobs** and **7shifts user**. The name opens the employee in the employee editor.



- **A linked employee** shows the 7shifts user's name. **Unlink** breaks the link, for example when someone was linked to the wrong user.
- **An unlinked employee** has a list of 7shifts users, with the best match by email, then by name, already chosen. **Link** links them.
- **Push to 7shifts** creates the employee in 7shifts, assigned to this location with the roles of their mapped jobs, and links them. With **Include hourly wages when pushing** ticked, their hourly wages go too; wages of salaried jobs are not sent. When an employee cannot be pushed, an information icon says why: 7shifts needs an email address, and at least one of the employee's jobs must be mapped.
- **Auto-map** links every unlinked employee who has an email or name match in 7shifts, then pushes every remaining employee who can be pushed. The message under the buttons counts what was matched, created, linked, pushed and skipped, with the reason for each skip.

> Auto-map on the Employees tab creates users in 7shifts for everyone it cannot match. Link the people who already exist in 7shifts first if you do not want duplicates.

Keeping it current

While the integration is on, the POS keeps these links up to date by itself:

- Saving a job maps it to a matching role, or creates one in the default department.
- Saving an employee links them to a matching 7shifts user, or pushes them once they have an email address and a mapped job.
- An employee made inactive or released in the POS is deactivated in 7shifts.

These run through the queue on the **Activity** tab. One that cannot complete — an employee with no email, say — shows there with its reason. Add what is missing and save the employee again, or press **Retry** on the row.

Time Punches

View online ↗

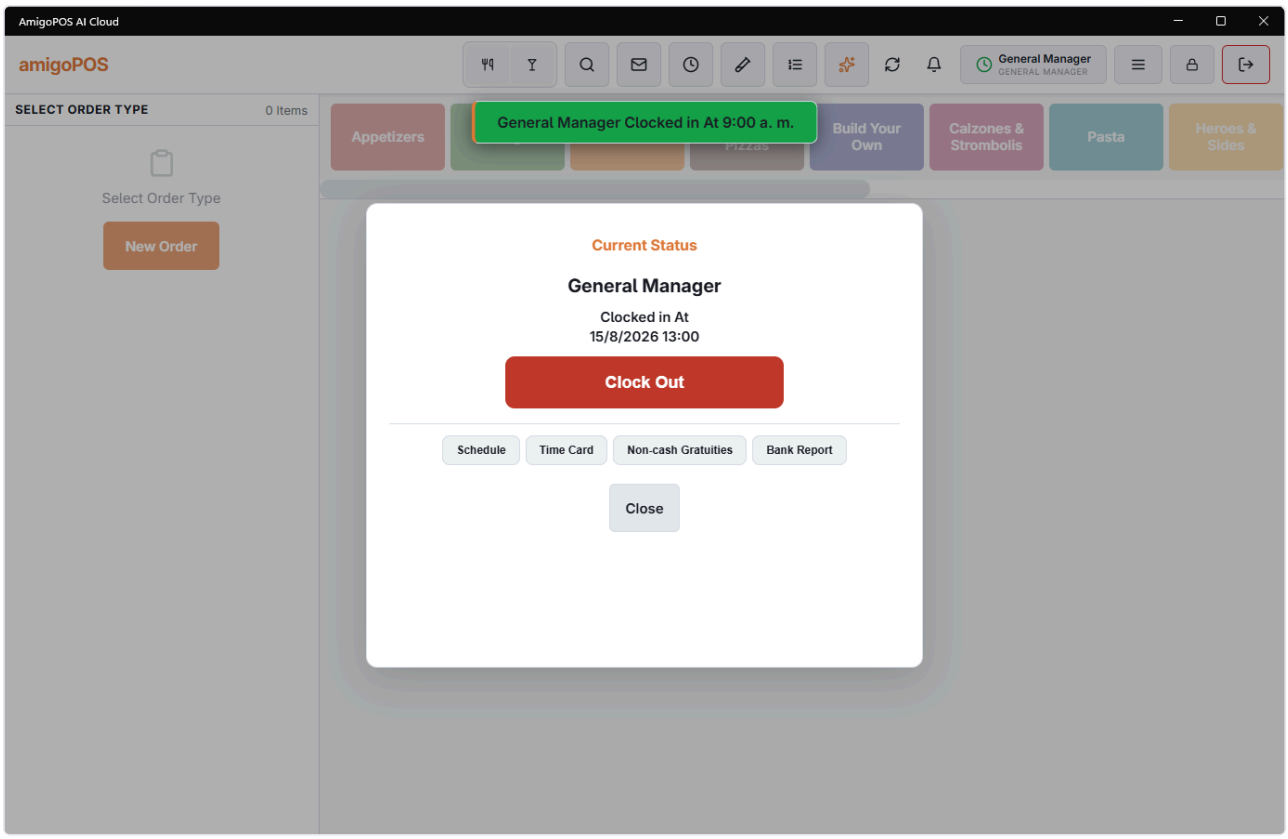
How clock in, clock out and breaks reach 7shifts, and what happens when they cannot.

With **Send time punches** on (Settings tab of **Back Office › Integrations › 7shifts**), every clock event of a linked employee is sent to 7shifts. 7shifts becomes the place where actual hours are reviewed and exported to payroll; the POS keeps its own time sheets unchanged.

What is sent

- **Clock in** creates the punch in 7shifts, under the 7shifts role mapped to the job the employee clocked in on.
- **Clock out**, **breaks**, **declared cash tips** and **time sheet edits** update the same punch.
- Deleting a time sheet in the POS deletes its punch in 7shifts.

Each update is built from the POS time sheet at the moment it is sent, so 7shifts always gets the latest times and the full list of breaks. Breaks are marked as paid when **Breaks are paid** is on.



What is needed

- The employee is linked to a 7shifts user, and the job they clocked in on is mapped to a 7shifts role. See Linking jobs and employees.
- When either is missing, the request shows on the **Activity** tab with the reason and is retried. Fix the link, then press **Retry** on the row.

Corrections

A manager correcting a time sheet in the POS sends the correction on. Editing a punch inside 7shifts does not change the POS, so the two records then differ. Agree with your managers which side is used for corrections.

> Do not run a second time-clock integration for the same staff. Two systems sending punches produce duplicated hours.

When 7shifts is unreachable

The clock action finishes normally on the POS. The punch waits in the queue and is sent when 7shifts answers again; a request is tried for about eight hours before it is marked as failed.

Checking

Compare a day's hours in 7shifts against the POS time sheets. A gap almost always means an unlinked employee or an unmapped job; the Activity tab names it.

Sales Receipts

Integrations › 7shifts

View online ↗

Sending settled sales to 7shifts for labour forecasting and sales per labour hour.

With **Send sales receipts** on (Settings tab of **Back Office › Integrations › 7shifts**), each order is sent to 7shifts as a sales receipt. This is what makes 7shifts' sales-per-labour-hour figures and its forecasting useful. The switch is off by default.

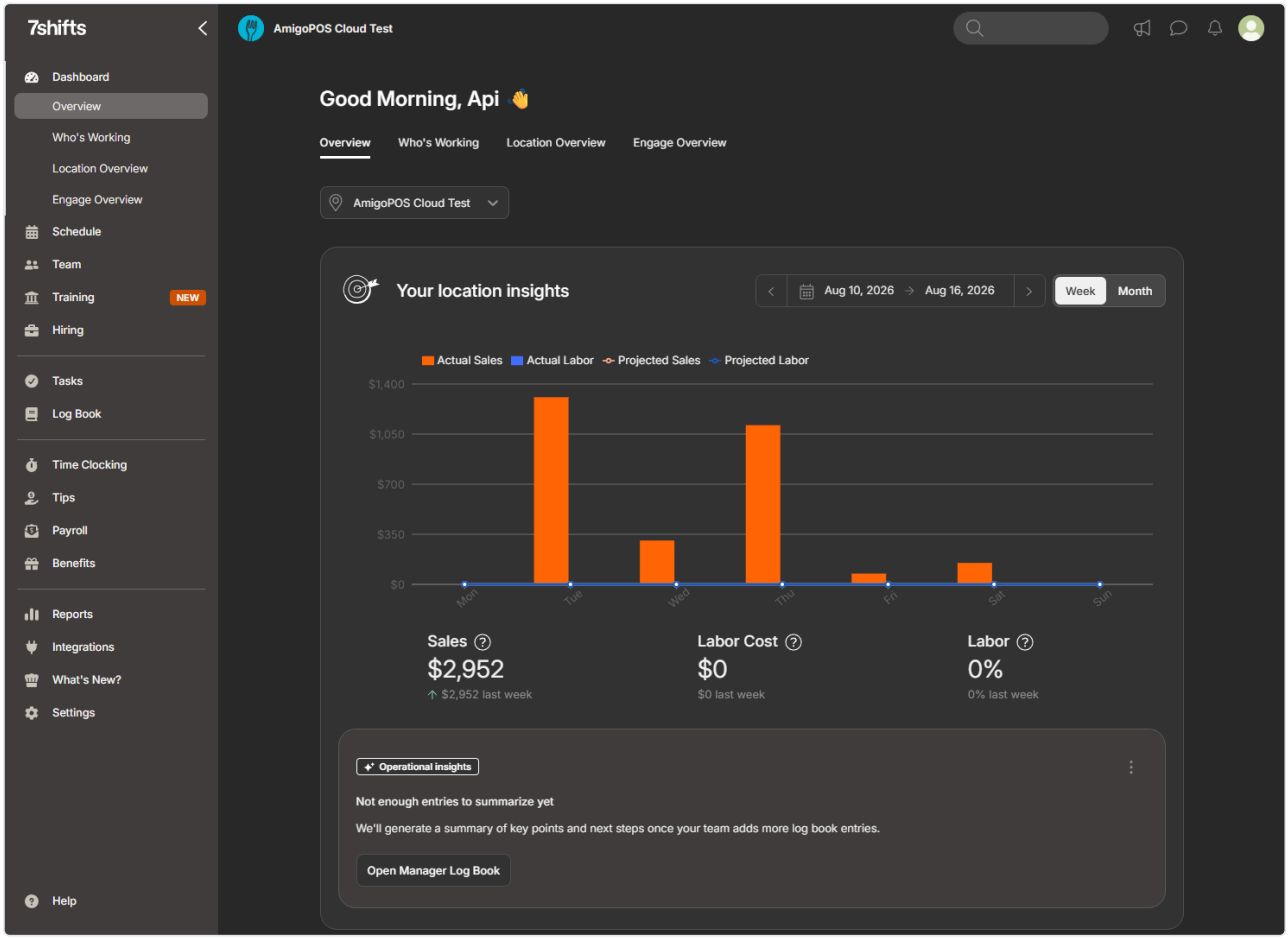
When a receipt is sent

- When an order is saved, settled or changed — an added item, a tip, a discount.
- When an order is voided: the receipt is marked voided, with its totals at zero.

The receipt is built from the order at the moment it is sent, so several changes in a row send the latest state. The first send creates the receipt in 7shifts; later sends update the same receipt instead of adding a second one.

What it contains

Field	Value
Net total	The order subtotal less discounts, before tax and tips.
Gross total	The order total the customer pays.
Discounts	The order's discounts.
Tips	The order's gratuity plus the tips on its payments.
Employee	The employee who owns the order, which is how per-server sales appear in 7shifts.
Date	When the order was started.
Status	Open, closed (settled) or voided.



> In stores whose menu prices include VAT, the order subtotal includes VAT, so the net total sent to 7shifts includes it too. Read 7shifts sales as including VAT in those stores, and use the POS reports for net sales.

Checking

Compare a finished day's sales in 7shifts with the End of Day report. If receipts are missing, open the **Activity** tab: a failed request shows the reason.

Schedule Enforcement

Integrations › 7shifts

View online ↗

Using the published 7shifts schedule to control who may clock in.

With **Schedule enforcement** on (Settings tab of **Back Office › Integrations › 7shifts**, **Time clock** section), the POS asks 7shifts at every clock-in whether the employee is scheduled to work now. It is the one part of the integration that can stop an action at the POS.

The check

- The employee counts as scheduled when 7shifts has them on a shift at this location now, or starting within the **Grace period (minutes)** — 0 to 60, 15 by default.
- When 7shifts says the employee is not scheduled, the clock-in is flagged *Not scheduled to work in 7shifts*.
- When the employee is not linked to a 7shifts user, it is flagged *Employee is not linked to a 7shifts user*, so the missing link gets noticed.

What happens next

A flagged clock-in follows the **Unscheduled Clock-In Policy** of the time clock, set in the **Schedule Enforcement** section of **Back Office › Employees › Scheduling › Time Clock** (see Time Clock settings):

Policy	Result
Block	The clock-in is refused.
Require Manager	A manager must approve the clock-in at the register.
Allow	The clock-in goes ahead.

> Before switching enforcement on, check that policy and link every employee. With the policy on **Block**, an employee who is unlinked, or missing from the 7shifts schedule, cannot clock in.

Failing open

If 7shifts cannot be reached, does not answer within a few seconds, or returns an error, the clock-in is allowed. Enforcement never becomes the reason a shift cannot start because the internet is down.

7shifts Troubleshooting

Integrations › 7shifts

View online ↗

Punches or sales not reaching 7shifts, employees not matching, and connection failures.

Most problems show up on the **Activity** tab of **Back Office › Integrations › 7shifts**.

The Activity tab

Pending and failed requests lists what is still waiting to go to 7shifts: its **Type**, **Status** (**Pending**, **Retrying** or **Failed**), the number of **Retries**, the **Next attempt** and the **Response** from 7shifts. Click a response to read it in full and copy it.

- A failed request is tried again after 1, 2, 5, 10, 30, 60, 120 and 240 minutes, then shown as **Failed**.
- **Retry** sends it again now, once the cause is fixed. **Delete** removes it without sending, after confirmation.

The **Transaction log** below shows every request and answer for the chosen day while **Transaction logging** is on (Settings tab). Pick a date and press **Refresh**.

Test connection fails

The access token is wrong, expired or was revoked in 7shifts, or the company or location ID is wrong. Generate a new token, paste it again and check both IDs under Developer Tools › Resource IDs.

Some employees' hours never appear

The employee is not linked to a 7shifts user, or the job they clocked in on is not mapped to a role. The failed punch on the Activity tab says which. Fix it on the **Employees** or **Roles** tab, then press **Retry**. A 7shifts user deleted in 7shifts also breaks the link: unlink the employee and link them again.

An employee cannot be pushed

Hover the information icon on their row on the **Employees** tab. 7shifts needs an email address, and at least one of the employee's jobs must be mapped to a role.

Hours are duplicated

Two sources are sending punches — usually a second integration, or hours keyed into 7shifts by hand as well as clocked at the POS. Choose one.

Sales do not appear

- Check that **Send sales receipts** is on.
- Check the **Location Id**: sales sent to another location are misplaced, not missing.
- Look for failed receipts on the Activity tab.

Staff cannot clock in

Schedule enforcement is on and the **Unscheduled Clock-In Policy** on the Time Clock page is **Block**. The employee is either unlinked or not on the 7shifts schedule for now. Link them, add the shift in 7shifts, or set the policy to **Require Manager** so a manager can let them in. See Schedule Enforcement.

COGS-Well

COGS-Well Overview

Integrations › COGS-Well

View online ↗

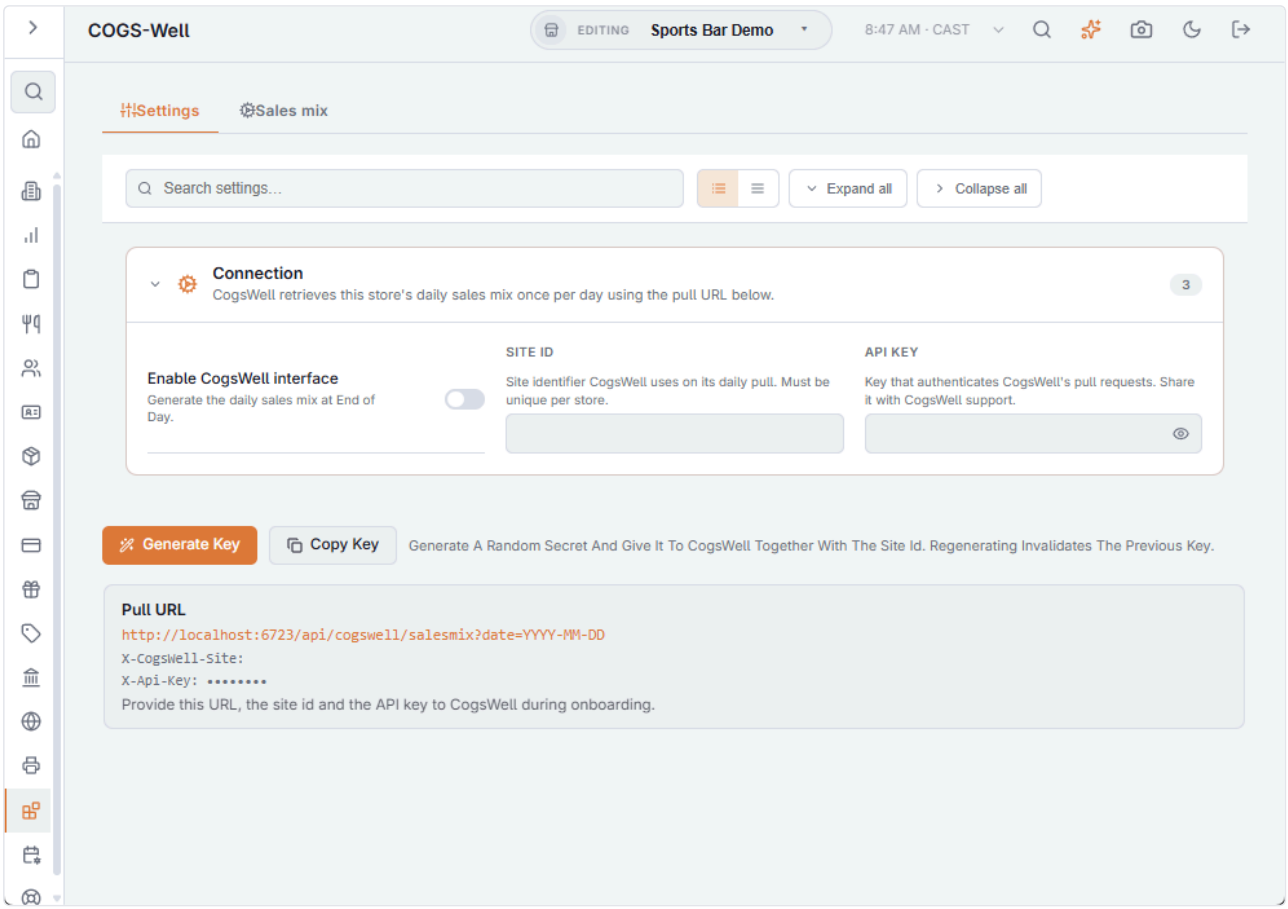
How the daily sales mix is prepared for COGS-Well to collect.

COGS-Well is a food-cost and inventory analysis service. It calculates theoretical usage by taking what you sold and multiplying it through your recipes, then comparing that with what you actually bought and counted. For this it needs one thing from the point of sale: an accurate **item-level sales mix** for each business date.

How the exchange works

Unlike the other integrations, CloudPos does not send anything to COGS-Well. COGS-Well collects the data itself, once per day, from a secure address unique to your store.

1. End of Day closes the business date.
2. CloudPos aggregates that date's sales into a stored sales mix — one row per menu item.
3. COGS-Well calls the store's collection address, identifying itself with the site id and key.
4. The stored rows are returned.



Why the data is stored rather than sent

- The figures are calculated once, at End of Day, and cannot drift afterwards.
- COGS-Well can collect at any time, including after a network outage, without missing a day.
- You can inspect exactly what will be handed over, before it is collected.
- Any past date can be regenerated if a correction is made.

Before you start

- An active COGS-Well account with a site created for this store.
- The site id COGS-Well assigns to it.
- A CloudPos menu whose items match the recipes set up in COGS-Well.

> COGS-Well is only as accurate as your menu. Items rung in as open or miscellaneous carry no recipe and will appear as unmatched sales in their reports.

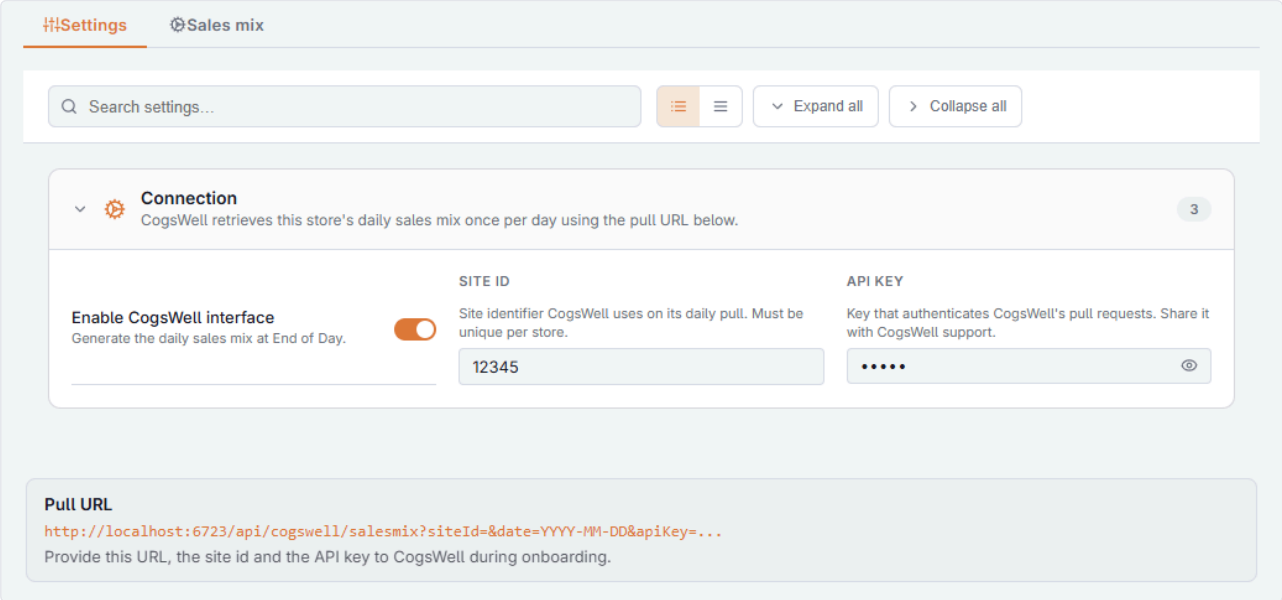
COGS-Well Settings

Integrations › COGS-Well

View online ↗

Enabling the integration, setting the site id and key, and sharing the collection address.

The **Settings** tab of **Back Office › Integrations › COGS-Well** holds the store's connection to COGS-Well and the details COGS-Well needs to collect the daily sales mix. Each setting saves as soon as it is changed.



Connection

Setting	What it does
Enable CogsWell interface	Builds the sales mix at End of Day and lets COGS-Well collect it. Off, nothing is built and every collection is refused.
Site Id	The identifier COGS-Well uses for this store when it collects. It must be unique to the store and match what COGS-Well has on file.
API key	The secret COGS-Well presents with every collection.

The key

- **Generate Key** creates a long random key, saves it and copies it to the clipboard. When a key already exists it asks first, because COGS-Well's daily collection fails until they are given the new one.
- **Copy Key** copies the current key again, for a second hand-over. Copying needs a secure (HTTPS) connection to Back Office. With no key yet, it says **There Is No Key Yet. Use Generate Key First.**

> Anyone holding the site ID and the key can read this store's daily sales mix. Share the key once, through a channel you trust, and generate a new one if someone who had it leaves.

Pull URL

Below the settings, **Pull URL** shows the address COGS-Well calls, with the date as `YYYY-MM-DD`, and the two headers it must send: `X-CogsWell-Site` with the site ID (it shows a new **Site Id** as soon as it is saved) and `X-Api-Key` with the key. Give COGS-Well the URL, the site ID and the key during onboarding.

Onboarding note for COGS-Well

The POS identifies items and sales categories by long unique identifiers rather than short numeric codes. COGS-Well maps these to its own recipe records once, during setup. Mention this when the site is created so the first mapping pass is expected.

The Sales Mix

Integrations › COGS-Well

View online ↗

What each row contains, what is counted, and what is excluded.

The **Sales mix** tab of **Back Office › Integrations › COGS-Well** shows the rows prepared for a business date — the same rows COGS-Well collects. Use it to check a day before it is collected, and to look into a figure in a COGS-Well report.



Using the tab

- The tab opens on the last date that was built, shown as **Last generated** with its number of rows.
- Choose another date and press **Refresh** to see its rows.
- **Regenerate** rebuilds the chosen date. See Regenerating and Backfilling.

The columns

Column	Meaning
Category	The menu category the item belongs to.
Item	The menu item.
Quantity	Quantity sold, after voided and removed lines are left out.
Price	The price the item was sold at.
Net sales	Quantity times price, less discounts on the line, before tax.

The last row totals the quantity and the net sales.

What is counted

- Menu items and bar items on settled orders of the business date. The business date follows the store's business-day start time, so late-night trade stays with the right day.
- Voided orders, voided or removed lines, and open orders are left out.
- Only the main item lines are counted; modifiers are not rows of their own.

> In stores whose menu prices include VAT, the price and net sales include VAT.

> If a COGS-Well variance looks impossible, open this tab for the day first. It settles quickly whether the question is about the data or about the recipe.

Regenerating and Backfilling

Integrations › COGS-Well

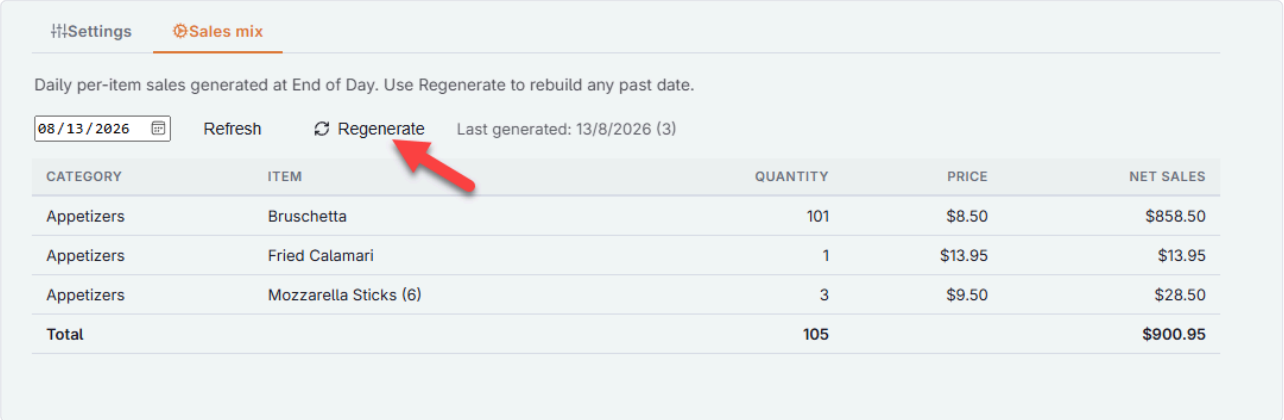
View online ↗

Rebuilding a date after a correction, and preparing history for a new site.

The sales mix for a date is built at End of Day, but it can be rebuilt at any time from the **Sales mix** tab of **Back Office › Integrations › COGS-Well**. Rebuilding replaces that date's rows completely, so it is safe to repeat.

Regenerating a date

1. Open the **Sales mix** tab and choose the date.
2. Press **Regenerate**. A message shows how many rows were built, and the table shows them.
3. If COGS-Well already collected that date, ask them to collect it again.



When to regenerate

- A day closed before COGS-Well was switched on.
- Orders were corrected after End of Day.
- A menu item or its category was corrected after the day closed.
- The tab shows no rows for a day that clearly had trade.

Backfilling history

Regenerate each past date COGS-Well should have, one date at a time.

> Regenerating reads the menu as it is *now*. If an item was renamed or moved to another category since the day traded, the rebuilt rows carry the current name and category. Quantities and money are not affected.

> Regenerating a date COGS-Well has already collected does not update their copy. Ask them to collect it again, or their reports keep the earlier figures.

COGS-Well Troubleshooting

Integrations › COGS-Well

View online ↗

Verifying collection and resolving the usual causes of missing data.

COGS-Well reports no data for a date

1. Open the *Sales Mix* tab for that date. No rows means the aggregation did not run — regenerate the date.
2. Rows present means the problem is collection: check the site id and key match what COGS-Well holds.
3. Confirm the integration is still enabled. Disabling it closes the collection address.

COGS-Well reports an authorisation failure

The site id or the key does not match. Both are case-sensitive and both must be exact. If the key was changed recently, COGS-Well is still presenting the old one.

Quantities are lower than my sales report

Expected, and usually correct. The sales mix excludes voided and removed lines, unsettled orders, and non-item charges. Compare against a report on the same basis before treating it as a fault.

Items appear unmatched in COGS-Well

The item exists in CloudPos but has no recipe mapped in COGS-Well. New menu items need mapping there. Items rung in as open or miscellaneous can never be mapped — give anything recurring its own menu item.

Sales land on the wrong day

The business day-start time is set incorrectly, so late trade is falling into the following date. Correct it in store settings and regenerate the affected dates.

Categories look wrong in their reports

Menu items were moved between categories after those dates traded. Regenerate the dates, or accept that historical rows follow the current structure.

Uber Eats

Uber Eats — overview

Integrations › Uber Eats

View online ↗

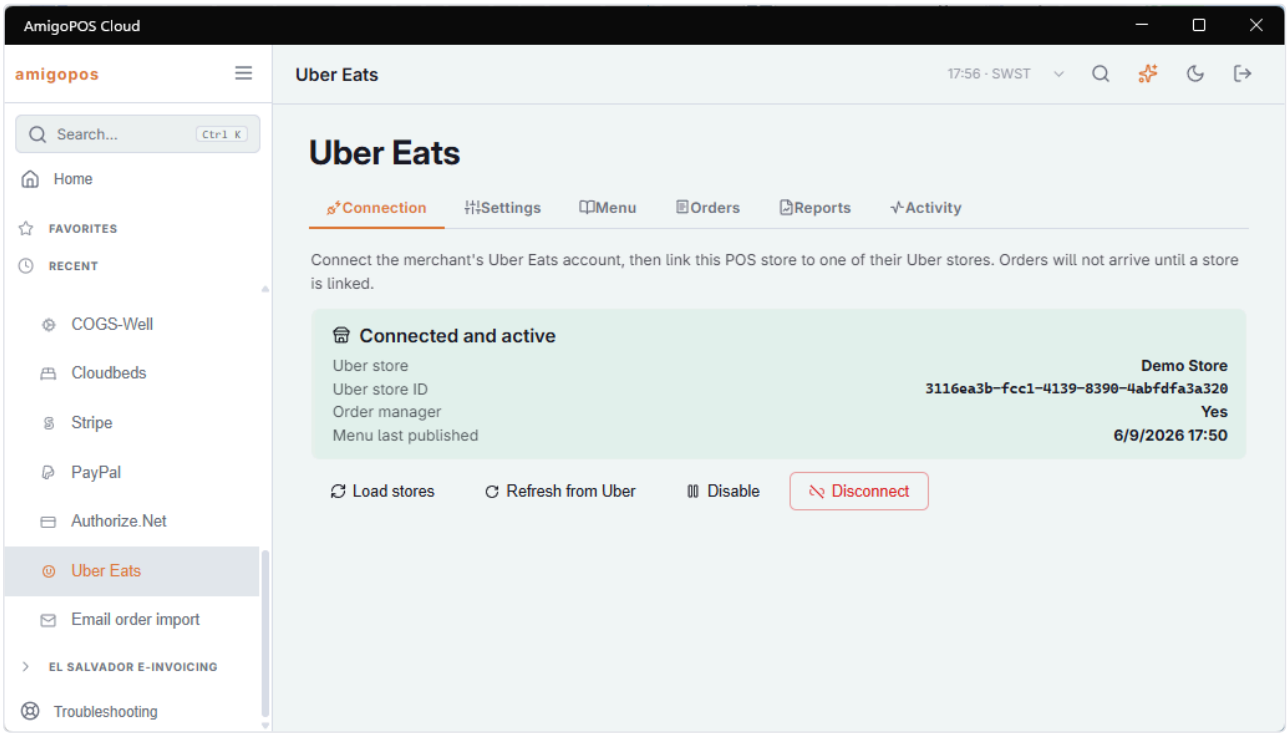
What the Uber Eats integration does, what you need before you start, and where each part lives.

The Uber Eats integration connects one CloudPos store to one Uber Eats store. Once connected it does five things:

- **Publishes your menu** to Uber Eats, including categories, prices, modifiers, opening hours and, in the US, the tax label Uber uses to charge sales tax.
- **Receives orders** from Uber Eats straight into the POS as tickets, with prep tickets and receipts printing exactly as they do for any other order.
- **Lets staff manage those orders at the register** — accept or deny, cancel, mark ready or move the ready time — from the Uber Eats Order Manager on the POS top bar.
- **Keeps availability in step** — when an item's counter reaches zero in the POS it is marked sold out on Uber Eats, and the store can be paused or its prep time changed from Back Office.
- **Pulls payout reports** so you can reconcile what Uber paid against what the POS recorded.

Before you start

- An Uber Eats store that is already trading, or a test store provided by Uber.
- Sign-in details for the Uber account that owns that store — you will be asked to log in during setup.
- Weekly opening hours set for the store. The menu cannot be published without them.
- An order type set aside for Uber Eats orders, and a tender to settle them to.

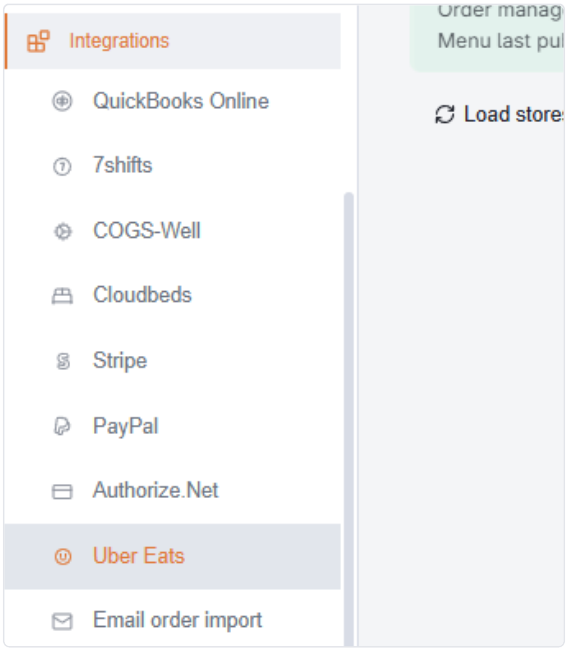


How it fits together

Setup lives on one page: **Back Office › Integrations › Uber Eats**. The tabs run left to right in roughly the order you will use them.

- **Connection** — link this POS store to an Uber store, see whether the store is online, pause it, set its prep time, and choose the integration settings Uber holds for the store. Nothing else works until a store is linked. See Connecting a store to Uber Eats.
- **Settings** — how orders are handled and what gets published. See Uber Eats settings.
- **Menu** — preview and publish the catalog, and set tax labels. See Publishing your menu to Uber Eats.
- **Orders** — every Uber order this store has received and what happened to it, with an **Uber Status** button that shows Uber's own record of the order.
- **Reports** — payout and performance reports from Uber.
- **Activity** — the queue of requests going out to Uber, the log of every call and its answer, and the notifications Uber sent. See Checking what Uber received.

At the register, the **Uber Eats** button on the POS top bar opens the Order Manager. See The Uber Eats Order Manager.



What Uber controls, and what you control

Some things are decided on Uber's side and cannot be changed from CloudPos:

- Whether Uber accepts orders on the store's behalf. The Connection tab shows it as **Auto-Accept (Set By Uber)**.
- Commission, delivery fees and what the eater is charged in total.
- Whether the store appears in search results for a given address.

> If something looks wrong on the marketplace and nothing in Back Office explains it, it is usually one of the items above. Your Uber Eats partner manager is the right contact.

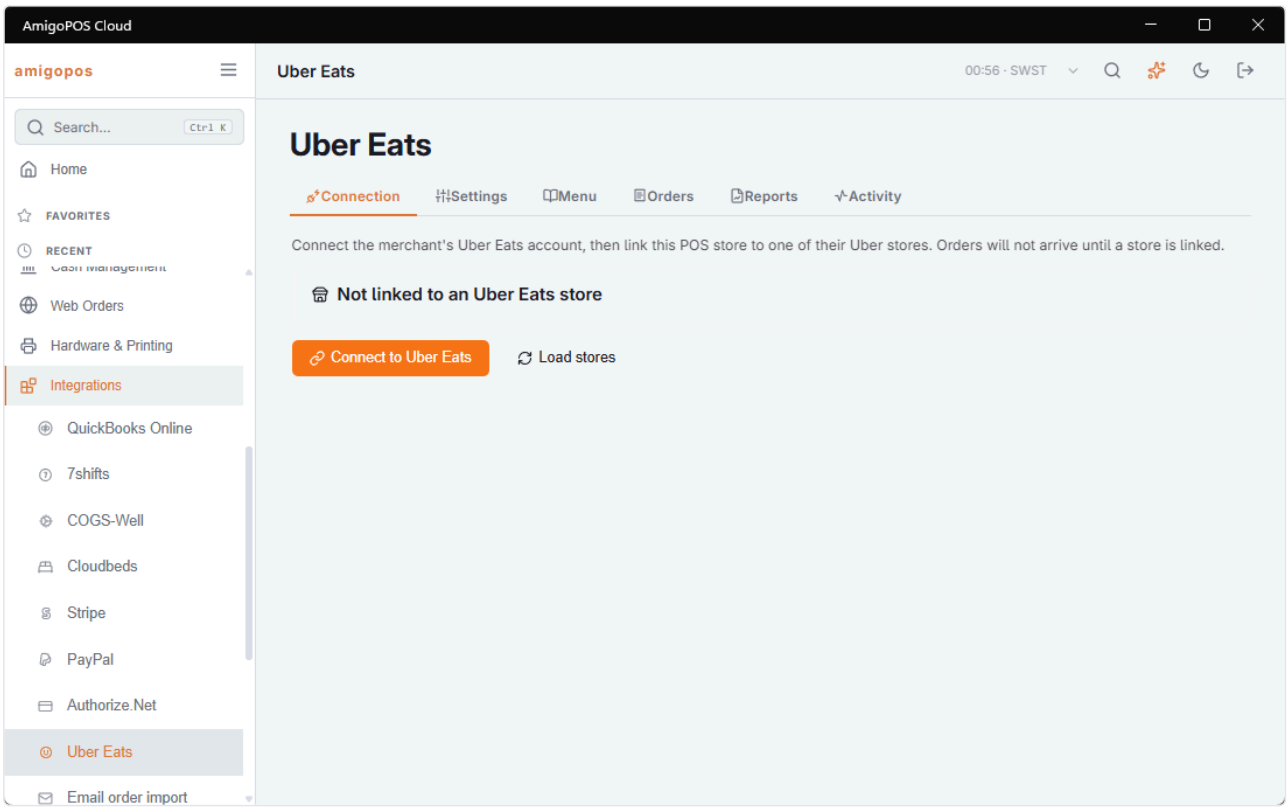
Connecting a store to Uber Eats

Integrations › Uber Eats

View online ↗

Authorise the merchant’s Uber account, link this POS store to one of their Uber Eats stores, and choose the integration settings Uber holds for it.

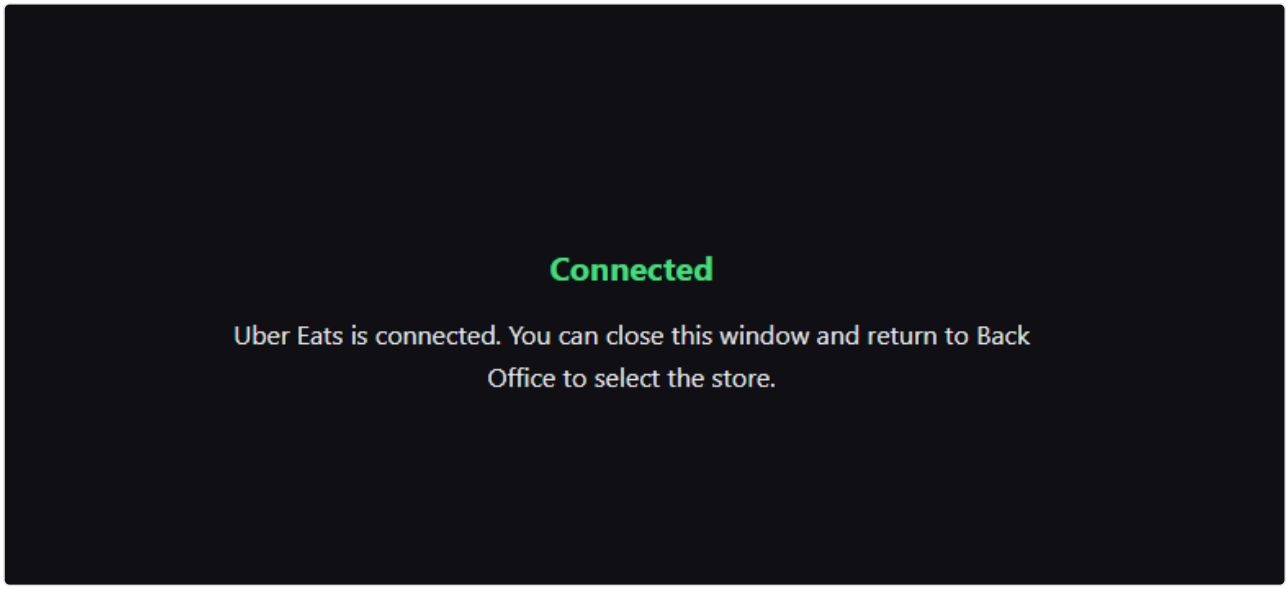
Go to **Back Office › Integrations › Uber Eats › Connection**. The card at the top always tells you where you stand: not linked, linked but disabled, or connected and active.



Step 1 — authorise

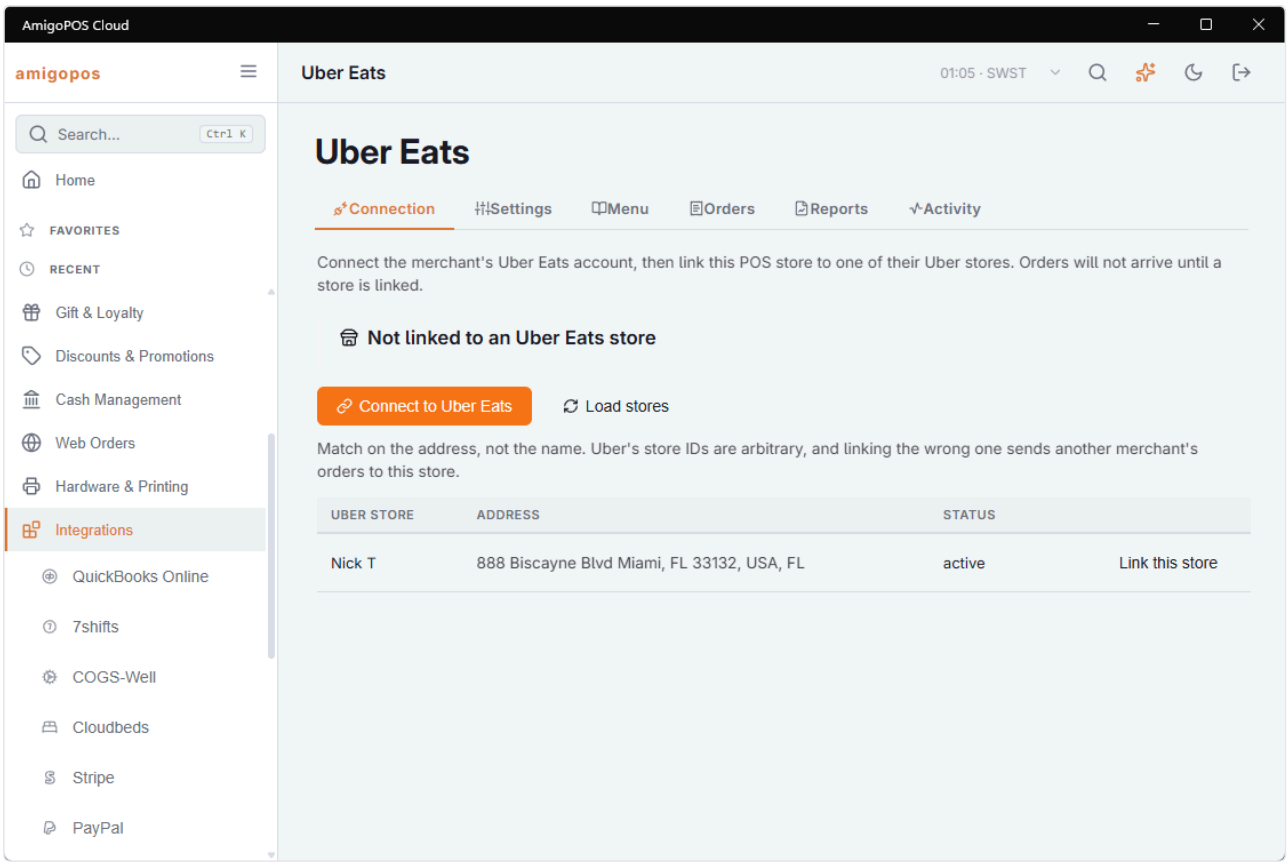
Press **Connect to Uber Eats**. A new browser window opens on Uber's sign-in page. Sign in with the account that owns the store, and approve the request.

When you come back to Back Office, the list of that account's stores appears below. It can take a few seconds. If it does not, press **Load stores**.



Step 2 — pick the store

Find the store in the list and press **Link this store**.



> Match on the **address**, not the name. Store names repeat across a chain, and linking the wrong one sends another location's orders to this store.

If the store list comes back empty

Some Uber accounts return no stores, or too many to find the right one. Copy the store's ID from the Uber Eats Manager, paste it into **Uber Store ID** under the buttons, and press **Link By Store ID**. Uber still checks that the account you signed in with manages that store; if it does not, Uber's answer is shown and nothing is linked.

Step 3 — check the result

The status card should now read **Connected and active** and show the Uber store name and ID.

It also shows **Order manager**. This tells you whether CloudPos is allowed to accept, deny, cancel and mark orders ready for the store:

- **Yes** — staff manage orders at the POS.
- **No** — another app holds that role, or the store is set up so that Uber accepts orders automatically. Orders still arrive in the POS; only the order actions will fail.

When it reads No, a **Request Order Manager** button appears. Press it and CloudPos asks Uber for the role. The role usually lands after the next menu publish; if Uber records no order manager at all, the store is probably set to accept orders automatically and Uber support has to change it.

Integration settings

The **Integration Settings** card on the same tab shows settings Uber keeps for the store, read live from Uber each time the tab opens. Change a switch and press **Save**; **Reload From Uber** reads them again.

- **Scheduled Order Notifications** — Uber tells CloudPos when a scheduled order is placed, not only when it is released to the kitchen. Leave it on: it is what lets CloudPos check and accept an order for later as soon as the eater places it.
- **Special Instructions** — eaters can add notes to items and orders. The notes print on the prep ticket.
- **Utensils And Napkins Request** — eaters choose whether they want utensils, straws and napkins. When they decline, the order shows **No cutlery**.

- **Require Acceptance On Uber Tablet** — leave this off. When it is on, an order does not reach CloudPos until someone accepts it on Uber's own tablet.

Below the switches, **Webhook Version** shows which version of Uber's order notifications the store uses, and **Auto-Accept (Set By Uber)** shows whether Uber accepts orders on the store's behalf. A store still on the **Legacy** version shows a **Switch To Order API 1.0.0** button; switching affects only new orders, and switching back needs Uber support.

> Uber decides which of these settings it keeps. If a switch turns itself back off after **Save**, Back Office says so — the switches always show what Uber recorded — and the change has to be made by Uber support.

Turning the connection off

- **Disable** stops orders and menu updates but keeps the link. Use this for a temporary pause; **Enable** switches it back on.
- **Refresh from Uber** re-reads the store's details. Useful if Uber support has changed something and Back Office still shows the old state.
- **Disconnect** asks how: **Disconnect from Uber Eats** removes the integration on both sides; **Unlink here only** removes the link from CloudPos without telling Uber — use it only if the first option fails or the wrong store was linked, and then remove the integration from the Uber account too.

> Coming back after a disconnect means going through the whole sign-in and linking process again. Use **Disable** unless the store is leaving Uber Eats.

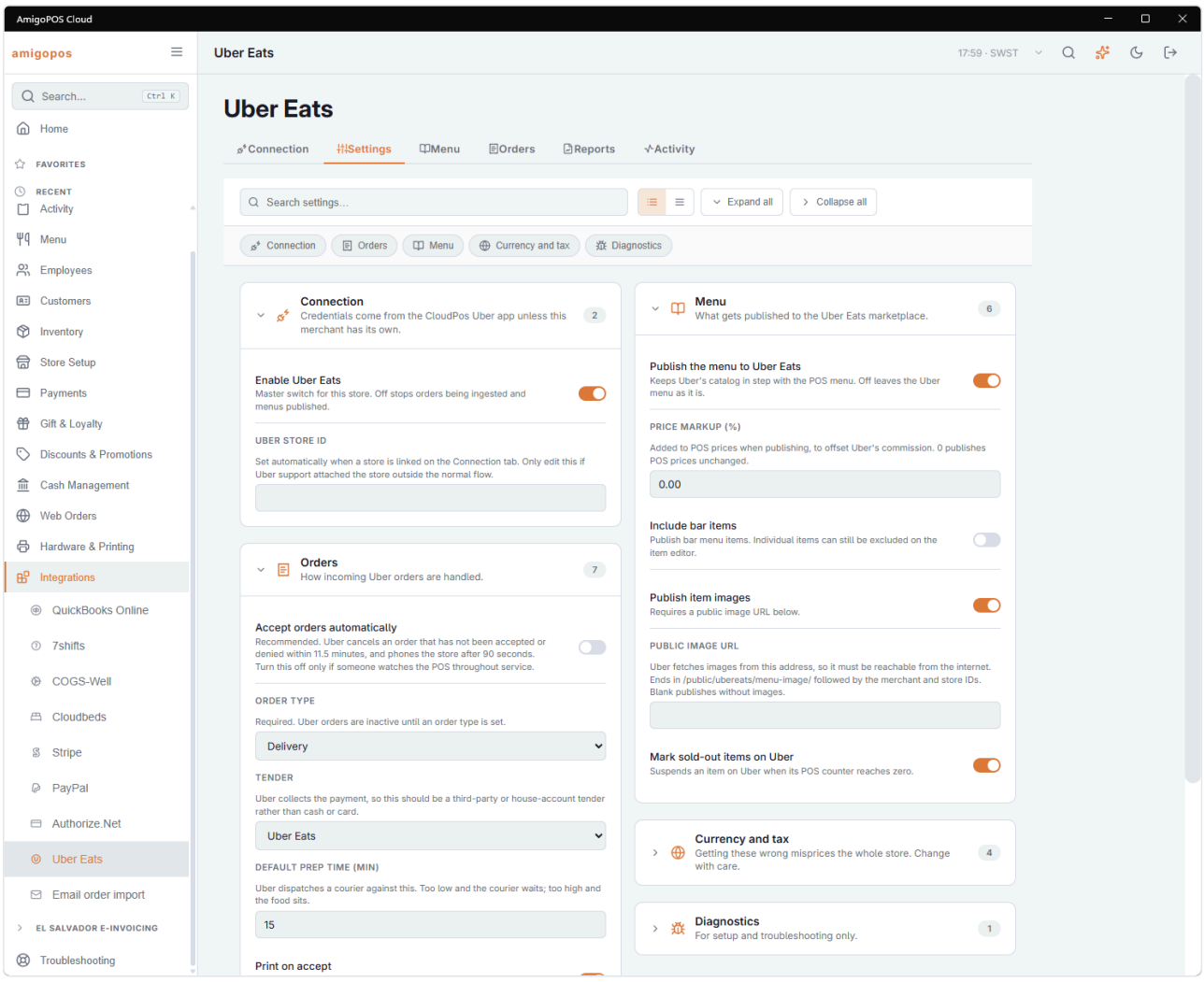
Uber Eats settings

Integrations › Uber Eats

View online ↗

Every setting on the Uber Eats Settings tab, what it does, and the ones that matter most.

Back Office › Integrations › Uber Eats › Settings. Settings save as you change them. The settings Uber itself keeps for the store — special instructions, utensils, scheduled order notifications — are on the Connection tab instead; see Connecting a store to Uber Eats.



Connection

- **Enable Uber Eats** — the master switch for this store. Off stops orders being taken in and menus being published.
- **Uber store ID** — filled in automatically when a store is linked on the **Connection** tab. Only edit it if Uber support attached the store outside the normal flow.

Orders

- **Accept orders automatically** — recommended, and on by default. Uber cancels an order that has not been accepted or denied within about eleven minutes, and telephones the store after ninety seconds of silence. Only turn this off if somebody watches the Order Manager throughout service.
- **Order type** — required. Uber orders are inactive until this is set. Most stores create an order type called “Uber Eats” so the sales report separates marketplace trade from the rest.
- **Tender** — Uber collects the money, so this should be a third-party or house-account tender, never cash or card.
- **Default prep time** — sent to Uber with each order as it is accepted; Uber dispatches a courier against it. It also fills the **Prep time (min)** box in the Order Manager, where it can be changed for one order. The store-wide prep time Uber holds is set separately, on the Connection tab — see Hours, holidays and pausing the store.
- **Print on accept** — prep tickets and a receipt print when an order is accepted. Nothing prints before that, so a denied order costs no paper and no food.
- **Accept scheduled orders** — off denies orders placed for a later time.
- **Print Scheduled Order Notice** — off by default. When a scheduled order is accepted, a heads-up slip with the due time and the items prints at the receipt printer, so the kitchen knows what is coming. The prep ticket and the kitchen display still wait until the order is due.

- **Deny orders with notes we cannot relay** — off by default, and it should stay off. CloudPos prints allergy and instruction text on prep tickets. Switch it on only if this store's prep tickets have been set up without notes: every Uber order carrying an allergy request or a special instruction is then denied, as Uber requires.

Menu

- **Publish the menu to Uber Eats** — keeps Uber's catalog in step with the POS menu.
- **Price markup** — a percentage added to POS prices when publishing, to offset Uber's commission. Zero publishes your POS prices unchanged.
- **Include bar items** — publishes bar menu items as well as food. Individual items can still be excluded on the item editor.
- **Publish item images** and **Public image URL** — Uber downloads item photographs from an address on your own server, so that address has to be reachable from the internet. Leave the URL blank to publish without photographs.
- **Mark sold-out items on Uber** — when an item's counter reaches zero in the POS, it is shown as sold out on Uber within about half a minute.

Currency and tax

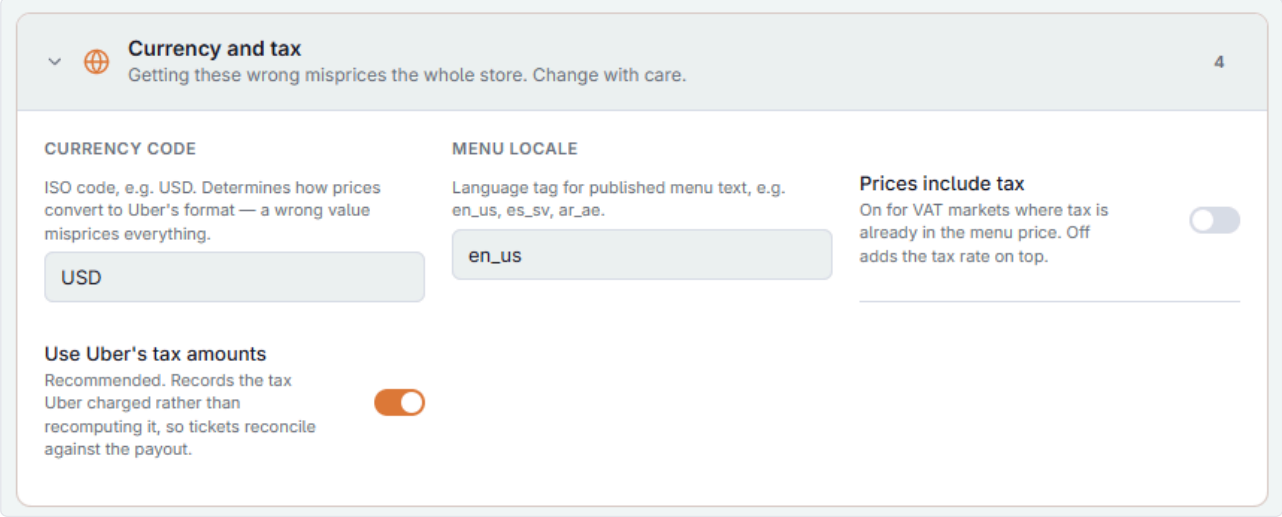
> These four are easy to get wrong and expensive when you do. If you are unsure, leave them as they are and check with your partner manager.

- **Currency code** — determines how prices are converted for Uber. A wrong value misprices every item on the store.
- **Menu locale** — the language tag for published menu text.
- **Prices include tax** — on for markets where tax is already inside the menu price.
- **Use Uber's tax amounts** — recommended. Records the tax Uber actually charged rather than recalculating it, so tickets reconcile against the payout.

In the US, Uber also needs a tax label on each item; those are set on the Menu tab. See Uber Eats tax labels.

Diagnostics

Log every request saves each call to Uber and Uber's answer for thirty days, viewable under **Activity › API Log**. Failures, denials and cancellations are always saved; turn this on when setting up or chasing a problem, and off the rest of the time. See Checking what Uber received.



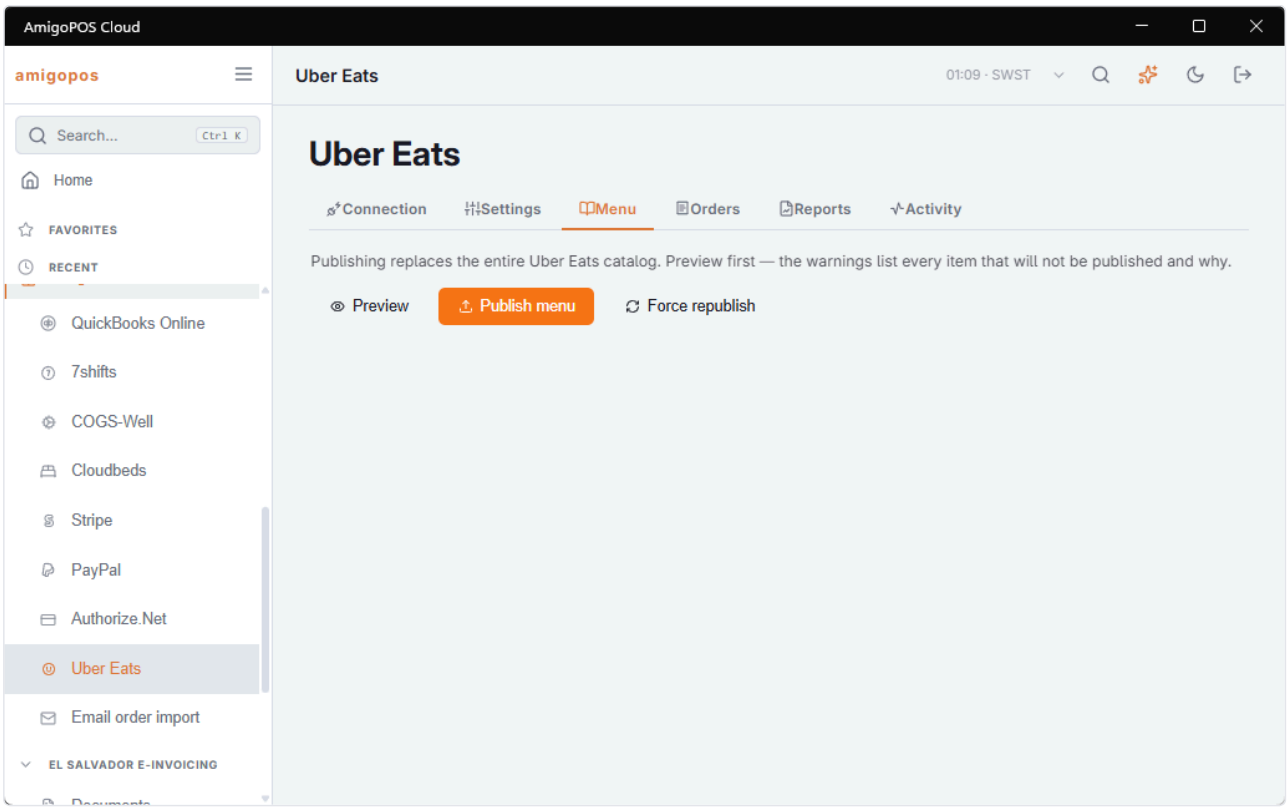
Publishing your menu to Uber Eats

Integrations › Uber Eats

View online ↗

How to preview and publish the catalog, what the warnings mean, and how items get excluded or marked sold out.

Back Office › Integrations › Uber Eats › Menu.

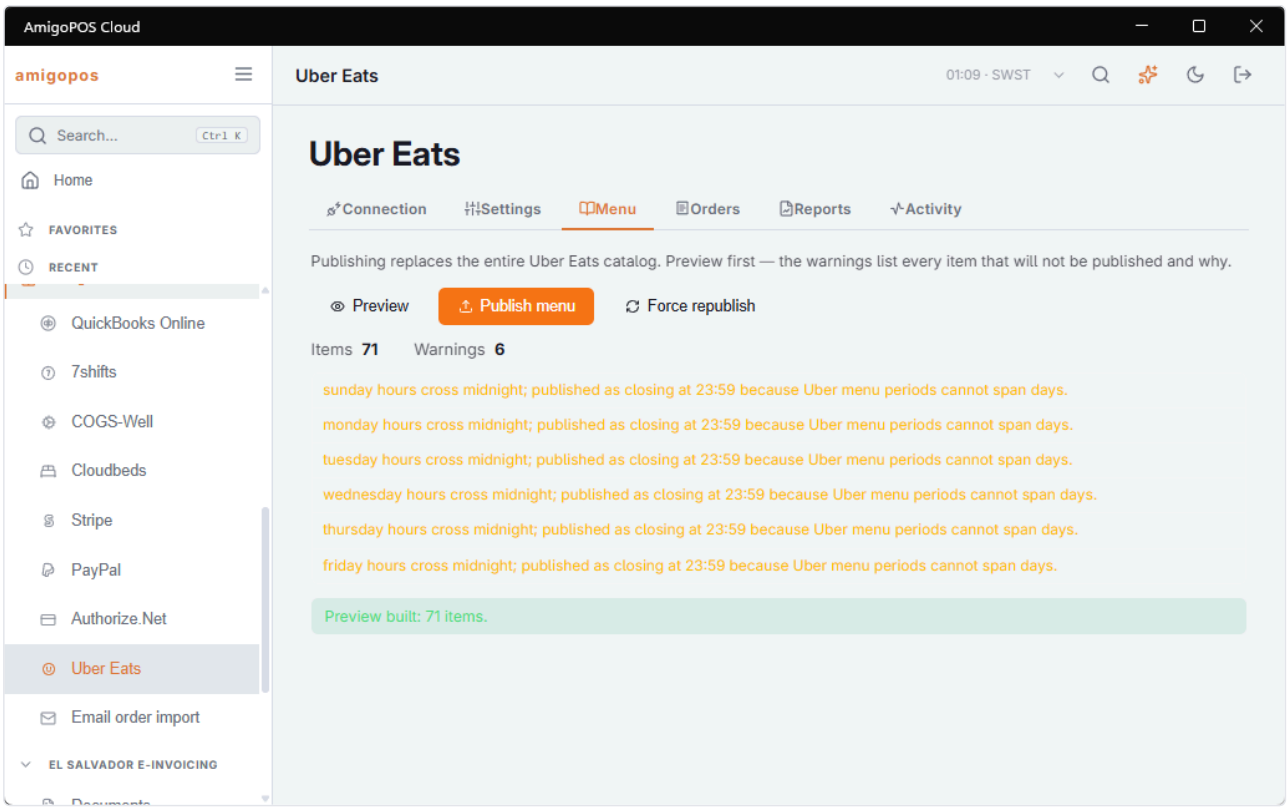


Preview before you publish

Press **Preview**. Nothing is sent to Uber — CloudPos builds the catalog and shows you what it would publish, along with a list of warnings.

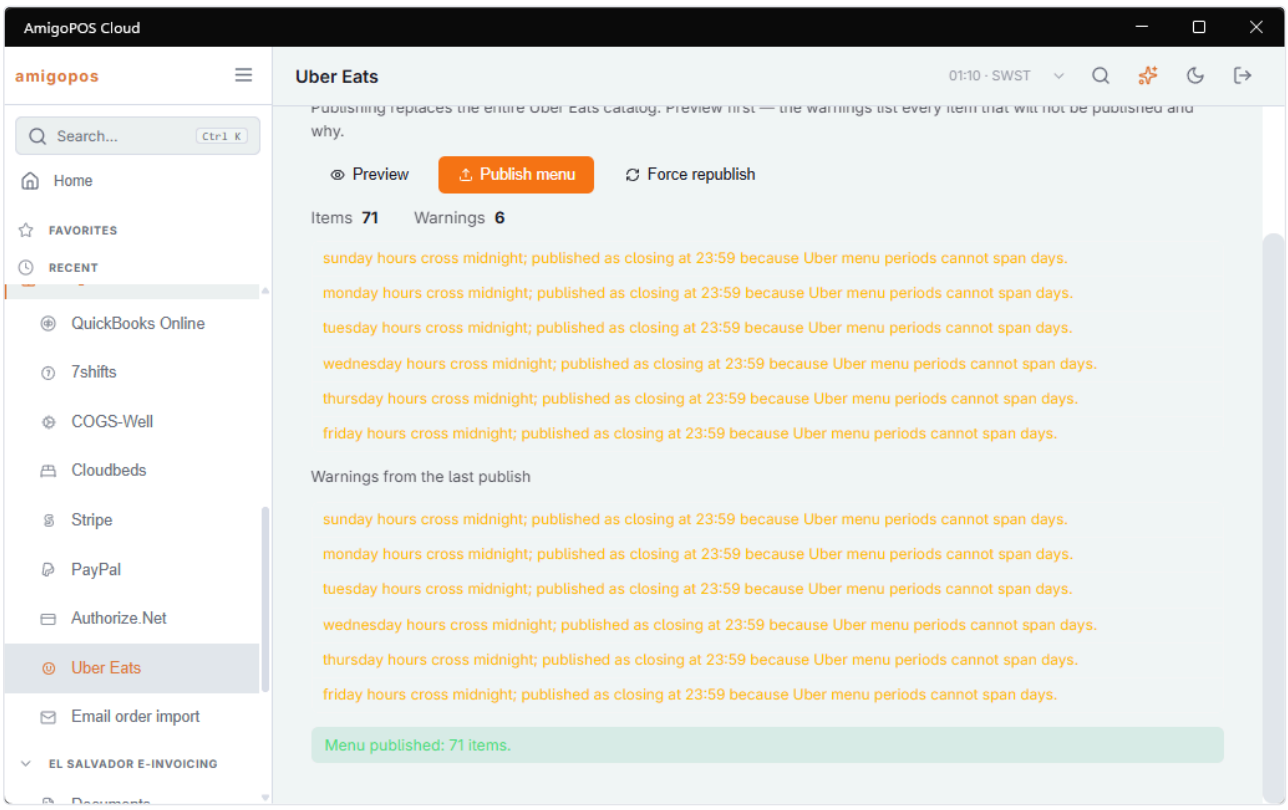
The warnings are the useful part. They name every item that will *not* be published and why. The usual reasons:

- **No price** — an item priced at zero is skipped. A free dish on a marketplace is expensive, so CloudPos will not publish one by accident.
- **No category** — items must belong to a menu category.
- **Hours problems** — a day open for less than an hour, or hours that run past midnight, cannot be expressed on Uber and are adjusted or skipped.



Publishing

Press **Publish menu**. The item count and any warnings are shown when it finishes.



Force republish sends the menu again even when nothing has changed. Use it if Uber's copy has drifted — for instance after somebody edited the menu in Uber's own tools.

Keeping the menu in step

Once **Publish the menu to Uber Eats** is switched on, you do not normally press Publish again. Editing a menu item, category or price queues a republish automatically, and several edits in a row collapse into one upload.

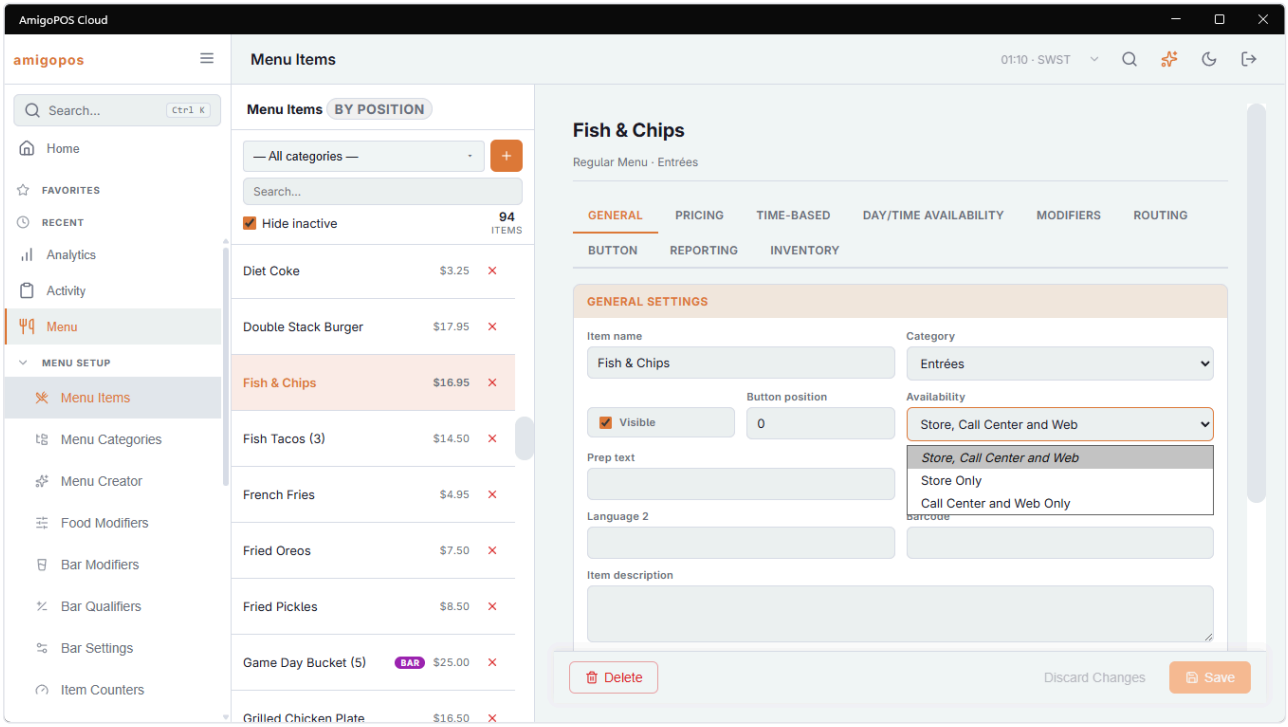
> Publishing **replaces** the entire Uber Eats catalog rather than merging with it. That is why CloudPos refuses to publish when the build produced no items — sending an empty catalog would take the store off the marketplace.

Tax labels

In the US, Uber calculates and collects sales tax from a label on each item. The **Tax Labels** card below the publish buttons sets them for the store, a category or a single item, and they go to Uber with the next publish. See Uber Eats tax labels.

Excluding items

Some items do not belong on a delivery marketplace — room hire, deposits, staff meals. Tick **Exclude from Uber Eats** on the item editor and republish.



Sold-out items

Uber marks an item sold out when its POS item counter reaches zero, without republishing the whole menu. **Mark sold-out items on Uber** must be on in Settings.

- To take an item off right away, open **Manager › Menu Item Counters** on the POS (or **Item Counters** in Back Office), add the item and set its quantity to **0**.
- An item with a counter also goes sold out by itself when it sells down to zero.
- Setting the quantity above zero, or deleting the counter, puts the item back on sale.

The change reaches Uber within about half a minute and shows as **MenuItemUpdate** on the Activity tab. A sold-out item comes back by itself at the end of the store's day.

> Photographs are downloaded by Uber from your own server, so they can take several hours to appear after a publish, and they will not appear at all if the address in Settings is not reachable from the internet. An item with no photograph shows Uber's own placeholder pattern; that cannot be turned off from CloudPos.

Uber Eats tax labels

Integrations › Uber Eats

View online ↗

How to tell Uber which sales-tax classification each item falls under, for US stores where Uber calculates and collects the tax.

In the US, Uber calculates and collects sales tax on each Uber Eats order itself. To do that it needs to know what kind of item each dish is — prepared food, a bottled drink, alcohol, and so on — and for food, whether it is served hot or cold. That is the item's **tax label**.

> Outside the US, or anywhere Uber does not calculate the tax, leave the store default as **Not Sent** and nothing here is published.

Where to set them

Back Office › Integrations › Uber Eats › Menu, the **Tax Labels** card. Each row has two lists:

- **Tax Classification** — the kind of item, from Uber's list.
- **Temperature** — **Heated**, **Unheated** or **Cold** for classifications where it changes the tax, or **Not Set**.

A change saves as soon as you pick it; a tick appears on the row.

Store, category and item

Set the label once at the widest level that is true, and only override where something differs. The most specific label wins:

1. **Store Default** — the first row. Most restaurants set this to their main prepared-food classification.
2. **Category** — one row per menu category. Left blank, it shows the store default it is using.
3. **Item** — open a category with its arrow to see its items. Left blank, an item shows the category's label (or the store default) that it falls back to.

For example: store default prepared food, served hot; the *Drinks* category set to soft drinks; one bottled-water item in that category set to bottled water.

Getting them to Uber

Labels travel with the menu. Press **Publish menu** after changing them, or wait for the next automatic publish.

> CloudPos does not decide which classification is right for your items; that depends on your state's rules. If you are unsure, ask your accountant or your Uber Eats partner manager before publishing.

Uber Eats orders at the POS

Integrations › Uber Eats

View online ↗

How Uber Eats orders arrive, print and reach the kitchen, including scheduled orders, cancellations and orders the POS cannot take in.

How an order arrives

An Uber Eats order becomes a normal POS ticket within a second or two of the eater placing it. It carries the eater's name, the short order code Uber and the courier use, and any allergy or instruction text.

Nothing prints until the order is accepted, so an order that gets denied never reaches the kitchen.

- With **Accept orders automatically** on (the recommended setup), CloudPos accepts the order at once: it prints and goes to the kitchen display straight away.
- With it off, the order waits for staff in the **Uber Eats Order Manager** on the POS top bar, with a countdown to Uber's deadline. See The Uber Eats Order Manager.

On the kitchen display an Uber order carries an **Uber Eats** badge, so cooks can tell it from the store's own takeout and web orders.

Allergies and special instructions

Allergy requests are shown separately from ordinary notes, in red, because they are easy to miss in a list. They also print on the prep ticket. Whether eaters can add instructions at all is a setting Uber keeps for the store; see **Special Instructions** in Connecting a store to Uber Eats.

Scheduled orders

An order placed for later is accepted twice, because Uber requires it.

- **When it is placed**, CloudPos checks every item against the menu and accepts it — straight away with automatic acceptance on, or when staff accept it from the Order Manager's Pending tab, where it shows a **Scheduled** pill and its due time. No ticket is written and nothing goes to the kitchen yet. If **Print Scheduled Order Notice** is on in Settings, a heads-up slip with the due time and the items prints at the receipt printer.
- **Shortly before it is due**, Uber sends it again. CloudPos then writes the ticket, accepts it a second time and prints it, just like an order placed for now. The second acceptance never waits for staff — the store already said yes.

Until then the order sits on the Order Manager's **Scheduled** tab and is listed as **Scheduled** on the Back Office Orders tab. If the store does not take orders for later, switch off **Accept scheduled orders** in Settings and they are denied when they are placed.

Cancellations

If Uber or the eater cancels an order that was already accepted, the ticket is voided automatically and a cancellation notice prints to the kitchen so anybody already cooking it knows to stop. Staff can also cancel an accepted order from the Order Manager.

Orders the POS cannot take in

When an order cannot be turned into a ticket, CloudPos denies it with Uber straight away instead of leaving it to time out. The eater hears at once, and Uber does not count it as an order the store ignored. The Orders tab shows it as **Denied**, with the reason beside it.

- **An item is not on the POS menu** — denied as an item availability problem, naming the items. Usually Uber still has an older copy of the menu: publish it again.
- **No order type set**, Uber Eats switched off in CloudPos, or the order could not be read from Uber — denied as the POS not being ready. Fix what the reason names.

The Orders tab in Back Office

Back Office › Integrations › Uber Eats › Orders lists every Uber order for the current business day, or for a date range when **Current Business Day** is switched off. The **Detail** column shows why an order was denied or cancelled. **Uber Status** on a row asks Uber for its own record of that order; see Checking what Uber received.

After an outage

Uber only resends an order for about a minute when CloudPos does not answer. If the system was down for longer, CloudPos asks Uber for the orders it missed as soon as it is back, and every two minutes after that, and takes them in as usual. An order older than Uber's eleven-minute limit has already been cancelled by Uber and is not brought back.

The Uber Eats Order Manager

Integrations › Uber Eats

View online ↗

Accepting and denying Uber Eats orders at the register, and cancelling, marking ready or moving the ready time of accepted ones.

The **Uber Eats** button on the POS top bar opens the Order Manager. It is on the bar whenever the store is linked to Uber Eats and the integration is switched on; stores without Uber Eats never see it.

- **Plain icon** — nothing is waiting. A small number on it is how many scheduled orders are accepted and waiting for their time.
- **Pulsing, with a count** — orders are waiting for a decision. It turns urgent when the oldest is close to Uber's deadline.
- **Pulsing, with !** — something is wrong: orders recently failed to come in, or no order type is set so new orders cannot. Hover over it for the reason.

The window has three tabs. It opens on the first one that has something in it.

Pending — orders waiting for a decision

Only used when **Accept orders automatically** is off. Each order shows its short code, the order type, the eater, the total and a **countdown** — the time left before Uber cancels it on the store's behalf. Uber also telephones the store after ninety seconds without an answer.

Press **View Order** to see the items, then:

- **Accept** — tells Uber yes, prints the prep ticket and receipt and sends the order to the kitchen display. Uber dispatches a courier against **Prep time (min)**; change that number first if this order will take longer than usual.
- **Deny** — asks for a reason: **Item unavailable**, **Kitchen too busy**, **Store closed**, **Cannot honour the request**, **POS not ready** or **Other**, with an optional explanation. Then press **Confirm**. The reason is reported to Uber; pick the accurate one, because denying everything as Other makes the store look unreliable.

A scheduled order waiting for a decision shows a **Scheduled** pill and its due time, and has no prep-time box — Uber already holds the time the eater asked for. Accepting it moves it to the Scheduled tab; nothing is cooked yet.

Scheduled — accepted orders for later

Scheduled orders the store has accepted, with the time each is **Due**. Shortly before that time Uber sends the order again and it becomes a normal ticket that prints and goes to the kitchen. Open one to see its items or to **Cancel Order**.

Today — every Uber order this business day

Each order with its status: **Accepted**, **Ready**, **Scheduled**, **Cancelled** or **Denied**. Open an accepted order to:

- **Mark Ready** — tells Uber the food is ready for the courier.
- **Update Ready Time** — the kitchen is running late or early: enter the minutes in **Ready In (Min)** and press it, and Uber moves the courier to match.
- **Cancel Order** — asks for a reason (**Customer Called To Cancel**, **Out Of Items**, **Restaurant Too Busy**, **Kitchen Closed**, **Cannot Complete Customer Note** or **Other**), tells Uber and voids the ticket. It needs the same permission as voiding an order.

> If an action fails with an error about access, check **Order manager** on the Back Office Connection tab. When it reads No, CloudPos is not allowed to act on this store's orders; see Connecting a store to Uber Eats.

Hours, holidays and pausing the store

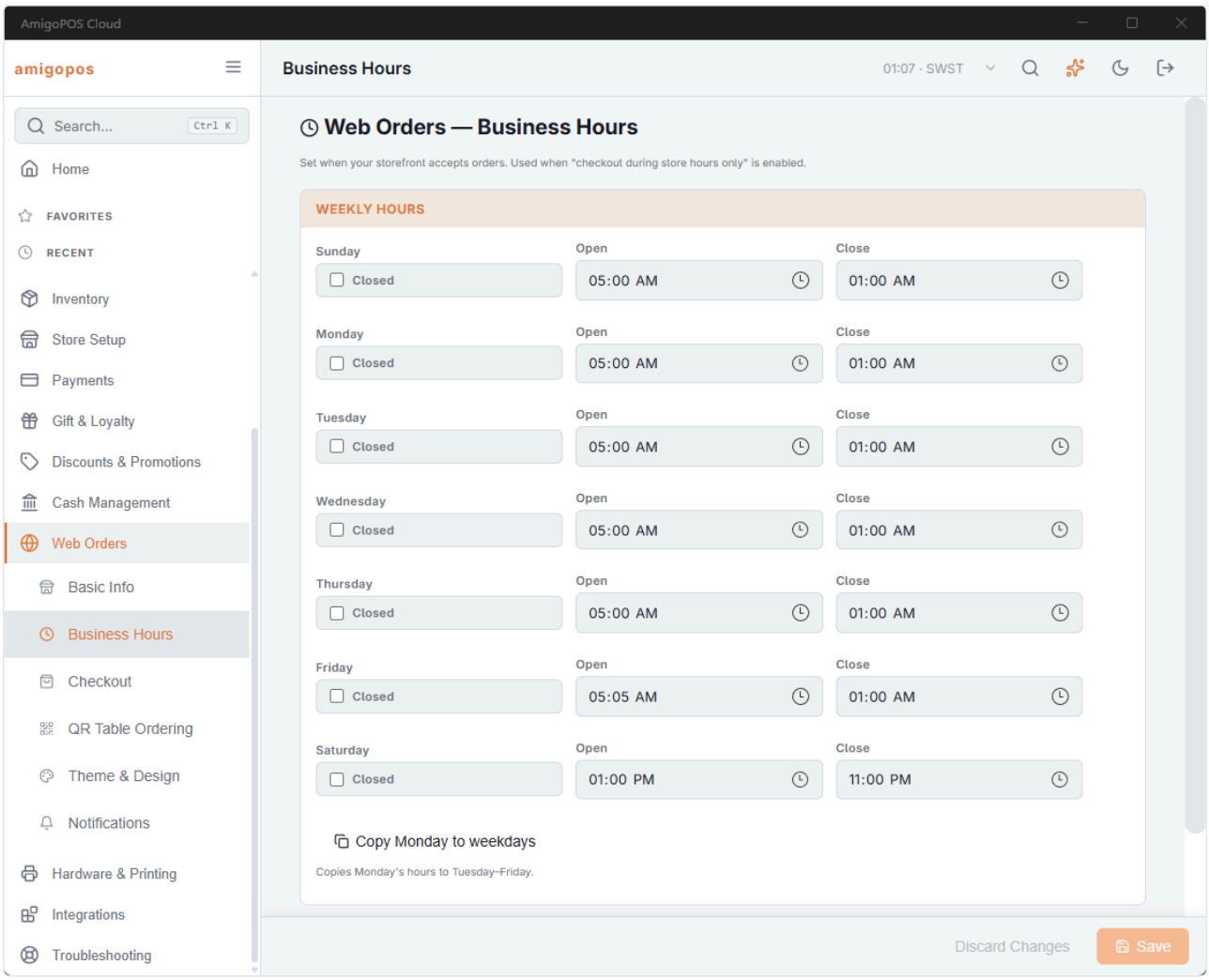
Integrations › Uber Eats

View online ↗

Where Uber Eats gets your opening hours, how to close for a holiday, how to pause when the kitchen cannot cope, and the store prep time.

Weekly hours

Uber Eats uses the same weekly opening hours as your web ordering site. Set them under **Back Office › Web Orders › Business Hours**, then publish the menu — the hours travel with it.

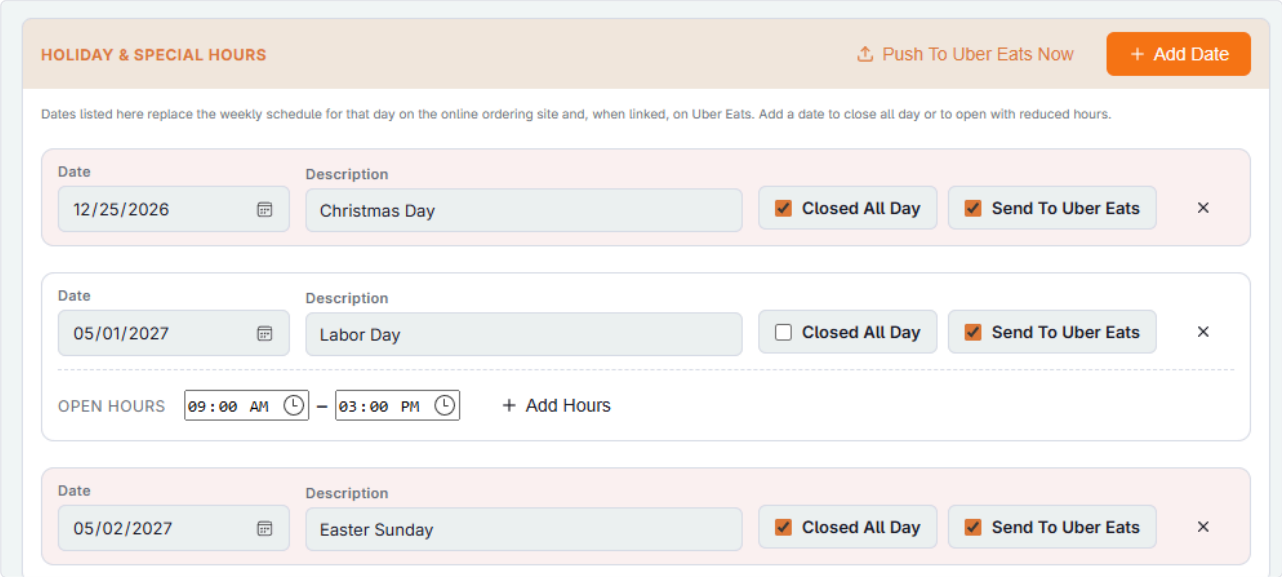


Uber cannot express hours that run past midnight as a single stretch, and it rejects any window shorter than an hour. Late-night trading is published as closing at 23:59. The preview warnings tell you which days were affected.

Holidays and one-off closures

Closing for a public holiday, or opening late for one day, is a **holiday hours** override on the same page, under **Holiday & Special Hours**. These are date-specific and sit on top of the weekly pattern.

Press **Add Date**, tick **Closed All Day** or add the hours you will actually trade, leave **Send To Uber Eats** ticked, and save. The full set is sent to Uber within seconds; **Push To Uber Eats Now** sends it again on demand.



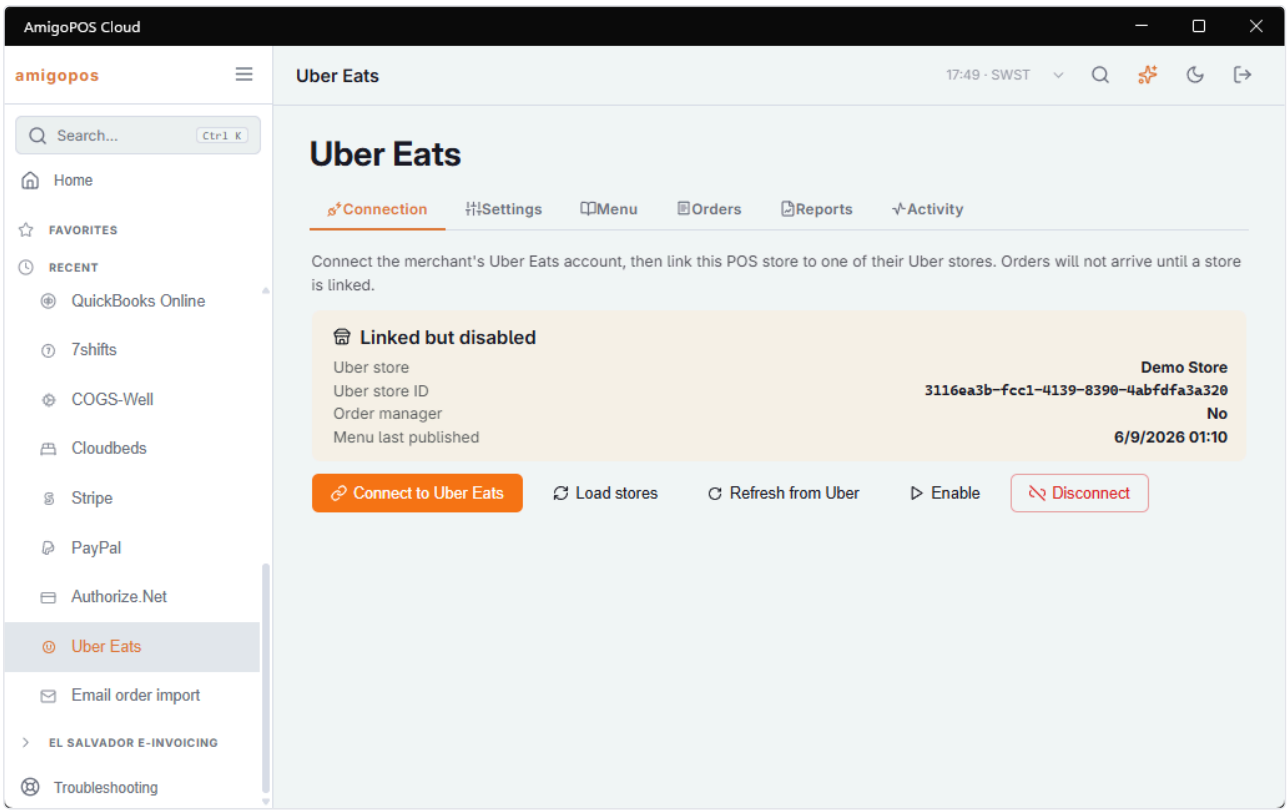
> Holiday hours **replace** the whole set each time they are sent, so keep future dates in the list rather than deleting them as they pass. If Uber turns a set down, the page says so and the reason is on the Uber Eats **Activity** tab, on the **StoreHolidayHours** row.

Pausing during service

Pausing takes the store off the marketplace immediately without touching hours or menu. Use it when the kitchen genuinely cannot fulfil orders — a printer failure, a backed-up pass, staff shortage.

Go to **Back Office › Integrations › Uber Eats › Connection**. The **Uber Eats Availability** card shows whether the store is online right now. Choose how long in **Pause For** — 15 minutes up to 4 hours — and press **Pause Store**. The store comes back by itself when the time runs out; **Resume Store** brings it back sooner.

Always set a time for the pause to lift. A store paused during a rush and forgotten stays invisible until somebody notices the missing revenue.



Store prep time

The same card sets the store's prep time on Uber — the time Uber quotes eaters before they order and uses to send couriers when no time comes with the order. Enter the minutes in **Prep Time (Minutes)**, from 1 to 180, and press **Update Prep Time**. The box shows the value Uber holds; it is read from Uber each time the tab opens and when you press **Check Status**.

Lengthen it during a rush so couriers arrive when the food does, and shorten it again afterwards. It is separate from **Default prep time** in Settings, which is sent with each order as it is accepted and decides that order's ready time.

Reading the availability card

- **Status** — **Online**, or **Paused** when the store is not taking orders.
- **Offline Reason** — shown only when the store is not online: Uber's reason, exactly as Uber sends it.
- **Paused Until** — when a pause ends by itself.

Press **Check Status** to read them again.

Why the store is not showing

The reason on the availability card explains most cases:

- **Outside menu hours** — the current time is not inside the published hours. This is by far the most common reason.
- **Paused by the restaurant** — somebody paused it, here or in Uber's own tools.
- **Paused by Uber** — Uber has taken the store offline; your partner manager will know why.

> A newly published menu can take a little while to appear on the marketplace. If everything above looks right and the store still is not listed, give it an hour before raising it with Uber.

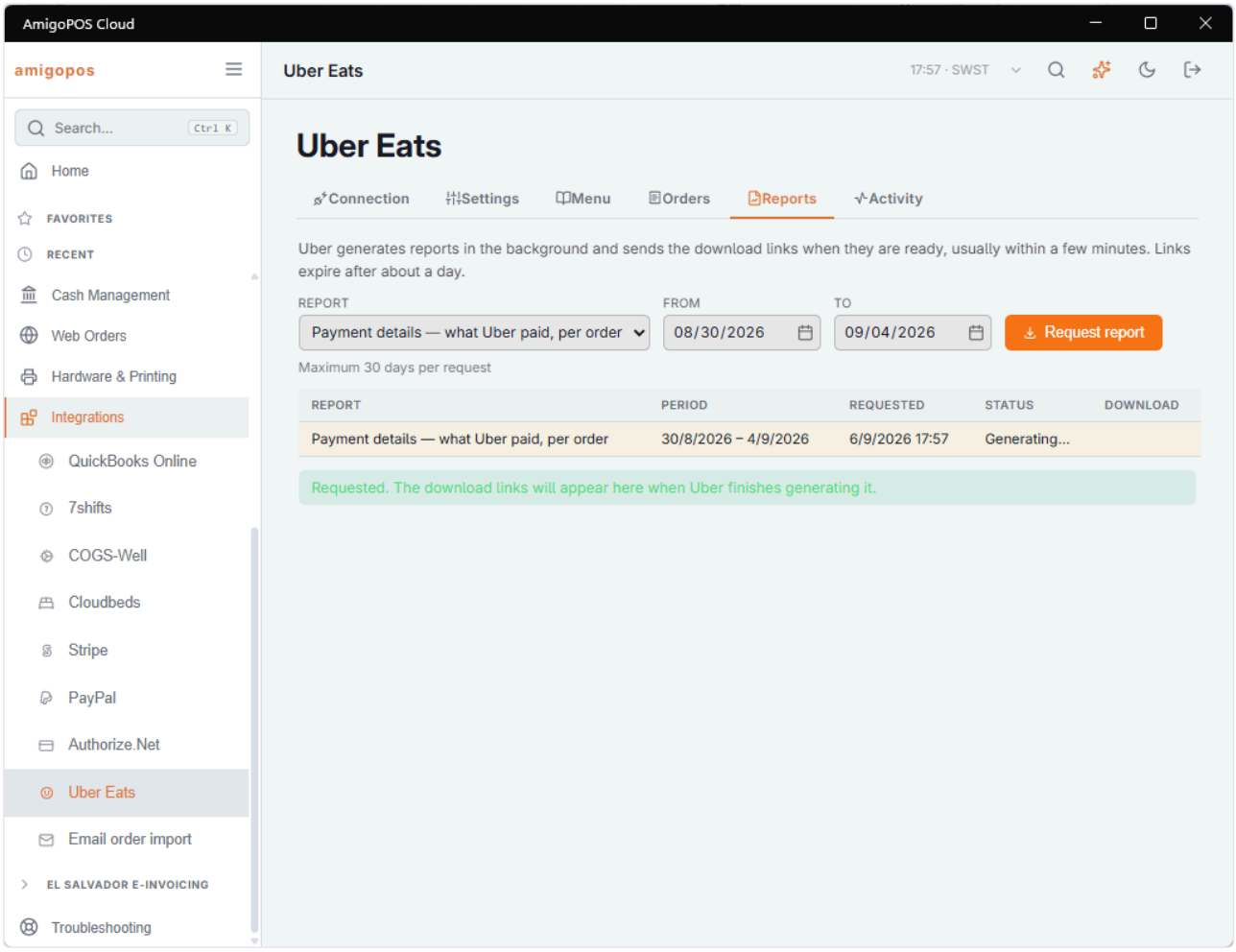
Uber Eats reports

Integrations › Uber Eats

View online ↗

Requesting payout and performance reports from Uber, and what the date limits mean.

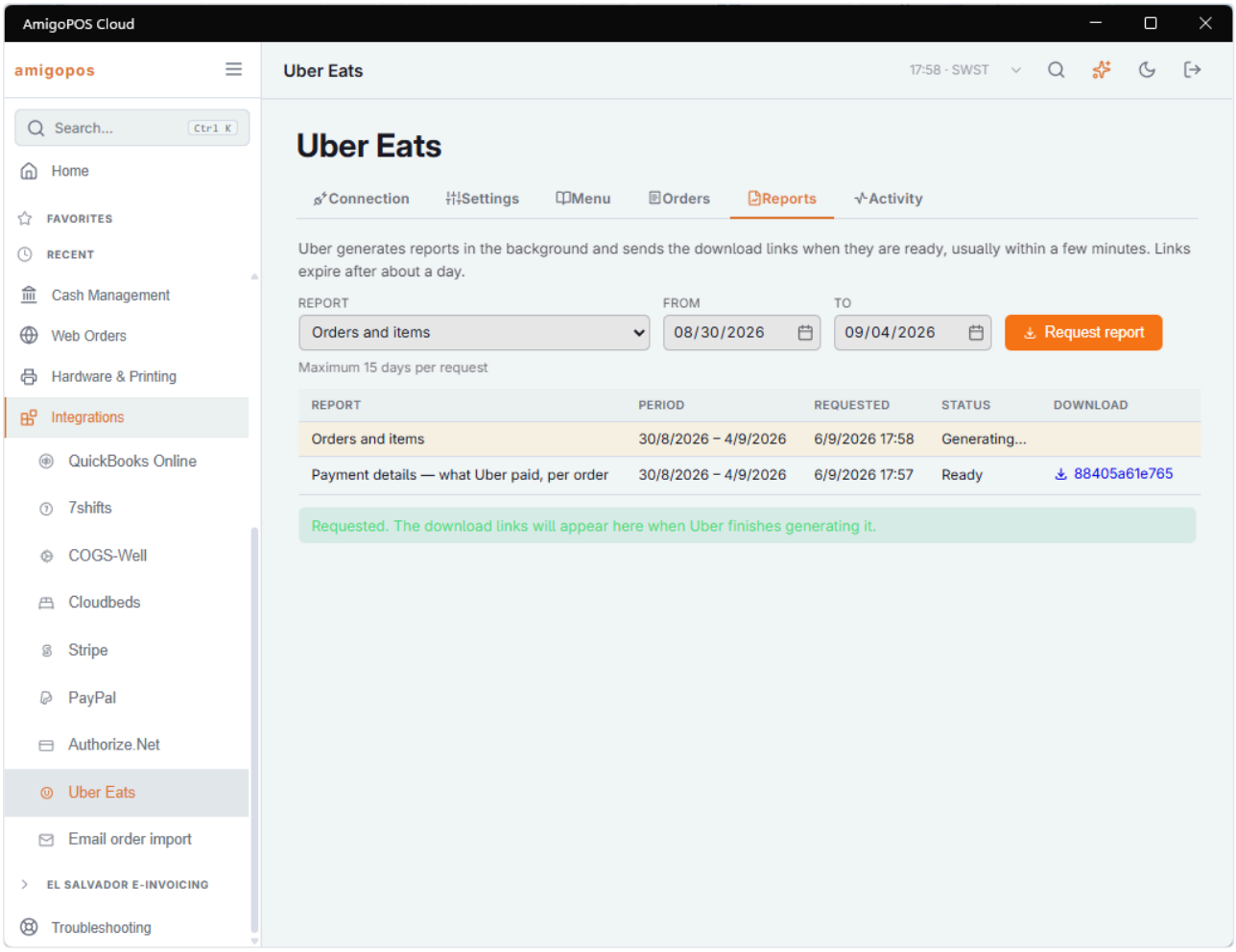
Back Office › Integrations › Uber Eats › Reports.



Requesting a report

Choose the report, set the dates and press **Request report**. Uber builds the report in the background, which usually takes a few minutes. The row shows *Generating* until it is ready, then download links appear.

The report you will use most is **Payment details** — what Uber actually paid, order by order. It is the one to reconcile against the POS.



Date limits

Each report has its own limits, shown under the date boxes. They come in two kinds:

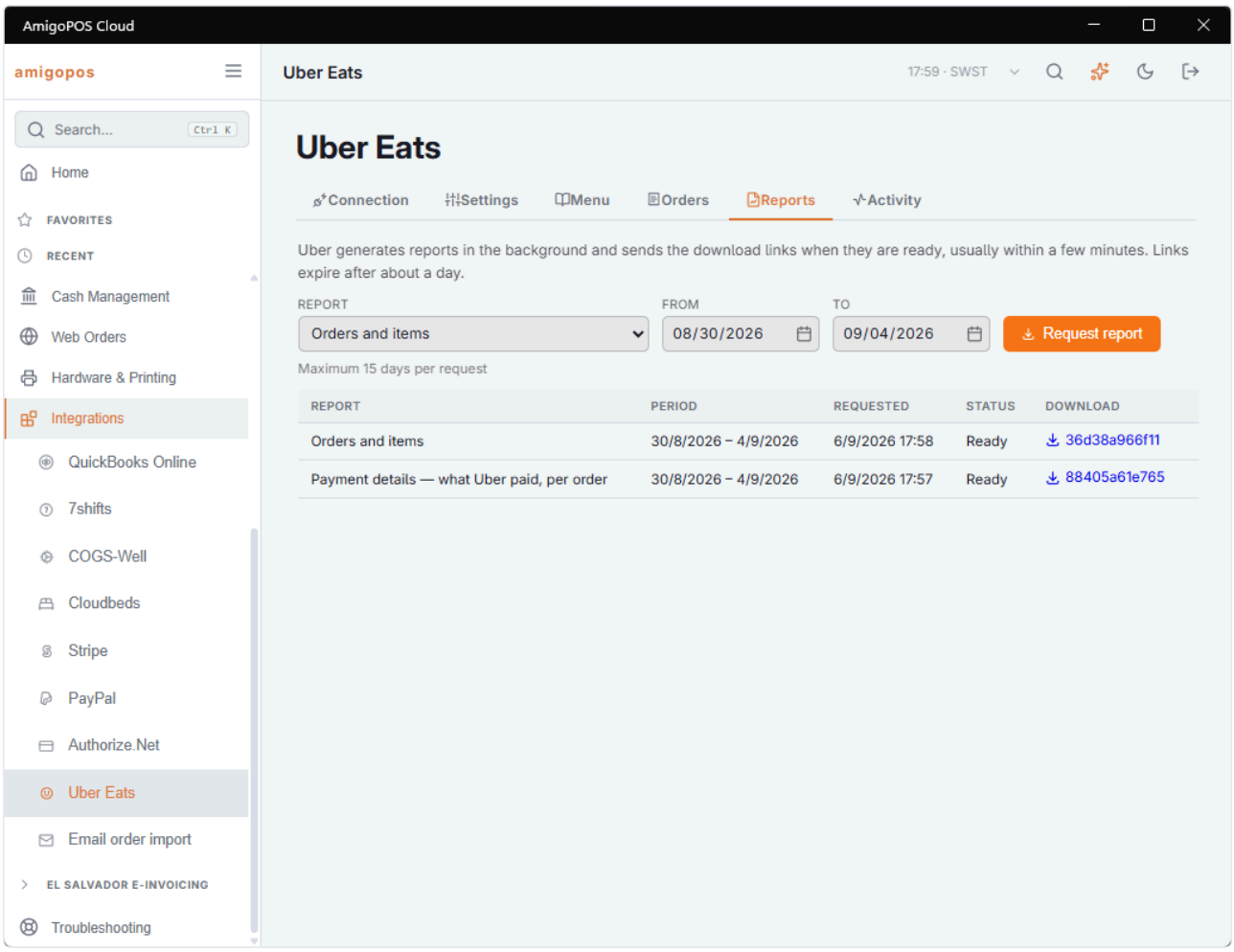
- **How wide a range** you can ask for — thirty days for most, fifteen for some.
- **How recent** the data goes. Several reports have no data for the last few days, so “yesterday” will be rejected.

The dates adjust themselves when you change the report, so you should not normally hit either limit.

Downloads expire

> The download links are temporary and stop working after about a day. The list keeps a record that the report was run, but you will need to request it again to get the files.

Larger reports arrive as several files, usually one per country. Download them all.



Checking what Uber received

Integrations › Uber Eats

View online ↗

Uber Status on an order, and the Activity tab’s Queue, API Log and Webhooks views: how to see exactly what passed between CloudPos and Uber.

When an order or a setting does not look the way you expect on Uber, Back Office can show what CloudPos sent, what Uber answered, and what Uber holds now. Everything here is read-only; nothing is changed or saved by looking.

Uber Status on an order

On **Back Office › Integrations › Uber Eats › Orders**, every row has an **Uber Status** button. It asks Uber, live, for its own record of that order and shows:

- **The order's state on Uber**, under Uber's own field names — for example `state` (OFFERED, ACCEPTED, FAILED…), `status`, `preparation_status` and each delivery's `status`. Compare it with the Status column: if CloudPos says Accepted and Uber still says OFFERED, the accept did not land.
- **Webhooks** — every notification Uber sent about this order, in the order received, flagged if one was not processed.
- **Raw Response** — Uber's full answer, and **Stored Payload** — the order as CloudPos saved it when it arrived, which is what the ticket was built from.

Copy puts either one on the clipboard; **Refresh** asks Uber again.

Activity › Queue

Back Office › Integrations › Uber Eats › Activity opens on the **Queue**: requests CloudPos sends to Uber in the background — menu publishes, item sold-out updates, holiday hours, store pauses. Failed rows retry by themselves. Rows marked *Dead* gave up after retrying

and need attention; Uber's answer is shown alongside, and **Retry** puts the row back in the queue.

Activity › API Log

Every call CloudPos made to Uber, with the time, the operation, OK or Failed, and the start of Uber's answer. Pick one operation from the list or tick **Failures Only** to narrow it down. **View** opens the full **Request** and **Response**, each with a **Copy** button.

Failures, denials and cancellations are always logged. Everything else is logged only while **Log every request** is on in Settings; the view says so when it is off. Entries are kept for thirty days.

Activity › Webhooks

Every notification Uber sent to CloudPos for this store — new orders, scheduled orders, cancellations, store changes — with the time it arrived and when it was processed. A row in red was not processed or ended in an error. **View** shows the notification exactly as Uber sent it. Notifications are kept for fourteen days after processing.

When you contact Uber support

Uber support will ask for the order or store ID, the call that was made and what came back. Open the entry under **API Log**, press **Copy** on the Request and the Response, and paste both into your message along with the order's Uber Status.

Uber Eats troubleshooting

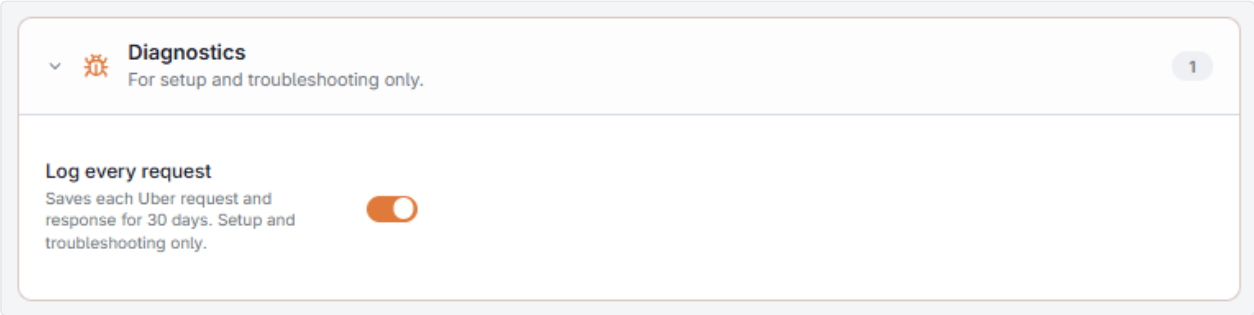
Integrations › Uber Eats

View online ↗

The problems that come up most often, and what to check first.

The store is not showing on Uber Eats

1. Connection tab — does it say **Connected and active**?
2. Read the **Uber Eats Availability** card, and press **Check Status**. An offline reason about menu hours means the current time is outside your published hours, which is the usual cause.
3. Has the menu been published at least once? Check **Menu last published** on the Connection tab.
4. A newly published menu can take an hour or more to appear.



Some items are missing from Uber Eats

Press **Preview** on the Menu tab and read the warnings. Every item that was not published is listed with the reason — almost always a missing price or a missing category. Also check whether **Exclude from Uber Eats** is ticked on the item, and whether the item has a counter at zero (it shows as sold out).

Prices on Uber do not match the POS

- Check **Price markup** in Settings. A markup is added on top of POS prices when publishing.
- Check **Currency code**. A wrong code misprices everything on the store.
- If only some prices are wrong, republish with **Force republish** — Uber's copy may have drifted.

Orders are not arriving

1. Is **Enable Uber Eats** switched on?
2. Is an **Order type** set? Orders cannot be taken in without one; the Connection tab and the POS button both warn when it is missing.
3. Is **Require Acceptance On Uber Tablet** off on the Connection tab? When it is on, orders wait on Uber's tablet before reaching CloudPos.

4. Check the **Orders** tab. An order listed as *Denied* with a reason beside it reached CloudPos but could not be turned into a ticket, so it was turned down with Uber straight away; the reason says what to fix. *Failed* means Uber would not take the denial either, and the reason shows Uber's answer.
5. Check **Activity › Webhooks**. If Uber's notification is not there, it never reached CloudPos.

An order will not accept, deny, cancel or mark ready

Check the **Order manager** line on the Connection tab. If it reads **No**, CloudPos is not allowed to act on this store's orders — press **Request Order Manager**, or ask Uber support to change it.

CloudPos shows an order as Denied or Cancelled, but Uber still shows it

Press **Uber Status** on the order. If Uber's `state` is still OFFERED or ACCEPTED, open the matching entry under **Activity › API Log**: it shows exactly what was sent and what Uber answered. Copy both for Uber support. See Checking what Uber received.

An integration setting switches itself back off

Uber decides which of the Connection tab's **Integration Settings** it keeps. When it accepts a change but does not keep it, Back Office says so and the switch shows what Uber recorded. Only Uber support can change it.

Holiday hours were not accepted

Open **Activity › Queue** and read Uber's answer on the **StoreHolidayHours** row. Fix the date it names on **Web Orders › Business Hours** and save, or press **Retry**.

Photographs are not showing

- Is **Publish item images** on, and is **Public image URL** filled in?
- That address must be reachable from the internet, not just from inside the restaurant.
- Uber downloads photographs some time after the menu, so allow a few hours.

Something failed and I want to see why

See Checking what Uber received: the Activity tab's Queue, API Log and Webhooks views show every request, Uber's answer, and every notification Uber sent.

Orders were missed while the system was down

Nothing to do. When CloudPos is back it asks Uber for any order it never received and takes it in, within about two minutes. Orders older than eleven minutes were already cancelled by Uber.

A scheduled order is still showing Scheduled

That is normal until shortly before it is due: the ticket is written and printed when Uber sends the order the second time. See Uber Eats orders at the POS.

For anything that looks like a store configuration problem rather than a CloudPos one — commission, whether Uber accepts orders for you, whether the store appears in search — your Uber Eats partner manager is the right contact.

Email order import

Email order import — overview

Integrations › Email order import

View online ↗

How the order confirmation emails delivery platforms send become tickets waiting for approval at the POS, and what the import deliberately does not do.

Back Office › Integrations › Email order import turns the order confirmation emails that delivery platforms send into tickets at the POS. It reads each email, pulls out the customer, the items and the totals, matches the items against your menu, and creates a ticket that waits for approval at the POS.

What it is not

This is **not** an API integration, and the page says so above the tabs. Nothing is sent back to the platform. That has four consequences worth knowing before you turn it on:

- **You still work the platform tablet.** Accepting, rejecting and marking ready all still happen there. The import only saves you keying the order in again.
- **Every order waits for approval** on the POS. Items are matched by their printed name, so nothing guarantees the match is right — a person confirms it before the ticket goes to the kitchen.
- **Prices come from the email, always.** The customer has already paid what the email says. Nothing is re-priced from your menu, even when the two disagree.
- **Email layouts change without warning.** When a platform redesigns its confirmation email, reading can get worse. The **Test an email** tab is where that becomes visible.

Before you start

- A mailbox that receives the platform emails, connected by your installer. See Connecting the mailbox.
- Access to each platform's merchant portal, so the forwarding address can be added to its order-notification settings.
- On the **Settings** tab, **Import Order Emails** switched on, and an order type and a misc menu item chosen for these orders. Until then nothing is imported. See Email order import settings.

The tabs

- **Addresses** — one import address per ordering service. See The forwarding address for each store.
- **Messages** — every email that arrived and what became of it. See Working orders day to day.
- **Held** — emails that could not be confirmed as an order for this store. See Held mail and sender checks.
- **Menu mapping** — names on orders that did not match the menu. See How items are matched to your menu.
- **Test an email** — paste an email to see how it would be read. See Testing and troubleshooting.
- **Settings** — turns the import on and sets how imported orders are booked and how emails are read. See Email order import settings.

The forwarding address for each store

View online ↗

Create the address the platform sends to, add it to the merchant portal, and understand which forwarding routes work.

Each store gets its own address on the **Addresses** tab. The address is what tells CloudPos which store an email belongs to, so a store with no address can never receive orders by email.

Create the address

1. Open the **Addresses** tab.
2. Give the address a label — usually the platform name, so a store on two platforms has one address for each and you can tell them apart later.
3. Create it, then copy it with the copy button. Do not retype it: the address carries a signature and a single wrong character makes it unusable.

Add it to the platform

In the merchant portal for the platform, find the setting that controls where order notification emails are sent, and add the CloudPos address there. Keep your own address on the list as well — you want a copy you can read.

> An address that resolves proves only that someone knew the address. It is not proof the email came from the platform — that is a separate check, covered under held mail.

Which routes work

- **The platform sends to it directly.** Best. Nothing sits in the middle.
- **A rule in your mailbox auto-forwards to it.** Works. The sender signature survives an automatic forward.
- **Someone presses Forward by hand.** Does not work. A manual forward rewrites the message, the sender signature no longer matches, and the message is held rather than imported. This is deliberate — see the topic on held mail.

Changing the address

The signature is derived from a key held on the server. If that key is ever replaced, every address issued before the change stops resolving and has to be re-issued and re-entered in each merchant portal. Treat it as permanent.

Connecting the mailbox

Integrations › Email order import

View online ↗

What your installer sets up so forwarded order emails reach CloudPos, and how to tell the connection is alive.

This is installer work and is done once. It is described here so you know what was set up and what to check when mail stops arriving.

What gets configured

- A Google Cloud project with a notification topic, so CloudPos is told the moment mail arrives rather than polling for it.
- A service account with delegated access to the mailbox that receives the platform emails.
- A mail routing rule that preserves the address the message was originally sent to. Without it every message looks like it was addressed to the mailbox itself, and no store can be identified.

Turning it on

Collection stays switched off until the service account credentials are in place. Once they are, the installer enables it and the Addresses tab begins reporting when mail was last collected.

> If the last-collected time stops advancing while orders are still coming in, the mailbox connection is the first thing to check — not the parsing.

Email order import settings

Integrations › Email order import

View online ↗

Turning the import on for the store, the order type, misc item, payment method and customer imported orders use, and how the emails are read.

The **Settings** tab of **Back Office › Integrations › Email order import** turns the import on for the store, chooses how imported orders are booked, and sets how the order emails are read. Each setting saves as soon as you change it, and belongs to the store you are working in.

Import

Setting	What it does
Import Order Emails	Imports the order emails forwarded to this store's import addresses. Off until you switch it on.
Order Type	The order type every imported order is created under. Required. Giving these orders their own type keeps them apart from your own delivery and takeout orders in the reports.
Misc Item	The menu item used for an order line whose name does not match the menu. Its tax rate and printer routing are used; the name and the price come from the email. Required.
Payment Method	The payment method recorded for prepaid orders. The ordering service has already collected the money.
Customer	The customer imported orders are booked against. The list shows the first 200 customers by name.

> Nothing is imported until **Import Order Emails** is on and both **Order Type** and **Misc Item** are chosen. An email that arrives before then shows on the **Messages** tab as **Skipped**, with the reason.

Reading Orders

Setting	What it does	Starts at
Name Match Threshold	How close a printed name must be to a menu name to count as a match, from 0 to 1. Higher is stricter: raise it and more lines land on the misc item; lower it and more lines match, including some that should not. See How items are matched to your menu.	0.82
Maximum Order Age (Minutes)	Orders older than this are logged and not sent to the POS, so a mailbox backlog cannot flood the kitchen. 1 to 1440.	120

Setting	What it does	Starts at
Use The Tax On The Email	Uses the tax printed on the order email instead of calculating it here. The customer was already charged that amount.	On
Keep Email Text (Days)	How many days the full email text is kept for troubleshooting. 0 keeps it for good.	30
Commission (%)	What the ordering services take as a percentage of each order. The Channel Profitability report uses it to estimate what each order leaves. See Channel Profitability: what each way of selling leaves you.	25

> The threshold is not the only rule: if two menu items score almost the same for a name, neither is used. A misc line is visibly wrong and gets fixed at approval; a confident wrong match is not.

How items are matched to your menu

Integrations › Email order import

View online ↗

Name matching, what happens to items and modifiers that do not match, and how to teach the matcher a name.

Nothing in a platform email identifies your menu items. All the email carries is the wording the customer saw, so matching is done on the printed name.

What happens to each line

- **A clear match** becomes a normal ticket line, priced from the email.
- **No match, or two candidates too close to separate,** becomes a misc line. The line keeps the customer wording as its name, so the kitchen still reads what the customer ordered.
- **Modifiers that do not match** become notes on their line rather than misc lines of their own.

Teaching it a name

The **Menu mapping** tab collects every name that failed to match, with the platform it came from and how often it has appeared. Pick the menu item it should have been and that name is matched from then on.

Work this list in order of how often a name has appeared. A name seen thirty times is worth mapping; one seen once was probably a discontinued special.

> Renaming a menu item to match the platform wording is usually faster than mapping the same name in three places, and it fixes the customer-facing wording at the same time.

Why an import is never rejected

An unmatched item could have failed the whole order instead. It does not, because there is no way to tell the customer why. The order was accepted on the platform tablet and the kitchen is waiting for it — a rejected import would simply vanish. A misc line is wrong in a way somebody can see at approval.

Working orders day to day

Integrations › Email order import

View online ↗

Reading the Messages tab, what each status means, and approving a held order on the POS.

The **Messages** tab of **Back Office › Integrations › Email order import** is the record of every order email that arrived: when it was **Received**, its **Source**, the platform's **Order number**, its **Status**, and how many lines were **Unmatched**. The orders themselves are approved at the POS.

What the statuses mean

- **Received** — the email arrived and is waiting to be read.
- **Read** — read as an order, not yet a ticket.
- **Waiting for approval** — a ticket exists and waits for someone at the POS.

- **Sent to POS** — approved, and working like any other order.
- **Skipped** — recognised as something other than an order, such as a receipt or a marketing email, or rejected at the POS.
- **Held for review** — it could not be tied to a store, or the sender could not be confirmed. It is on the **Held** tab. See Held mail and sender checks.
- **Could not be read** — the reason is shown in its detail. **Read again** runs the email through the readers once more, for example after a reader was updated.

View opens a message: the reason it failed, if it did, then the source, the order number, the reader that handled it (**Read by**), the address it was **Delivered to**, and the email text underneath.

Approving on the POS

An order waiting for approval is not in the kitchen yet. Approving it releases the ticket and prints it the same way any other order prints. Nothing prints before approval.

Approval is the moment to check a misc line or a wrong quantity, because the platform's wording is still on the line in front of you.

The approval queue at the register

When an email order is waiting, an inbox badge with the count appears in the POS top bar; it checks for new orders every 30 seconds. Tap it to open **Email Orders Waiting For Approval**, oldest first.

- Each row shows the platform and its order number, the order number here, how long it has waited (late after 5 minutes), the customer, the item count, the total of the items and every line with its modifiers.
- When lines did not match the menu, the row says how many came in as misc items: check them before approving.
- **Approve** sends the order to the kitchen printers and the KDS. The message turns to *Sent to POS* in Back Office.
- **Reject** asks for a reason — *Duplicate Email*, *Cancelled On The Platform*, *Can't Make It* or *Other* — and an optional private note, then voids the order and puts back any 86 counts it used. The message turns to *Skipped*, with the reason.
- Lines cannot be edited in the queue. Approve the order as it came in, or reject it and ring it in again.
- The platform is not told either way: cancel the order on the platform's tablet too.
- Any station can approve or reject. If two act on the same order, the second is told another station already handled it.

Held mail and sender checks

View online ↗

Why some messages stop before becoming tickets, and what each hold reason tells you to fix.

Two separate questions are asked of every inbound message, and both have to pass.

- **Which store is this for?** Answered by the address the message was delivered to.
- **Did this really come from the platform?** Answered by the signature the platform attaches to its own mail.

An address that resolves does not answer the second question. Forwarding addresses leak — they sit in merchant portal configuration screens that several people can see. If the address resolves but the signature does not, the message is held and never imported.

Common hold reasons

- **Sender could not be confirmed.** Almost always a manual forward. Pressing Forward rewrites the message and breaks the signature. Use an automatic rule instead, or have the platform send direct.
- **No store could be identified.** The message reached the mailbox without the original recipient address surviving, or it was sent to an address that was never issued.

> One check is deliberately not enforced: the sending-server check fails by design on any forwarded mail, because the forwarding server is not on the platform list of approved senders. It is shown for information and nothing is held because of it.

Testing and troubleshooting

Integrations › Email order import

View online ↗

Use the Test an email tab to see exactly what the import reads from an email, and work through the usual causes when an order does not arrive.

The **Test an email** tab of **Back Office › Integrations › Email order import** takes the full source of an email, runs it through the same readers the live import uses, and shows the result. Nothing is sent to the POS and no ticket is created, so it is safe to run with a real order.

Getting the full source

In Gmail, open the message, use the message menu and choose **Show original**, then copy all of it, headers included. The headers matter: without them nothing identifies the platform or the store.

Reading the result

Paste the source into the box and press **Read this email**. The result shows:

- **Read by** — the reader that was chosen, with how confident it was.
- **Delivered to** — the import address the email was sent to, which decides the store.
- **Sender check** — whether the platform's signature on the email passed: **DKIM Passed** or **DKIM Failed**, with the signing domain.
- **Totals** — subtotal plus tax equals the total.
- Any warnings, then each line with its quantity and price. A line with *No menu match — would import as a misc line* did not match; a line marked *close match, check before serving* matched a menu item by a close name.

Show the text that was read opens the plain text the readers worked on. It is the only place a reading failure becomes visible: if the items are missing from it, no setting will help — the email layout has changed and the reader needs updating.

An order did not arrive

1. **Is it on the Messages tab at all?** If not, the email never reached the POS — check the forwarding address in the merchant portal, and whether the mailbox is still collecting.
2. **Is it on the Held tab?** The reason on the row says which of the two checks failed.
3. **Is it Could not be read?** Paste the same email here and read the text that was read.
4. **Is it Waiting for approval?** It arrived correctly and is waiting at the POS. Nothing prints until somebody approves it.

> Keep one real confirmation email from each platform. When a layout change breaks reading, a known-good sample from before the change is the fastest way to show what moved.

Xero

Xero Overview

Integrations › Xero

View online ↗

How CloudPos sends each day of trading to Xero, and what appears in the accounts.

CloudPos can send each day of trading to Xero automatically, so the accounts are up to date without anyone keying figures in twice. One business day becomes one sales invoice in Xero, plus a credit note on days with refunds.

What gets sent

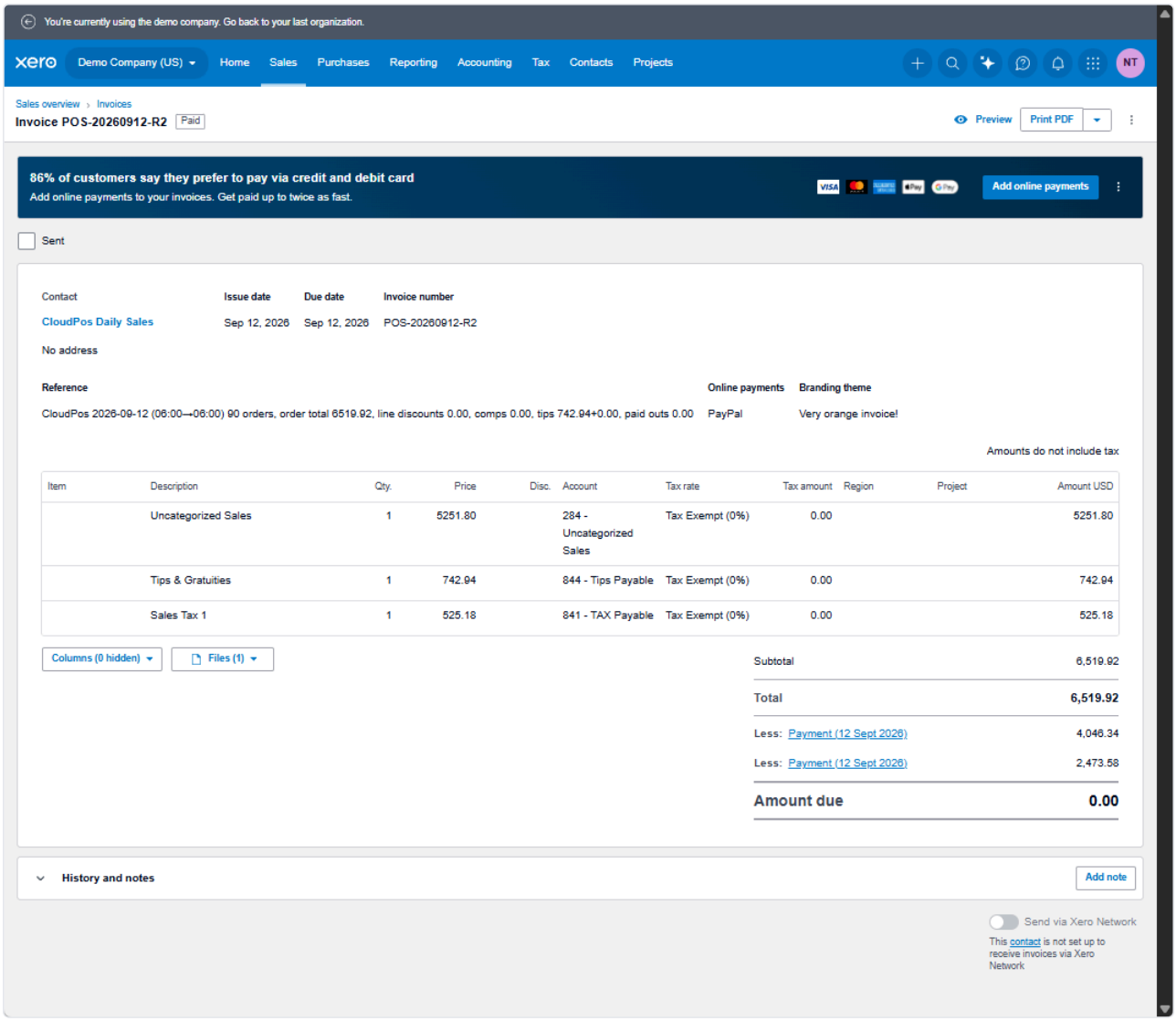
At the close of each business day CloudPos raises **one sales invoice** covering that day, and then applies **one payment per tender** against it.

The invoice carries the day's trading as separate lines:

- Sales for each menu category at full menu price, each to its own revenue account
- Discounts — order, item and percentage discounts together — and comps, which reduce the total
- Delivery charges and surcharges
- Tax — either on its own line, or carried on the sales lines with Xero's tax rates (see *Using Xero Tax Rates*)

- Tips and gift cards sold, posted as money owed rather than income; tips handed to staff in cash bring that balance back down
- Reservation deposits taken online, held as money owed to the guest until the party is seated
- Cash paid outs, house account write-offs and a cash over or short line when the takings do not match the sales

The payments are the money actually taken: one for cash, one for each card type, one for gift cards redeemed, and so on. Each goes to its own account, which is what makes the bank reconciliation straightforward later.



Because the payments always add up to the invoice total, the invoice settles to paid the moment it is raised. It is a record of the day, not a bill anyone has to chase.

Refunds

A refund given at the POS is sent on the day it was given, not the day of the original sale. Xero does not accept an invoice or a payment below zero, so the day's refunds go on their own **credit note**, with one refund payment per tender. See *Refunds, Deposits And Write-Offs*.

Also available

- **Supplier bills** — inventory receivings sent as bills from each supplier. Off until switched on; see *Supplier Bills*.
- **Payroll journal** — one journal per pay period from the Payroll page. See *Payroll Journal*.

Why an invoice and not a journal

An invoice puts the day's takings where Xero expects to find sales, so the revenue appears in Xero's own reporting, and it lets each tender be paid into a separate account that the real bank deposit can be matched against.

What it does not do

- It does not send individual orders or receipts. Xero holds one summary per day; the detail stays in CloudPos, where the reports are built for it.
- It does not send card processing fees or employer payroll taxes — CloudPos does not know them. The bookkeeper posts those.
- It does not see refunds made directly on a card terminal without being recorded at the POS.

> The End Of Day report for the same day is attached to the invoice, so anyone looking at the summary in Xero can open the underlying POS document without asking for it.

Before starting

The business needs its own Xero subscription. Setting up takes three passes, in this order:

1. Connect CloudPos to the Xero organisation.
2. Map each figure the POS posts to an account in Xero.
3. Preview a day, check it, and post it.

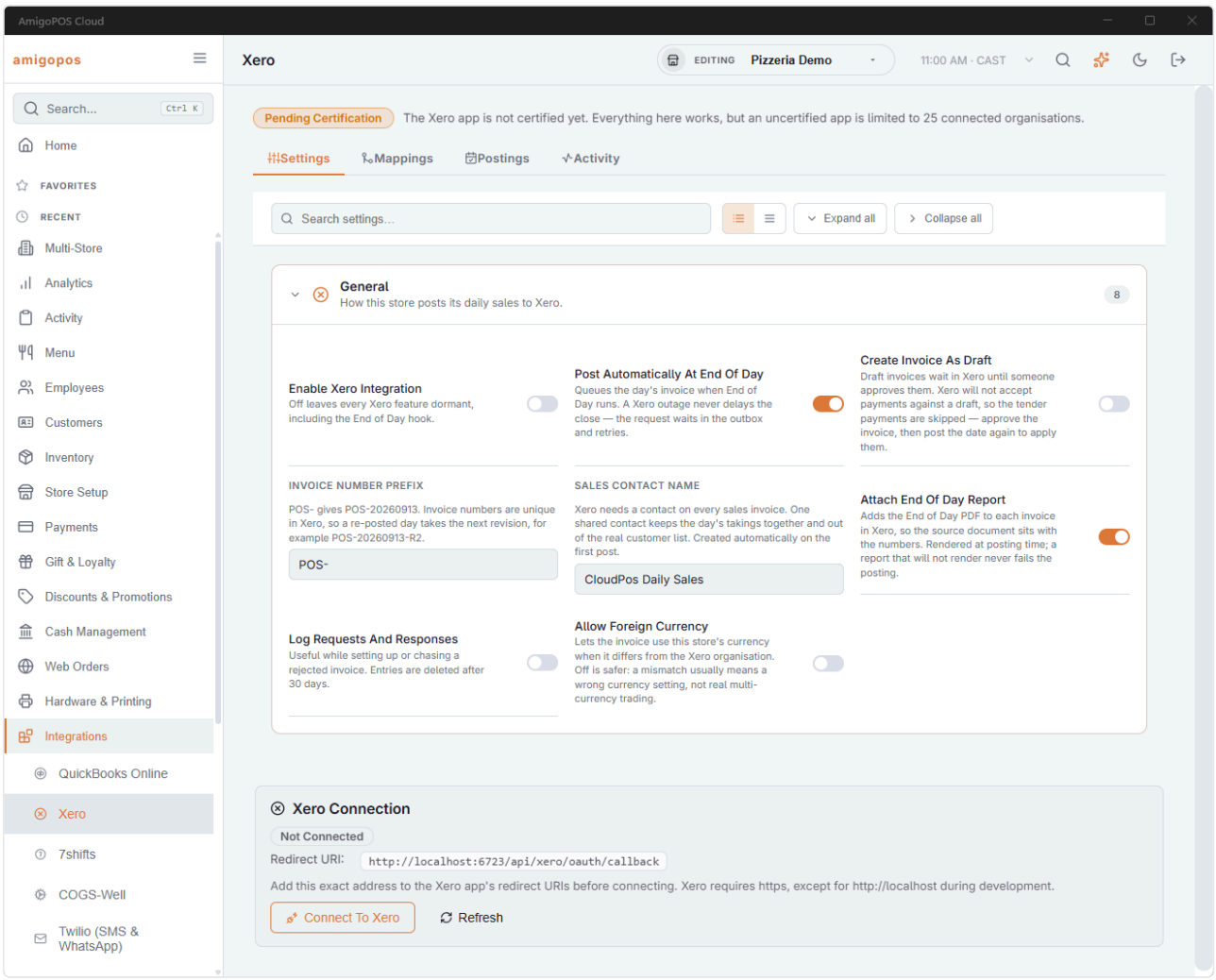
Connecting To Xero

Integrations › Xero

View online ↗

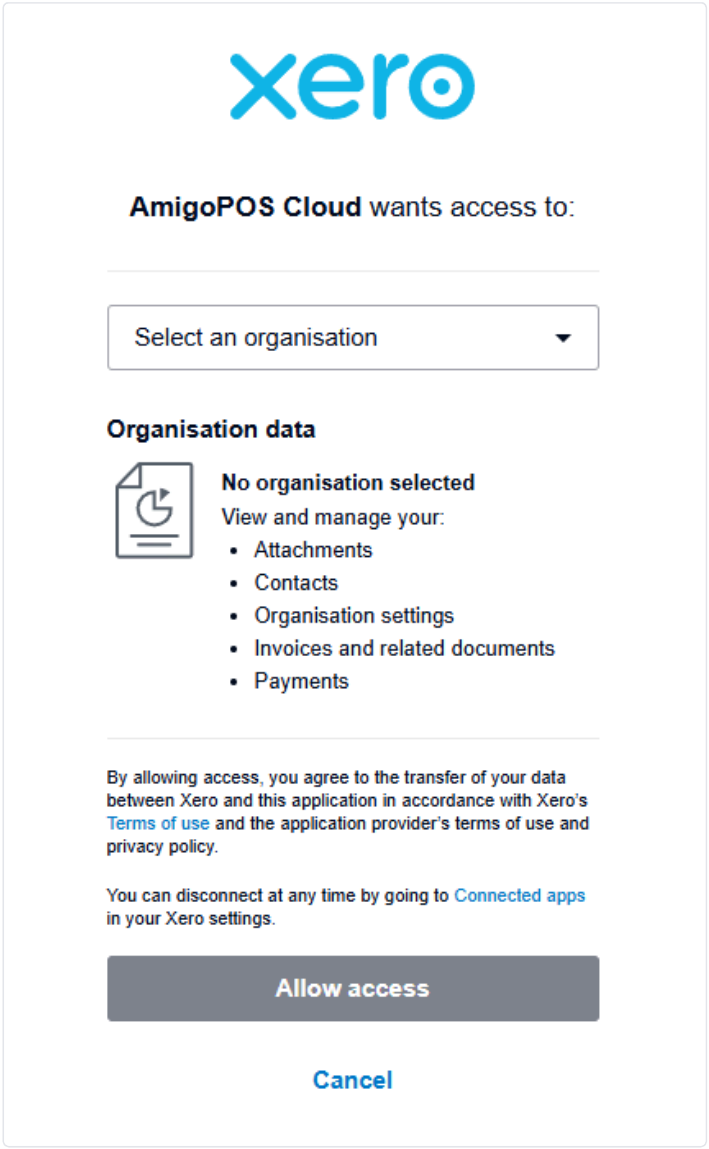
Connect a store to its Xero organisation, choose what gets posted, and keep the connection healthy.

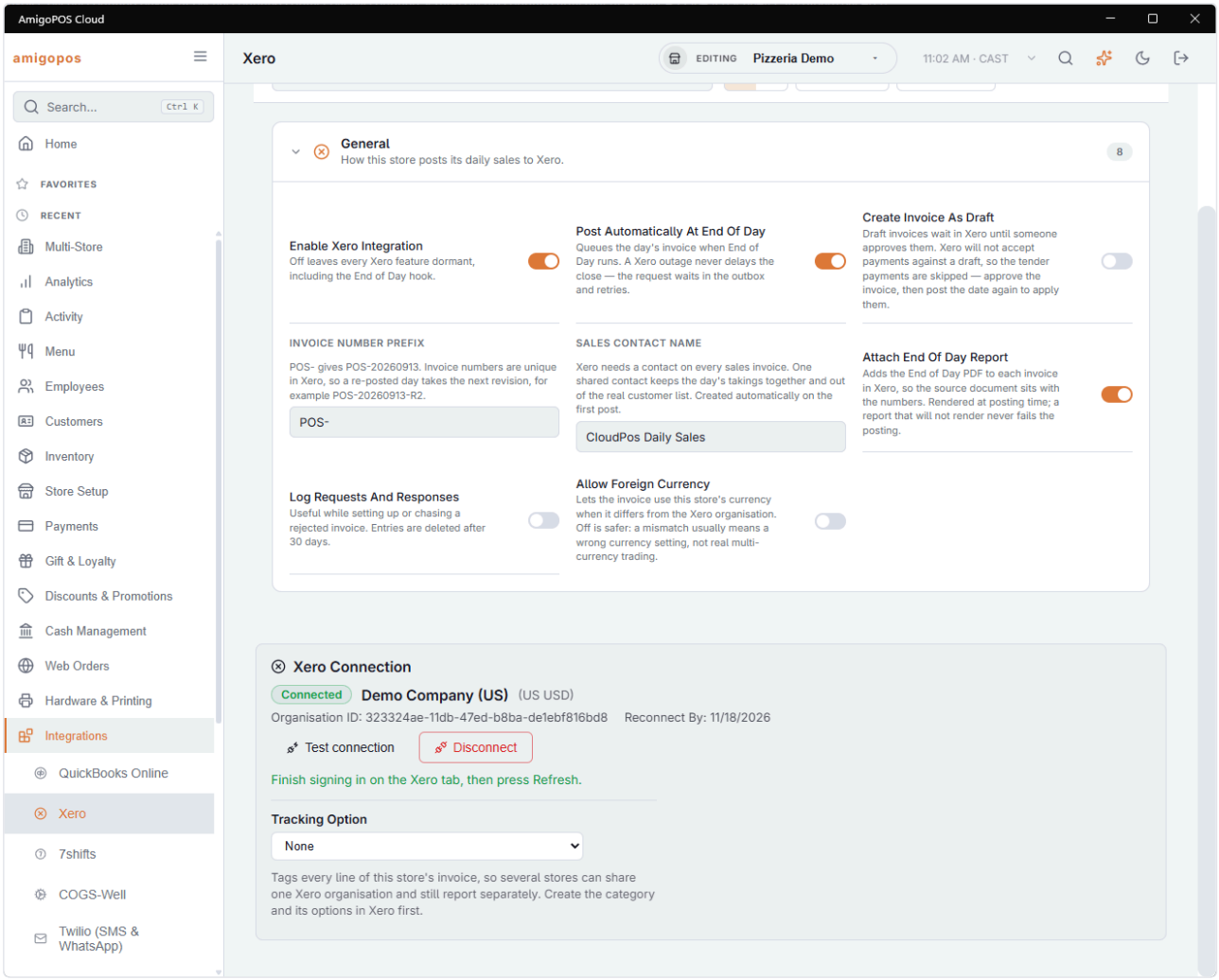
Connecting is done once per store, from **Back Office › Integrations › Xero**, on the **Settings** tab. Someone who can sign in to the Xero organisation needs to be at the keyboard, because Xero asks them to approve the connection.



Connect

1. Open the **Settings** tab and find the **Xero Connection** panel at the foot of the page.
2. Press the blue **Connect To Xero** button. A new browser tab opens on Xero's own sign-in page.
3. Sign in to Xero and choose the organisation the takings should go to, then approve access.
4. Close the Xero tab, return to CloudPos and press **Refresh**. The panel should now show **Connected** and the organisation name.


xero
AmigoPOS Cloud wants access to:
Select an organisation
Organisation data
No organisation selected
View and manage your:
• Attachments
• Contacts
• Organisation settings
• Invoices and related documents
• Payments
By allowing access, you agree to the transfer of your data between Xero and this application in accordance with Xero's Terms of use and the application provider's terms of use and privacy policy.
You can disconnect at any time by going to Connected apps in your Xero settings.
Allow access
Cancel

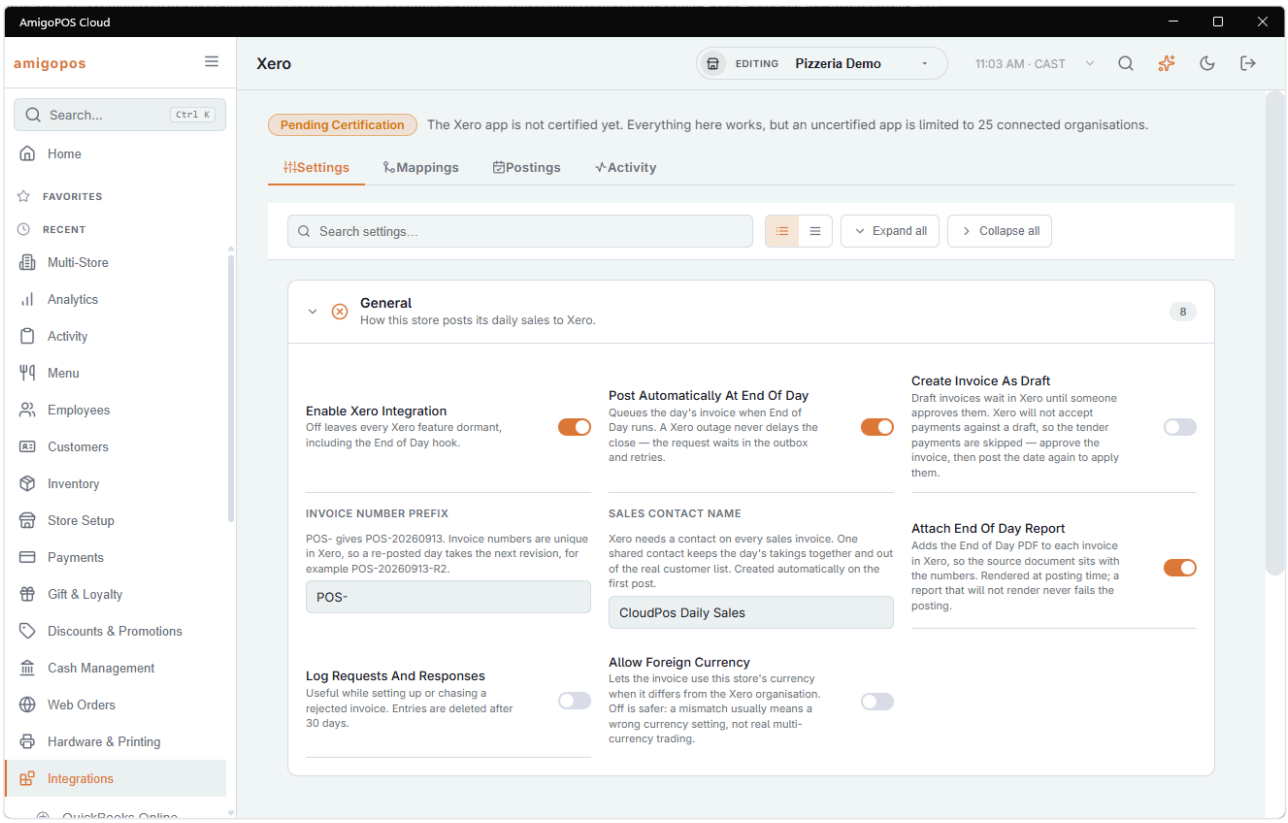


> The app credentials are configured by the software provider and are not something a merchant needs to supply. If the Connect button is greyed out and the panel says Xero is not set up on this server yet, contact support rather than trying to create a Xero app.

Turn it on

Connecting does not start posting. On the same tab, the **General** section holds:

- **Enable Xero Integration** — the master switch. Nothing posts while this is off.
- **Post Automatically At End Of Day** — queues the day's invoice when End Of Day runs. Leave this on for normal use; turn it off to post by hand only.
- **Create Invoice As Draft** — for businesses whose bookkeeper wants to approve each day before it reaches the ledger. See the warning below.
- **Invoice Number Prefix** — leads the invoice number, so POS- gives POS-20260813.
- **Sales Contact Name** — the Xero contact every daily invoice is raised against. It is created automatically the first time a day posts, and keeps the takings out of the real customer list.
- **Store Code In Invoice Numbers** — only matters when several stores share one Xero organisation. See *Several Stores, One Xero*.
- **Attach End Of Day Report** — puts the day's End Of Day PDF on the invoice. On by default.
- **Log Requests And Responses** — records every exchange with Xero for support. See *Activity And Retries*.
- **Allow Foreign Currency** — for a Xero organisation whose plan includes multi-currency and that trades in this store's currency. Leave off otherwise.
- **Use Xero Tax Rates** — for businesses that file VAT, GST or IVA out of Xero. See *Using Xero Tax Rates*.
- **Post Supplier Bills** — sends inventory receivings as supplier bills. See *Supplier Bills*.



> **Create Invoice As Draft** has a consequence worth knowing: Xero does not accept payments against a draft invoice, so the tender payments are not applied. The day sits in Xero as an unpaid draft until someone approves it and the date is posted again. Leave it off unless a bookkeeper has specifically asked for it.

Checking the connection

Test Connection asks Xero who it is talking to and shows the organisation name, country and currency. It is the quickest way to confirm nothing has expired.

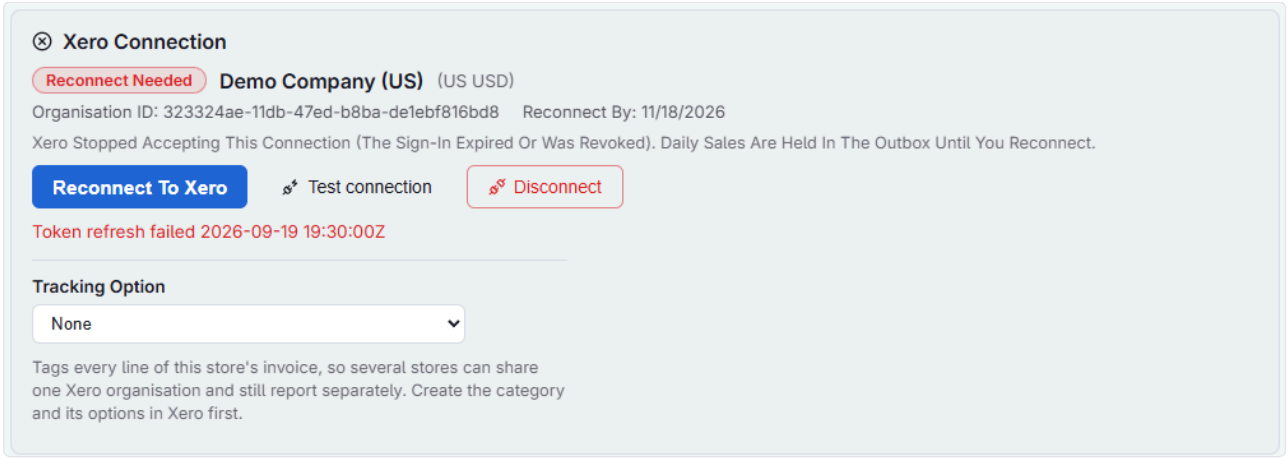
Several organisations

If the person who approved the connection has access to more than one Xero organisation, an **Organisation** dropdown appears in the panel. Switching it repoints this store without signing in again.

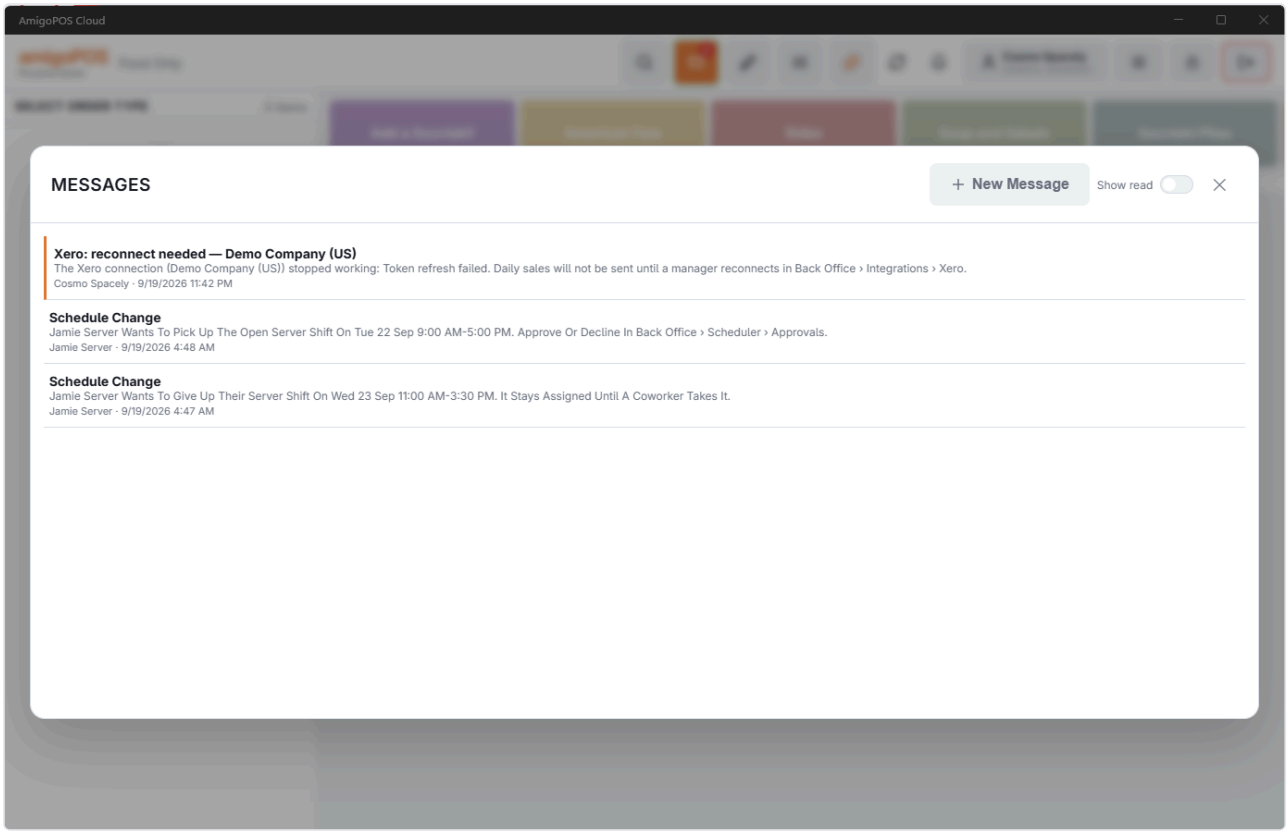
> Account mappings belong to the organisation they were made in. After switching organisations, run **Auto-Map** again before posting, or the postings will fail on accounts that no longer exist.

Keeping the connection healthy

CloudPos checks every connection once a day and renews it before it can lapse, even for a store that has stopped posting. If Xero stops accepting the connection — someone revoked access in Xero, or the organisation was changed — the panel switches to **Reconnect Needed** and shows a **Reconnect To Xero** button. Daily sales wait in the outbox until then; nothing is lost.



The store's managers are also told, in the POS **Messages** inbox and on their phones if they receive notifications there. The alert repeats at most once a day until the connection is fixed. Days that fail to post raise the same kind of alert.



> When a store is deactivated or its subscription ends, CloudPos disconnects it from Xero by itself, so no one keeps access to that organisation's books. Anything already in Xero stays there.

Disconnecting

Disconnect ends the connection. Anything already in Xero stays there.

Mapping Accounts

Integrations › Xero

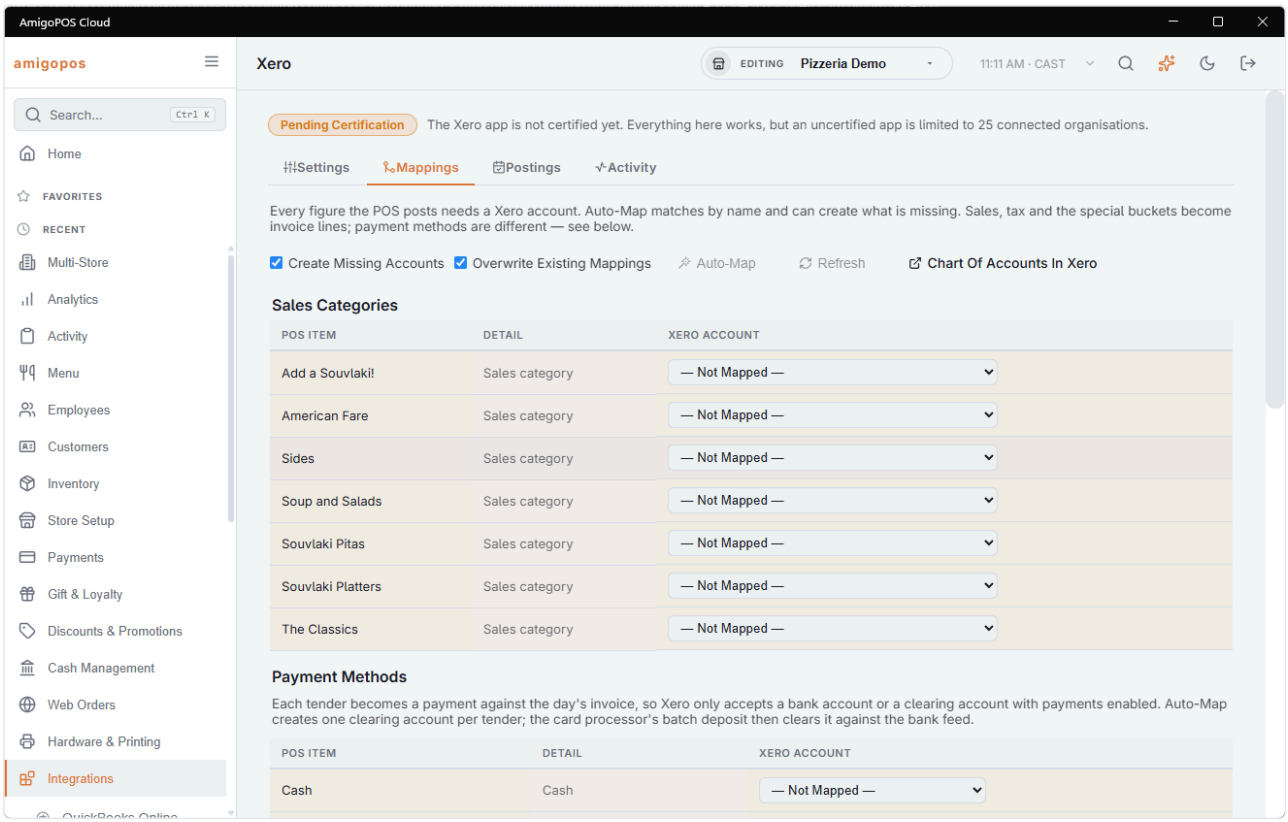
View online ↗

Point every figure the POS posts at an account in the Xero chart of accounts.

Every figure CloudPos posts needs somewhere to land in Xero. The **Mappings** tab lists each one and the account it currently points at. Nothing can be posted while anything the day needs is unmapped.

Auto-Map does most of it

Rather than picking forty accounts by hand, press **Auto-Map**. It matches each item to an existing account by name and, with **Create Missing Accounts** ticked, creates the ones that do not exist yet with sensible names and account codes.



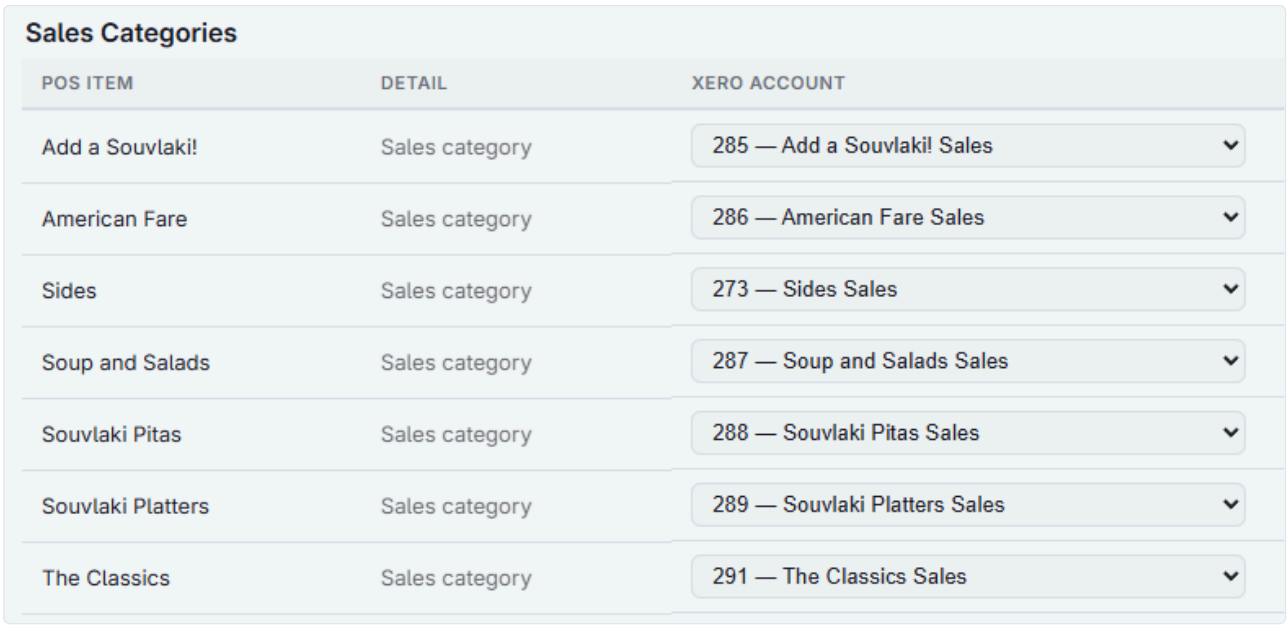
A full menu takes a minute or so, because each account is created individually in Xero. The progress bar shows how far along it is. When it finishes it reports how many were matched, how many created, and how many were skipped — read that line, because anything skipped still needs attention.

- **Create Missing Accounts** — create accounts that do not exist yet. Leave ticked for a first run.
- **Overwrite Existing Mappings** — replace mappings that are already set. Leave unticked unless starting again deliberately.

> Auto-Map is safe to run again later. Without **Overwrite Existing Mappings** it only fills in what is missing, so it is the quickest way to pick up a newly added menu category or a row added by an update.

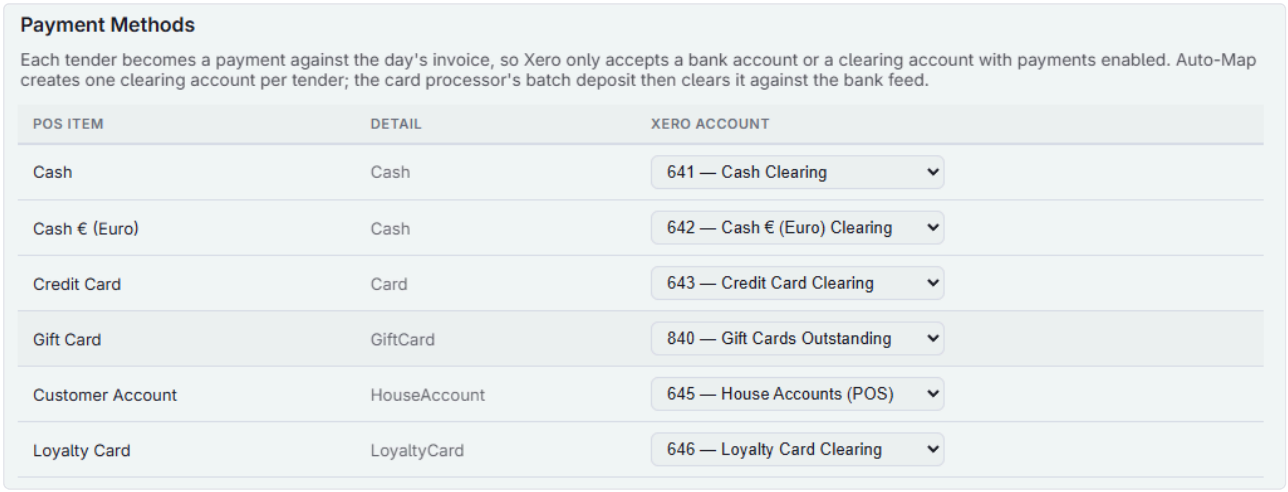
The five groups

Sales Categories — one row per menu category, each pointing at a revenue account. Auto-Map gives every category its own account.



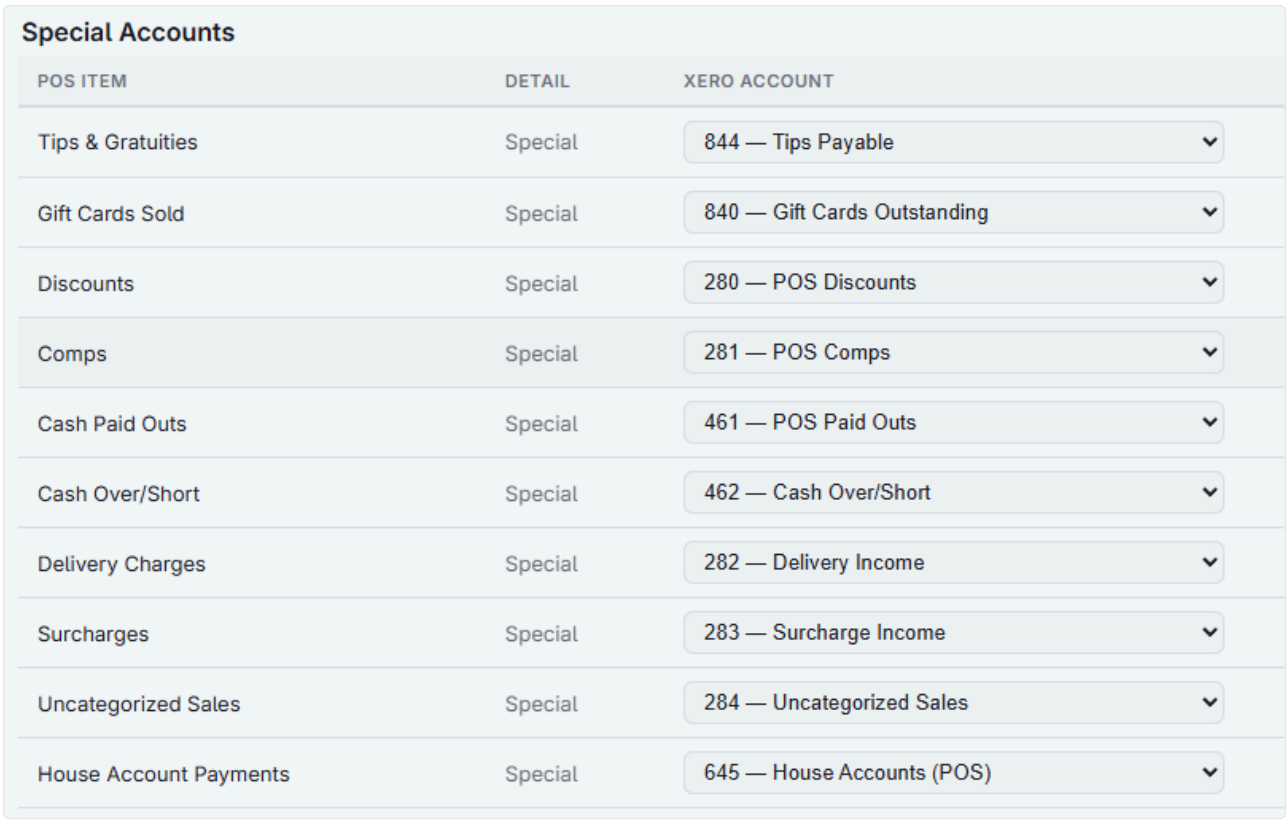
Twenty menu categories means twenty revenue accounts, which is more detail than most businesses want in the accounts. Several categories can point at the same account — map the wine, beer and spirit categories all to one Beverage Sales account, for example, and archive the extras in Xero.

Payment Methods — one row per tender. These work differently from the rest: they are where money arrives, not a line on the invoice, so Xero only accepts a bank account or a *clearing account* here. Auto-Map creates one clearing account per tender. Refunds are paid out of the same account the tender was paid into.



Taxes — the tax collected in each of the three tax slots, pointing at a tax liability account.

Special Accounts — everything that is not a category or a tender: tips, gift cards sold, discounts, comps, cash paid outs, cash over/short, delivery charges, surcharges, uncategorised sales, house account payments, refunds not tied to items, bad debt from house account write-offs, customer deposits and no-show fees from reservations, purchases for uncategorised inventory, and the wages accounts used by the payroll journal.



Inventory Categories (Supplier Bills) — one row per inventory category, pointing at a cost-of-sales or purchases account. Only used when **Post Supplier Bills** is on; see *Supplier Bills*.

The Xero Tax Rate column

With **Use Xero Tax Rates** switched on in Settings, a **Xero Tax Rate** column appears beside the tax slots, the sales categories and the revenue rows of Special Accounts. It is hidden otherwise, because nothing reads it. See *Using Xero Tax Rates*.

Changing a mapping by hand

Pick a different account from the dropdown and it saves immediately — there is no save button. A tick appears beside the row when it has saved, and a cross if it has not. The accounts are grouped by type, so revenue, liability and asset accounts are easy to tell apart.

> The dropdown for a tender row shows a shorter list than the others. That is Xero's rule, not a fault: a payment can only go to a bank account or to an account that has payments enabled on it.

Keeping it current

Refresh re-reads the chart of accounts from Xero, which is worth doing after adding or renaming accounts there. **Chart Of Accounts In Xero** opens the chart in Xero directly.

Using Xero Tax Rates

Integrations › Xero

View online ↗

Put Xero tax rates on the daily invoice so the VAT, GST or IVA return in Xero sees the sales.

By default CloudPos posts the tax it charged as its own line on the daily invoice, and nothing else on the invoice carries tax. That keeps the ledger right, but Xero's tax return does not see sales posted that way. Businesses that file VAT, GST or IVA out of Xero should switch on **Use Xero Tax Rates**.

What changes

With the setting on, each sales line on the invoice carries a Xero tax rate, and the tax amount on it is set to exactly what the POS charged. There is no separate tax line. The totals are the same either way — only the shape changes, so that Xero's tax reports include the day's

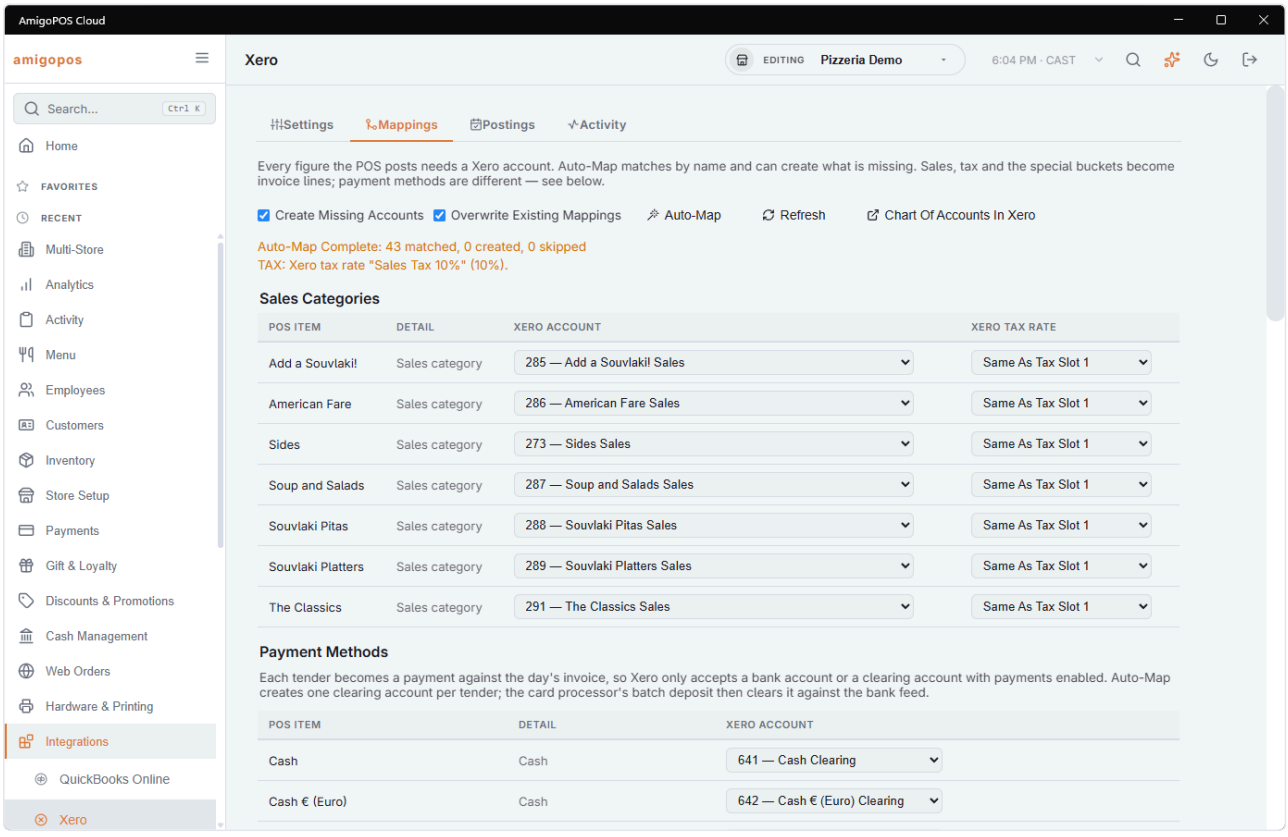
sales and the tax on them.

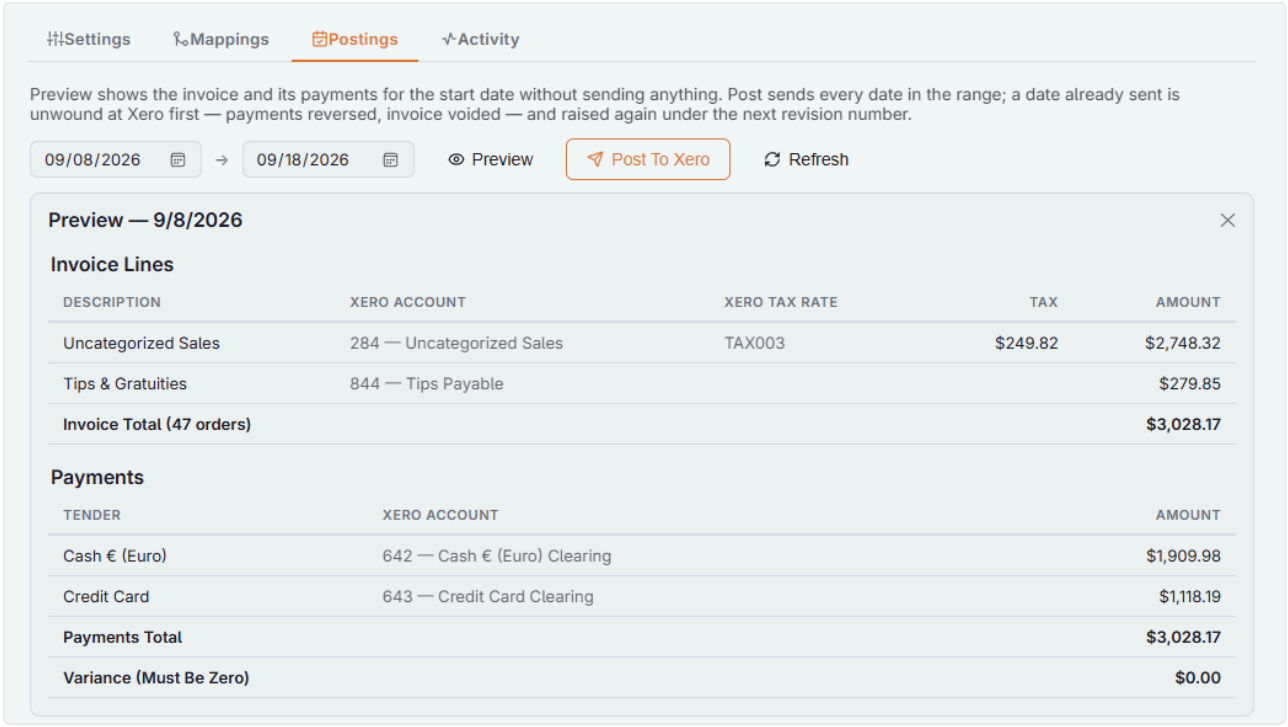
- Tax included in menu prices is taken out of the sales line and shown as that line's tax, so the line reads net and the tax reads as charged.
- Tax is shared across the day's sales lines in proportion to their amounts, to the cent.
- Tips, gift cards, deposits, paid outs and the over/short line carry no tax.
- Refund credit notes follow the same rule, so refunded tax comes off the return on the day of the refund.

Setting it up

1. On the **Settings** tab, switch on **Use Xero Tax Rates**.
2. Open the **Mappings** tab. A **Xero Tax Rate** column now appears.
3. For each tax slot the store uses, pick the matching Xero rate. **Auto-Map** does this for you when a Xero rate has the same percentage as the slot.
4. Sales categories default to **Same As Tax Slot 1**. Pick a different rate only for categories taxed differently — zero-rated food, for instance.
5. Preview a day and check the new **Xero Tax Rate** and **Tax** columns against the End Of Day report.







A tax slot that collected tax on a day, but has no Xero rate chosen, stops that day from posting, with a message saying which slot. That is deliberate: posting it without a rate would leave the tax out of the return.

Which way to choose

- **Leave it off** where sales tax is filed from the POS reports, as in most of the United States. The tax line on the invoice is all the bookkeeper needs.
- **Switch it on** where the business files its VAT, GST or IVA return out of Xero.

The POS stays the tax system of record in both modes. Xero is never asked to calculate tax itself; it is told what was charged.

Posting A Day

Integrations › Xero

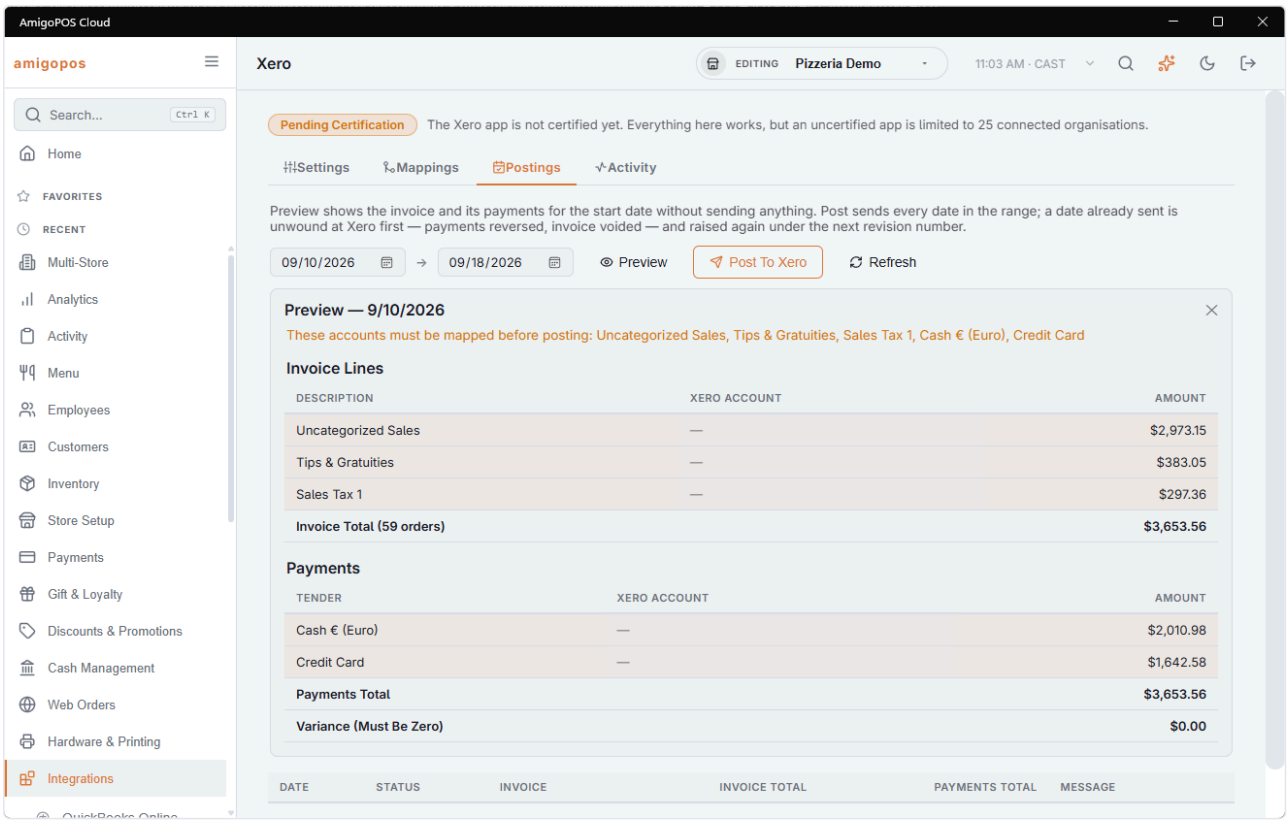
View online ↗

Preview a day before it is sent, post a date or a range, and correct a day already posted.

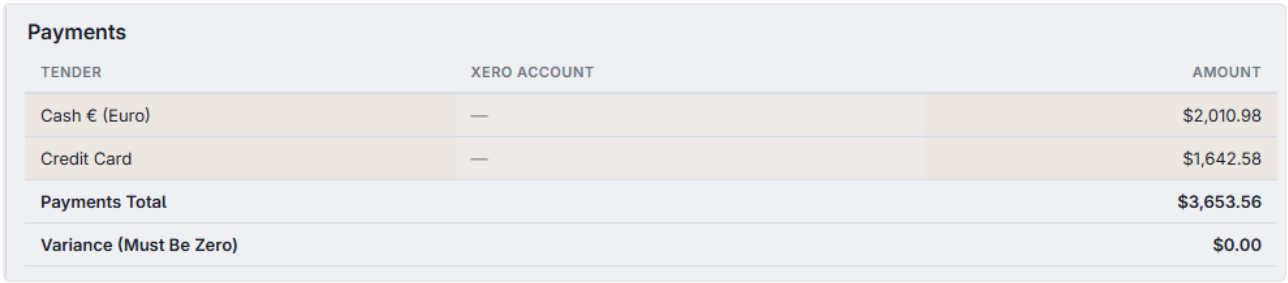
With **Post Automatically At End Of Day** switched on, nothing needs doing day to day — closing the day queues it and it posts on its own. The **Postings** tab is for checking what went, for posting older dates, and for putting a day right.

Preview first

Set the start date and press **Preview**. Nothing is sent to Xero. The preview shows exactly what would be, built from the same figures.



The **Invoice Lines** table is the day's trading, and the **Payments** table is the money taken. On a day with refunds a third table, **Refund Credit Note**, shows the refunded lines and the money paid back per tender.



Payments

TENDER	XERO ACCOUNT	AMOUNT
Cash € (Euro)	—	$2,010.98
Credit Card	—	$1,642.58
Payments Total		**$3,653.56**
Variance (Must Be Zero)		**$0.00**

> Check the **Variance** row. It must read zero. Anything else means the takings and the sales do not agree and the day should not be posted until it is understood.

Messages above the tables name anything that would stop the post — an unmapped account, or a tax slot with no Xero tax rate when **Use Xero Tax Rates** is on.

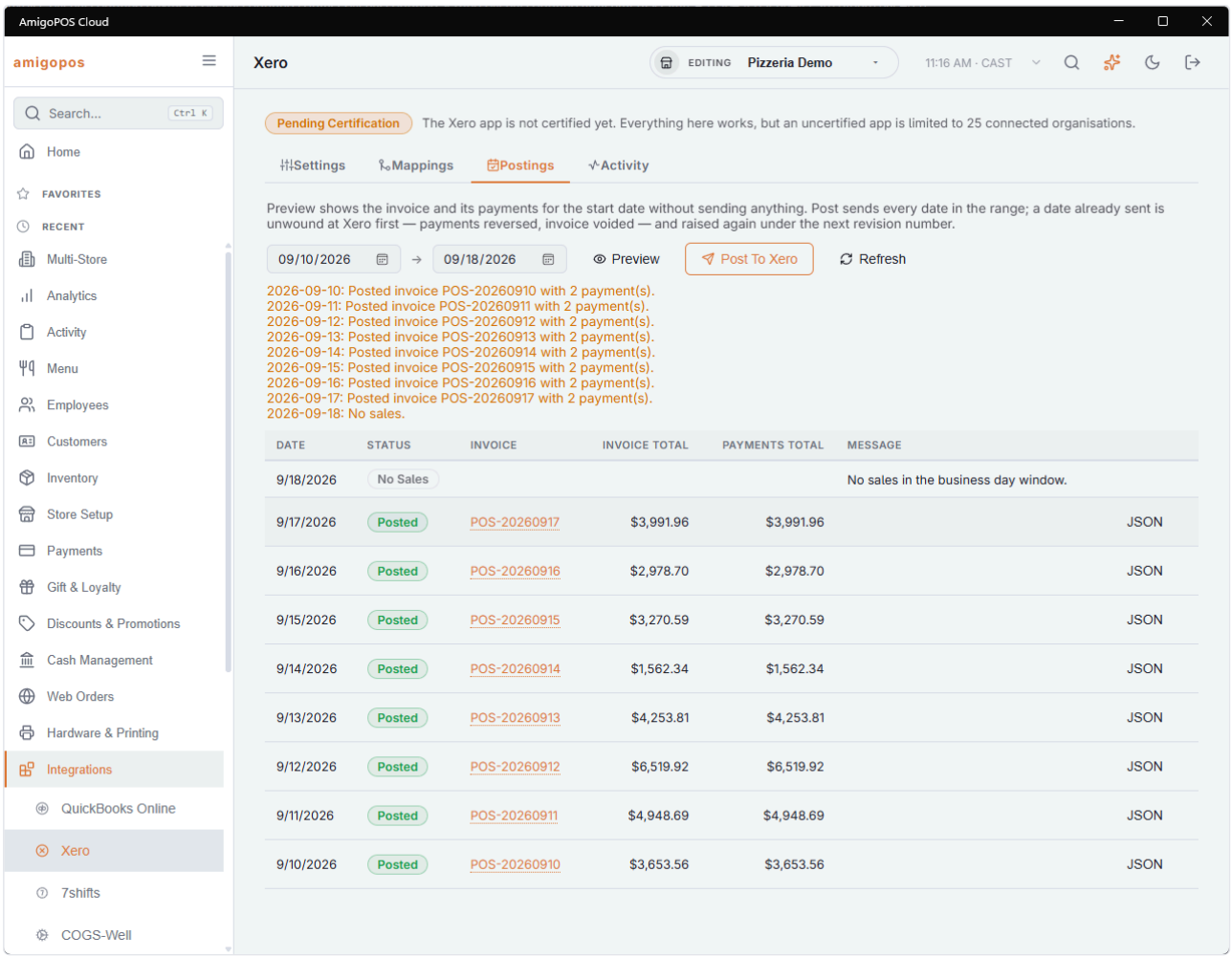
Preview always covers the **start** date only, whatever the end date says.

Posting

Set the dates and press **Post To Xero**. Every date in the range is posted, one invoice each, so leaving the end date a month away sends a month of invoices. Set both dates the same to post a single day.

Each date comes back as one of:

- **Posted** — the invoice and its payments are in Xero, and the credit note too if there were refunds.
- **No Sales** — there was no trading that day, so nothing was sent.
- **Failed** — the message column says why.



The history

Below the buttons is every date posted recently, with its invoice number, totals and message. The invoice number is a link straight to that invoice in Xero; on refund days the credit note number sits underneath it with its own link. Where a request and response were recorded, a **JSON** button shows exactly what was sent and what came back.

Correcting a day already posted

Simply post the same date again. CloudPos removes the payments from the old invoice and credit note, voids them, and raises fresh ones from current figures.

> Xero does not release the number of a voided invoice, so the replacement takes the next revision — POS-20260813 becomes POS-20260813-R2. Both remain visible in Xero, one voided and one paid. That is the expected result, not a duplicate.

This is worth doing whenever a day's figures change after it was posted — an order corrected the following morning, for instance. A refund given later does *not* need it: it is sent on its own day.

Which day End Of Day posts

End Of Day queues the business day it closes. Even when it runs after midnight or the next morning, the invoice is for the day being closed, not the new one. A day closed while **Post Automatically At End Of Day** was off is not sent later on its own — post it from the Postings tab.

Posting by hand and the queue

When you post a day by hand, that day's automatic post still waiting in the queue is closed, so the day is not posted again later. The integration pages and their actions need the Back Office configuration right.

Refunds, Deposits And Write-Offs

View online ↗

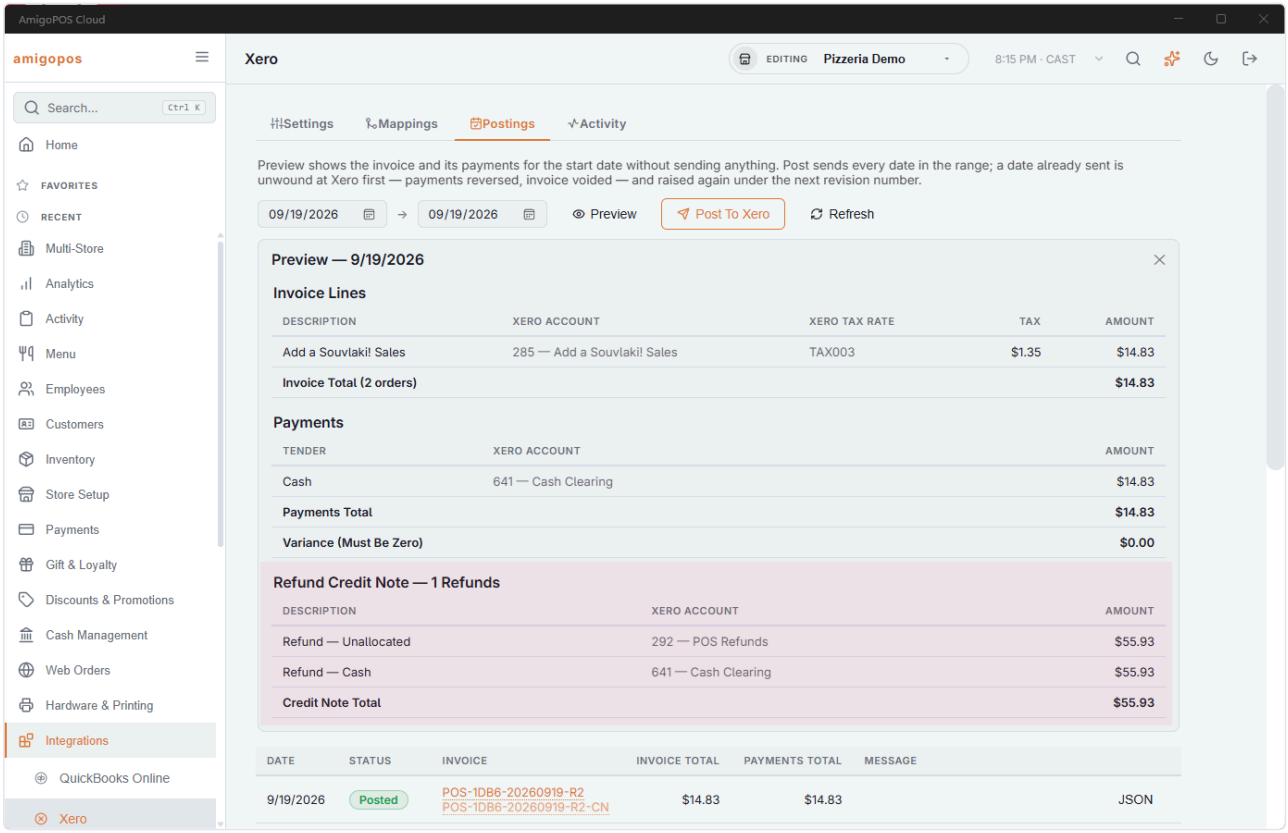
How refunds, reservation deposits, no-show fees, house account write-offs and tips paid out reach Xero.

Some money moves on a different day, or in the other direction, from the sale it belongs to. This page covers how each of those reaches Xero. All of them are sent automatically with the day; there is nothing extra to post.

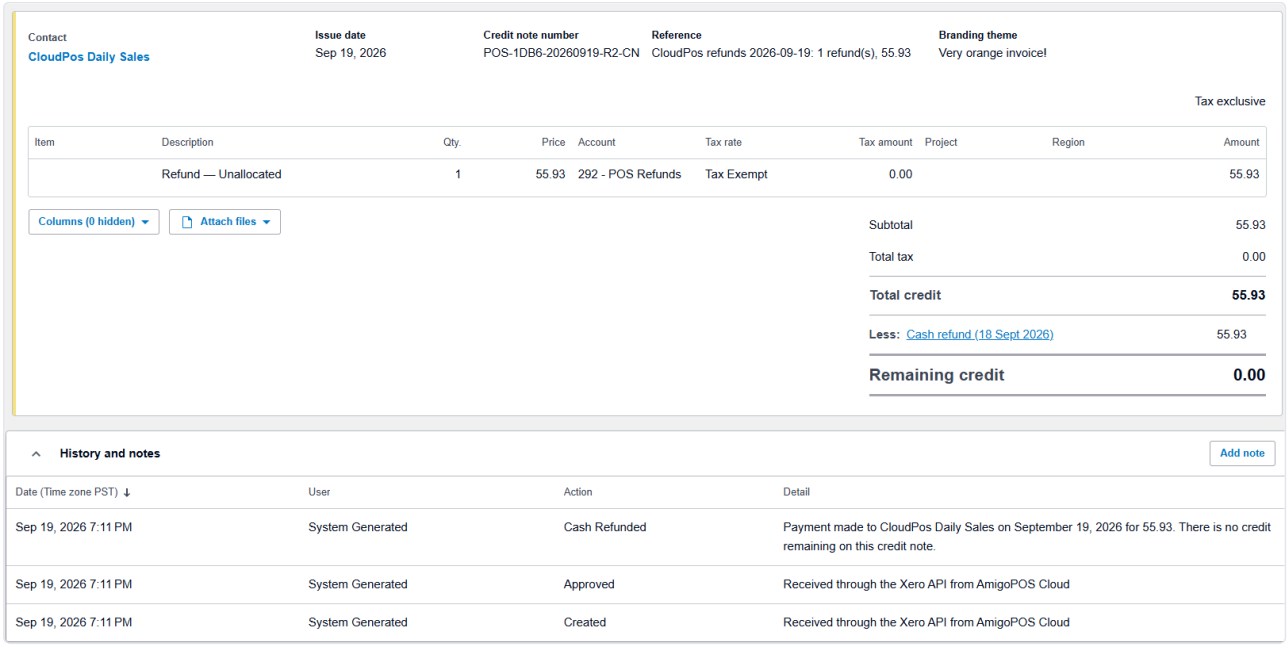
Refunds

A refund given at the POS belongs to the day it was given, not the day of the original sale. Xero does not accept an invoice or a payment below zero, so the day's refunds are sent on their own **credit note**, numbered after the day's invoice with -CN on the end.

- Refunded items go back against their own menu categories, so category sales in Xero are net of refunds.
- A refund of an amount rather than of items goes to the **Refunds (Unallocated)** account.
- Refunded tax comes off the tax account.
- One refund payment per tender takes the money back out of that tender's clearing account.



DATE STATUS INVOICE INVOICE TOTAL PAYMENTS TOTAL MESSAGE
9/19/2026 Posted POS-1DB6-20260919-R2 POS-1DB6-20260919-R2-CN $14.83 $14.83 JSON



Contact	Issue date	Credit note number	Reference	Branding theme
CloudPos Daily Sales	Sep 19, 2026	POS-1DB6-20260919-R2-CN	CloudPos refunds 2026-09-19: 1 refund(s), 55.93	Very orange invoice!

Tax exclusive

Item	Description	Qty.	Price	Account	Tax rate	Tax amount	Project	Region	Amount
	Refund — Unallocated	1	55.93	292 - POS Refunds	Tax Exempt	0.00			55.93

Columns (0 hidden) | Attach files

Subtotal	55.93
Total tax	0.00
Total credit	**55.93**
Less: Cash refund (18 Sept 2026)	55.93
Remaining credit	**0.00**

History and notes — Add note

Date (Time zone PST) ↓	User	Action	Detail
Sep 19, 2026 7:11 PM	System Generated	Cash Refunded	Payment made to CloudPos Daily Sales on September 19, 2026 for 55.93. There is no credit remaining on this credit note.
Sep 19, 2026 7:11 PM	System Generated	Approved	Received through the Xero API from AmigoPOS Cloud
Sep 19, 2026 7:11 PM	System Generated	Created	Received through the Xero API from AmigoPOS Cloud

A day with a refund and no sales — a refund given on a day the store was otherwise closed — sends the credit note alone.

> Card refunds made directly on the card terminal, without being recorded at the POS, never reach Xero. Record refunds at the POS so the books see them.

Reservation deposits and no-show fees

A deposit taken when a guest books online is money owed to that guest until the party is seated. It arrives in Xero on the day it is paid, in the **Customer Deposits** account and the Stripe clearing account.

- **Seated** — the deposit is put on the check. That day's invoice draws the Customer Deposits balance down instead of counting the money again.
- **Refunded** — the balance comes down and the money leaves the Stripe clearing account.
- **No-show** — a deposit never used or refunded is kept as income, in the **No-Show Fees** account.
- **No-show fee charged to a card on file** — income in the same account, received into Stripe clearing.

House account write-offs

Writing off a house account balance that will not be paid moves it from the house account receivable to **Bad Debt** on the day of the write-off. No money moves.

Tips paid out in cash

Card tips handed to staff in cash at the end of a shift leave the drawer. They reduce the tips owed to staff, not the business's expenses, and the cash payment for the day is reduced by the same amount so cash clearing matches what is banked.

Accounts to map

These appear under **Special Accounts** on the Mappings tab. **Auto-Map** creates any that are missing.

- **Refunds (Unallocated)** — revenue (contra)
- **Customer Deposits (Reservations)** — current liability
- **No-Show Fees & Forfeited Deposits** — revenue
- **Bad Debt (House Account Write-Offs)** — expense

> QuickBooks Online receives the same figures, as lines in its daily journal entry.

Clearing Accounts And The Bank

View online ↗

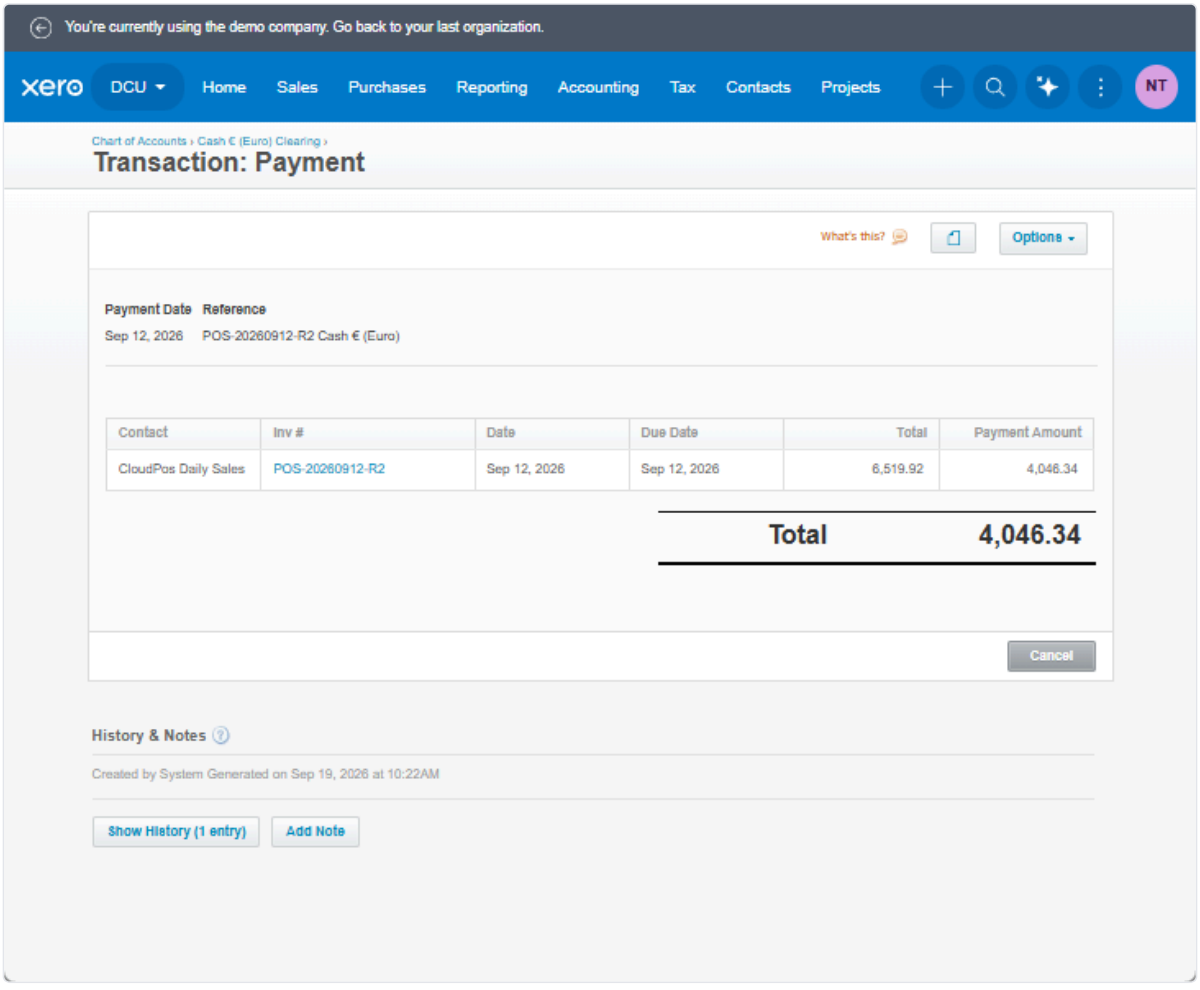
Why each tender gets its own account, and how the day is matched to the real deposit.

Each tender is paid into its own *clearing account* rather than straight into the bank account. This is deliberate, and it is what makes the bank reconciliation work.

Why not pay it straight into the bank

Money taken today is not in the bank today. Cash sits in the safe until someone banks it. Card takings arrive as a single settlement a day or two later, often several days at once and usually net of fees. If the day were posted directly to the bank account, the bank account in Xero would never match the real one.

The clearing account holds the money in between. The day's takings go in; the deposit takes them out.



How a day clears

1. CloudPos posts the day and the tender total lands in that tender's clearing account.
2. The real money arrives in the bank and appears on the bank feed in Xero.
3. The bank line is reconciled against the clearing account.
4. The clearing account returns to zero.

A card settlement covering three days of trading clears three days of card takings at once, which is exactly what should happen.

What else moves the clearing accounts

- **Refunds** recorded at the POS are paid out of the same clearing account the tender was paid into, on the day of the refund. A card refund therefore nets against the card settlement it comes out of.

- **Cash paid outs and tips paid to staff in cash** reduce the cash payment, so cash clearing equals what should actually be banked.
- **Reservation deposits** and **no-show fees** taken online arrive in the Stripe clearing account on the day they are paid, matching Stripe's own payouts.

Reading the balance

A clearing account that sits at zero after each banking run is a sign everything is agreeing. A balance that does not clear is telling you something:

- **Cash clearing does not clear** — takings have not been banked yet, or the banked amount differs from the drawer.
- **Card clearing keeps a small balance** — usually processor fees, which the merchant's own bookkeeper posts separately. CloudPos does not know the fees.
- **A balance that grows steadily** — worth investigating, because it means money recorded at the POS is not arriving.

> Card refunds issued directly on the card terminal, without being recorded at the POS, show up here as a balance that will not clear. That is the only sign the accounts will give, so record refunds at the POS whenever possible and check the clearing accounts periodically.

Gift cards, tips and deposits

Gift cards, tips and reservation deposits are not income and are not treated as such. Selling a gift card records money owed to the customer until they spend it; redeeming one clears it. Tips are recorded as money owed to staff until they are paid out. A deposit is owed to the guest until the party is seated, refunded, or forfeited as a no-show.

Several Stores, One Xero

Integrations › Xero

View online ↗

Keep each store's figures separate when they share a single Xero organisation.

A business with more than one store can keep them in separate Xero organisations, or put them all in one. Both work; each store connects on its own.

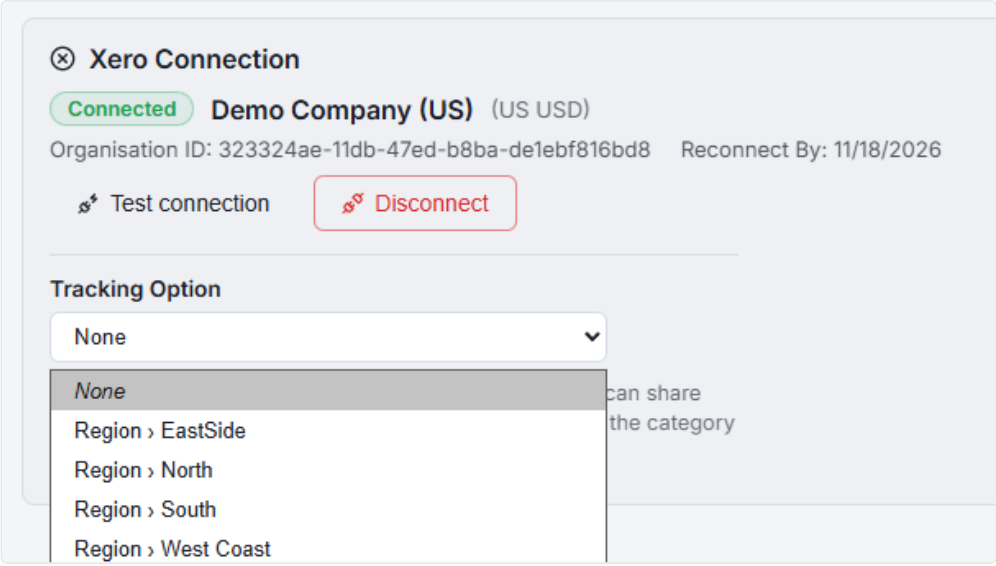
Separate organisations

Nothing extra to do. Connect each store to its own organisation and the figures stay apart naturally.

One organisation

To report on stores separately while sharing one set of books, use a Xero **tracking category**. CloudPos stamps the chosen option on every line it posts — invoices, credit notes, supplier bills and payroll journals — so Xero can report by store.

1. In Xero, create a tracking category — Store or Location is the usual name — with one option per store.
2. In CloudPos, open **Back Office › Integrations › Xero** on that store and go to the **Settings** tab.
3. In the **Tracking Option** dropdown at the foot of the connection panel, choose the option for this store.
4. Repeat for each store, choosing its own option.

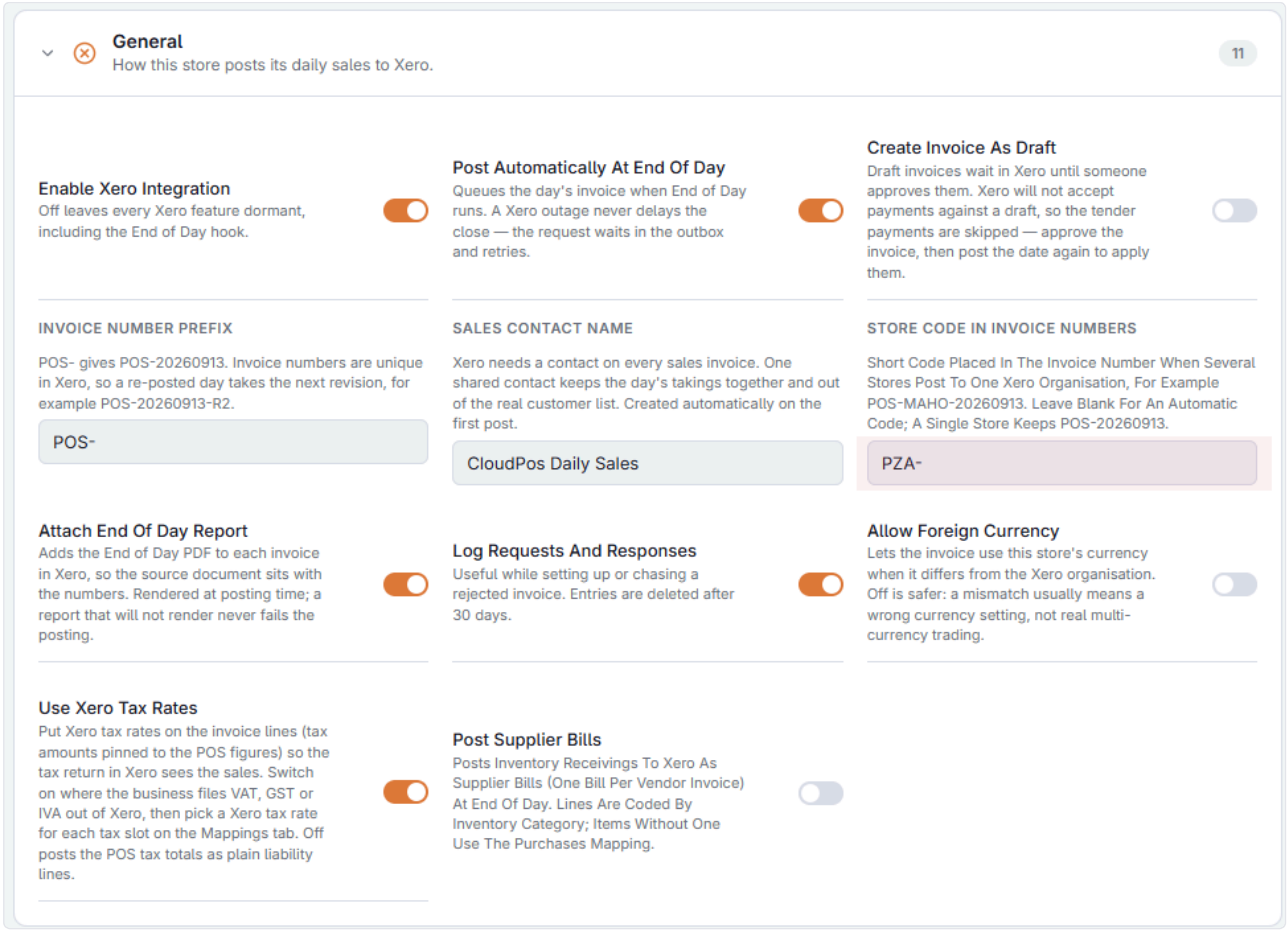


The category and its options have to exist in Xero first. If the dropdown is empty, nothing has been created there yet.

Invoice numbers

Invoice numbers must be unique within an organisation. When CloudPos sees that another store of the business is connected to the same organisation, it puts a store code into the number automatically — POS-3F2A-20260913 rather than POS-20260913 — so two stores can post the same date without colliding.

The automatic code is taken from the store's identifier and is not very readable. To choose your own, enter a short code in **Store Code In Invoice Numbers** on each store's Settings tab — MAIN or BEACH, for example, gives POS-MAIN-20260913. A store alone in its organisation keeps the plain number.



Set the store codes before the stores start posting, so every invoice in Xero follows the same pattern.

Things to keep straight

- Each store maps its own accounts. Stores sharing one organisation will usually point at the same accounts, but each one is mapped separately.
- Each store has its own sales contact setting. Leaving the same name on every store puts all the daily invoices under one contact, which is usually what is wanted.

Supplier Bills

Integrations › Xero

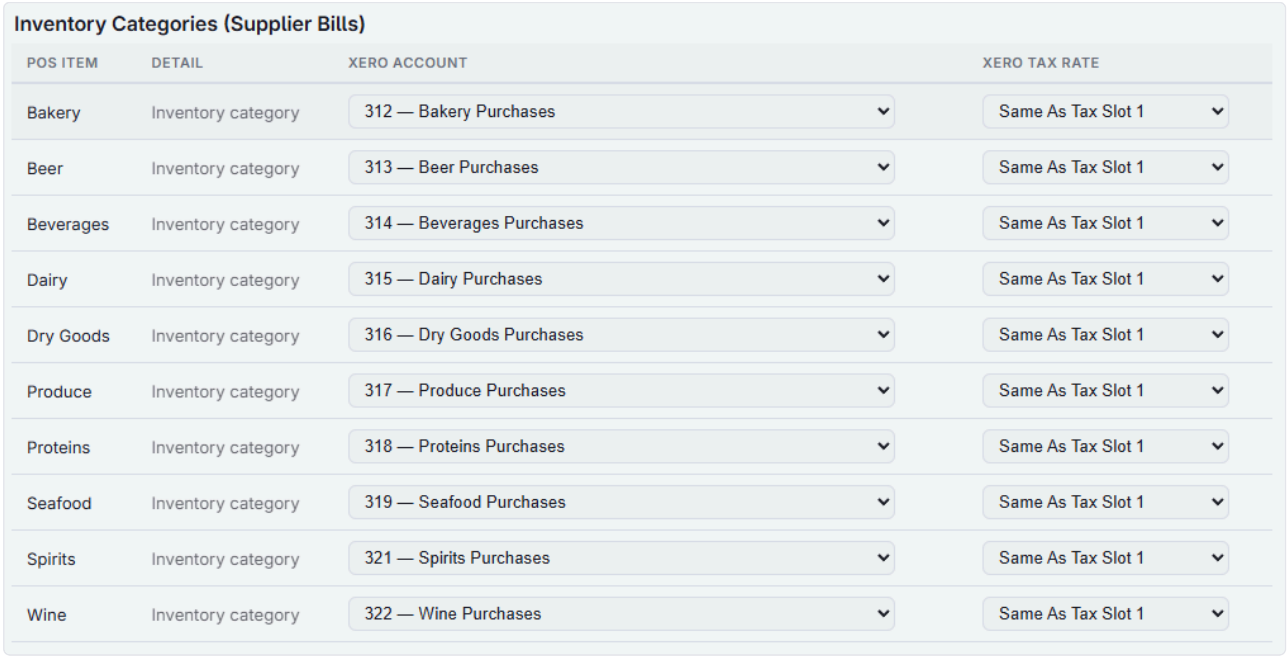
View online ↗

Send inventory receivings to Xero as bills from each supplier.

When a delivery is received in CloudPos, the same receiving can be sent to Xero as a **bill** from that supplier, so purchases and cost of sales sit in the accounts next to the day's sales.

Switching it on

1. On the **Settings** tab, switch on **Post Supplier Bills**.
2. On the **Mappings** tab, map the **Inventory Categories (Supplier Bills)** group — one row per inventory category — and the **Purchases** row under Special Accounts, which catches items without a category. **Auto-Map** creates cost-of-sales accounts for them.

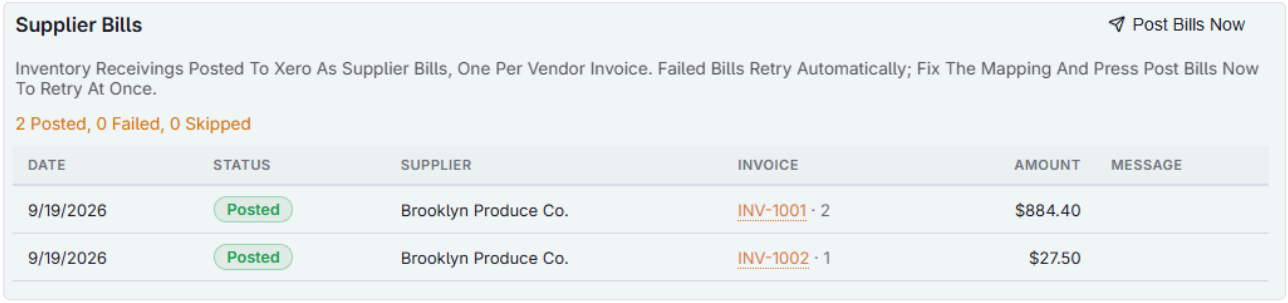


What gets sent

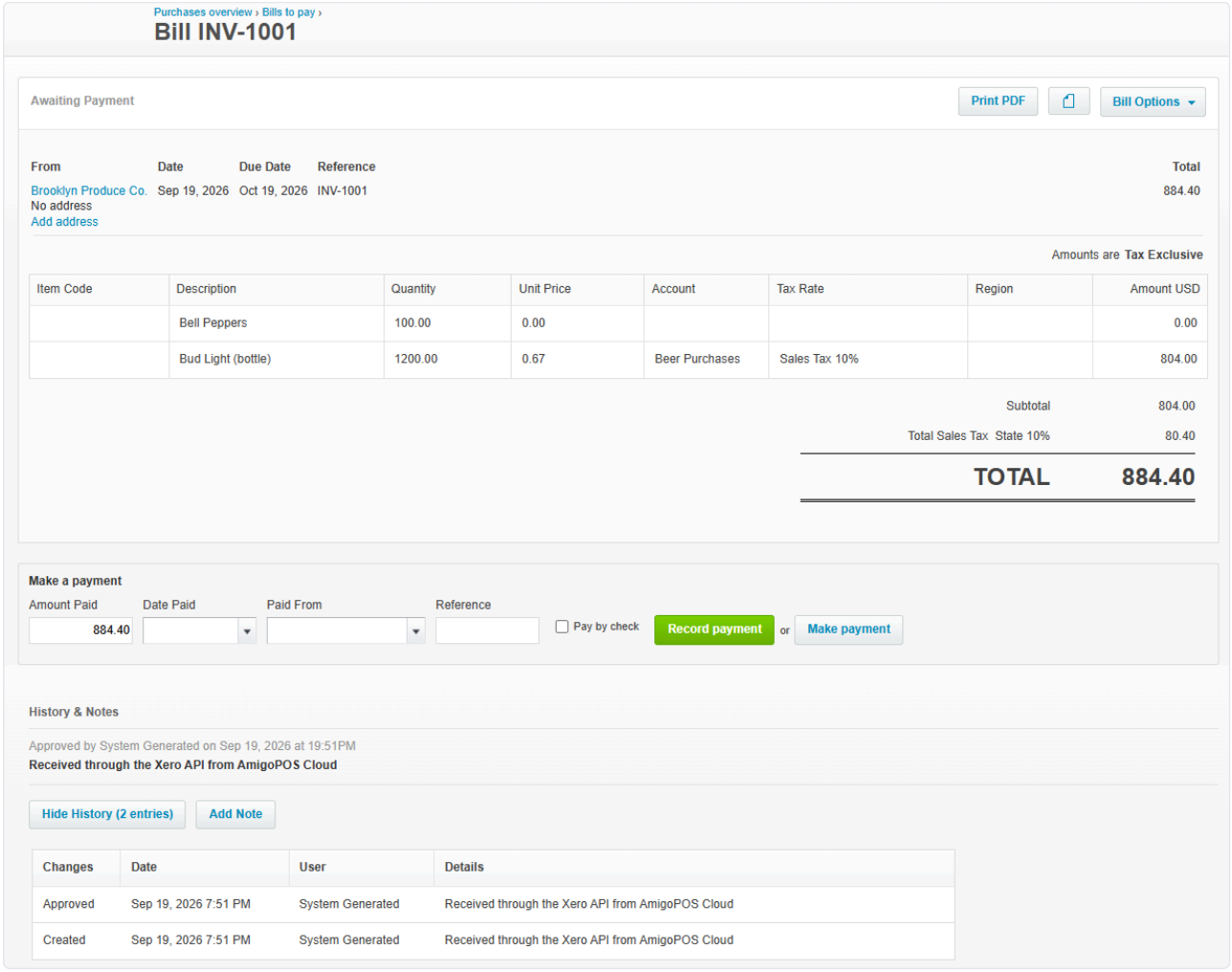
- **One bill per supplier invoice.** Receivings entered with the same supplier invoice number become one bill with that number. Receivings with no invoice number become one bill per supplier per day.
- **One line per item received** — the item, the quantity and the unit cost, coded to its inventory category's account.
- The supplier is created in Xero as a contact the first time a bill is sent for them.
- Bills are due thirty days after the receiving date, and are created as drafts when **Create Invoice As Draft** is on.
- With **Use Xero Tax Rates** on, each line takes its category's tax rate, or the Purchases row's. Unit costs are treated as excluding tax.
- Stock transfers between the business's own stores are not purchases and are never sent.

When it runs

Every receiving not yet sent goes at End Of Day, alongside the daily invoice. To send them now, open the **Postings** tab and press **Post Bills Now** under **Supplier Bills**.



The list shows each bill with its supplier, number, amount and status. The number links straight to the bill in Xero.



If a bill fails

The message on the row says why — usually an unmapped inventory category. Fix it and press **Post Bills Now**; a failed bill is also retried automatically at later closes. A receiving is only ever sent once.

> Bills are not re-sent when a receiving is edited afterwards. Correct the bill in Xero, the same way as any supplier invoice keyed by hand.

Payroll Journal

Integrations › Xero

View online ↗

Post a pay period's wages and payroll tips to Xero as one journal from the Payroll page.

Once a pay period has been run and locked, its wages can be sent to Xero as one journal, so labour cost appears in the accounts for the period it belongs to. The payroll itself is still paid through your payroll service.

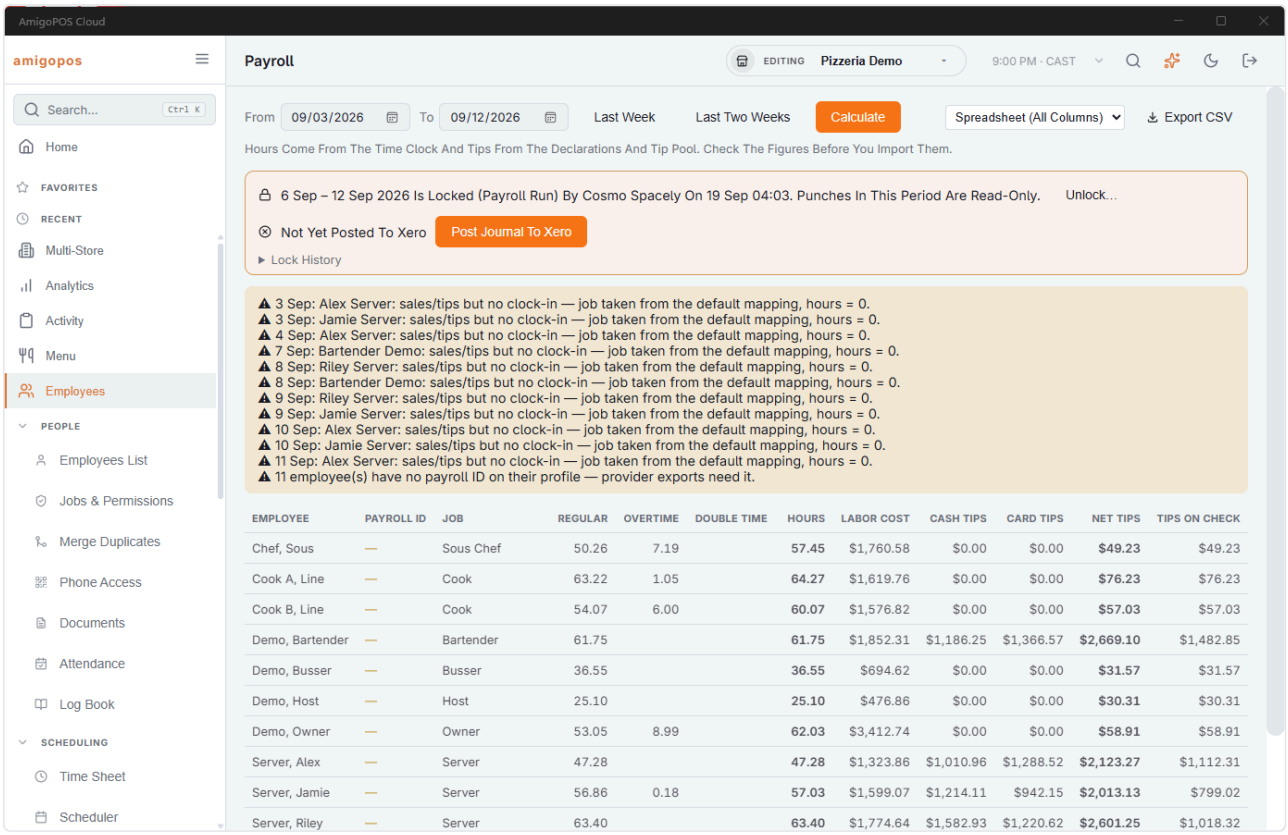
What the journal contains

- **Wages** — the period's labour cost, one line per job, debited to the Wages account.
- **Tips paid through payroll** — card and pooled tips the pay run hands over, taken off the tips owed to staff.
- **Wages Payable** — the total, credited to the liability your payroll service pays out of.

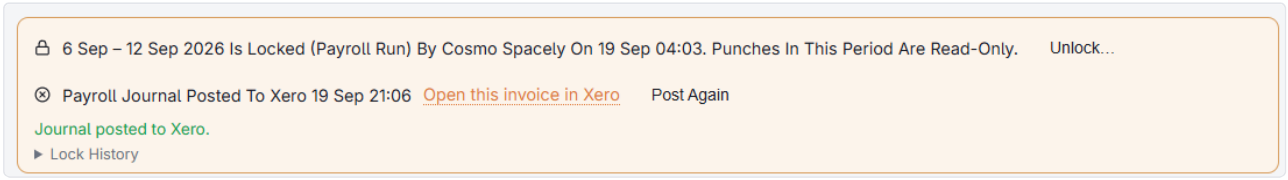
The journal is dated the last day of the period. Declared cash tips are already in the staff's pockets and are not included. Employer taxes and deductions are not known to the POS and are posted by the payroll service or the bookkeeper.

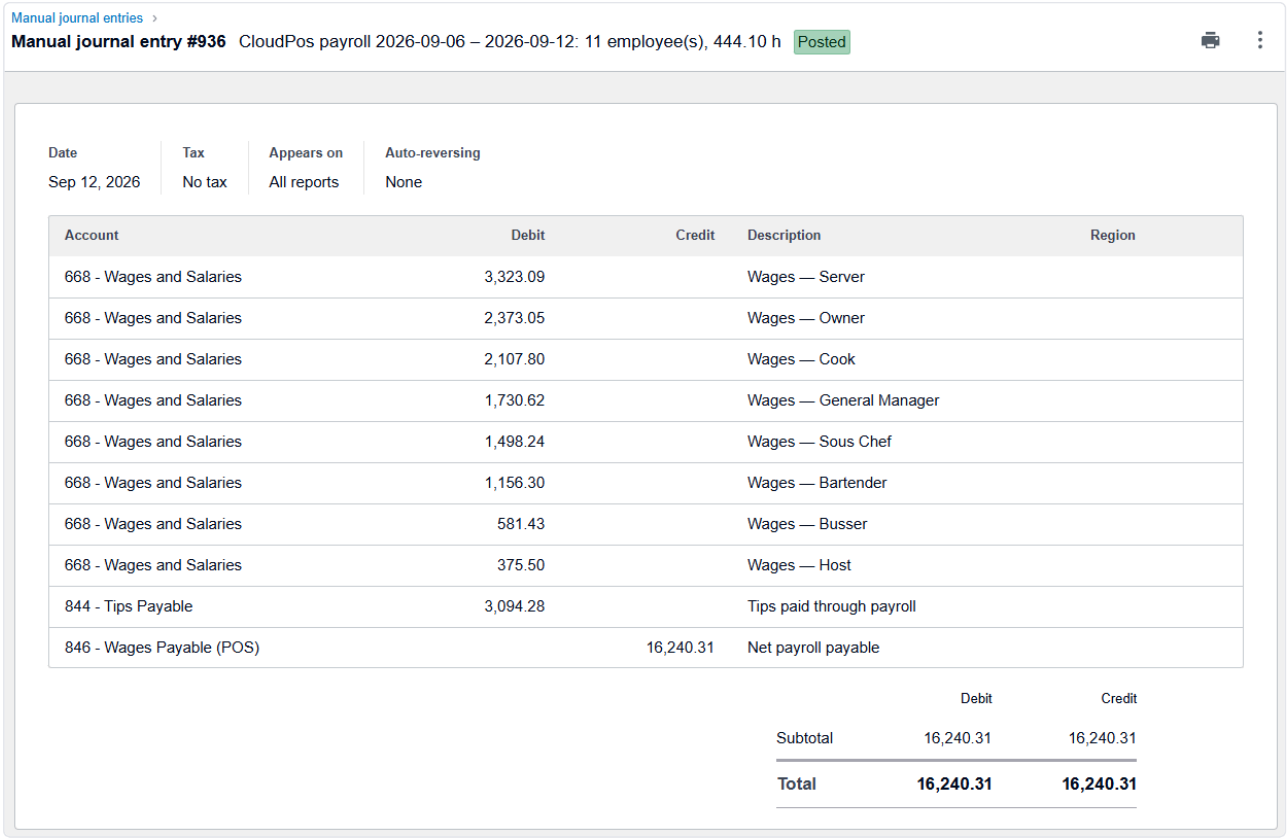
Posting it

1. Map **Wages** and **Wages Payable** under Special Accounts on the Xero Mappings tab, or run **Auto-Map**.
2. Open **Back Office › Employees › Scheduling › Payroll**, choose the dates and press **Calculate**.
3. Lock the period once the export has gone to your payroll service.
4. In the lock panel, press **Post Journal To Xero**.



The panel then shows when it was posted, with an **Open In Xero** link.





> The Xero row appears only when the store's Xero integration is enabled and connected, and the button is available only for a locked period, so the journal always matches what was paid.

Posting again

If a period is unlocked and corrected, lock it again and press **Post Again**. The previous journal is voided in Xero and replaced.

> Stores connected to Xero before the payroll journal was introduced need to press **Reconnect To Xero** once, on the Xero Settings tab, before the first journal. Until then Xero refuses it, and the message says so.

Activity And Retries

Integrations › Xero

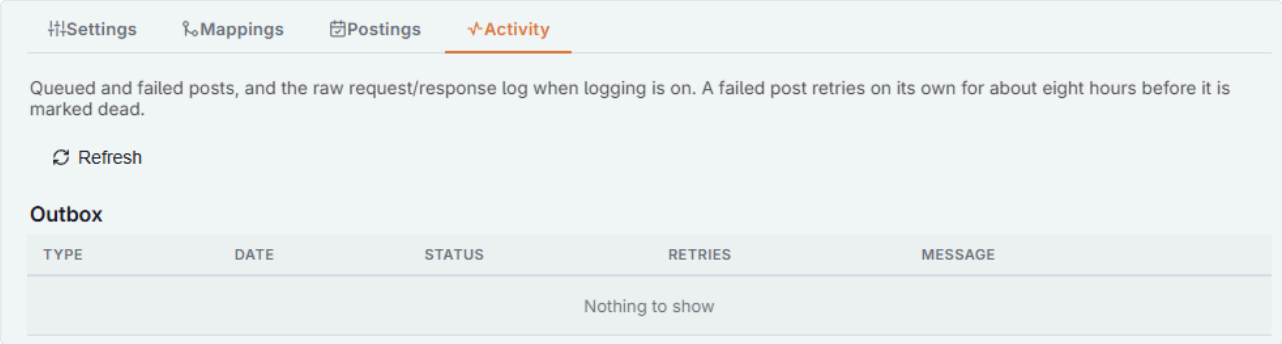
View online ↗

What the queue and the diagnostic log show, and what to do with a stuck item.

The **Activity** tab shows work waiting to go to Xero and, when logging is switched on, the exact conversation with Xero.

The outbox

Closing the day does not post to Xero directly — it puts a request in a queue, and a background service works through it. The close is never held up by Xero being slow or unreachable. The same queue carries the day's supplier bills when **Post Supplier Bills** is on.



A request that fails is tried again automatically, waiting longer between each attempt, over roughly eight hours. Most short outages sort themselves out with nobody doing anything.

- **Pending** — waiting its turn.
- **Retrying** — an attempt failed and another is scheduled. The message says why.
- **Failed** — attempts are exhausted. This one needs attention.
- **Completed** — it went through.

The type reads **Daily Sales**, **Invoice Changed** or **Supplier Bills**, followed by what it refers to, such as the date.

Retry puts an item back at the front of the queue, which is what to press once the underlying problem is fixed. **Delete** removes it without posting.

> A whole run of Failed items with the same message usually means one cause — an expired connection, or an account removed in Xero. Fix that, then press Retry on each.

You are told when something fails

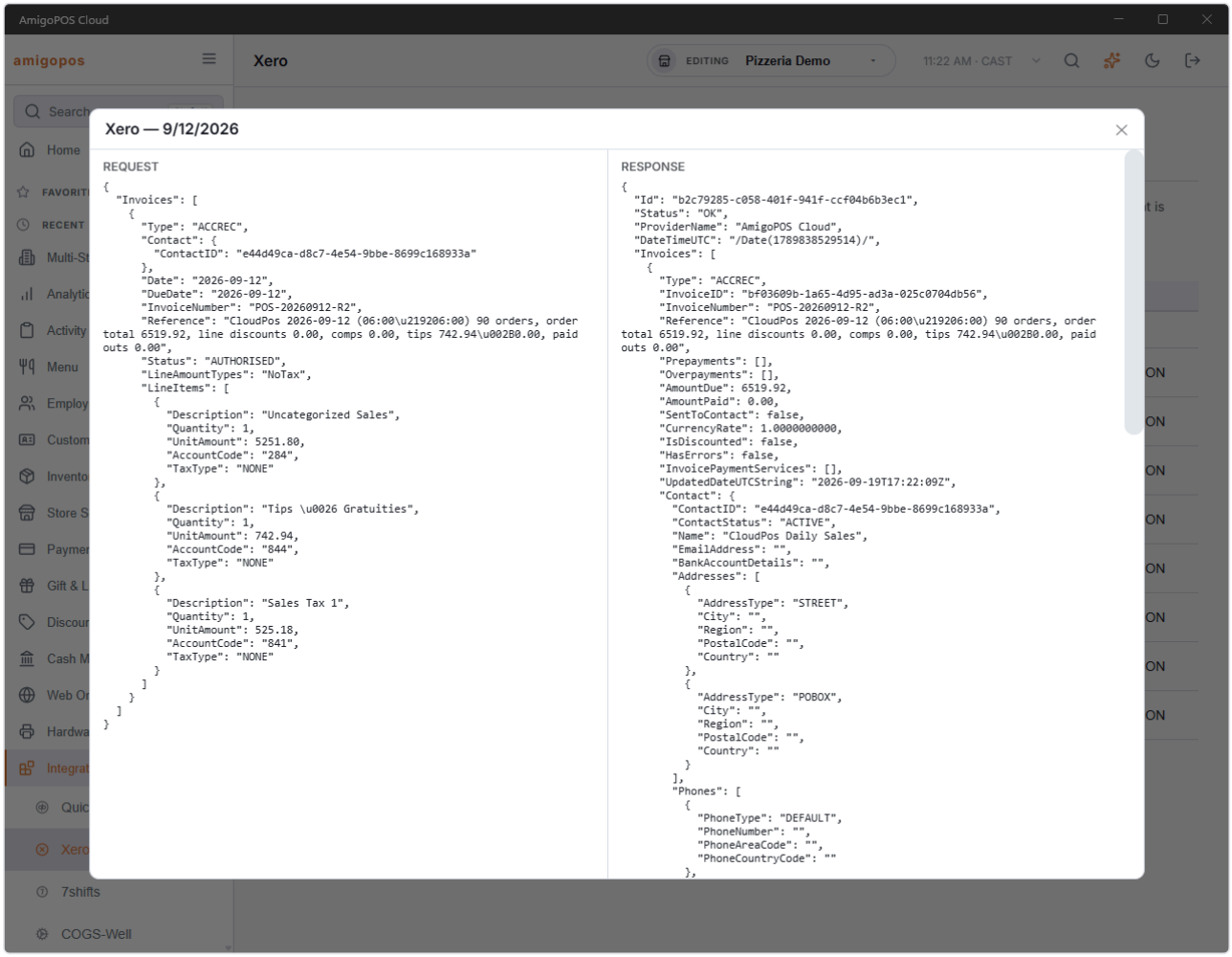
Nobody has to watch this tab. When a day fails to post, or the connection stops working, the store's managers get an alert in the POS **Messages** inbox, at most once a day, and the connection panel on the Settings tab shows a **Failed Posting(s)** count for the last two weeks.

The diagnostic log

With **Log Requests And Responses** switched on in Settings, every exchange with Xero is recorded. The **JSON** button on a row shows what was sent and what came back.

Diagnostic Log

DATE	TYPE	STATUS	
9/19/2026 1:22 PM	Attachment EndOfDay-2026-09-17.pdf	OK	JSON
9/19/2026 1:22 PM	Payment Credit Card	OK	JSON
9/19/2026 1:22 PM	Payment Cash € (Euro)	OK	JSON
9/19/2026 1:22 PM	Invoice 2026-09-17	OK	JSON
9/19/2026 1:22 PM	Attachment EndOfDay-2026-09-16.pdf	OK	JSON
9/19/2026 1:22 PM	Payment Credit Card	OK	JSON
9/19/2026 1:22 PM	Payment Cash € (Euro)	OK	JSON
9/19/2026 1:22 PM	Invoice 2026-09-16	OK	JSON
9/19/2026 1:22 PM	Attachment EndOfDay-2026-09-15.pdf	OK	JSON
9/19/2026 1:22 PM	Payment Cash € (Euro)	OK	JSON



This is mainly of use to support. Turning it on before reproducing a problem gives them everything they need in one place. Entries are deleted automatically after thirty days.

> Posting failures are also recorded against the date itself, on the Postings tab, which is usually the easier place to look first. Supplier bills and payroll journals keep their own status in their own lists.

Xero Troubleshooting

View online ↗

What the common messages mean and what to do about them.

Most problems fall into a handful of cases. The message on the Postings tab, the Supplier Bills list or the Payroll page says which.

"Xero integration is disabled"

The master switch is off. Turn on **Enable Xero Integration** on the Settings tab. Everything else — connecting, mapping, previewing — works while it is off, so it is easy to have set everything up and not switched it on.

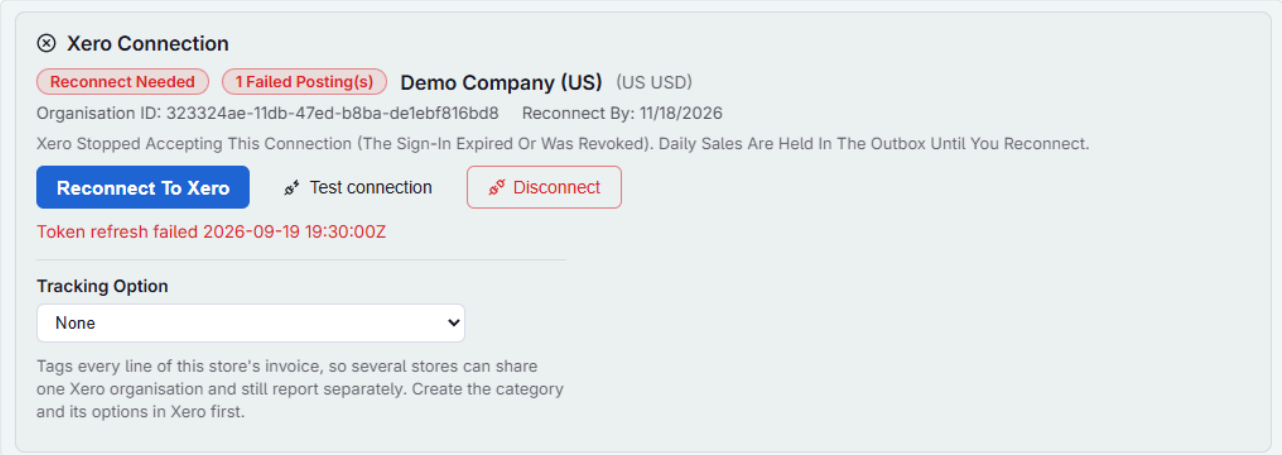
"Unmapped accounts"

Something the day needs has no account. The message names them. Go to the **Mappings** tab and either map them by hand or run **Auto-Map**, then post again.

This often appears after a new menu category is added, or after a day that includes something the business had not had before — its first refund, gift card or reservation deposit, for instance.

Reconnect Needed, or "Xero is not connected"

Xero has stopped accepting the connection — usually because someone removed CloudPos from the organisation's connected apps in Xero. Open the **Settings** tab and press **Reconnect To Xero**. The days that waited in the outbox post once it is back.



"Disconnected from Xero: the store was deactivated"

CloudPos ends the Xero connection of a store that is deactivated or whose subscription is no longer active. Once the store is active again, connect it again from the Settings tab.

"Currency mismatch"

The store trades in one currency and the Xero organisation keeps its books in another. Posting is refused rather than converting silently, because the usual cause is the wrong organisation being connected, or the store's currency setting being wrong.

Check both. If the business genuinely trades in a different currency from its books, and its Xero plan includes multi-currency, switch on **Allow Foreign Currency** after agreeing it with the bookkeeper.

"Tax slot has tax today but no Xero tax rate"

Use Xero Tax Rates is on, and a tax slot that collected tax that day has no rate chosen. Pick one in the **Xero Tax Rate** column on the Mappings tab, or switch the setting off. See *Using Xero Tax Rates*.

"Invoice posted but the refund credit note failed"

The sale went through but the day's refunds did not. The message says why — usually an unmapped refund line. Fix it and post the date again; the day is replaced in full, invoice and credit note together.

A supplier bill says "Unmapped"

An inventory category, or the **Purchases** row for items without a category, has no account. Map it on the Mappings tab and press **Post Bills Now** under Postings › Supplier Bills.

The payroll journal is refused (403)

The store was connected before the payroll journal existed, and Xero has not given CloudPos permission to write journals yet. Press **Reconnect To Xero** once on the Settings tab, then post the journal again.

Auto-Map skipped something

The result line reports how many were skipped, and the log beneath says why for each. The usual reason is an account of that name already existing in Xero but not being usable for that purpose — a clearing account without payments enabled, for example. The message says which. Either correct the account in Xero, or map the row by hand.

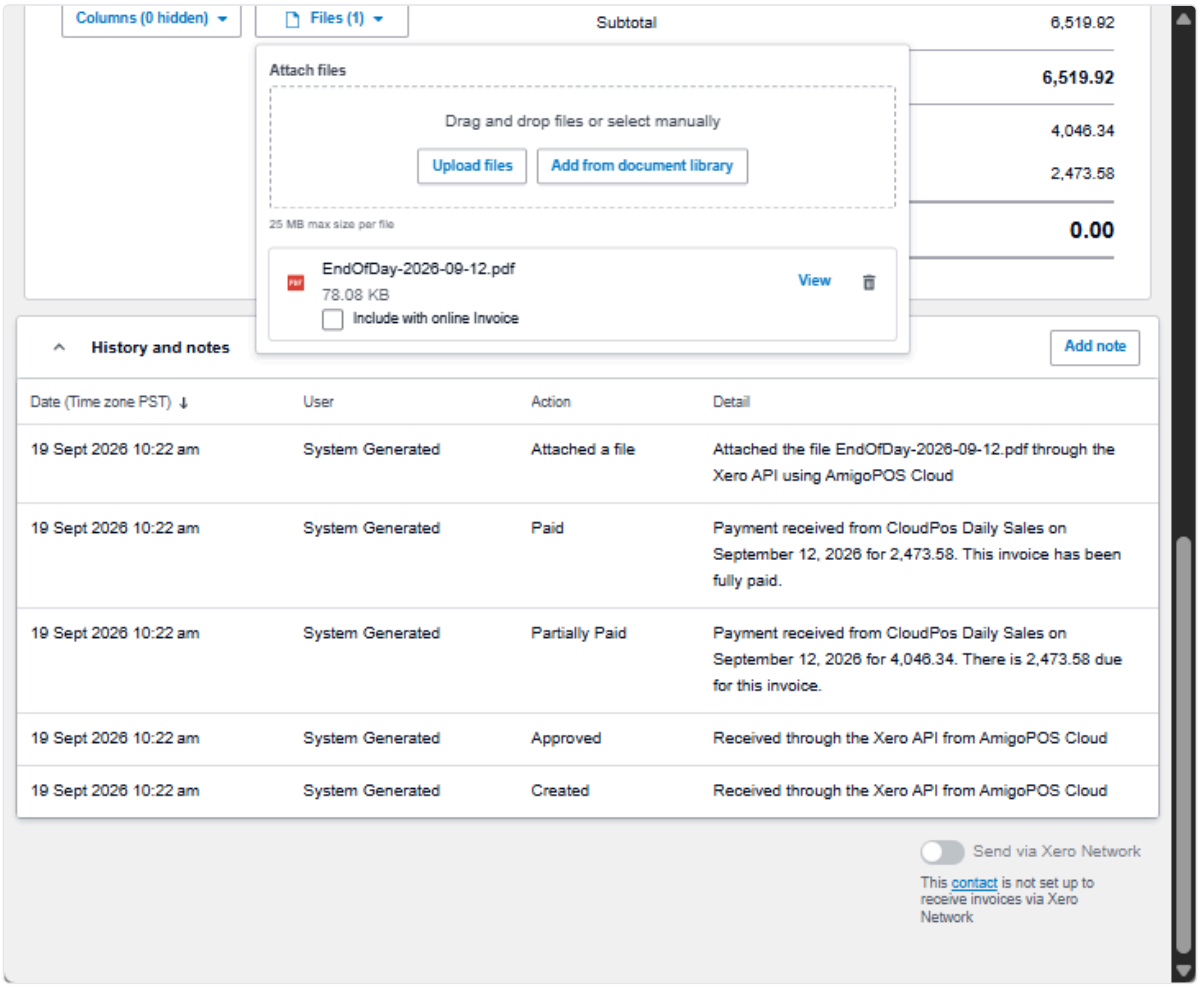
A day posted, but the figures look wrong

Preview the same date again and compare it with the End Of Day report. They are built from the same figures, so a difference points at the mapping rather than the totals.

Once the cause is fixed, post the date again — the old invoice is voided and replaced.

The invoice is in Xero but shows as unpaid

This happens when **Create Invoice As Draft** is on, because Xero will not accept payments against a draft. Approve the invoice in Xero, then post the date again to apply the payments.



Nothing is posting at all

Work down this list:

1. Is **Enable Xero Integration** on?
2. Is **Post Automatically At End Of Day** on?
3. Does the connection panel say Connected, or Reconnect Needed?
4. Is anything sitting in the Activity tab outbox as Retry or Dead?
5. Has End Of Day actually been run for the day in question?

> Posting a date by hand from the Postings tab is always available, whatever the automatic posting is doing, and the message it returns is usually the quickest way to find out what is wrong.

Caller ID

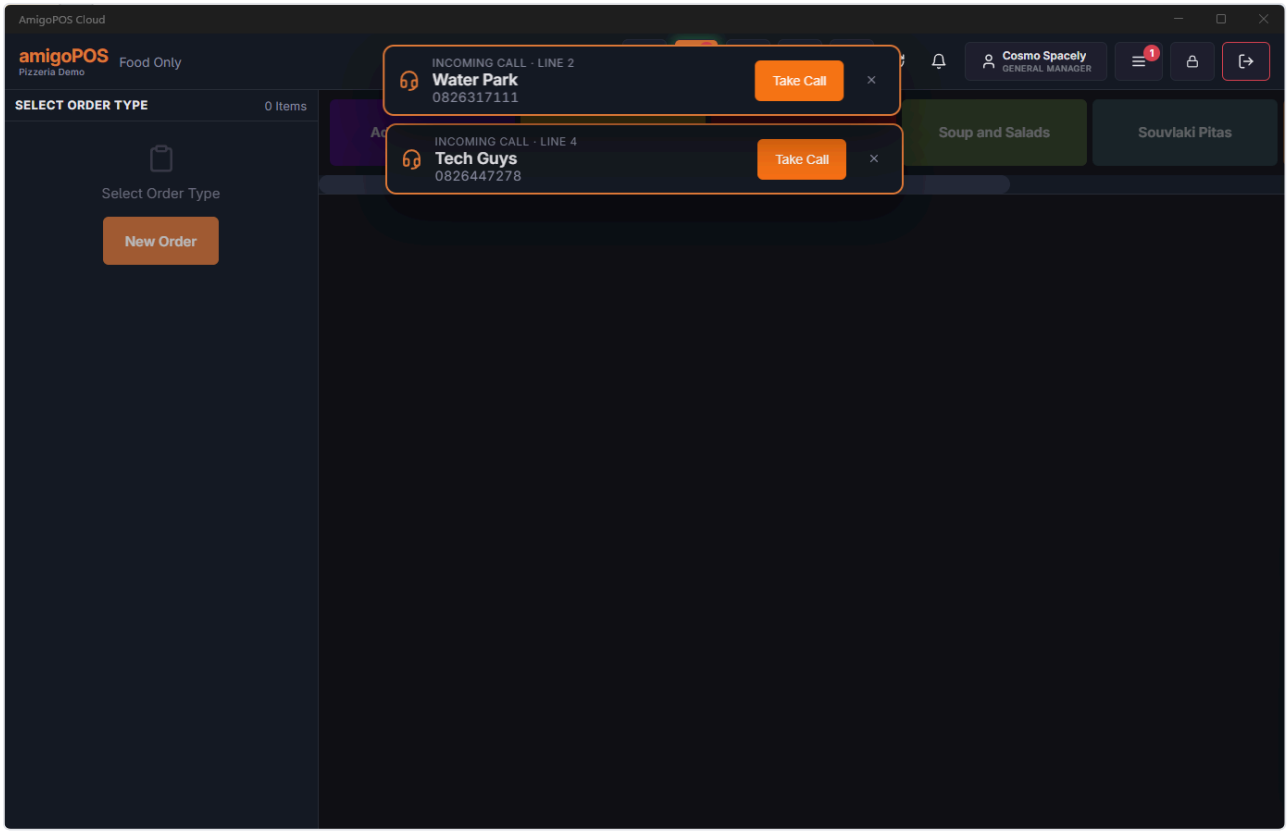
How caller ID works

Integrations › Caller ID

View online ↗

Incoming phone calls pop up on the registers while the phone rings, matched to the customer, from a phone system or a CallerID.com box.

With caller ID connected, every incoming phone call appears on the registers while the phone is still ringing: the caller's number, and their name when they are already a customer. One tap on **Take Call** opens the customer screen with the number already searched, so a phone order starts without typing a single digit.



Where the calls come from

- **FreePBX** (free, open-source phone system) — the phone system asks CloudPos who is calling each time a call comes in. See **Connecting FreePBX**.
- **3CX** (Pro or AI edition) — the same idea through 3CX's CRM integration. See **Connecting 3CX**.

- **A CallerID.com box** (Whozz Calling) on ordinary analog phone lines — the box sends each call over the store network and the registers pick it up. See **Using a CallerID.com box on analog lines**.

What staff see

- **A banner at the top of the register** for each ringing call. A green border means the number belongs to a customer; an orange border means an unknown caller.
- **Take Call** opens Customer Information on that number. The other stations drop the call as soon as one of them takes it.
- **Recent Calls** in Customer Information lists the latest calls, so a missed caller can be called back or looked up later.
- **A small caller line in the Back Office header** when someone is working in Back Office on that station.

Call-center stations see the calls for every store of the business; a store's registers see that store's calls.

> Caller ID never blocks anything. If the phone system or the connection is down, the phones still ring and orders are taken the usual way, with the number typed in.

Getting started

1. Turn caller ID on in Back Office — **Setting up caller ID in Back Office**.
2. Connect your phone system or box using its own topic.
3. Use **Send Test Call** on the Caller ID page to check the registers before the first real call.

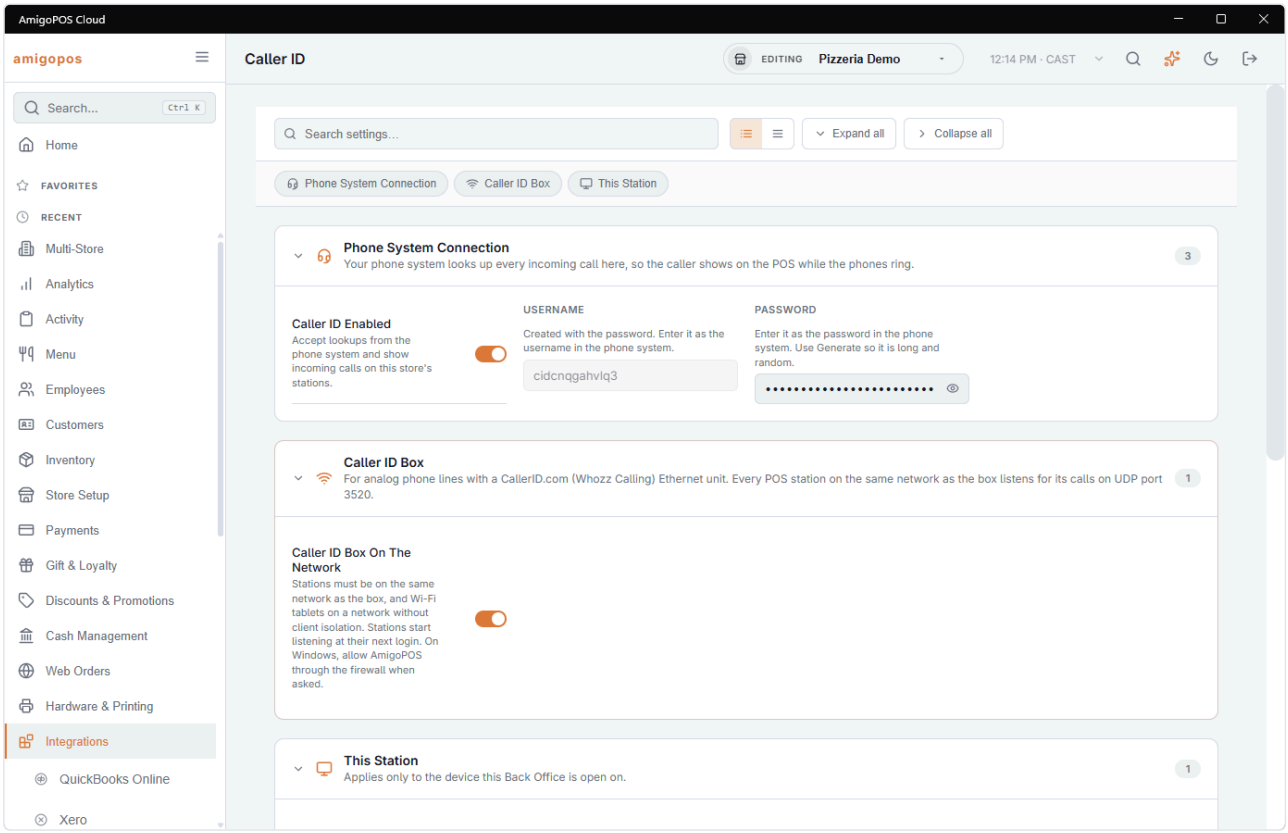
Setting up caller ID in Back Office

Integrations › Caller ID

View online ↗

Turn caller ID on, create the username and password your phone system uses, and ring the registers with a test call.

Everything for caller ID is on one page: **Back Office › Integrations › Caller ID**. Settings are per store; with more than one store, choose the store in the header first.



Phone System Connection

1. **Caller ID Enabled** — the master switch. Off, no calls are shown and phone systems are refused.
2. **Generate Username And Password** — creates the store's **Username** (it starts with *cid*) and a long random **Password**, and copies the password to the clipboard. Your phone system sends these two with every lookup, so they are what you type into FreePBX or 3CX.
3. **Copy Password** — copies the current password again, for example to set up a second phone system.

> After the first time, the button becomes **New Password**. A new password stops the old one working at once, so the phone system must be given the new one straight away or the pop-ups stop.

The username never changes once created; it identifies the store. A CallerID.com box does not use the username or password at all.

The setup panels

Below the settings, **FreePBX Setup** and **3CX Setup** show the exact values to enter on the phone system's side — host, port, path and the lookup URL for your store. Copy them from there rather than typing them from memory.

Caller ID Box

If the store has a CallerID.com box on its phone lines, switch on **Caller ID Box On The Network**. See **Using a CallerID.com box on analog lines**.

This Station

Show Incoming Calls On This Station applies only to the device the Back Office is open on. The same switch is on the register under **More › Settings** — see **Taking a call at the register**.

Test Call



Send Test Call rings this store's registers exactly as a real call would, without a phone system: the banner appears, the call is listed in Recent Calls, and Take Call works. Type a customer's number to see a matched caller, or leave it blank to use 5551234.

> Registers read the caller ID settings when someone signs in. After switching caller ID on, sign out and back in on each register before testing.

On a call-center seat

The same page is on a call-center seat, for the line of the seat's own location (the office). A seat shows calls for every store of the business, and it starts listening whenever caller ID is on at any of them — an office with no line of its own needs nothing here to ring for the stores. See The call center's own hardware.

Connecting FreePBX

Integrations › Caller ID

View online ↗

Add CloudPos as a CallerID Lookup Source in FreePBX and assign it to the store's inbound route.

FreePBX has a built-in feature, **CallerID Lookup Sources**, that asks another system for the caller's name every time a call arrives. Pointing it at CloudPos is what makes the call appear on the registers.

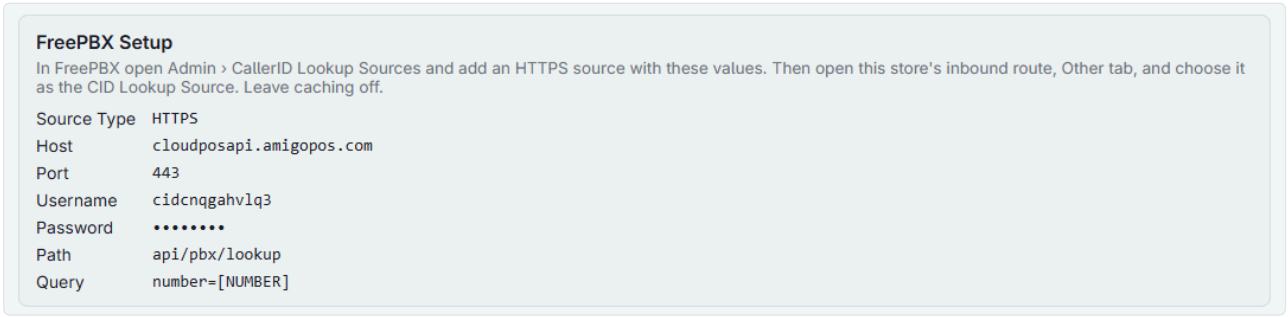
Before you start, set up the Back Office side and keep the **Caller ID** page open — its **FreePBX Setup** panel has the values below. See **Setting up caller ID in Back Office**.

1. Add the lookup source

1. In FreePBX open **Admin › CallerID Lookup Sources** and click **Add CIDLookup Source**. (If the page is missing, install the CallerID Lookup module from Admin › Module Admin.)
2. Fill it in from the FreePBX Setup panel:

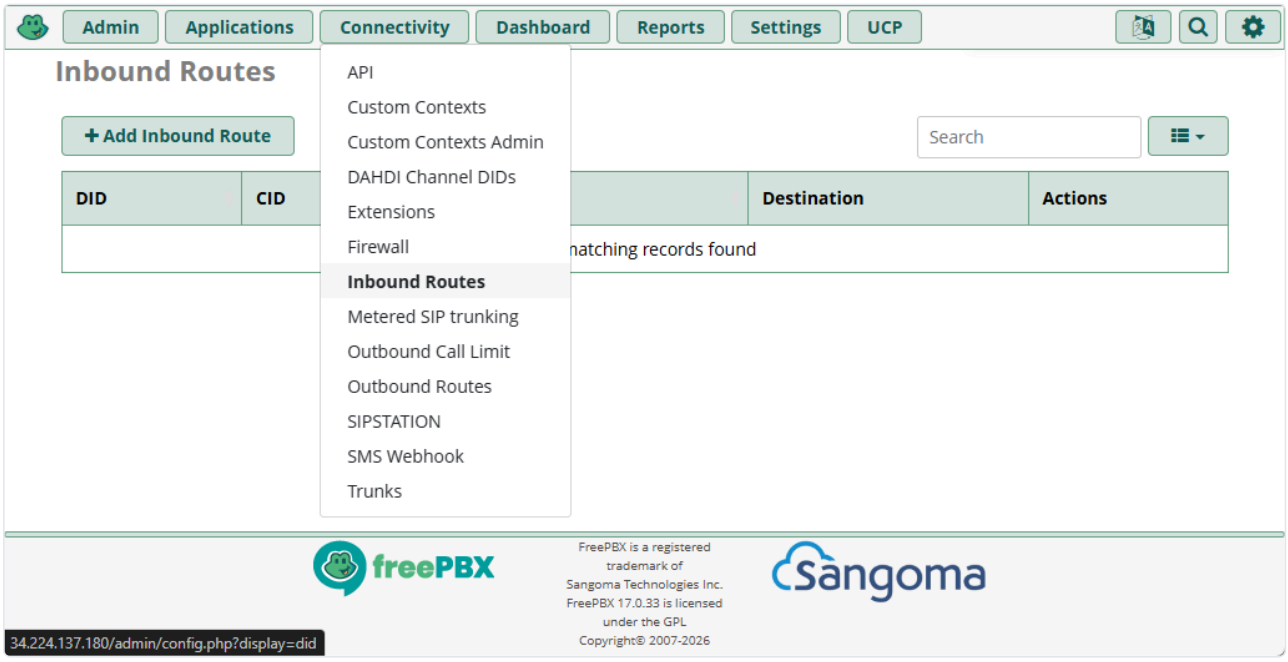
- **Source Description**: CloudPos
- **Source Type**: HTTPS
- **Host** and **Port**: as shown on the panel (port 443)
- **Username** and **Password**: the store's caller ID username and password
- **Path**: api/pbx/lookup
- **Query**: number=[NUMBER]

3. If the form has a **Cache Results** option, leave it off. With caching on, repeat callers never reach CloudPos and the banner does not appear for them.
4. Click **Submit**, then the red **Apply Config** button.



2. Use it on the inbound route

1. Open **Connectivity › Inbound Routes** and edit the route for the store's phone number.
2. On the **Other** tab, set **CID Lookup Source** to CloudPos.
3. **Submit**, then **Apply Config**.



Call the store's number: the registers show the call while the phones ring, and phones on the system show the customer's name.

Several stores on one FreePBX

Each store's number has its own inbound route. Create one lookup source per store, each with that store's username and password, and give each route its own source. That is how the call reaches the right store — and the call center sees which store was dialed.

Good to know

- FreePBX waits for the answer before ringing the phones. CloudPos replies straight away, so the delay is a fraction of a second.

- When the caller is not a customer, CloudPos answers with no name and the phones show the number, as they would without a lookup.
- The phone system only needs to reach CloudPos over the internet (outgoing HTTPS). No port has to be opened towards the phone system for caller ID.

> Test the registers first with **Send Test Call** on the Caller ID page. If the test works but real calls do not, the problem is on the FreePBX side — see **Caller ID troubleshooting**.

Connecting 3CX

Integrations › Caller ID

View online ↗

Use 3CX's CRM integration to look up callers in CloudPos. Needs the 3CX Pro or AI edition.

> **3CX Pro or AI edition only.** The CRM integration that caller ID uses is not available in the free edition of 3CX. In the 3CX admin console, **Integrations › CRM** shows which editions include it.

3CX looks callers up through a **server-side CRM template**: for each incoming call it calls a web address with the caller's number. Pointing that address at CloudPos makes the call appear on the registers.



Setting it up

1. Set up the Back Office side first — see **Setting up caller ID in Back Office**. The **3CX Setup** panel on the Caller ID page shows your store's **Lookup URL**.
2. In the 3CX admin console open **Integrations › CRM** and add a server-side template with a contact lookup by number.
3. Use the **Lookup URL** from the panel as the lookup address, with 3CX's number variable in place of *[Number]*.
4. Choose **Basic** authentication with the store's caller ID **Username** and **Password**.
5. Map the reply fields: **id** to the contact ID, **firstName** to the first name, **lastName** to the last name and **phone** to the phone number.
6. Use the template's **Test** button with the number of an existing customer, then save.

Limits to know

- **The dialed number is not sent.** 3CX does not tell CloudPos which of your numbers the caller dialed, so every call through a store's template rings that store's registers. With several stores on one 3CX, call-center operators choose the store as usual.
- **3CX's own phonebook comes first.** If the caller is already saved as a normal 3CX contact, 3CX may use that and skip the lookup, and the registers do not ring. Avoid keeping customers as manual contacts in 3CX.

Using a CallerID.com box on analog lines

Integrations › Caller ID

View online ↗

Connect a CallerID.com (Whozz Calling) Ethernet unit: every register on the store network hears the calls and shows them.

Stores on ordinary analog phone lines can use a **CallerID.com** unit (the Whozz Calling Basic or Deluxe Ethernet models, or the Vertex unit for VoIP lines). The box sits on the phone lines and announces each call on the store network; the registers listen for it and show the call.

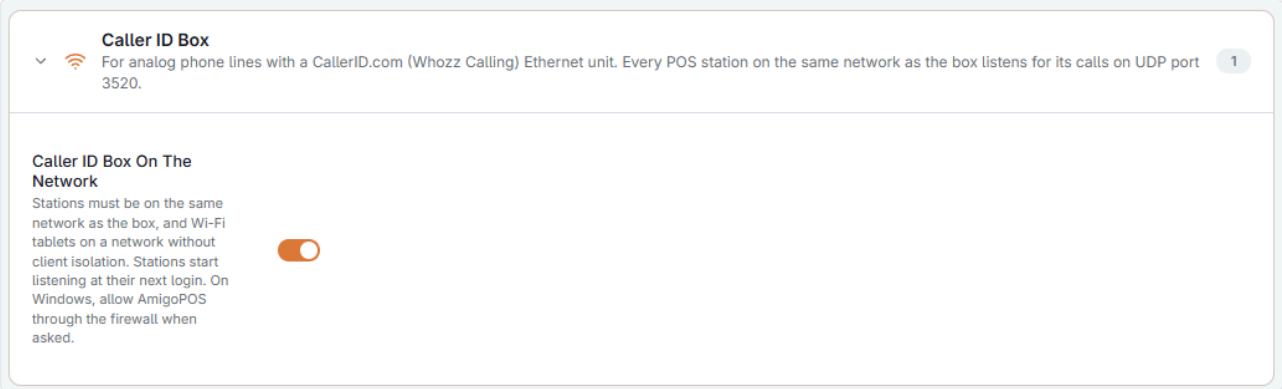
What it needs

- **The same network.** The box announces calls to its own local network only, so the registers must be on the same network as the box. A register on a different network, or on a separate guest Wi-Fi, will not hear it.
- **Wi-Fi without client isolation.** Tablets on Wi-Fi only hear the box if the access point lets devices see each other. Settings called client isolation or AP isolation (common on guest networks) block it.

- **The box on its standard settings**, sending on port 3520, which is how CallerID.com ships it.

Turning it on

1. In **Back Office › Integrations › Caller ID**, make sure **Caller ID Enabled** is on.
2. In the **Caller ID Box** section, switch on **Caller ID Box On The Network**.
3. Sign out and back in on each register. Registers start listening at sign-in and keep listening until the app is closed, including while they sit at the sign-in screen.

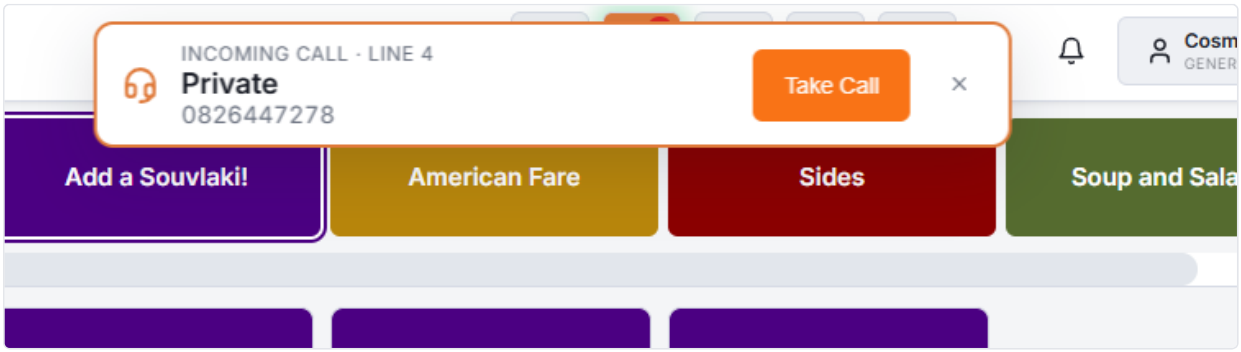


Windows registers: the firewall prompt

The first time a Windows register starts listening, Windows asks whether to allow the app on the network. Someone with administrator rights must tick **Private networks** and click **Allow**. If the prompt was dismissed, the register will not hear the box; add the permission in Windows Defender Firewall under *Allow an app through firewall*.

Android tablets have no such prompt. They only hear the box while the POS app is open, which is normal for a register.

What you see



- The banner shows which phone line is ringing, for example **Line 1**.
- When the number is not a customer, the banner shows the name sent by the phone company instead of *Unknown Caller*, when there is one.
- Every register hears the same call, but it is shown and logged once. A register that hides the banner (see **Taking a call at the register**) still passes calls on, so a quiet bar tablet leaves no gap.
- Calls with a withheld number are not shown.

> CallerID.com offers a free **Ethernet Emulator** program that sends test calls exactly like the box. Run it on a computer on the store network to test the registers before the box is installed.

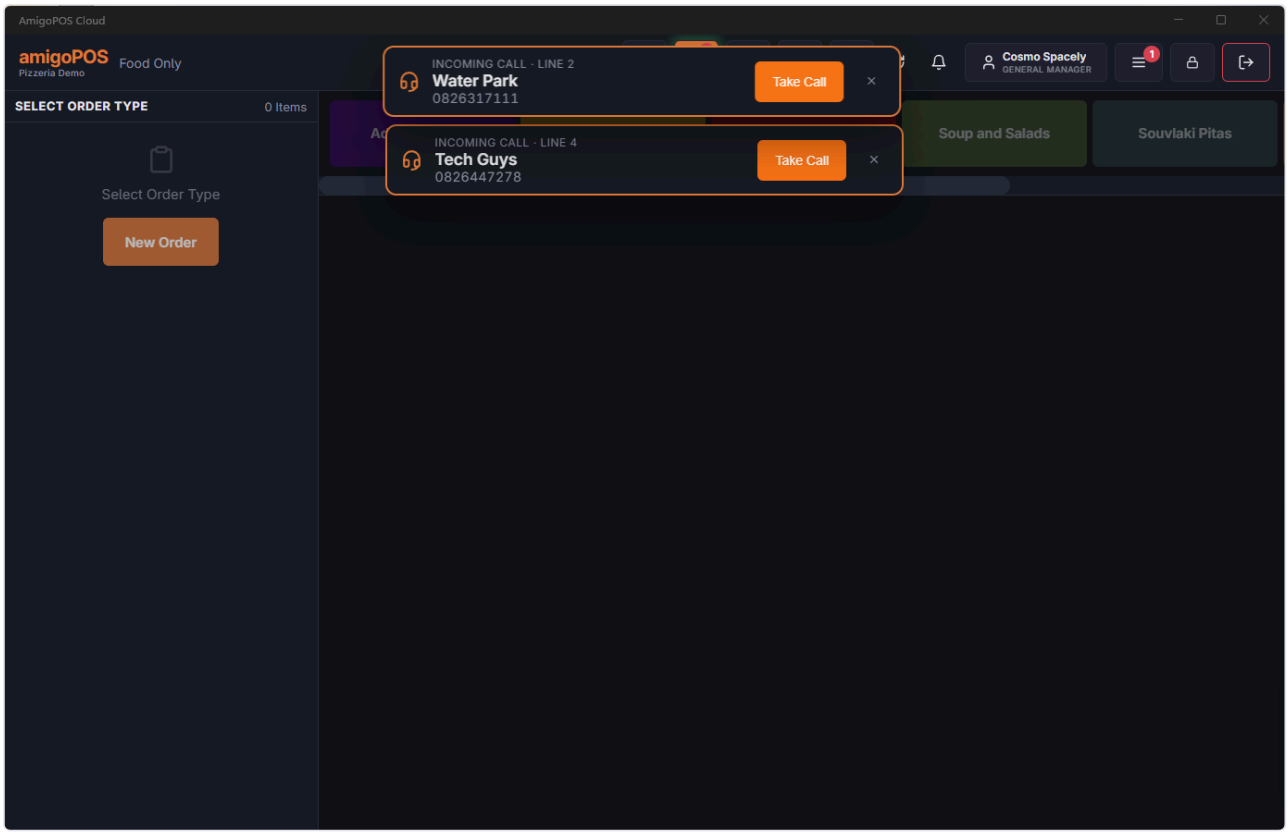
Taking a call at the register

Integrations › Caller ID

View online ↗

The incoming-call banner, Take Call, Recent Calls, the Back Office header line and hiding calls on one station.

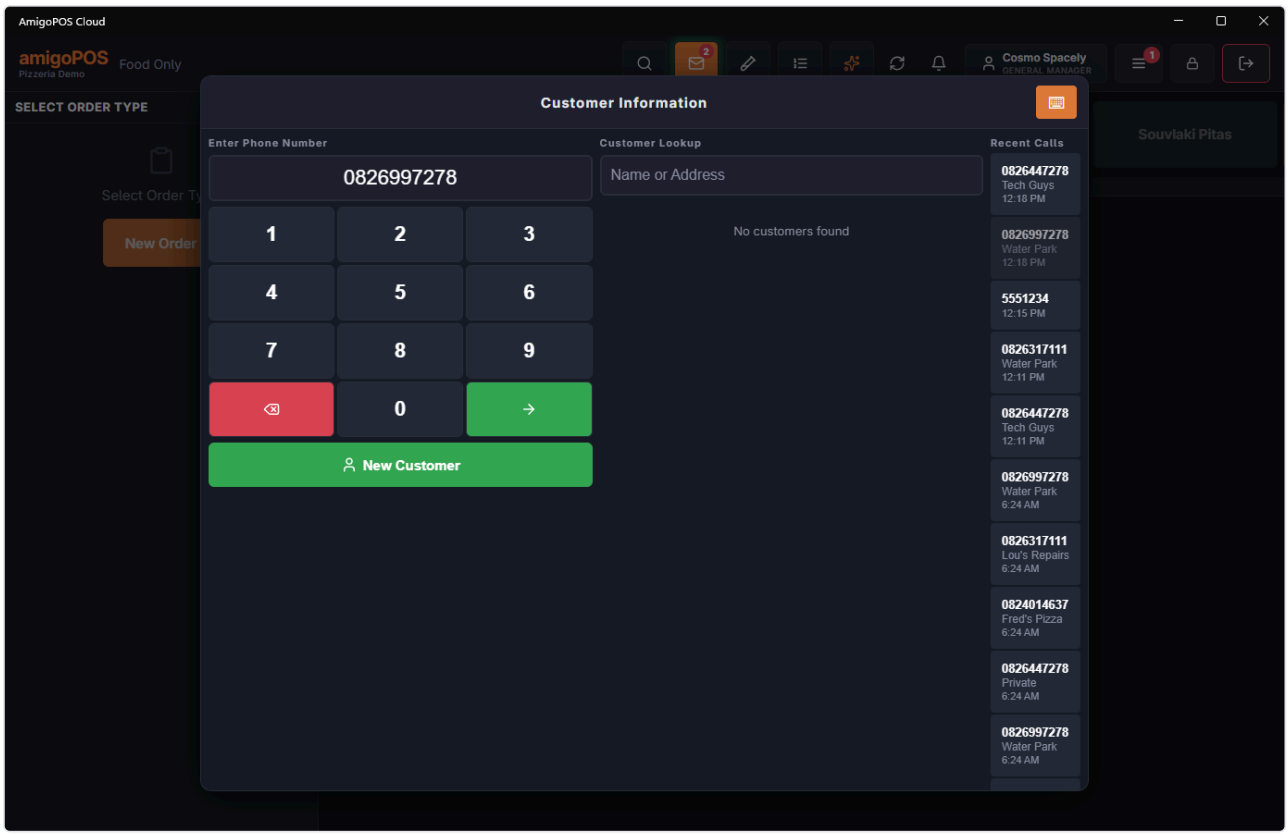
When a call comes in, a banner appears at the top of every register of the store while the phone rings. Up to three ringing calls are shown at once, newest first.



- **Green border** — the number belongs to a customer, and their name is shown.
- **Orange border** — an unknown caller: the phone company's name when there is one, otherwise *Unknown Caller*.
- The banner disappears when any station takes the call, when you close it with the **X**, or after about a minute and a half.

Take Call

1. Answer the phone and tap **Take Call** on the banner.
2. **Customer Information** opens on the caller: a customer the number matched lands on their record; a first-time caller lands in a new customer with the number — and the phone company's name, when there is one — already filled in. Only a number that matches something here after all opens the lookup, with the number searched.
3. Take the order as usual.

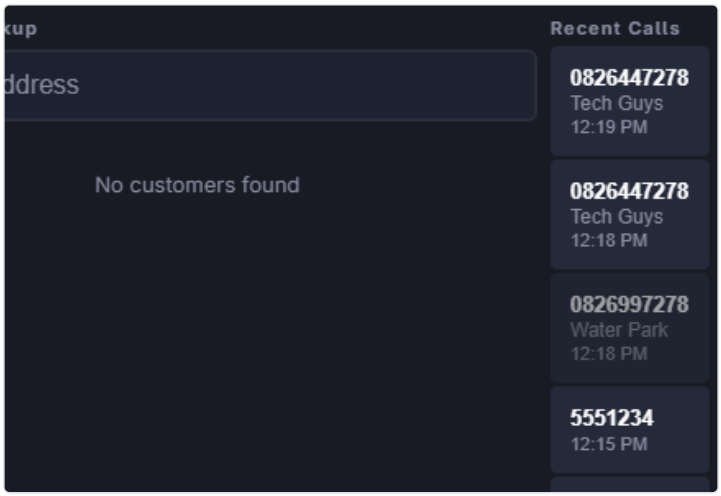


The other registers drop the call as soon as one takes it, so two people do not end up with the same caller.

> Take Call is refused while the order on screen already has items, because the caller would be added to someone else's order. Finish or hold that order first; the banner waits.

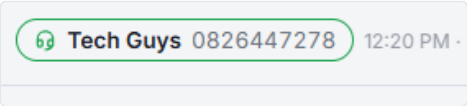
On a call-center station, taking the call also records the caller's number on the call, and the store is chosen in Customer Information as usual.

Recent Calls



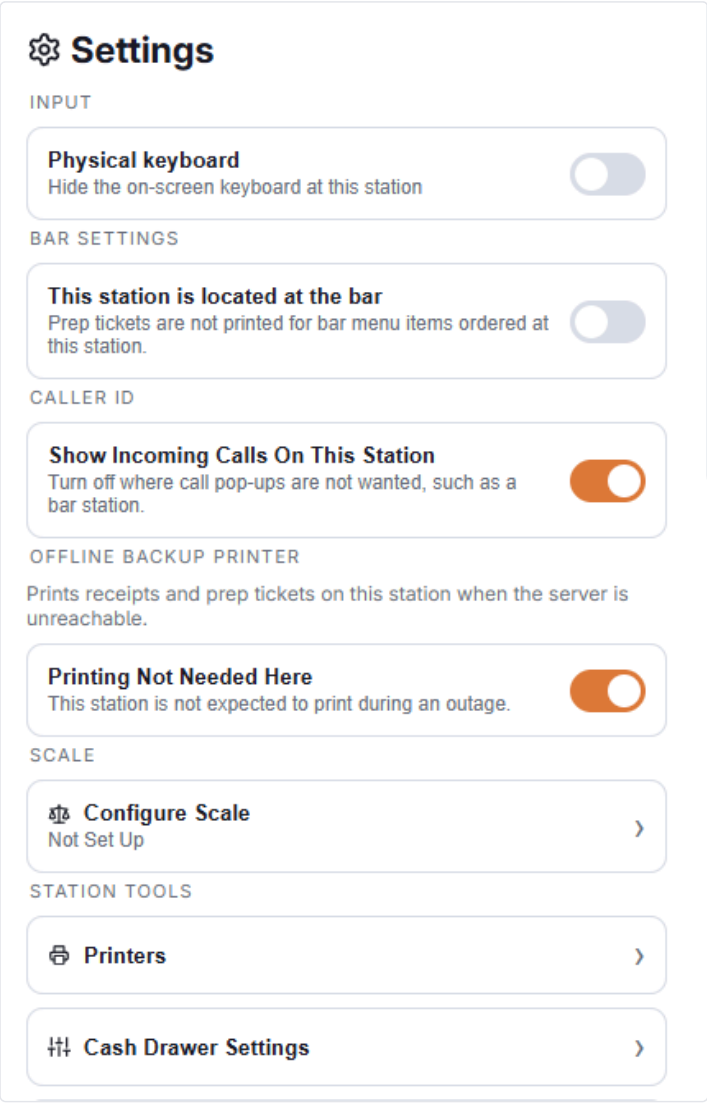
The **Recent Calls** column on the right of Customer Information lists the latest calls, newest first. Tap one to search that number. Calls already taken are dimmed; the rest were not taken from a register and may be worth a call back. Call-center stations see the recent calls of every store.

In Back Office



While someone is working in Back Office on a register, a ringing call shows as a small line in the Back Office header, next to the store clock. It is a reminder only; to take the call, leave Back Office and use the banner.

Hiding calls on one station



On a station where call pop-ups are not wanted, such as a bar tablet, open **More › Settings** and switch off **Show Incoming Calls On This Station** in the **Caller ID** section. It applies at once, to this device only, and hides both the banner and the Back Office line. The section appears when caller ID is on for the store.

When the caller is a regular, the banner also shows their usual order under the number — see The usual: one-tap reorder for regulars.

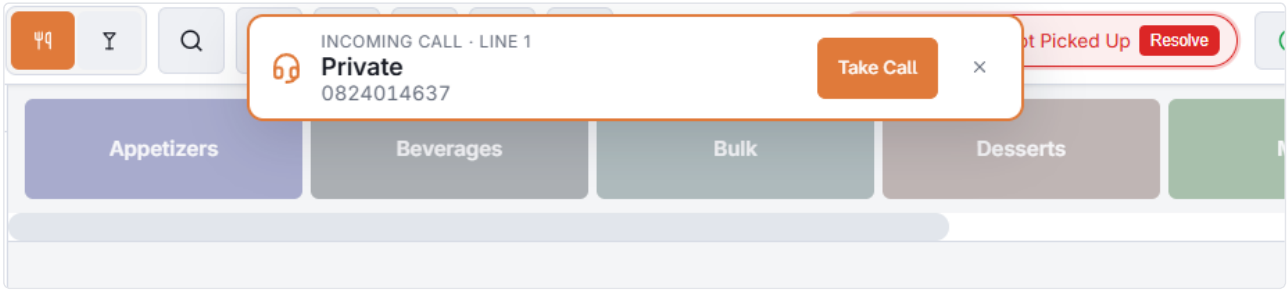
If two people tap the same call

The second station is told who took it — ***name*** **Already Took This Call** — and nothing opens. A call taken earlier can still be opened from Recent Calls, to call the customer back.

Take Call on a call-center station

What opens depends on the number:

- **A number that matches a customer**: the order-type picker is skipped when that customer has ordered before — the type of their last order is taken for this one and their last delivery address is selected. The customer screen opens on their record with a strip of order types across the top; tap another type if the caller wants one. A customer with no order history gets the order-type picker first, as before.
- **A number that matches nothing**: after the order type, the customer screen opens on a **new customer** with the number already in place and, when the phone company sent a name, the name split into first and last name. Correct it while you read it back. If you cancel, or change to another customer, that new record is removed again.
- **A number the station does find after all** (the server did not match it, your station does): the phone lookup opens with the number searched, so you pick the right record.



While the order on screen has items on it, Take Call is refused and the call stays on the banner: finish or park the order first.

Caller ID troubleshooting

Integrations › Caller ID

View online ↗

What to check when calls do not appear on the registers, show as unknown, or appear on some stations only.

Start with **Send Test Call** on **Back Office › Integrations › Caller ID**. If the test rings the registers, the registers are fine and the problem is between the phone system and CloudPos. If the test does not ring them, start with the registers.

No banner on any register

- **Caller ID Enabled** must be on for the store. The test call says so when it is off.
- Registers read the setting at sign-in: sign out and back in after switching caller ID on.
- Check **More › Settings › Show Incoming Calls On This Station** on the register.

The test works but real calls do not (FreePBX or 3CX)

- **FreePBX:** the CloudPos lookup source must be selected on the store's **inbound route** (Other tab), and **Apply Config** pressed afterwards.
- **Username and password:** they must match the Caller ID page exactly. After **New Password**, the phone system still has the old one — copy it across again.
- **3CX:** check the edition (Pro or AI) and that the caller is not saved as a normal 3CX contact.
- The phone system must be able to reach the internet over HTTPS.

CallerID.com box calls do not appear

- Is **Caller ID Box On The Network** switched on, and has each register signed in since?
- Is the register on the same network as the box? Tablets on a guest Wi-Fi, or on a network with client isolation, do not hear it.
- On Windows, the app must be allowed through Windows Defender Firewall for private networks.
- At least one register must have the POS app open. Every open register passes calls on, so one is enough.

The caller shows as unknown but is a customer

The number must be on the customer's record, as the phone number or the alternate phone. Matching ignores spaces, dashes and a country code in front, but a customer saved with a different number — an old mobile, say — shows as unknown until the record is updated.

The same caller rang twice and only one banner appeared

A second ring from the same number within 20 seconds is treated as the same call. This stops phone systems that look a call up twice, and registers that all hear the same box, from showing duplicates.

Calls show on some registers only

- That station may have **Show Incoming Calls On This Station** switched off.
- A register that has lost its connection to CloudPos shows nothing until it reconnects.

DC Direct (Datacap)

DC Direct card terminals: how they work

View online ↗

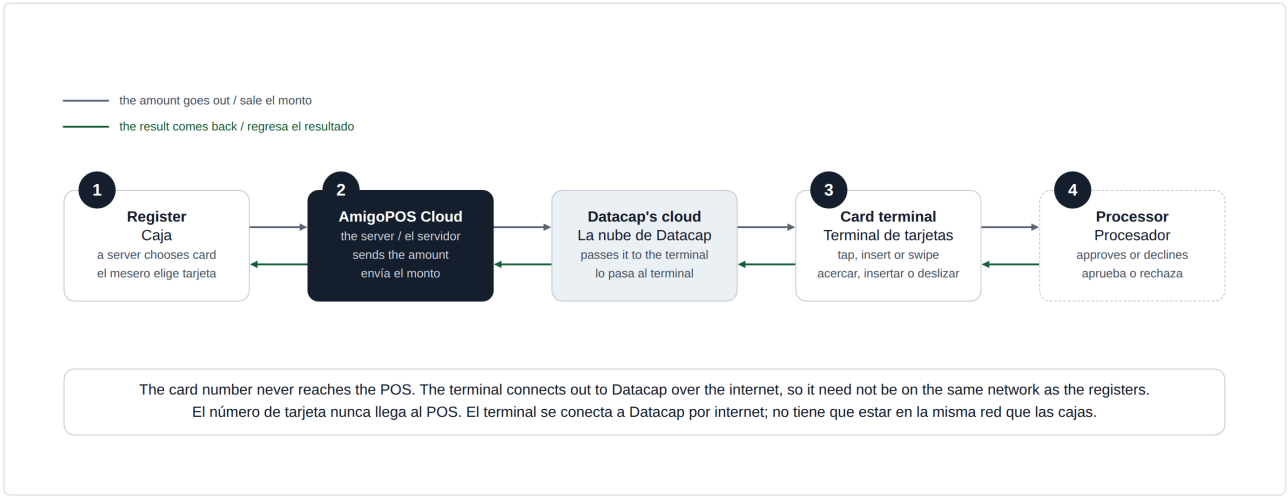
Datacap DC Direct connects portable card terminals to CloudPos through the cloud: what it does, where it is available and how a payment travels.

DC Direct is Datacap's way of connecting card terminals to a point of sale through the cloud. The guest taps, inserts or swipes on the terminal; CloudPos sends the amount and gets the result back, and the card number never touches the POS.

> DC Direct is available to merchants in the **United States and Canada**. It needs a merchant account with a processor that Datacap supports, set up through Datacap or a Datacap reseller.



How a payment travels



1. A server chooses the card method on the POS.
2. CloudPos sends the amount to Datacap's cloud, which passes it to the terminal.

3. The terminal asks for the card (and, depending on your settings, a tip, a signature or whether the guest wants a receipt) and sends the card to the processor.
4. The result comes back the same way and the payment is added to the order.

The terminal only ever connects *out* to Datacap over the internet. Nothing on the store network has to be opened towards it, and it does not need to be on the same network as the registers.

Portable and shared

Terminals such as the PAX A77 are hand-held. A server carries one to the table, the bar, the patio or the curb, and any register can charge on any terminal. When a store has several, the POS asks which one to use and shows which are busy — see **Sharing terminals across the floor**. Taking the terminal to the guest is pay-at-table without any extra setup.

What it can do

- Chip, tap (including phone wallets) and swipe; debit with PIN.
- Tips on the terminal, as suggested percentages or an amount the guest keys in, or a tip line on the receipt for table service.
- Table service in pre-auth mode: the check is authorized at the table and the card is charged once, for the check plus the tip written on the slip.
- Bar tabs held on a card, closed later with the final amount and tip.
- Voids, refunds to the original card and tip adjustments, all without the card present.
- An optional card fee (surcharge on credit cards, or a non-cash adjustment).
- Signature on the terminal, a receipt question, and printed merchant and cardholder copies.
- Terminal tools and batch totals on the register's **Credit Cards** screen.

Setting it up, in order

1. **What you need before you start** — the account, the credentials and the terminals.
2. **Setting up the store network and router** — one router setting matters on some internet services.
3. **Setting up the terminal** — Wi-Fi and its serial number.
4. **Setting up DC Direct in Back Office** — the card payment method and its terminals.
5. **Going live** — from test credentials to real cards.

Internet outages and card payments

Integrations › DC Direct (Datacap) View online ↗

DC Direct needs the store's internet. What stops during an outage, the backup phone-line terminal every store should keep, and how to record its payments in CloudPos afterwards.

> **Card payments through DC Direct need the store's internet connection.** When the internet is down — or the Wi-Fi the terminals use — no card can be charged through DC Direct until it comes back. The connection is provided by your internet service provider and is outside the control of CloudPos and Datacap, so every store taking cards this way should have a backup ready *before* an outage happens.

What still works during an outage

- The registers switch to offline mode on their own: orders are still taken, and **cash** payments are settled as usual (see **Working offline**).
- **Card payments of any kind cannot be taken or recorded in CloudPos** until the connection returns. Leave card-paying orders open and settle them afterwards, as described below.

The backup: a card terminal on the phone line

Ask your processor or reseller for a **standalone terminal that dials out over the phone line**. It does not use the internet at all, so it keeps approving cards while the internet is down.



- **It needs a true analog phone line.** Many business lines today are internet phone service (VoIP), supplied through the same modem as the internet. Those lines go down with the internet, and dial-up terminals often do not work on them at all. Confirm with your phone company that the line is analog and does not depend on the internet service.
- If a true analog line is not available, ask instead for a standalone terminal with its **own cellular connection**. It serves the same purpose.
- **Keep it ready:** plugged into power and the phone jack, in a place managers know. Run a small test sale and void it once a month, so you find out it has a problem before the day you need it.
- Show managers how to use it. It is operated on its own keypad, not from the POS.

During the outage

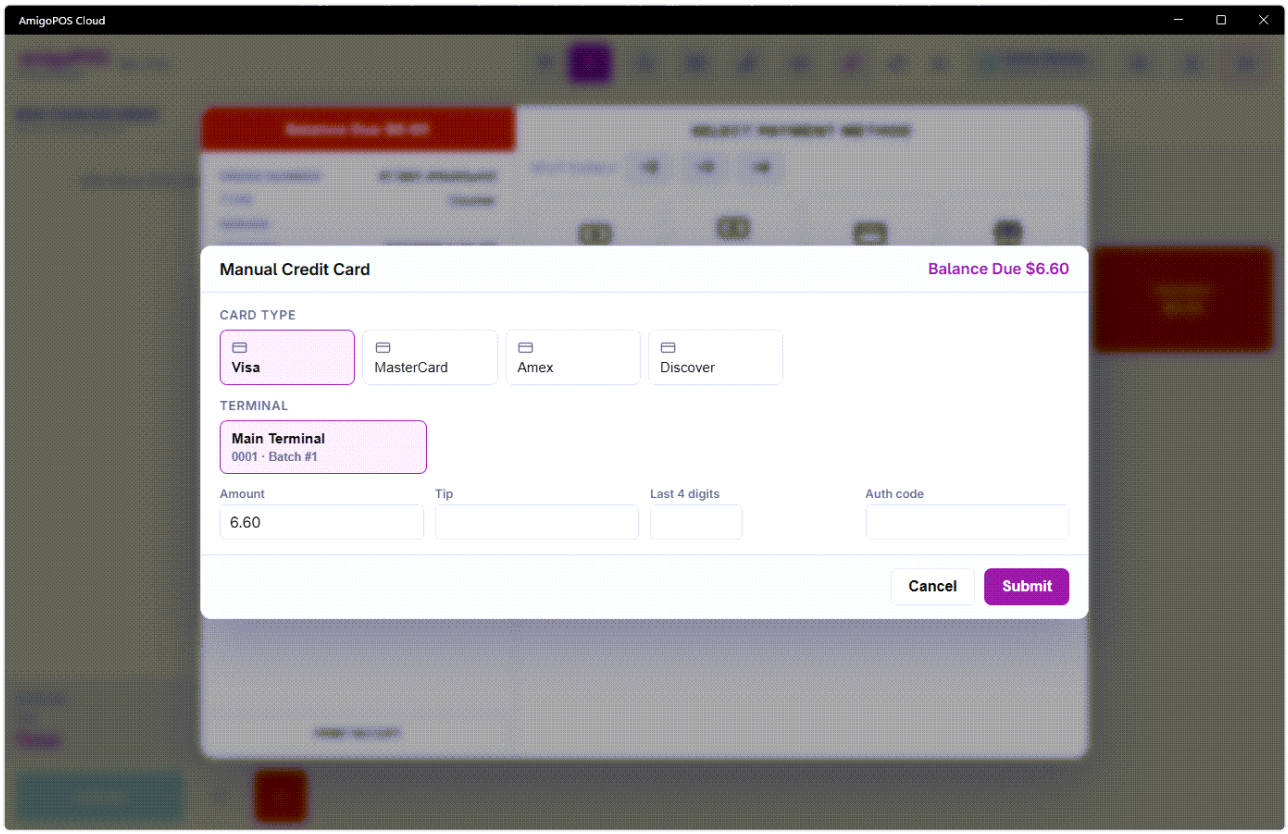
1. Keep taking orders and cash payments in CloudPos.
2. For a card, run the amount due (and the tip, if your backup terminal asks for one) on the backup terminal.
3. Keep the backup terminal's merchant copy and write the order number and table on it.
4. Leave the order open in CloudPos.

> Never write down card numbers to charge later. Storing card numbers on paper breaks card-industry security rules and exposes the store to fraud claims.

After the internet returns: recording the backup payments

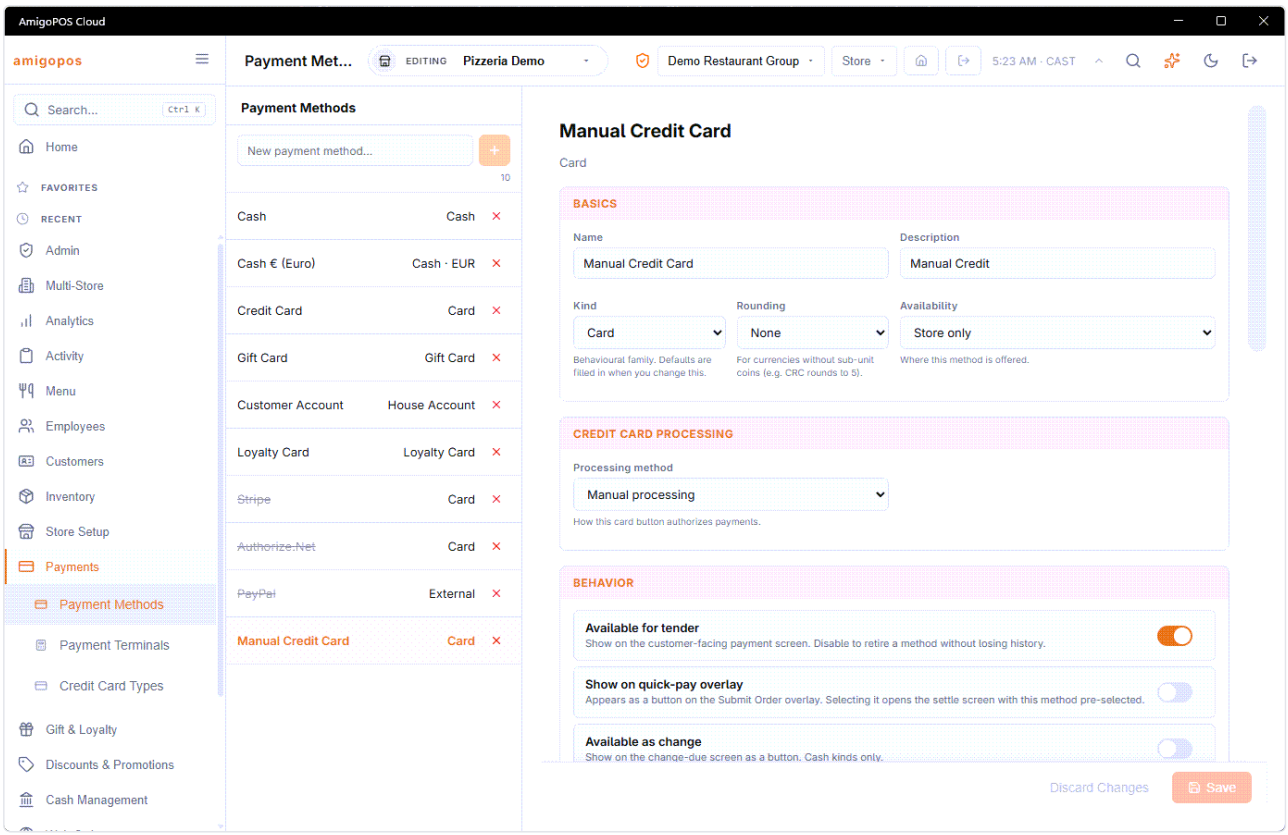
The card was already charged on the backup terminal, so CloudPos must only *record* the payment — not charge it again. Use a card payment method with no processor, set up in advance for exactly this:

1. Recall each order noted on a backup slip and open the settle screen.
2. Choose **Card – Backup Terminal** (the method below) and enter the amount from the slip, and the tip if there was one.
3. Confirm. The order is paid and balances, and the payment shows in reports, banking and End of Day as a card payment. Nothing is sent to any processor.
4. Settle every backup payment before End of Day.



Setting up the backup card method (do it now)

1. Open **Back Office › Payments › Payment Methods** and add a method named, for example, **Card – Backup Terminal**.
2. Set **Kind** to **Card** and leave **Credit Card Processing** without a processor. Leave manual card entry off: the card is not keyed into CloudPos.
3. Turn on **Allows tips** if tips are taken on the backup slips.
4. Save. Consider limiting it to managers, so it is used only for backup-terminal payments.



Good to know

- Payments taken on the backup terminal are **not in DC Direct**. They do not appear on the Credit Cards screen, and voids, refunds and tip corrections for them are done on the backup terminal itself. Voiding the payment in CloudPos only removes the record.
- The backup terminal settles its own batch, so its deposits may arrive separately from the DC Direct ones.
- **The best protection is backup internet:** a cellular failover router keeps the registers and DC Direct terminals working through most outages. See **Setting up the store network and router**.

What you need before you start

Integrations › DC Direct (Datacap)

View online ↗

The merchant account, the Datacap cloud credentials, the terminals and the internet connection DC Direct needs.

DC Direct has four pieces. Your Datacap reseller (or Datacap) usually supplies the first three together.

1. A merchant account

A card-processing account with a processor that Datacap supports, for a business in the United States or Canada. The processor is who deposits the money; Datacap connects the terminal to it.

2. Datacap cloud credentials

- **Merchant ID** — identifies your account at Datacap.
- **API User** and **API Password** — the cloud credentials CloudPos uses to talk to Datacap for your store.

There are two sets: **test** credentials for trying everything with test cards, and **production** credentials for real cards. Ask for both. Test credentials work only in the test environment and never charge a real card.

> Treat the API password like a bank password. Enter it only in Back Office, never in an email or a chat, and ask your reseller for a new one if it is ever shared.

3. Terminals set up for DC Direct

Each terminal must run Datacap's DC Direct software and be linked to your merchant account. Your reseller normally ships terminals ready. You need each terminal's **serial number**: it is the *Device ID* you enter in Back Office (see **Setting up the terminal**).

4. Internet at the store

The terminals need Wi-Fi (or their own mobile data, on models that have it) with internet access. The connection needs no special ports, but some internet services need one DNS change on the router — see **Setting up the store network and router**.

Also useful

- A receipt printer at each station that takes card payments, if you print card receipts.
- Chargers or docks where terminals live between tables.
- Your reseller's support number, for terminal and account questions.

Setting up the store network and router (US and Canada)

View online ↗

What DC Direct terminals need from the store Wi-Fi and router, the DNS change that 5G/LTE and some fibre internet services need, and what not to change.

A DC Direct terminal needs very little from the network: a Wi-Fi connection with internet access, and the ability to reach Datacap's cloud over HTTPS. Most store routers work as delivered. This topic covers the few settings that do matter in US and Canadian stores, and the ones you can leave alone.

What you do not need

- **No port forwarding, DMZ or static public IP.** The terminal connects *out* to Datacap; nothing connects in.
- **No fixed IP address for the terminal.** Ordinary automatic addressing (DHCP) is fine.
- **No link to the registers.** The terminal and the registers never talk to each other directly, so they can be on different networks, and client isolation on the Wi-Fi does no harm.

Wi-Fi

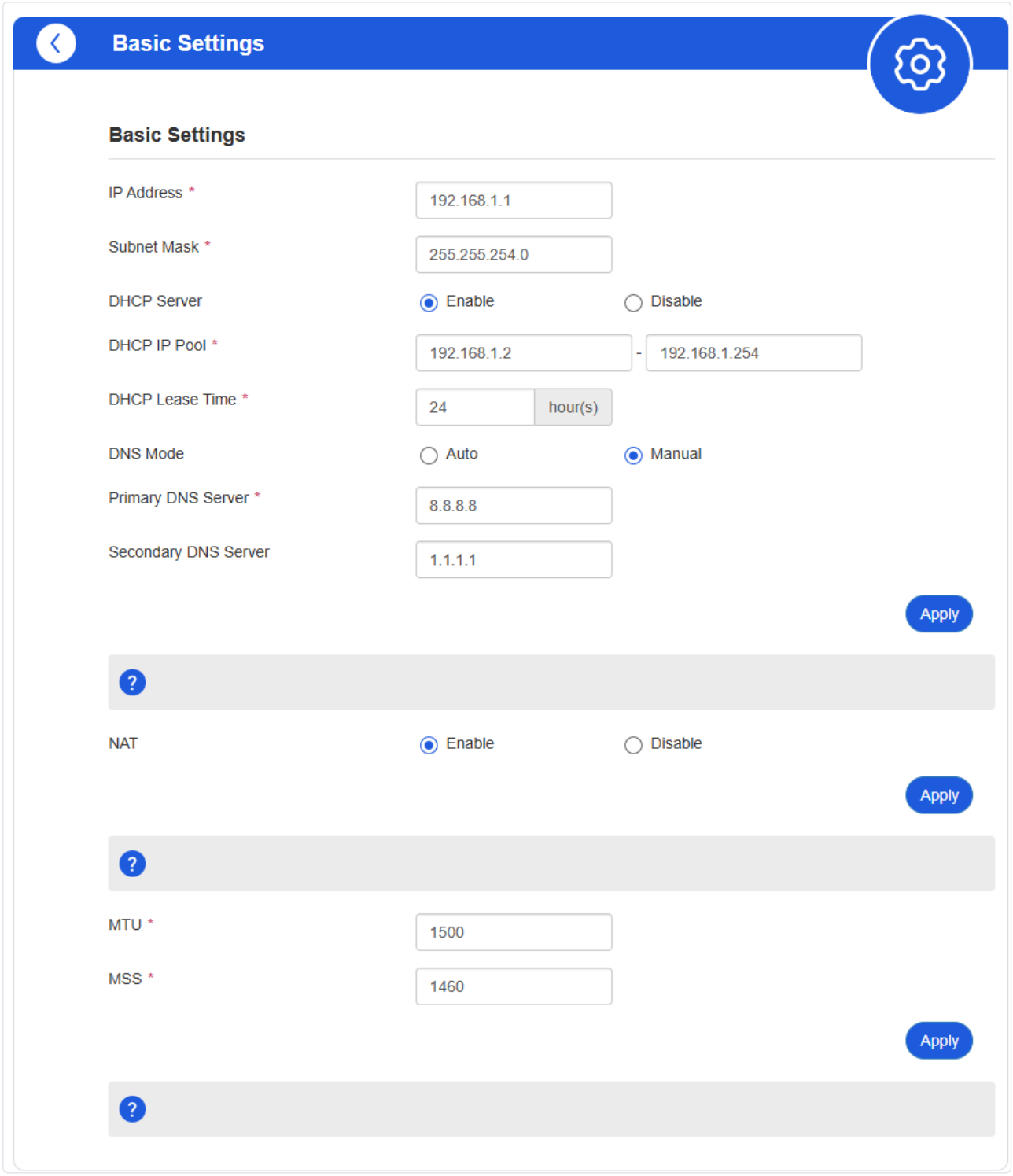
- **Use a password-protected network** (WPA2 or WPA3). Keep terminals off open guest Wi-Fi, and off any network that shows a sign-in or "accept the terms" page — the terminal cannot click through it.
- **Cover every place the terminal goes.** Terminals travel: tables, the bar, the patio, the curb. Walk the floor with a terminal and check the signal where guests pay. 2.4 GHz reaches farther through walls; 5 GHz is faster at shorter range. A mesh system or an extra access point is the usual fix for a patio or a back room.
- **Keep the same network name everywhere.** With several access points, give them one network name and password so the terminal moves between them on its own.

The DNS setting (5G, LTE and some fibre services)

Some internet services in the US and Canada — most often 5G or LTE *home internet* (fixed-wireless) gateways, and some fibre services — run on IPv6 and translate addresses with a feature called **DNS64**. On those connections a DC Direct terminal can show Wi-Fi as connected, browse normally, and still fail to reach Datacap: the sale never arrives, the terminal reports a network error, or it stays offline.

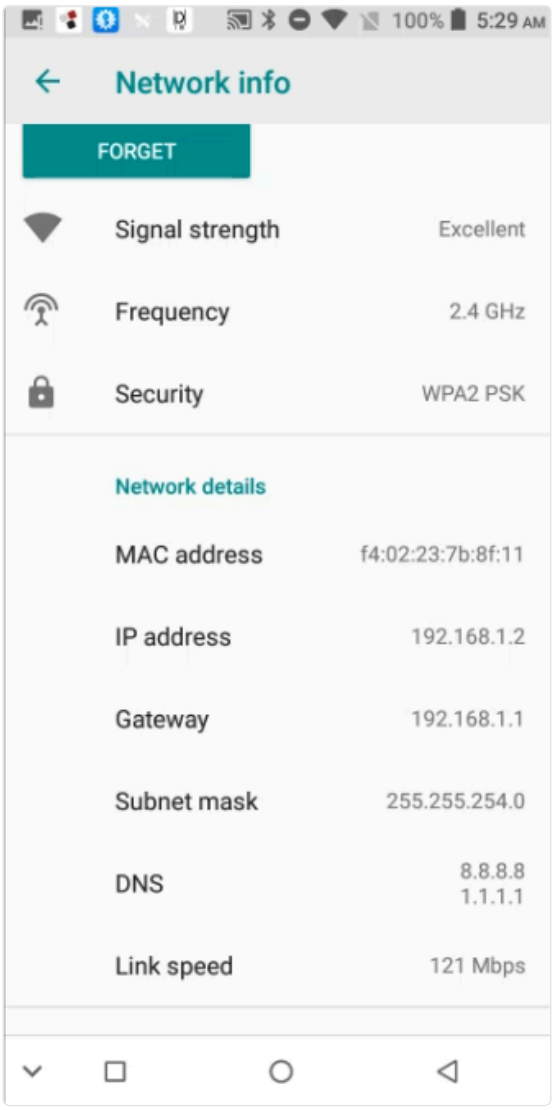
The fix is to have the router hand out public DNS servers instead of the provider's:

1. Open the router's admin page (often printed on its label, or in the provider's app).
2. Find the DNS setting. It is usually under *Internet*, *WAN*, *LAN* or *DHCP*.
3. Set the primary and secondary DNS servers to one pair:
    - Google: **8.8.8.8** and **8.8.4.4**
    - Cloudflare: **1.1.1.1** and **1.0.0.1**
4. Save. Then turn the terminal's Wi-Fi off and on (or restart the terminal) so it picks up the new setting.
5. Check with **Test Terminal** on the register's Credit Cards screen.



If the provider's gateway does not let you change DNS, either:

- **Put your own router behind the gateway** and set DNS on your router (the gateway's bridge or pass-through mode, if it has one, avoids double routing); or
- **Set DNS on each terminal** in its Wi-Fi settings: open the network, choose the advanced IP settings, switch from DHCP to static, and enter an unused address in your network, the router as gateway, and the DNS pair above. Pick an address outside the router's automatic range so no other device gets it. See **Setting up the terminal**.



Stores on cable, DSL or most fibre services usually need none of this. If terminals already reach Datacap, leave the DNS alone.

Firewalls and content filters

A normal router firewall allows the terminal's outgoing HTTPS (port 443). If the store uses a content filter, a DNS filtering service or a firewall that only allows approved sites, the terminal's traffic to Datacap must be allowed — ask Datacap or your reseller for the current addresses.

Everything else

- **Bandwidth:** a card payment is a few kilobytes. Any connection is enough; a busy guest Wi-Fi on the same line is not a problem as long as it is a separate network.
- **Router restarts:** terminals reconnect on their own after the router restarts. A payment started at that moment may time out — check the result before charging again.
- **Backup internet:** if the store fails over to a mobile backup line, the DNS setting above may be needed on that line too.
- **Terminals with mobile data:** models with their own SIM keep working when the store Wi-Fi is down; the DNS issue does not apply to their mobile connection.

Setting up the terminal

View online ↗

Charge the terminal, join the store Wi-Fi, find the serial number for Back Office, and check that the DC Direct software is ready.

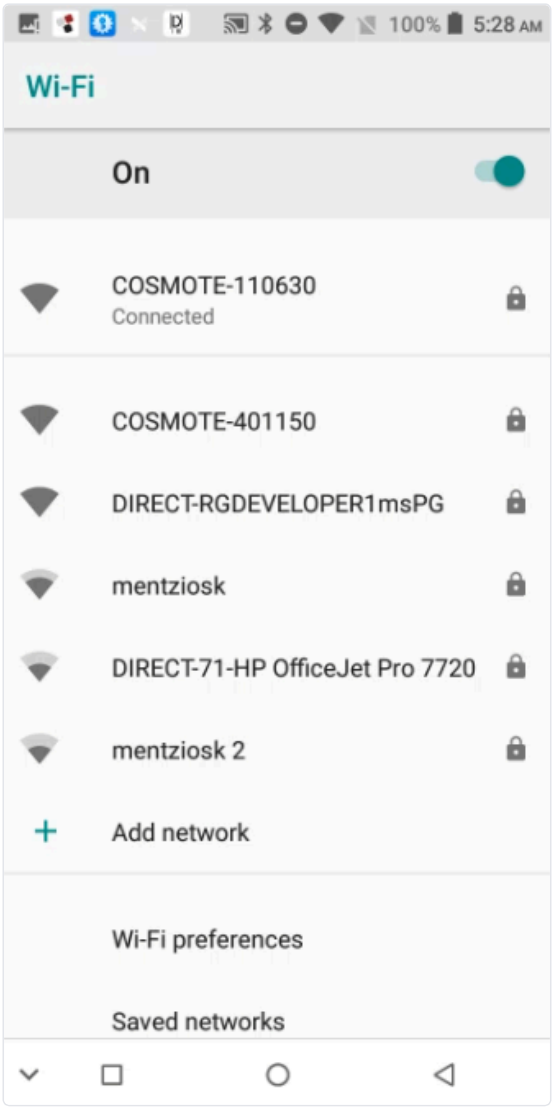
These steps use the **PAX A77**, a common hand-held DC Direct terminal. Other models follow the same idea; the menus differ.

1. Charge it

Charge the terminal fully before first use and keep it on its charger or dock between tables. A terminal that goes flat mid-shift drops off the network until it is charged and restarted.

2. Join the store Wi-Fi

1. Open the terminal's **Settings**. The A77 protects Settings with a password; your reseller provides it.
2. Open **Wi-Fi**, choose the store's staff network and enter its password.
3. Check that it shows *Connected*.



If your internet service needs the DNS change and the router cannot make it, set DNS here: open the network's advanced options, change IP settings from DHCP to static, and enter an unused address, the router as gateway, and DNS 8.8.8.8 and 8.8.4.4 (or 1.1.1.1 and 1.0.0.1). See **Setting up the store network and router**.

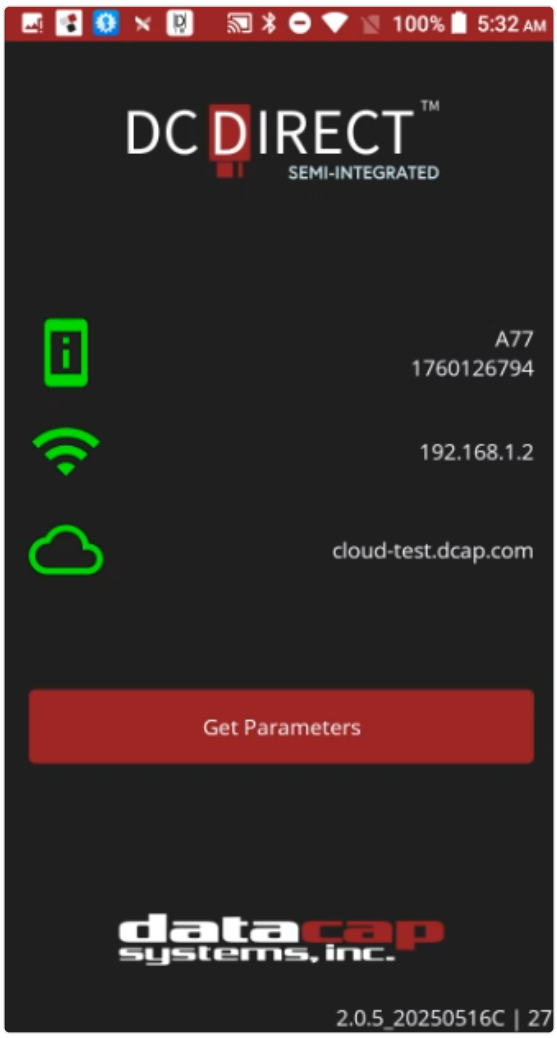
3. Find the serial number

The serial number is printed on the label on the back of the terminal (on the A77 it may be under the battery cover) and shown in the terminal's **About** screen. On PAX terminals it is ten digits. This is the **Device ID (Serial)** you enter in Back Office — Datacap knows the terminal by it.



4. Check the DC Direct software

The terminal runs Datacap's DC Direct software, which connects to Datacap's cloud and waits for payments. When it is online it shows its idle or ready screen. Leave it on that screen: closing it stops the terminal receiving payments.



> If the software is missing or shows that the terminal is not set up for your account, contact your reseller. Terminals are linked to a merchant account on Datacap's side; CloudPos cannot do that step.

Everyday care

- Label each terminal with the name you give it in Back Office ("Bar", "Patio 1"), so staff pick the right one on the POS.
- Restart a terminal that stops answering: most connection problems clear with a restart.
- Do not change the terminal's own settings beyond Wi-Fi unless your reseller asks you to.

Setting up DC Direct in Back Office

Integrations › DC Direct (Datacap) View online ↗

Create the card payment method, enter the Datacap credentials, add the terminals and choose the terminal options.

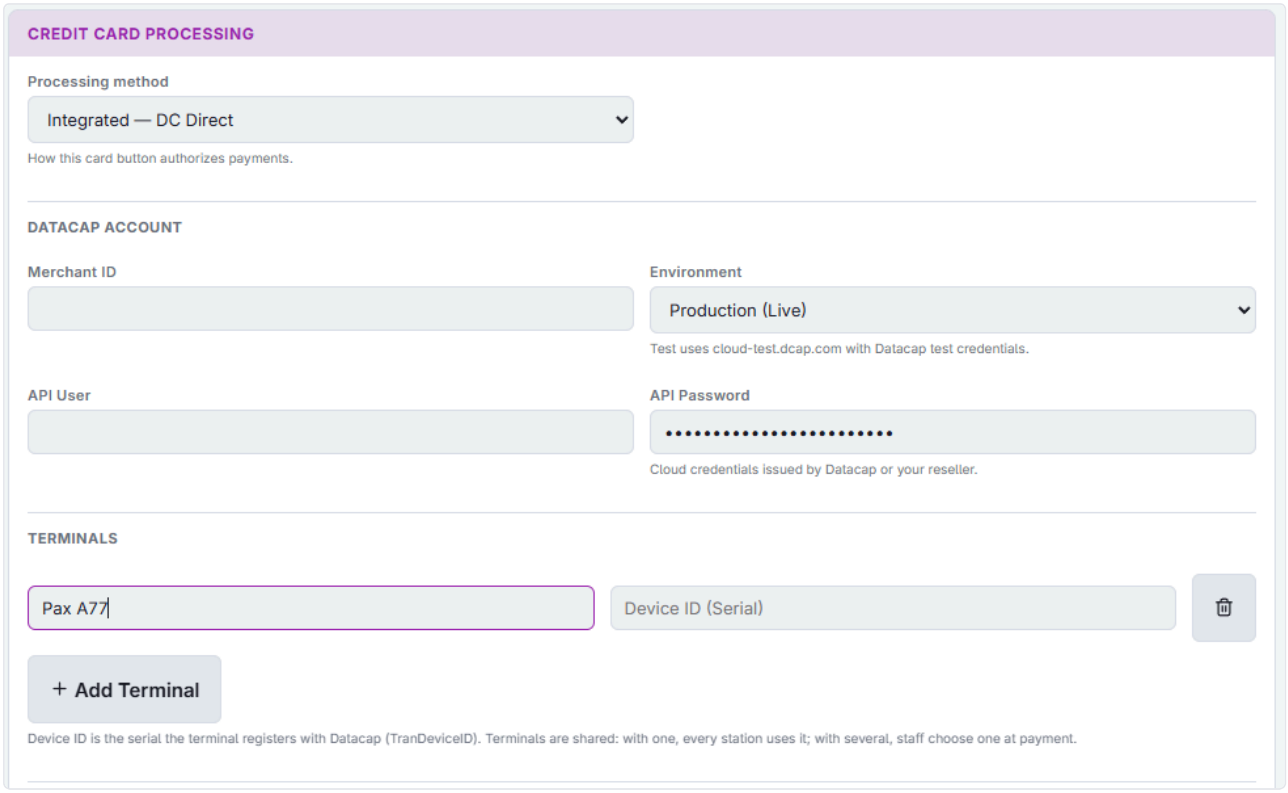
DC Direct is set up on a card payment method: the method holds the Datacap credentials, the list of terminals and every terminal option. Staff then take card payments by choosing that method on the settle screen.

1. The payment method

1. Open **Back Office › Payments › Payment Methods** and add a method (for example "Credit Card"), or open your existing card method.
2. Set **Kind** to **Card**. The **Credit Card Processing** section appears only for card methods.
3. Leave **Availability** on the store. DC Direct needs the card at a terminal, so it is not for call-center or web orders.
4. Turn on **Allows tips** if tips are taken on cards — tip prompts on the terminal depend on it.

2. Credentials

1. In **Credit Card Processing**, set the processor to **DC Direct**.
2. Enter the **Merchant ID**, **API User** and **API Password** from Datacap or your reseller.
3. Set **Environment**: **Test (Certification)** with test credentials, **Production (Live)** with production credentials. The two never mix: test credentials fail in production and the other way round.

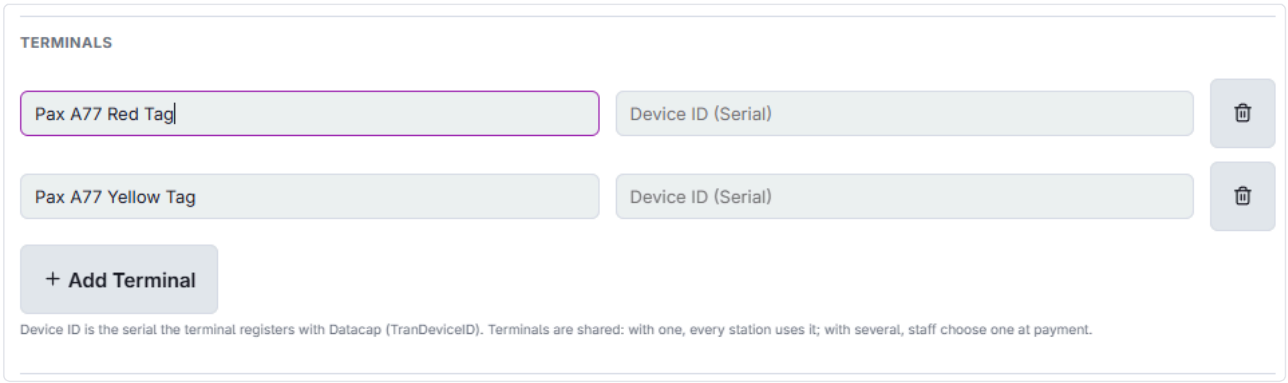


3. Terminals

Under **Terminals**, press **Add Terminal** once per terminal and fill in:

- **Name (e.g. Bar)** — what staff see when they choose a terminal. Match the label on the terminal.
- **Device ID (Serial)** — the terminal's serial number, exactly as printed.

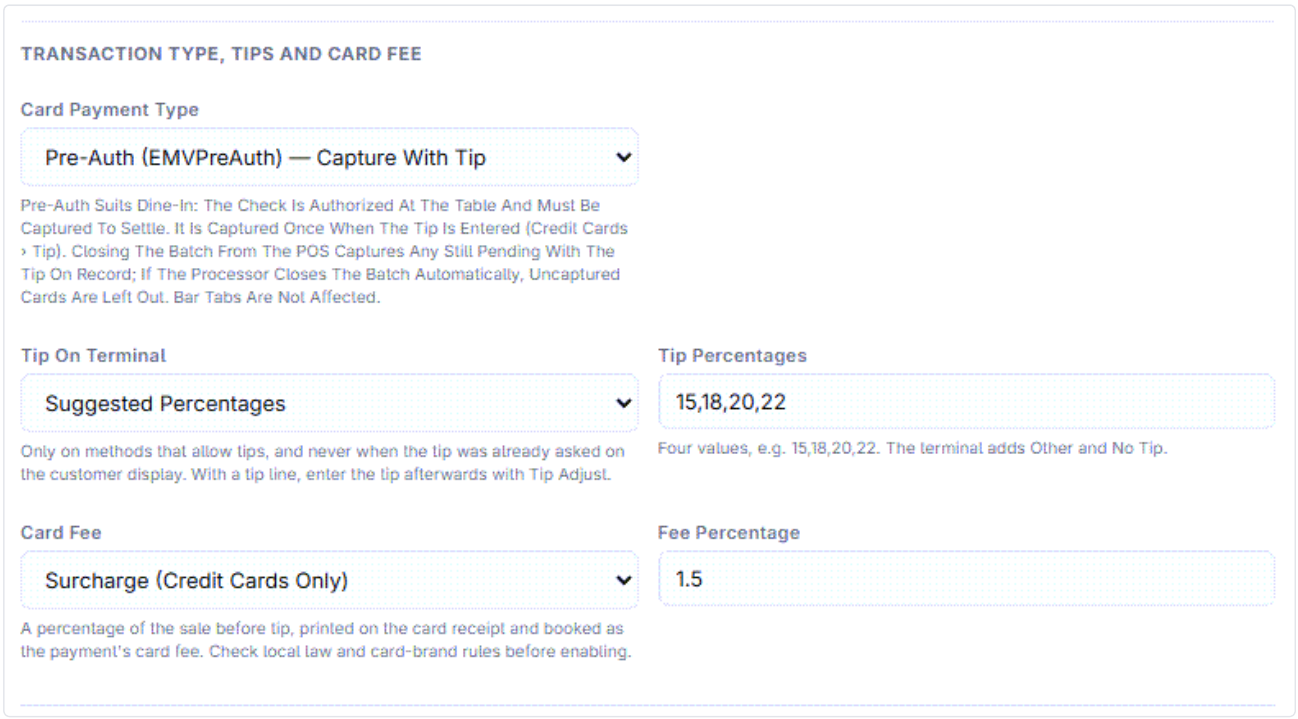
Remove Terminal takes one out of the list. Terminals are shared by every station: with one terminal every station uses it; with several, staff choose at payment.



4. Terminal options

- **Amount Confirmation On Terminal** — *Customer Confirms Amount* shows the amount for the guest to accept before presenting the card; *Skip Confirmation* goes straight to the card prompt.
- **Cardholder Name** — *Request From Card* reads the name from the card when the card provides it; it prints on the card receipt.

- **Card Receipts** — *Merchant And Cardholder Copies*, *Merchant Copy Only* or *Don't Print*. Copies print on the station's receipt printer after each approval.
- **Card Payment Type** (in the **Transaction Type, Tips And Card Fee** group) — *Sale (EMVSale) — Charge At Once*, the default, charges the card when it is presented; *Pre-Auth (EMVPreAuth) — Capture With Tip* authorizes it and charges it later, once, with the tip. Each store sets its own. See **Table service: authorize, then capture with the tip**.
- **Tip On Terminal** — see **Tips on the terminal**.
- **Card Fee** — see **Card fees: surcharge and non-cash adjustment**.
- **Signature On Terminal** and **Receipt Question On Terminal** — see **Signatures and card receipts**.



5. Save and check

1. Save the method.
2. On each register, sign out and back in (or restart the app) so it picks up the new method.
3. On a register open **More › Credit Cards**, choose the method and press **Test Terminal** for each terminal.

> One DC Direct method is enough for a store. Several methods only make sense for separate merchant accounts; each keeps its own terminal list.

Sharing terminals across the floor

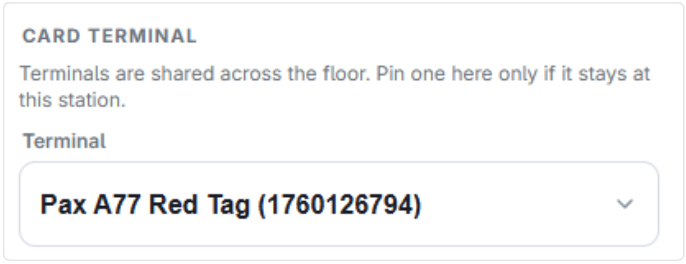
Integrations › DC Direct (Datacap) View online ↗

How the POS picks a terminal when there are several, what In Use means, and when to pin a terminal to one station.

DC Direct terminals belong to the store, not to a station. A server can start a payment on any register and charge it on whichever terminal is in hand.

Choosing a terminal at payment

With **one** terminal in the payment method, the POS uses it and never asks. With **several**, choosing the card method opens **Choose A Terminal**:

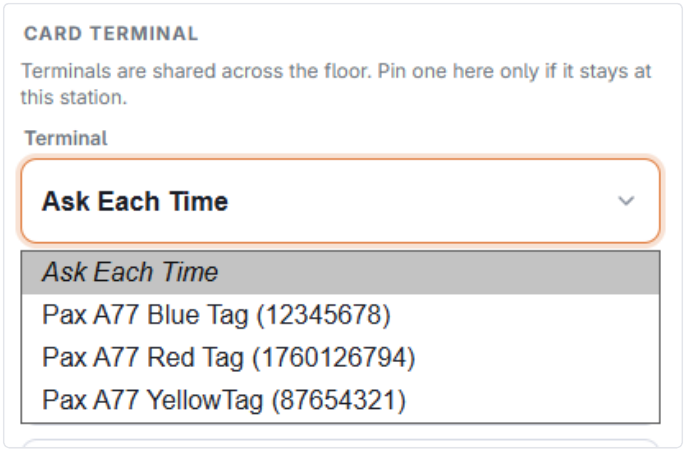


- There is one button per terminal, named as in Back Office.
- The terminal this station used last is highlighted, so repeat payments are one tap.
- **In Use** marks a terminal that is in the middle of another payment right now. You can still choose it; the payment waits until the terminal is free, up to about a minute.
- **Close** goes back to the settle screen without starting a payment.

Pinning a terminal to a station

A countertop terminal that never leaves the bar can be pinned to the bar register, so that station skips the question:

1. On that register open **More › Settings** and find **Card Terminal**.
2. Choose the terminal. **Ask Each Time** (the default) shows the question at every payment.



The setting is saved on the device only. When there is a single terminal, the section just shows *Automatic* with its name. Changing this section needs the permission to configure station hardware.

> Voids, tip adjustments and refunds do not need the original terminal: they go to Datacap without the card. Only a new card payment needs a terminal in hand.

Taking a card payment

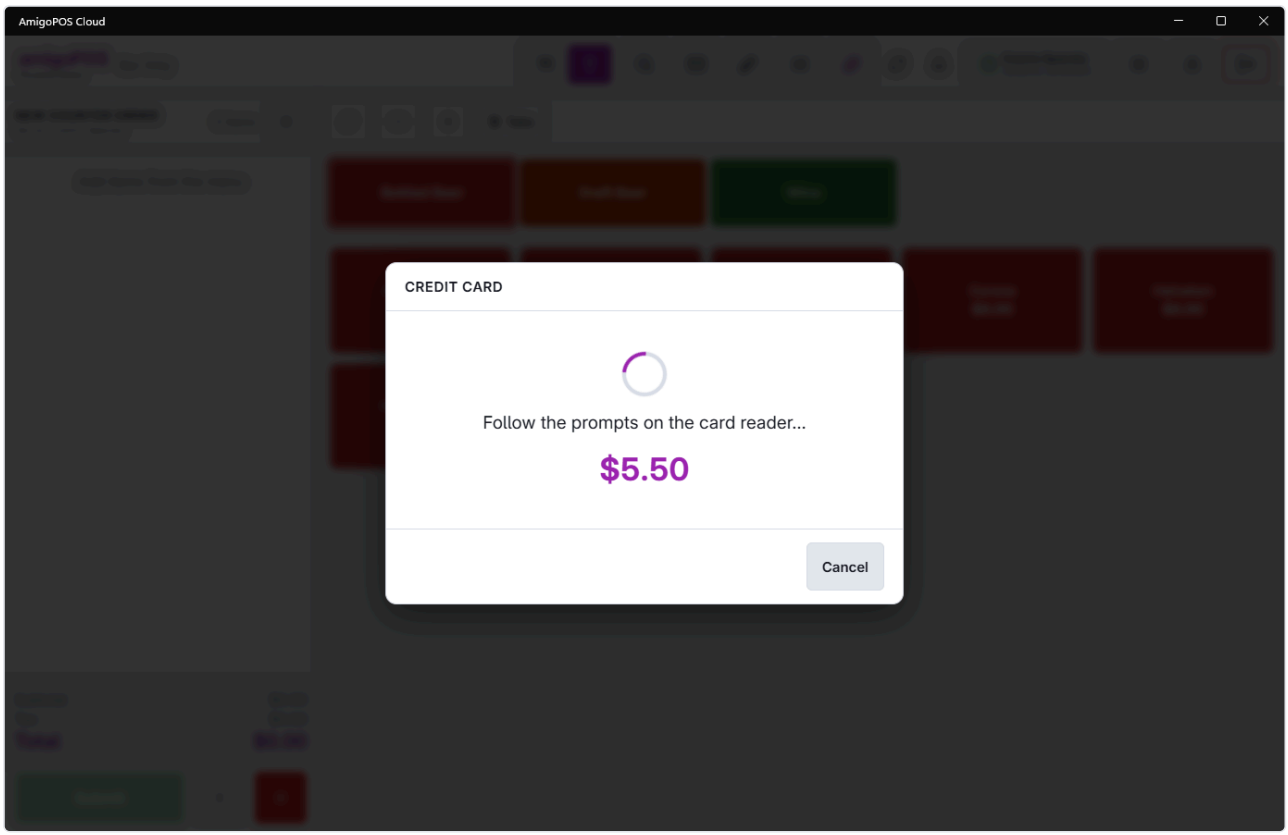
Integrations › DC Direct (Datacap) View online ↗

What happens on the POS and on the terminal during a DC Direct card payment, and what to do on a decline, a partial approval or a cancel.

Open the order's settle screen and choose the DC Direct card method. The POS charges the balance — or the current share when splitting.

On the POS

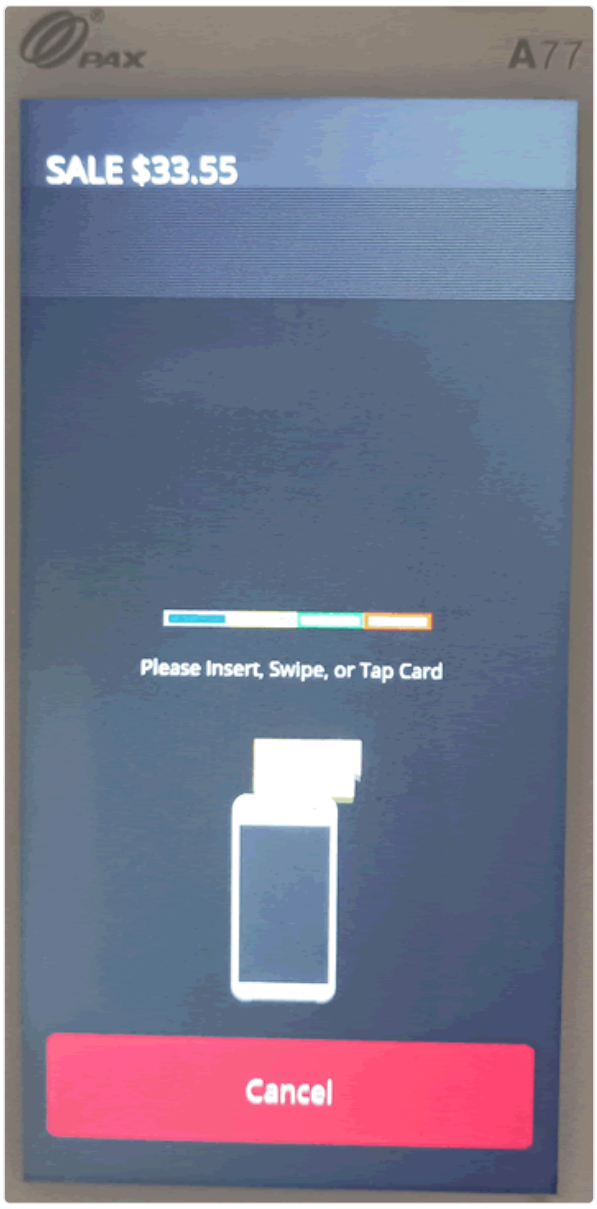
1. If the customer display is open and the method allows tips, the guest picks a tip there first. The terminal then does not ask again.
2. With several terminals, choose one (see **Sharing terminals across the floor**).
3. The POS shows the amount and waits for the terminal.



On the terminal

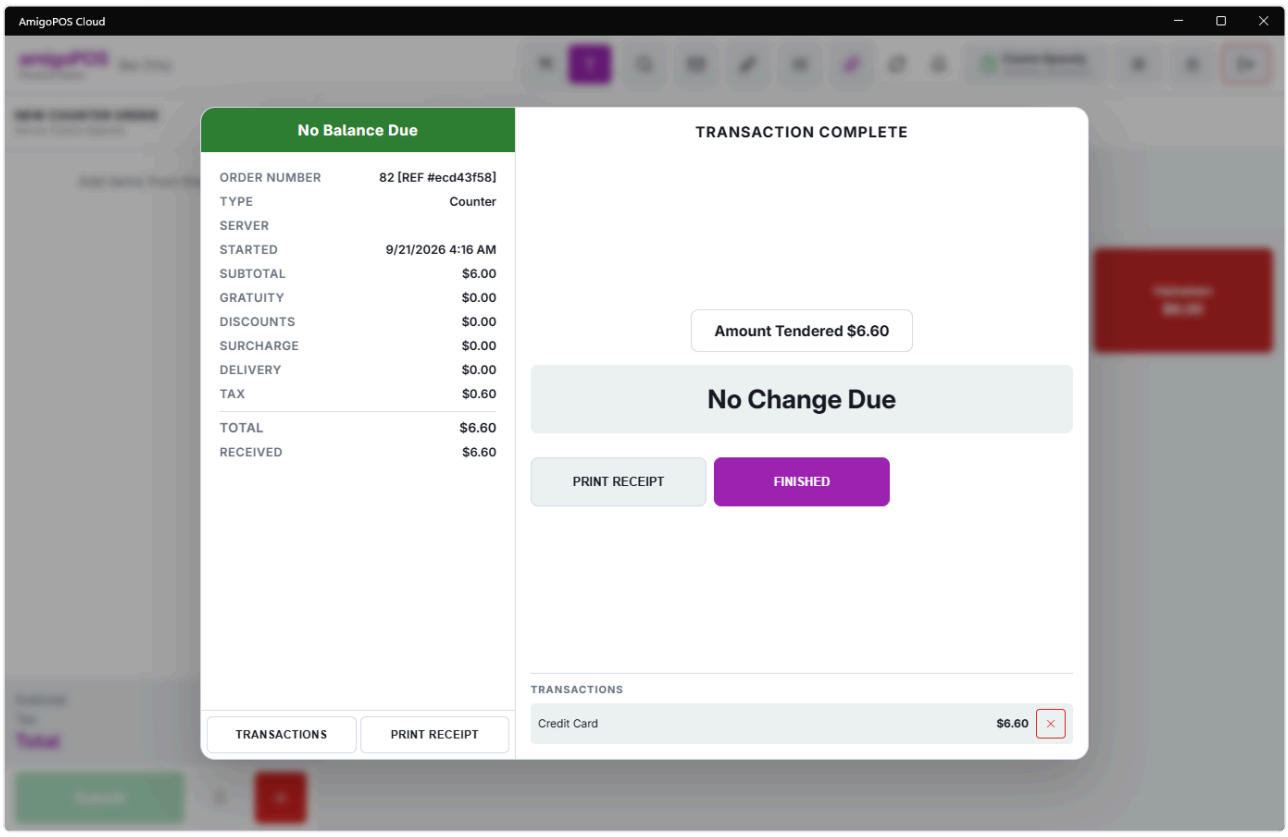
Hand the terminal to the guest. Depending on the payment method's options it may:

1. show the amount to confirm;
2. ask for a tip;
3. ask for the card — tap, insert or swipe — and the PIN for debit;
4. ask for a signature;
5. ask whether the guest wants a receipt.



The terminal waits up to five minutes for the guest. When it finishes, the POS shows the result.

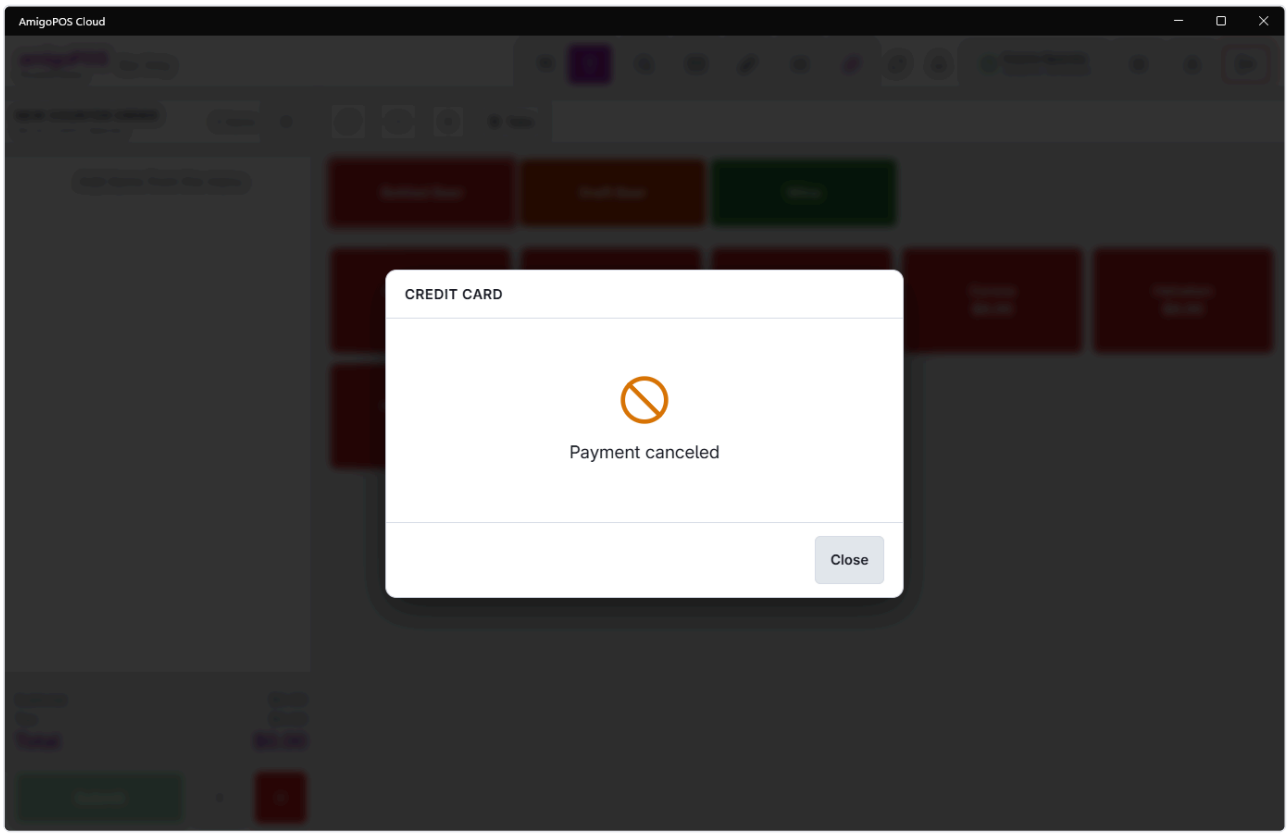
Approved



The payment joins the order's payment list with the card type and last four digits, including any tip or card fee. Card receipts print on the station's receipt printer as set on the payment method.

> With **Card Payment Type** set to **Pre-Auth**, the approval is an **authorization**: the order is paid and closes as usual, and the card is charged when the tip is entered and the authorization captured. See **Table service: authorize, then capture with the tip**.

Declined or failed



The POS shows the reason from the card network, the processor or the terminal. Nothing is recorded and the balance is unchanged, so you can try again, try another card or take another payment method.

Approved for less

A prepaid or gift card with a low balance may be approved for part of the amount. The POS records what was approved and tells you; the rest of the balance stays due and is paid another way.

Cancel

While the POS is waiting, **Cancel** asks the terminal to stop. If the guest has already presented the card, the terminal may still finish — the POS always shows what really happened, so a payment approved at the last second is still recorded.

If the POS closes mid-payment

If the register loses power, the app closes or the connection drops while a payment is in progress, reopen the order and choose the card method again: the POS picks up the same payment instead of starting a new one, so the guest is not charged twice.

> If the POS says the result is **unknown**, do not charge again straight away. Check **More › Credit Cards** first — see **DC Direct troubleshooting**.

Splitting

Split payments work as usual: each card is its own payment on its own terminal run. Take as many cards as the guests need; the balance drops after each approval.

Tips on the terminal

Integrations › DC Direct (Datacap)

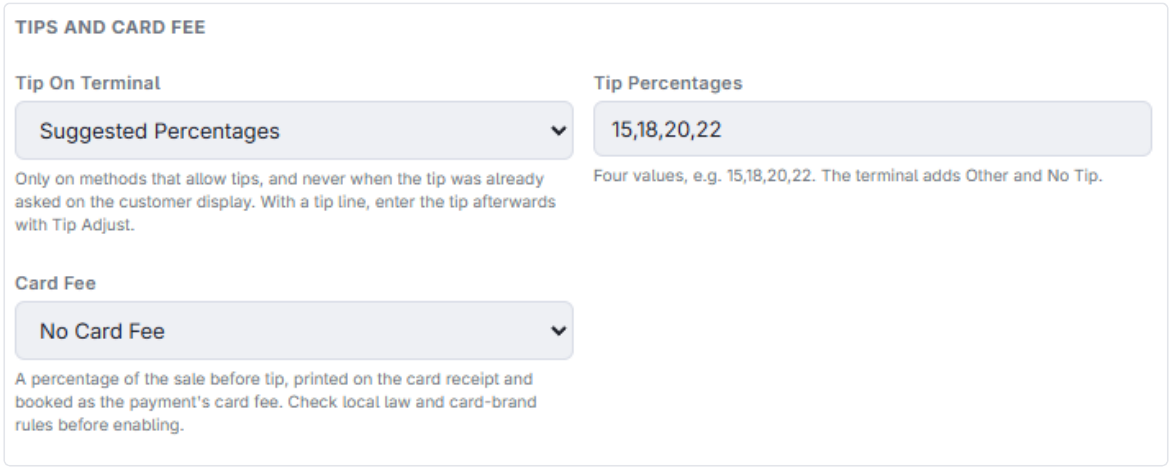
View online ↗

Choose how tips are taken on DC Direct terminals: suggested percentages, an amount the guest keys in, or a tip line on the receipt for later adjustment.

Tip handling is chosen per payment method in **Back Office › Payments › Payment Methods**, under **Tip On Terminal**. The payment method must have **Allows tips** on.

The four choices

- **No Tip Prompt** — the terminal never asks. Use it when tips are taken on the customer display, or not at all.
- **Suggested Percentages** — the terminal shows four buttons with the percentage and the amount, plus *Other* and *No Tip*, with the total on screen. Set the four values in **Tip Percentages** (for example 15,18,20,22). The percentages are worked out on the amount before tip and any card fee.
- **Customer Enters Tip** — the guest keys a tip amount on the terminal.
- **Tip Line On Receipt** — nothing is asked on the terminal; the card receipt prints blank tip and total lines for the guest to fill in and sign. Enter the tip afterwards with a tip adjustment (see **Voids, refunds and tip adjustments**). This is the classic table-service flow.





With pre-auth mode

When **Card Payment Type** is **Pre-Auth**, **Tip Line On Receipt** is the usual choice: the tip written on the slip is entered afterwards, and entering it (zero included) captures the authorization. A tip the guest chose on the terminal is kept and captured as is, unless you change it first. See **Table service: authorize, then capture with the tip**.

When the terminal does not ask

- The payment method does not allow tips.
- The order already carries a tip, such as an automatic gratuity for a large party.
- The customer display already asked for a tip on this payment — even if the guest chose no tip there.
- A bar tab is being opened on a card: the tip comes when the tab is closed.

A tip chosen on the terminal comes back with the approval and is recorded on the payment, so it appears in tip reports and shift banking like any other card tip.

Table service: authorize, then capture with the tip

Integrations › DC Direct (Datacap) View online ↗

Card Payment Type set to Pre-Auth: the check is authorized at the table and the card charged once with the tip — setup, entering tips, capturing, settling and voids.

In table service the tip is often written on the slip after the card has been run. With **Card Payment Type** set to **Pre-Auth**, a DC Direct card payment **authorizes** the check at the table, and the card is charged later, once, for the check plus the tip. Each store chooses this on its own DC Direct payment method; the default is **Sale**, which charges the card at once.

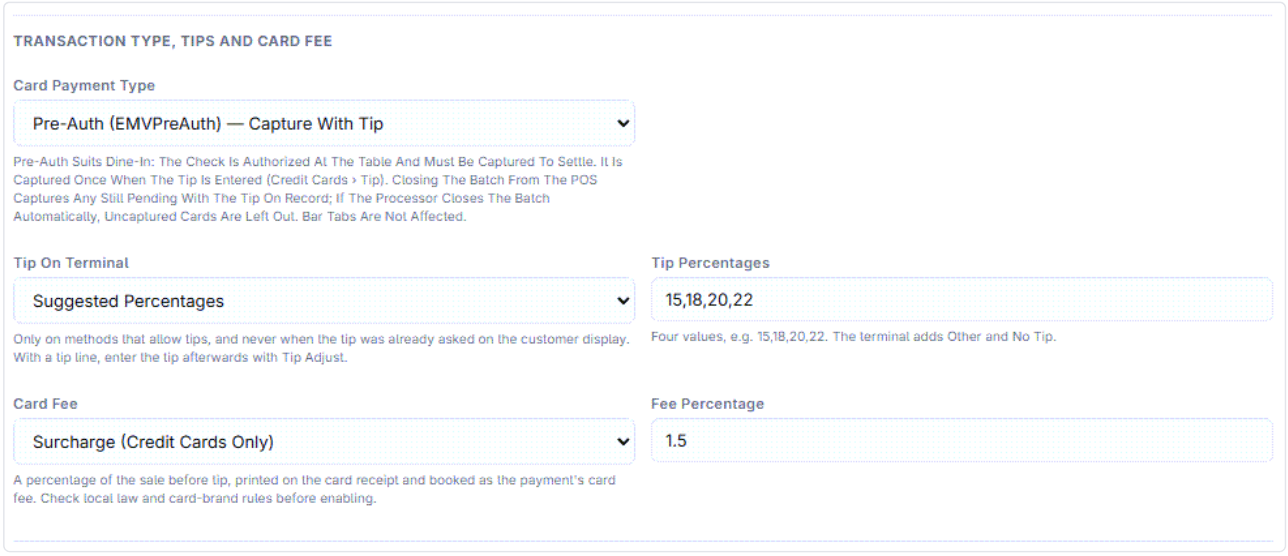
> **Every authorization must be captured — even when the tip is zero.** An authorization that is never captured is never deposited: the store does not receive that money.

Sale or Pre-Auth?

- **Sale (EMVSale) — Charge At Once** — the card is charged when it is presented, and tips are added afterwards with a tip adjustment. Suits counter service, bars, and restaurants where the guest chooses the tip on the terminal.
- **Pre-Auth (EMVPreAuth) — Capture With Tip** — the card is authorized when it is presented and captured later with the tip. This is the table-service flow Datacap describes for full-service restaurants; ask your reseller if your account expects it.

Turning it on

1. Open **Back Office › Payments › Payment Methods** and your DC Direct method.
2. In the **Transaction Type, Tips And Card Fee** group, set **Card Payment Type** to **Pre-Auth (EMVPreAuth) — Capture With Tip**.
3. Set **Tip On Terminal** to **Tip Line On Receipt** for the classic signed slip, or keep a tip prompt on the terminal (see below).
4. Save.



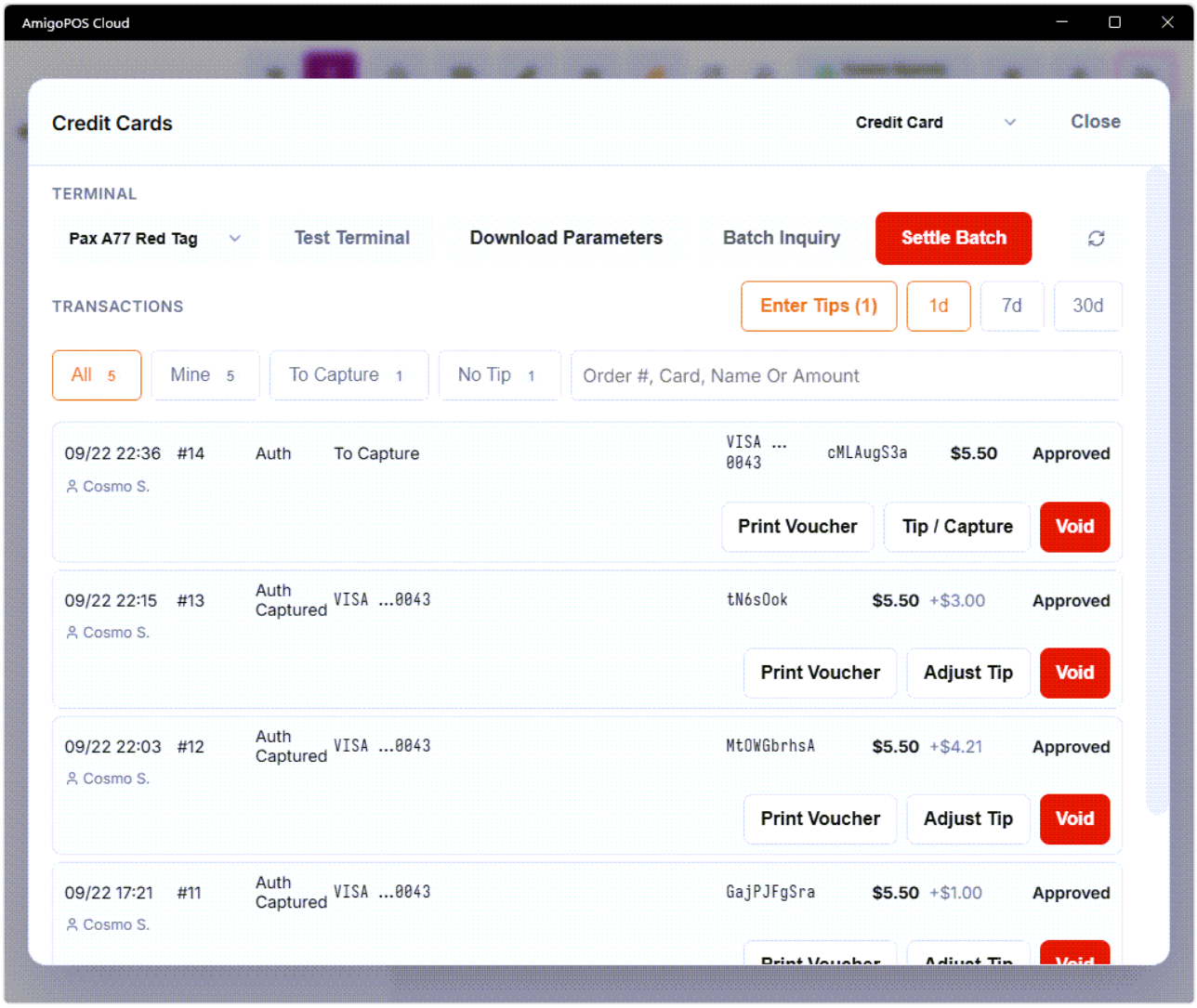
Bar tabs are not affected: a tab opened with a card is always a pre-authorization, closed with **Close Tab On Card** (see **Bar tabs on a card**).

At the table

1. Settle the check with the DC Direct method as usual. The terminal authorizes the amount due, plus any card fee.
2. The order is paid and closes like any card payment. The card slip reads *PREAUTH*; the guest writes the tip and signs.
3. On **More › Credit Cards** the payment shows as **Auth** with a **To Capture** tag.



My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333
CLERK ID: Cosmo S.
PREAUTH
VISA **********0043
ENTRY METHOD: CONTACTLESS
DATE: 09/22/2026 TIME: 22:36:38
INVOICE: 149393
REFERENCE: eajBDS4XDz
AUTH CODE: cMLAugS3a
AMOUNT USD$ 5.50
SURCHARGE 0.08
=========
TOTAL USD$ 5.58
APPROVED - THANK YOU
APPLICATION LABEL: VISA CREDIT
AID: A0000000031010
TVR: 0000000000
IAD: 06010A03A00000
TSI: 0000
Merchant Copy



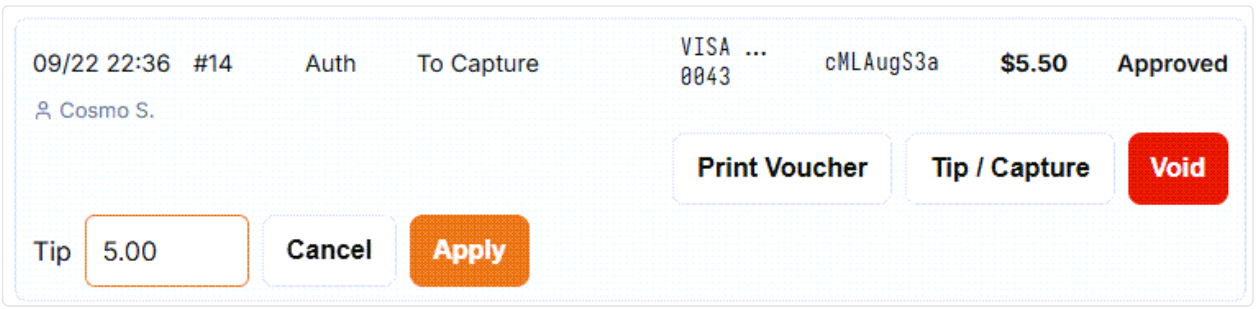
If the terminal asked for a tip (suggested percentages or an amount the guest keyed in), that tip is recorded on the Auth and is used for the capture unless you change it.

Entering the tip captures the card

Entering the tip captures the authorization for the check plus the tip — once. Any of these does it:

- **Tip / Capture** on the row in **More › Credit Cards**: type the tip (0 for none) and press **Apply**.
- **Enter Tips** on the same screen, for a stack of slips: every Auth is listed, and one left blank is captured with no tip.
- **Tip Adjust** on the Manager tab, or a tip change on the settle screen. To capture with no tip, use one of the two above.

Capturing with the tip counts as a tip adjustment: each of these needs the **Adjust Credit Card Tip** permission, or a manager's approval.



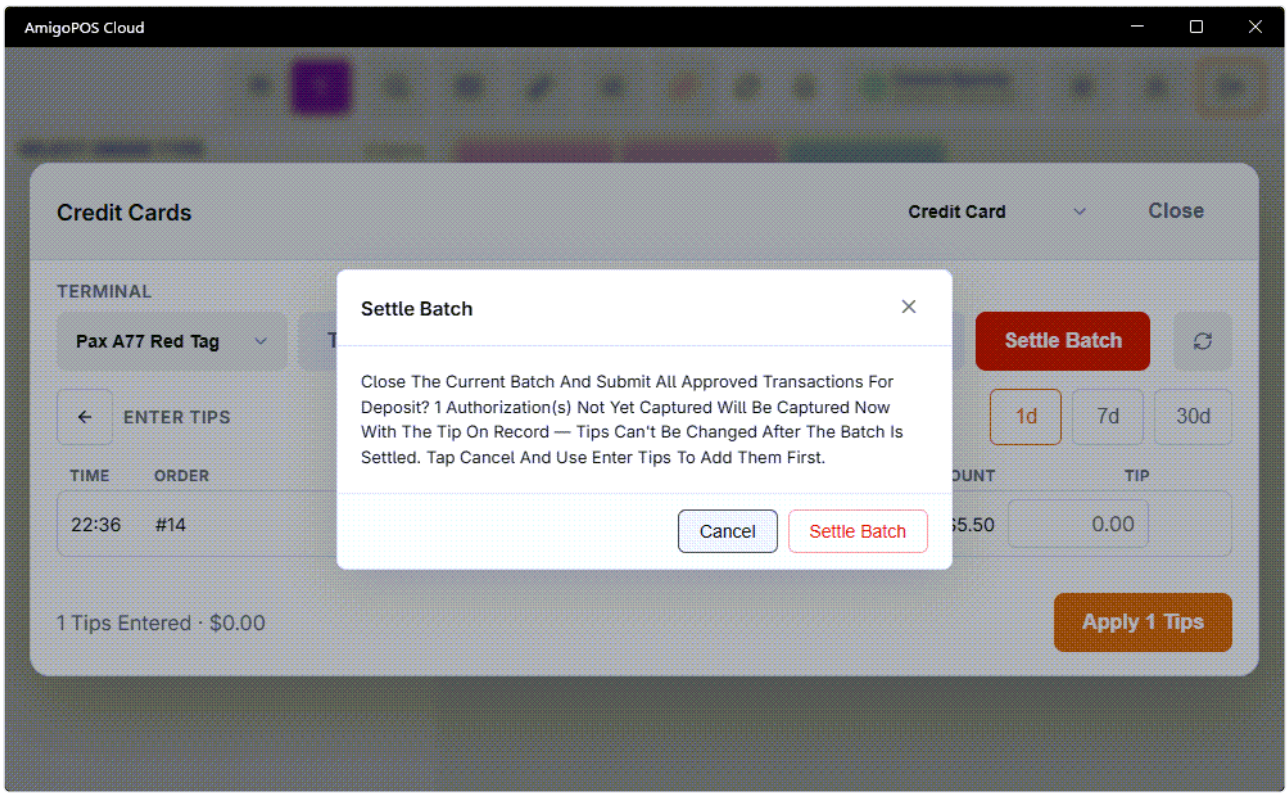
After the capture the row reads **Auth Captured** and works like a sale: **Adjust Tip** can still correct the tip until the batch settles, and a reprint shows the tip and total and reads *PREAUTH - CAPTURED*.



My Restaurant
600 Biscayne Blvd
Miami, FL 33130
111-222-3333
CLERK ID: Cosmo S.
PREAUTH - CAPTURED
VISA **********0043
ENTRY METHOD: CONTACTLESS
DATE: 09/22/2026 TIME: 22:14:57
INVOICE: 138088
REFERENCE: aoeZ9C4N9NCwyDV6WjsWOD
AUTH CODE: uOmCnvxNwC
AMOUNT USD$ 5.50
TIP USD$ 3.00
SURCHARGE 0.08
=========
TOTAL USD$ 8.58
APPROVED - THANK YOU
APPLICATION LABEL: VISA CREDIT
AID: A0000000031010
TVR: 0000000000
IAD: 06010A03A00000
TSI: 0000
Merchant Copy

Settling the batch

Settle Batch on the Credit Cards screen (it needs the **Credit Card Batch** permission, or a manager's approval) first captures every Auth still to be captured, with the tip on record (none if no tip was entered), and then closes the batch. Its confirmation says how many it is about to capture: press **Cancel** and enter the missing tips first, because a tip cannot change once the batch is settled.



If the processor closes your batch automatically, CloudPos is not involved at that moment, and any Auth not captured by then is left out of that batch. It stays To Capture and settles in a later batch once captured — but an authorization does not last forever: the card's bank releases it after some days, and a late capture can be declined. Capture every Auth before the automatic close, every day. Ask your reseller when your batch closes.

End of Day counts authorizations still to be captured with the open pre-authorizations, and warns (or blocks, depending on your settings) until they are captured or voided.

Voids and refunds

- **Void** on an Auth not captured yet releases the hold: the guest is never charged. Removing the payment from the order, or voiding the order, does the same.
- After the capture, Void works as on a sale until the batch settles.
- An Auth cannot be refunded before it is captured — nothing has been charged. Void it instead.

Good to know

- A card fee (surcharge or non-cash adjustment) is added when the check is authorized, as on a sale.
- Two stations cannot capture the same authorization: the second is told *This card was already captured.*
- Switching **Card Payment Type** affects new payments only. Authorizations already taken still have to be captured.

Bar tabs on a card

Integrations › DC Direct (Datacap)

View online ↗

Open a bar tab by pre-authorizing the guest's card, close it later with the final amount and tip, and deal with walk-outs.

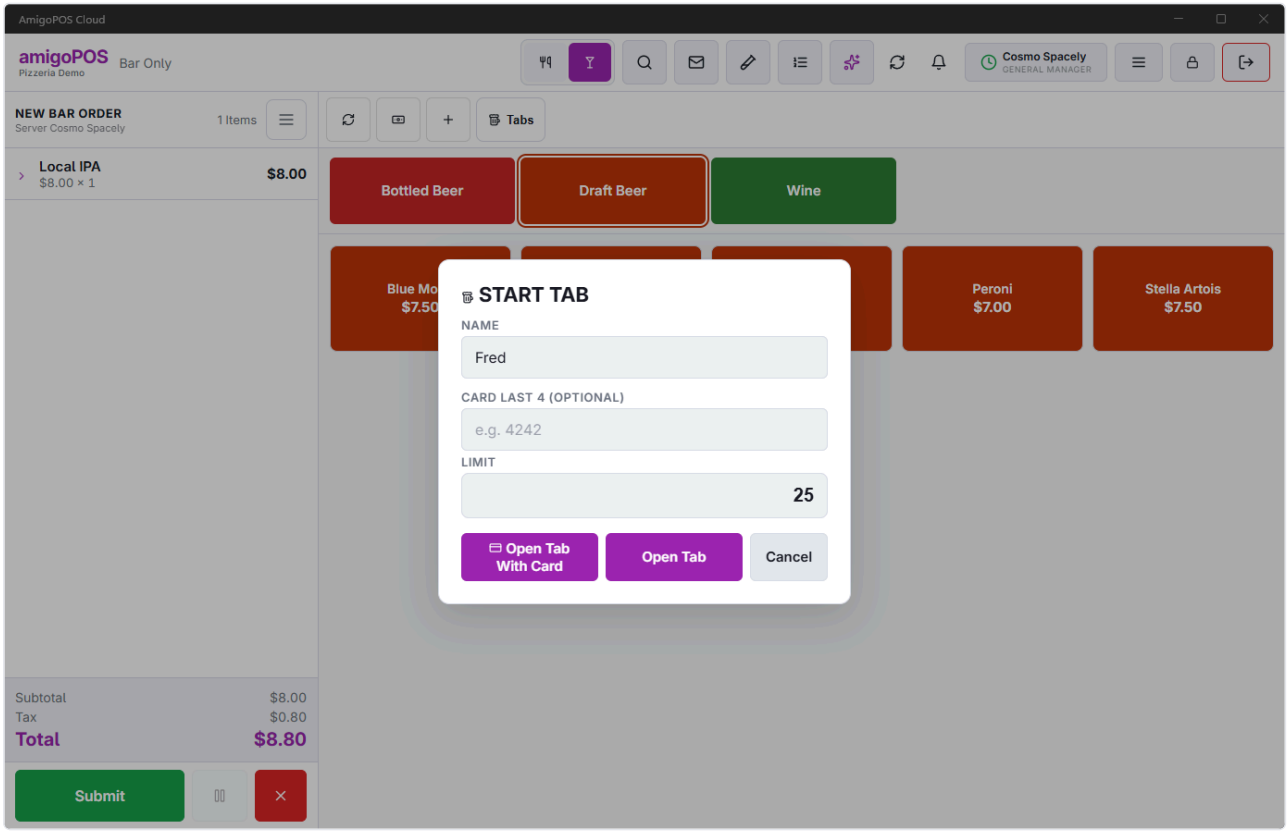
A bar tab can be held on the guest's card. When the tab opens, the terminal **pre-authorizes** the card for the tab limit: the money is held, not charged. When the guest is done, the tab is closed on the same card with the final amount and the tip — the card does not need to be presented again.

Turning it on

In **Back Office › Menu › Menu Setup › Bar Settings**, turn on the setting that shows the pre-auth button. A DC Direct card payment method must also be set up.

Opening a tab with a card

1. Start the tab as usual. On **Start Tab**, enter the name and, if you like, a **Limit**.
2. Press **Open Tab With Card**. The tab opens and the terminal asks for the card.
3. The guest presents the card. The POS confirms *Tab Opened — Card Pre-Authorized For* the amount.

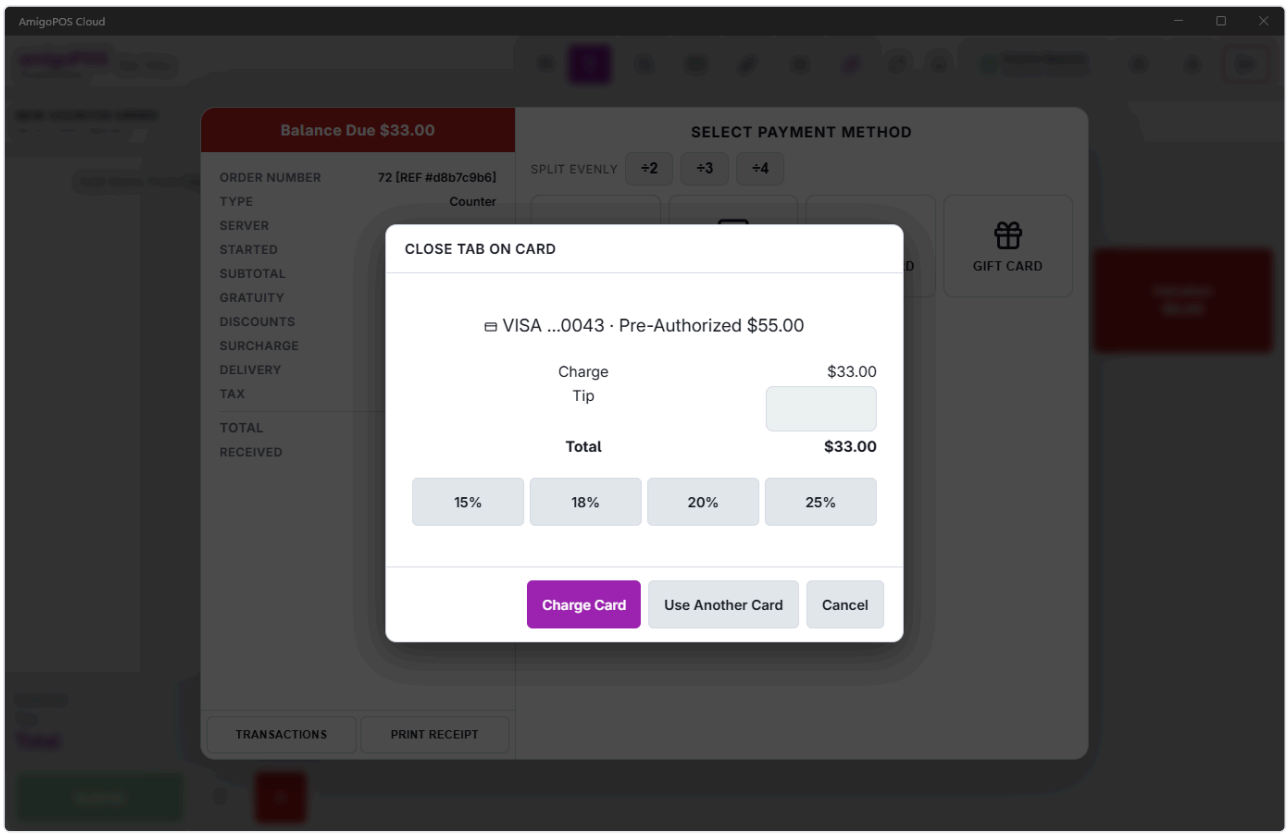


The pre-authorized amount is the tab's limit, or the store's default tab amount when no limit is entered. The terminal does not ask for a tip at this point. If the guest cancels on the terminal, the tab stays open without a card (*Tab Opened Without A Card*).

While the tab is open, the pre-authorization shows in the order's payment list as an open pre-auth. It is not counted as paid: the balance still shows everything on the tab.

Closing the tab on the card

1. Recall the tab, open the settle screen and choose the DC Direct card method.
2. **Close Tab On Card** opens instead of a new card payment. It shows the card, the amount *Pre-Authorized*, the **Charge** (the balance, or the current share when splitting), a **Tip** field with 15/18/20/25% shortcuts, and the **Total**.
3. Enter the tip from the signed slip or as the guest tells you, and press **Charge Card**.



- **Total above the pre-authorization:** the card is first asked to approve the difference. If it refuses, nothing is charged and the reason is shown — lower the tip, or charge part to this card and take the rest another way.
- **Total below it:** the unused part of the hold is released, so the guest is only held for what they spent.
- **Use Another Card** runs a normal card payment on a terminal instead (the guest wants to pay with a different card). The original pre-authorization stays open until you void it.

The payment is recorded like any card payment, so voids, tip adjustments and refunds work on it.

Walk-outs and abandoned tabs

- Close the tab on the card as above, if the store's policy allows charging a walked tab; or
- Release the hold: void the pre-authorization from **More › Credit Cards** (the row shows as *Pre-Auth*), or void the order — voiding an order voids its open pre-authorization too.

> A pre-authorization that is never closed or voided is money the store never receives, and End of Day warns about open pre-authorizations for that reason. Deal with them before closing the day.

Cancelling a tab releases the hold

When a tab opened with a card is cancelled — **Cancel Order** before it was saved, or the order is voided — its pre-authorization is voided automatically, so the guest's money is no longer held.

- If another open check is still on the same tab, the hold is kept and the tab stays with the other checks: only the cancelled check leaves it, and cancelling the last check releases the hold. If the hold was taken on the check you cancelled, the remaining checks can't close on it: take their payment another way and void the hold under **More › Credit Cards** (Open Pre-Auths filter).
- A card sale on the order is never touched; only the open pre-authorization is released.
- If the release does not go through, the order is still cancelled and the hold stays under **More › Credit Cards** (Open Pre-Auths filter) and on the Open Preauth Report. Void it there.
- When the hold disappears from the guest's statement is up to their bank.

Voids, refunds and tip adjustments

View online ↗

Reverse or change DC Direct card payments without the card: removing a payment, voiding an order, refunding to the original card and adjusting tips.

DC Direct keeps a secure token for every approved card payment, so voids, refunds and tip changes go straight to Datacap. The guest and the card do not need to be there, and no terminal is used.

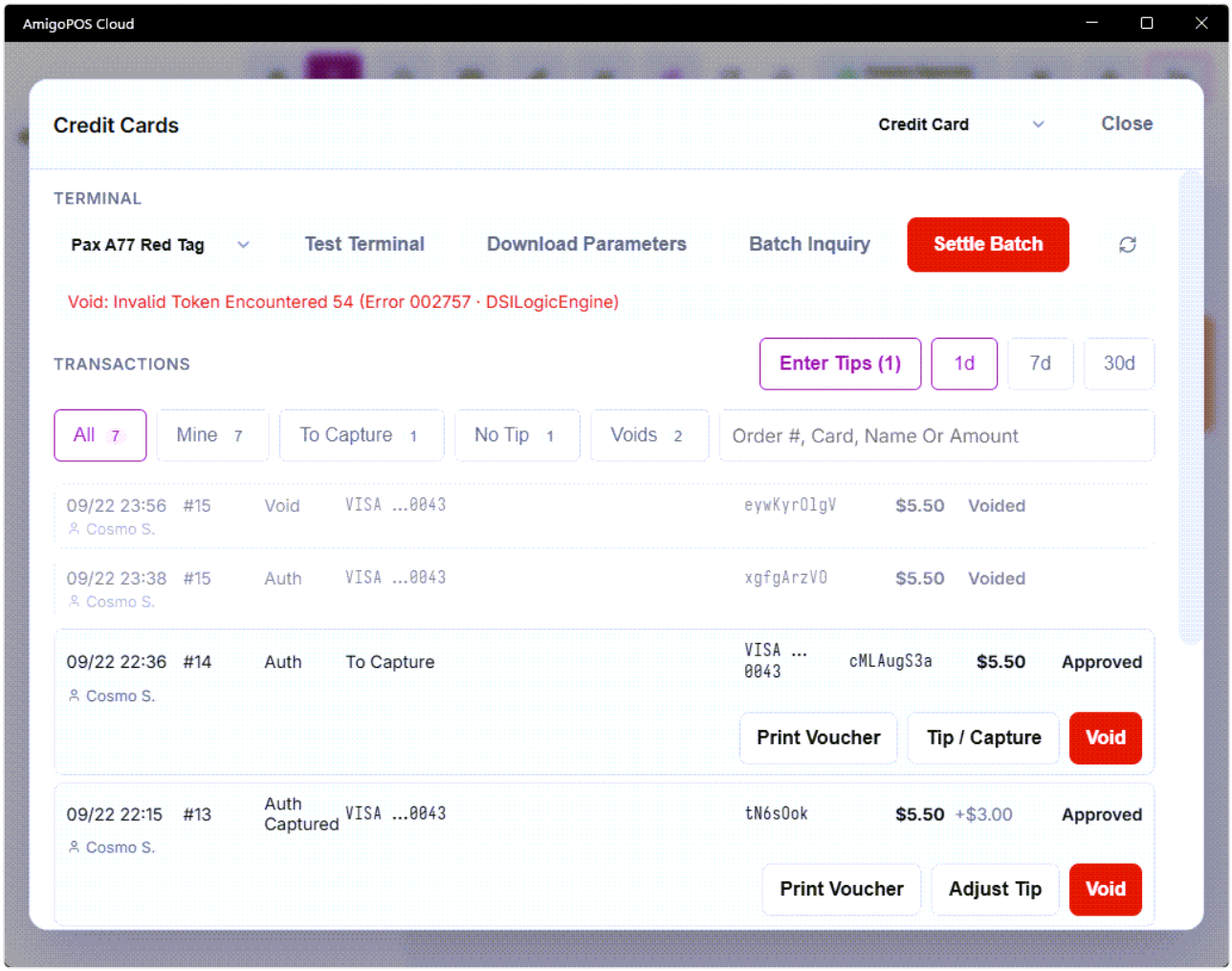
Void or refund?

A **void** cancels a payment before the day's card batch is settled, so the guest is never charged. After the batch has settled (usually overnight), the money has moved, and it can only be returned with a **refund**.

In pre-auth mode, voiding an authorization that has not been captured yet releases the hold on the guest's card.

Removing a card payment from an order

Removing a DC Direct payment from the order's payment list voids it on the card first. If Datacap refuses the void, the POS says why and asks **Card Void Failed**:



Remove Payment takes it off the order anyway. Only do that if the charge has already been reversed some other way (for example, by the processor); otherwise the guest stays charged while the order shows unpaid.

Voiding an order

Voiding an order voids every DC Direct payment on it first, including an open bar-tab pre-authorization. If any card cannot be voided, the order void stops and says why, so the order is never voided while money stays on a card.

Refunds

1. Start the refund as usual and choose the DC Direct card method as the tender.
2. The refund goes back to the card used on the original order, without the card.
3. Only up to what is left of that card payment can be refunded; earlier refunds count.

If Datacap declines the refund, nothing is recorded and the reason is shown.

An authorization that has not been captured yet (pre-auth mode) cannot be refunded: nothing has been charged. Void it instead.

Tip adjustments

Changing the tip on a DC Direct payment — from **Tip Adjust** on the Manager tab, from the settle screen, or from the Credit Cards screen — changes it at Datacap and on the payment together. Do it before the batch settles. This is how tips written on a *Tip Line On Receipt* slip are entered. It needs the **Adjust Credit Card Tip** permission, or a manager's approval.

In pre-auth mode, the first tip entered on an authorization — zero included — **captures** it for the check plus the tip. Later changes adjust the captured payment like a sale. To capture one with no tip, use **Tip / Capture** or **Enter Tips** on the Credit Cards screen. See **Table service: authorize, then capture with the tip**.

From the Credit Cards screen

More › Credit Cards lists recent card payments with **Print Voucher**, **Adjust Tip** (**Tip / Capture** on an authorization) and **Void** buttons, useful when the order is already closed, and **Enter Tips** takes a stack of tips at once. See **The Credit Cards screen: terminal tools and batches**.

Card fees: surcharge and non-cash adjustment

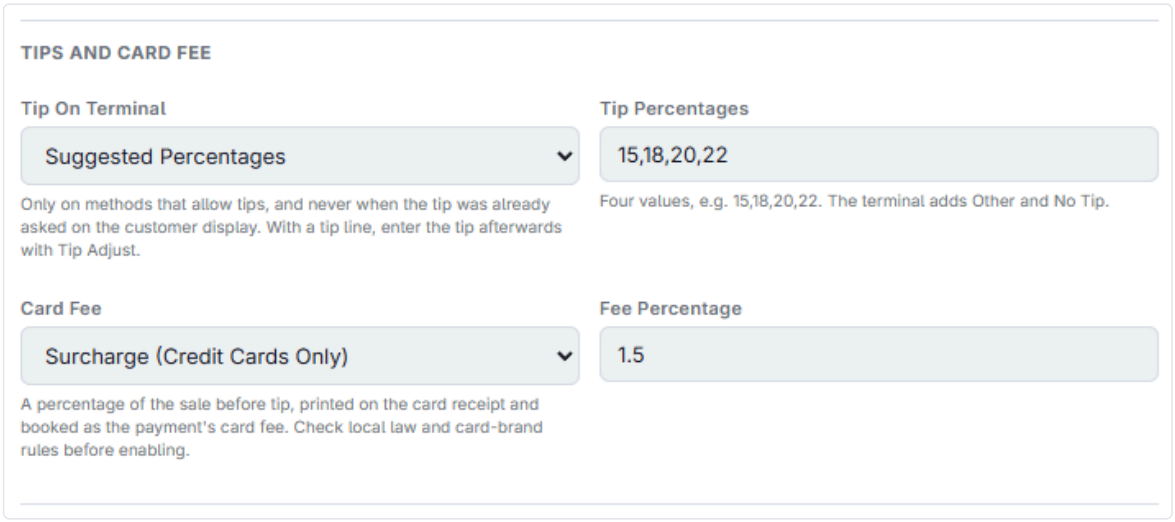
View online ↗

Add a percentage card fee to DC Direct sales, as a surcharge on credit cards only or as a non-cash adjustment on every card, and how it is recorded.

A DC Direct payment method can add a card fee to each sale, set under **Card Fee** in the payment method:

- **No Card Fee** — the default.
- **Surcharge (Credit Cards Only)** — the fee is offered with every sale and Datacap checks the card: it is added on credit cards and left off debit and prepaid cards.
- **Non-Cash Adjustment (All Cards)** — the fee is added on every card, with its own line on the receipt. Set that line's text in **Receipt Label** (default *NON-CASH ADJ*).

Enter the rate in **Fee Percentage** (for example 3 for 3%). The fee is a percentage of the sale before the tip.



What the guest and the store see

- The terminal and the card receipt show the fee on its own line (*SURCHARGE* or the receipt label).

- The fee applied comes back with the approval and is recorded on the payment as its card fee. The order total and the sales figures are not changed: the fee is on top of what pays the order, and reports that show card fees include it.
- The fee applies to sales only — not to bar-tab pre-authorizations or their closing charge, refunds or voids. In pre-auth mode (table service) the check's authorization counts as a sale: the fee is added when the card is authorized.



Check the rules first

> Card fees are regulated. In the **United States**, card brands require notice to the brands and signs for customers, cap the surcharge, and some states restrict or ban credit card surcharges (Connecticut and Massachusetts, for example, at the time of writing). In **Canada**, credit card surcharges are allowed in most provinces with a cap and notice, but not in **Quebec**, and debit cards cannot be surcharged. Non-cash adjustment programs have their own rules. Confirm with your processor before turning a fee on.

Signatures and card receipts

View online ↗

Capture signatures on the terminal, ask the guest whether they want a receipt, and choose which card receipt copies print.

Signature on the terminal

Signature On Terminal in the payment method decides when the guest signs on the terminal's screen after an approval:

- **Never** — the default.
- **When The Card Requires It** — only when the card's verification method asks for a signature. With chip-and-PIN and contactless, that is rare in the US and Canada.
- **Always** — every approved card payment.

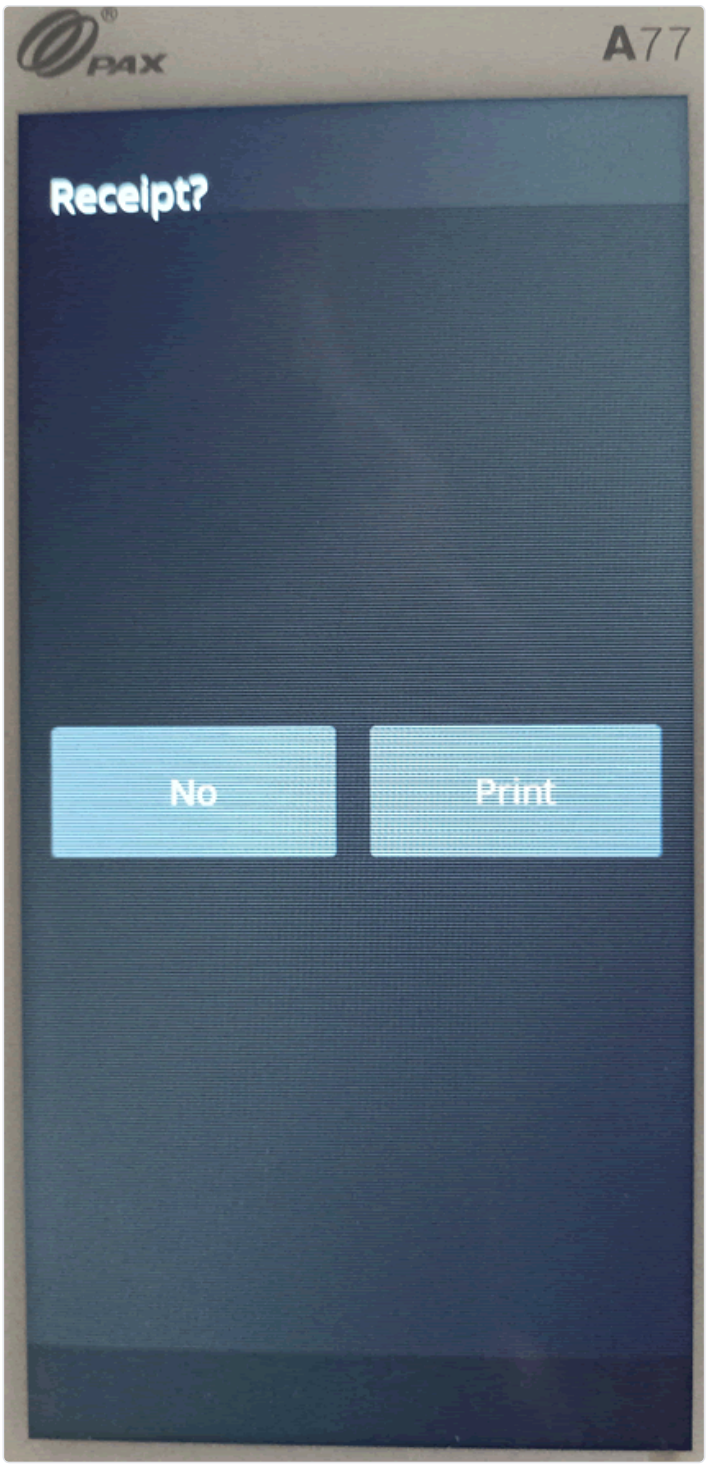


The signature is saved with the card record, and the card receipt reads *Signature On File*. If the guest skips signing or the terminal cannot capture it, the payment is still approved.

The receipt question

With **Receipt Question On Terminal** set to **Ask The Customer**, the terminal asks after each sale whether the guest wants a receipt. **No** skips the cardholder copy; the merchant copy still prints when it is enabled. No answer, or a cancel, prints as usual.

The wording is edited in the same place, as *Question*|*Print button*|*No button* — for example *Receipt?*|*Print*|*No*. Buttons hold up to eight characters.



Which copies print

Card Receipts chooses *Merchant And Cardholder Copies*, *Merchant Copy Only* or *Don't Print*. Copies print on the receipt printer of the station that took the payment, the merchant copy first. Merchant agreements normally expect a merchant copy to be kept.



The card receipt carries the store's name, address and phone from the store settings, the card lines Datacap returns (card type, masked number, entry method, authorization code, amount, tip and total) and the copy label. When the tip changes after the payment — a tip adjustment, or the capture of an authorization — a reprint shows the current tip and total, and a captured authorization reads *PREAUTH - CAPTURED* instead of *PREAUTH*.

Reprinting

Open **More › Credit Cards** and press **Print Voucher** on the payment. It prints the **merchant copy**, for the store's records, on the station's receipt printer.

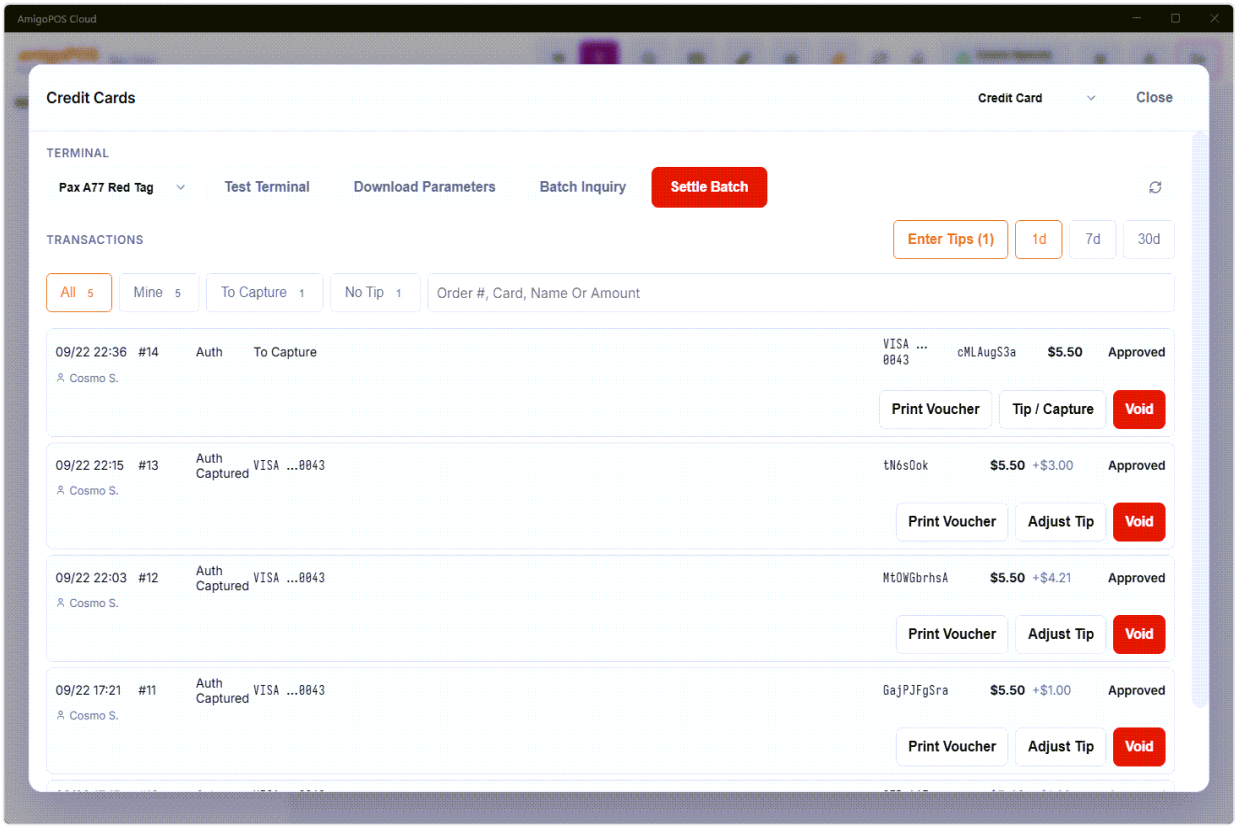
The Credit Cards screen: terminal tools and batches

View online ↗

The register's Credit Cards screen for DC Direct: recent card transactions, reprint, tip, capture and void, Enter Tips, terminal tests, parameter downloads and batches.

On a register, open **More › Credit Cards**. When the store has more than one card method, choose the DC Direct one at the top. The screen always opens on the transaction list.

Recent card transactions



The list shows the last day; **7d** and **30d** show more, and the search box finds a payment by order number, card, name or amount. The refresh button (the circular arrows at the end of the terminal buttons) reloads it.

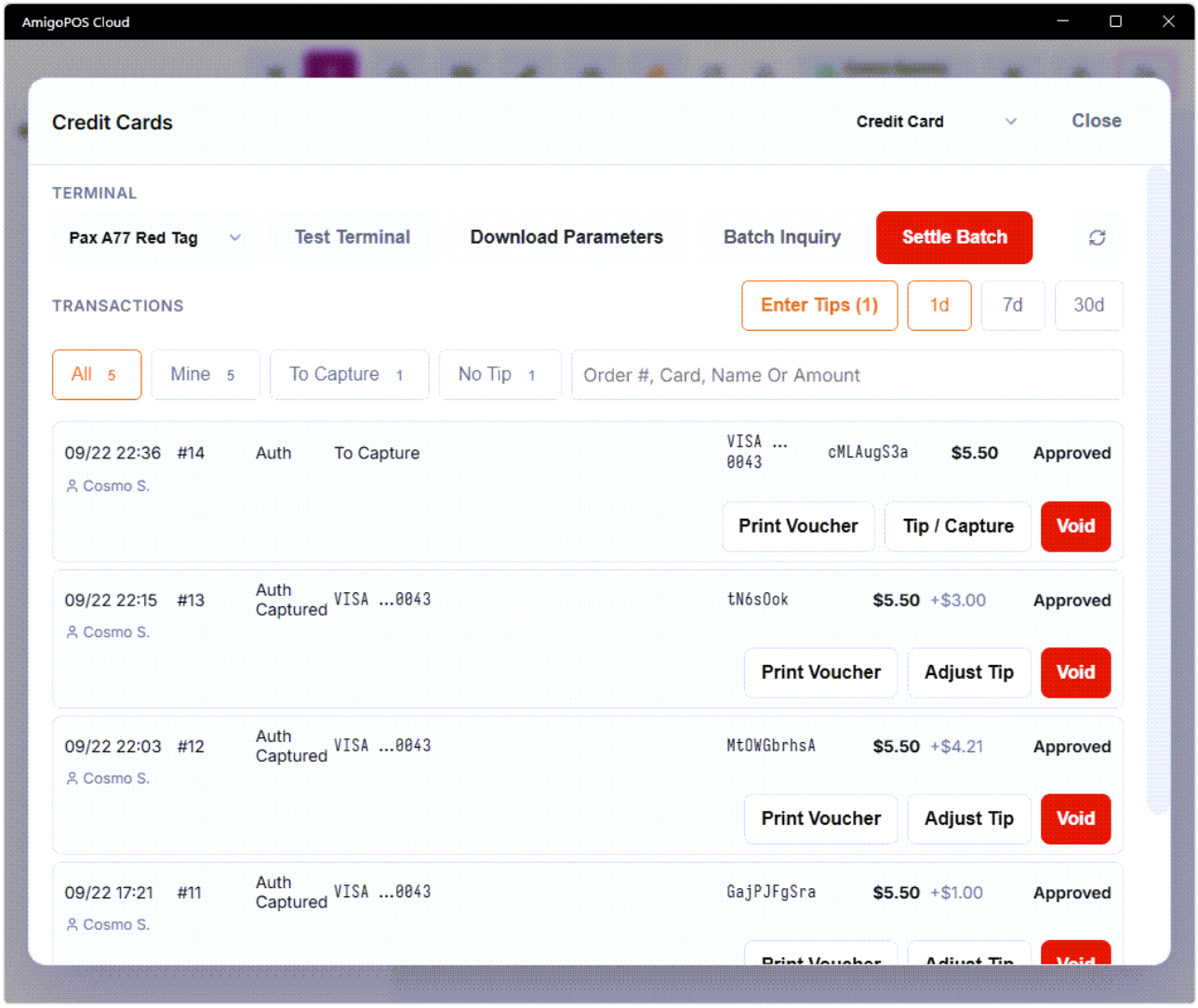
Each row shows the time, order, card, authorization code, amount, tip and what kind of transaction it is:

- **Sale** — a card payment.
- **Auth** — a table-service authorization (pre-auth mode) that has not been captured yet. It also shows a **To Capture** tag: it is not charged until it is captured.
- **Auth Captured** — an authorization captured with its tip. From then on it works like a sale.
- **Pre-Auth** — an open bar-tab hold.
- **Capture** — the charge that closed a tab.
- **Tab Closed** — a hold that has been captured; its Capture row carries the money.
- **Void** and **Refund**.

The filters above the list narrow it: **All**, **Mine** (payments you took), **To Capture**, **No Tip**, and filters for bar tabs, pre-auths, voids, refunds and declines. Each shows how many rows it holds; empty ones are hidden.

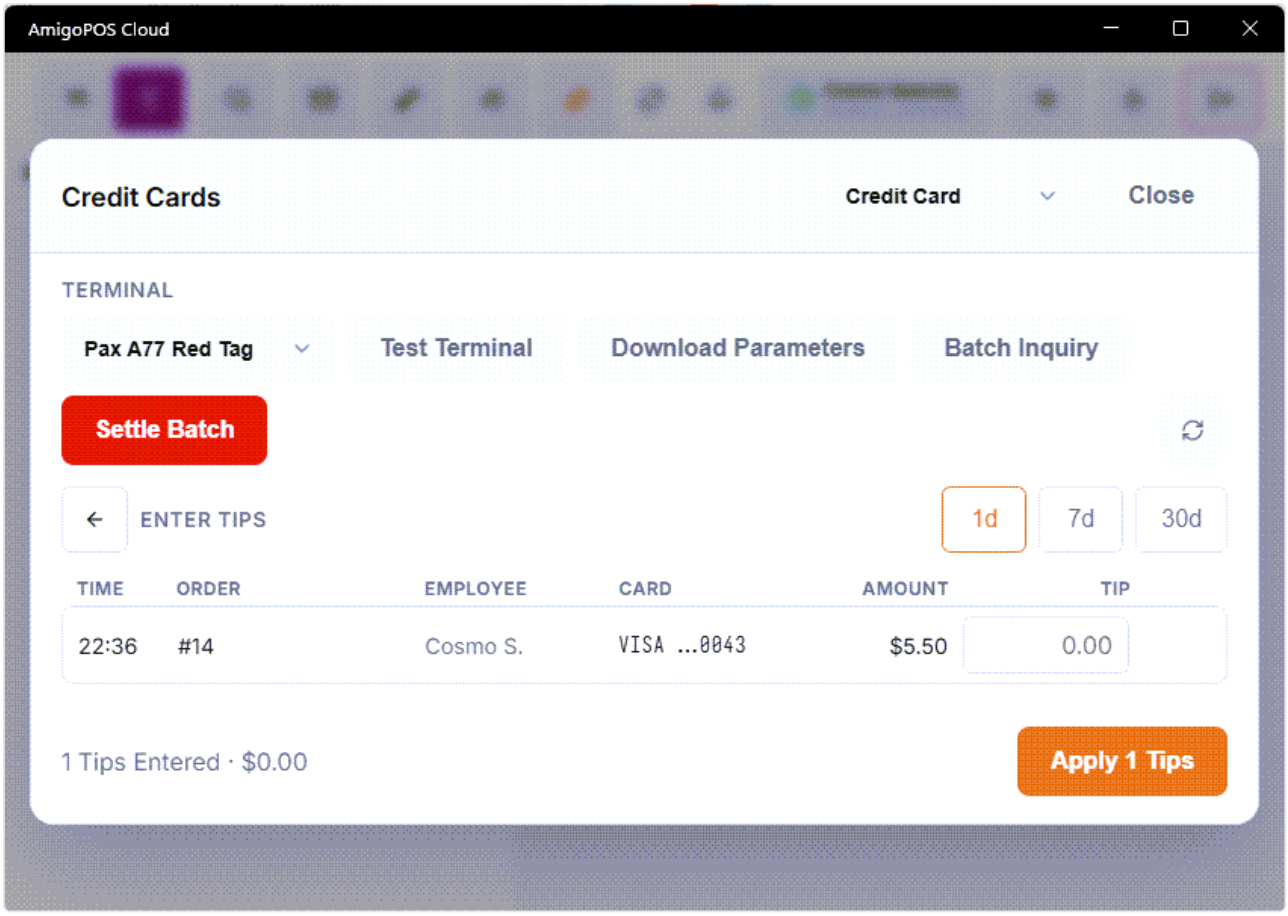
Buttons on a row:

- **Print Voucher** — reprints the merchant copy of the card receipt, with the current tip and total.
- **Adjust Tip** — changes the tip at Datacap and on the payment (on methods that allow tips).
- **Tip / Capture** — on an Auth: enter the tip, or leave it at zero, and press **Apply** to capture the authorization. See **Table service: authorize, then capture with the tip**.
- **Void** — voids it. On an open Pre-Auth, or an Auth not captured yet, Void releases the hold. Void needs the **Void Transactions** permission.



Enter Tips: a stack of slips at once

Enter Tips (on methods that allow tips) lists, oldest first, every card payment in the period that still has no tip, and every Auth still to be captured. The number on the button is how many there are.



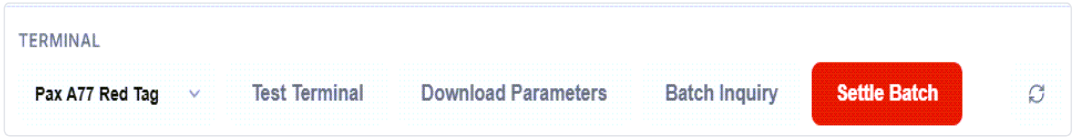
1. Type each tip from the signed slips. A tip the guest already chose on the terminal is filled in for you.
2. Press **Apply** (it shows how many will be sent). Payments with a tip above zero are adjusted, and **every Auth is captured** — with no tip when its field is left blank.
3. Rows that fail stay in the list with the reason, ready to try again.

A tip larger than the payment itself asks for confirmation first, to catch typing mistakes. The arrow at the top left goes back to the list.

Permissions on this screen

- **Adjust Tip**, **Tip / Capture** and **Enter Tips** need **Adjust Credit Card Tip**. Enter Tips asks once for the whole list.
- **Settle Batch** needs **Credit Card Batch**. **Batch Inquiry** needs none.
- Voiding a payment another employee took, or changing its tip, also needs **Other Users' Credit Cards**. A payment with no employee on it counts as nobody's. Seeing the list needs none.
- Without one of these, **Manager Override Required** asks a manager whose job has it to approve. Tip changes and the batch are checked again when they are sent to the processor.
- One approval lasts 5 minutes. On a long Enter Tips list, rows sent after that fail with **Permission required**; apply them again.

Terminal tools



With several terminals, first choose the terminal in the list next to the buttons.

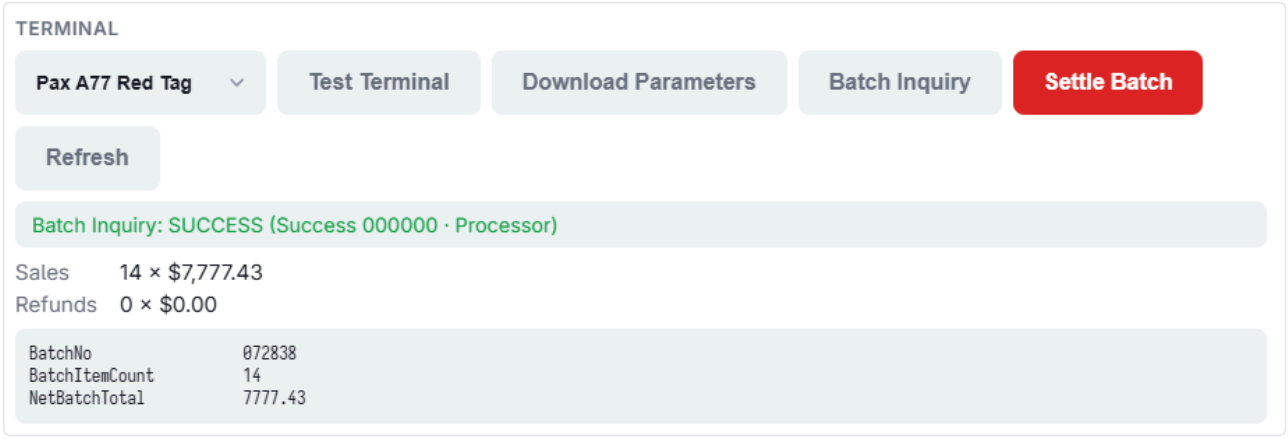
- **Test Terminal** — checks that the terminal answers through Datacap's cloud. Use it after setup, after a network change, or when a terminal seems unreachable.

- **Download Parameters** — refreshes the terminal's card settings from Datacap. The POS does this on its own whenever Datacap asks for it; run it by hand when your reseller tells you to.

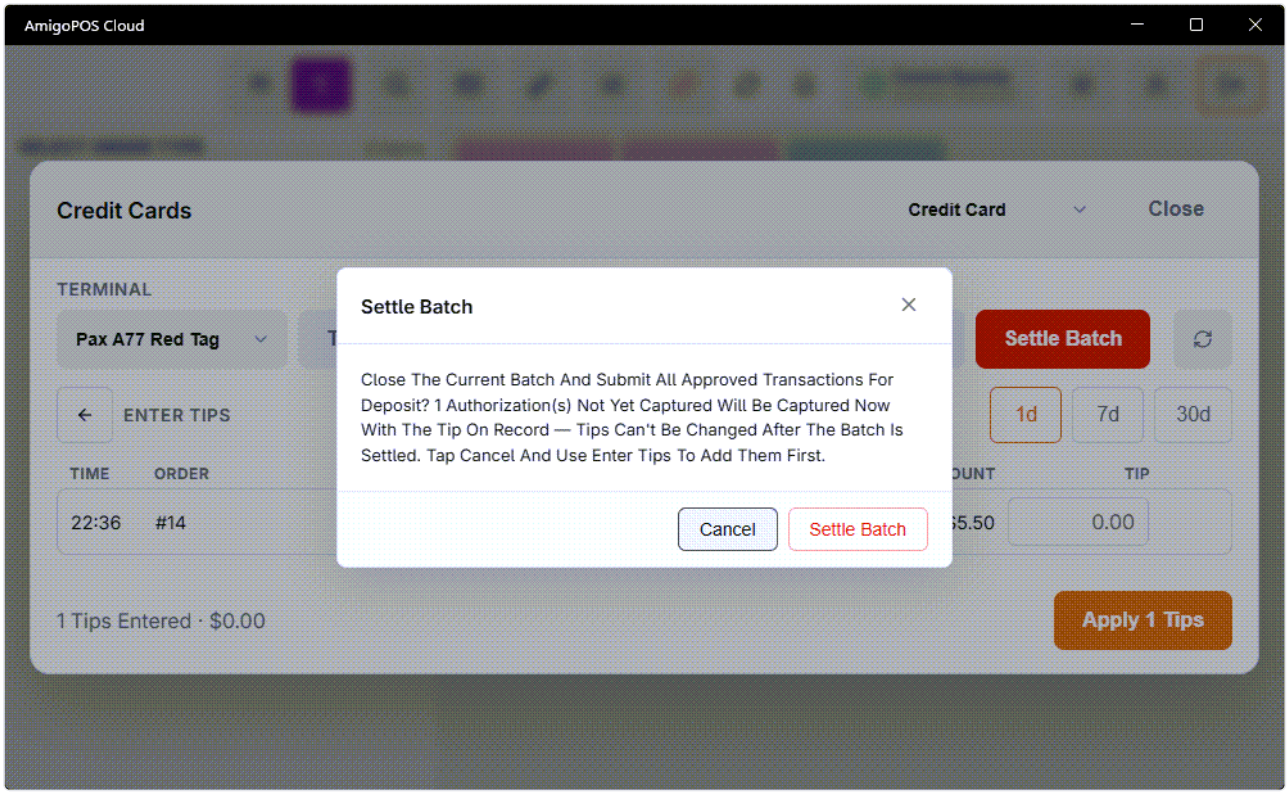
Batches

A **batch** is the set of card payments that the processor settles together, usually once a day.

- **Batch Inquiry** — shows the open batch's count and totals.
- **Settle Batch** — closes the batch so it is deposited. It first captures every Auth still to be captured, with the tip on record, so none is left out.



Settle Batch asks for confirmation. When there are authorizations it is about to capture, or open bar tabs that will not be in this batch, the confirmation says how many — counted over every day, not just the list on screen. If a slip's tip has not been entered yet, press **Cancel** and use **Enter Tips** first: once the batch is settled, its tips can no longer change. Open bar tabs are simply left out; they settle in a later batch once the tab is closed.



Afterwards the result says how many authorizations were captured and lists any that could not be; those stay **To Capture** and are not in this batch.

> Most processor accounts close the batch automatically every night, and then Settle Batch is not needed. Ask your reseller whether yours is set to close automatically. With pre-auth mode, CloudPos is not involved in an automatic close, so capture every Auth before that time: one still To Capture is left out of that batch. After a batch closes, payments in it can no longer be voided or tip-adjusted — only refunded.

Going live

View online ↗

A checklist for moving DC Direct from test credentials to real card payments.

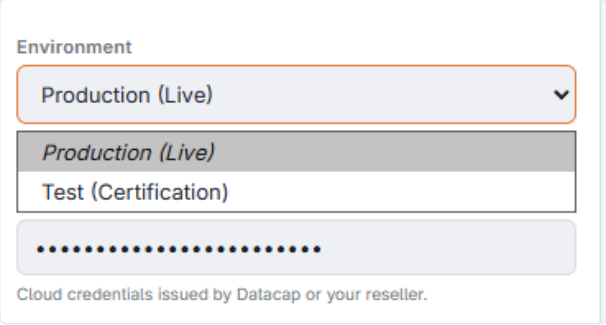
Set everything up and try it with **test** credentials first: test transactions go to Datacap's test environment and never charge a real card. When everything works, switch to production.

Testing

1. Payment method on **Test (Certification)** with the test Merchant ID, API User and API Password.
2. Use the test cards your reseller provides. Real cards do not work in the test environment.
3. Try what the store will use: a sale, a split, a tip on the terminal, a decline, a void, a refund, a bar tab opened and closed on a card, receipts, and **Test Terminal** on every terminal. With pre-auth mode, also an authorization captured with a tip, one captured with no tip, and a **Settle Batch** with one still To Capture.

Switching to production

1. Get the **production** Merchant ID, API User and API Password, and confirm with your reseller that each terminal is set up for your live account.
2. In the payment method, set **Environment** to **Production (Live)** and enter the production credentials. Save.
3. Sign out and back in on each register.
4. Run **Test Terminal** on every terminal.
5. Take a small live sale on a real card, check the receipt, then void it.
6. Ask your reseller whether batches close automatically; if not, add **Settle Batch** to the closing routine. With pre-auth mode and an automatic close, every authorization must be captured before that time.



Before the first busy shift

- Walk the floor and patio with a terminal and check the Wi-Fi everywhere guests pay.
- Label each terminal with its Back Office name and show staff **Choose A Terminal**.
- Show bartenders **Open Tab With Card** and **Close Tab On Card**.
- Make open pre-authorizations part of the end-of-day check.
- With pre-auth mode, show whoever closes how to use **Enter Tips**, so every authorization is captured each night.
- Check that the job of whoever enters tips and settles the batch has **Adjust Credit Card Tip** and **Credit Card Batch** (and **Other Users' Credit Cards** for payments others took), or they need a manager every night.

Backup for internet outages

Before going live, set up a backup terminal on an analog phone line and the backup card method, and test both. See **Internet outages and card payments**.

DC Direct troubleshooting

View online ↗

What to do when a DC Direct terminal does not respond, a payment is declined or its result is unknown, an authorization will not capture, receipts do not print or a fee or tip prompt is missing.

Start with **Test Terminal** on **More › Credit Cards**. If it succeeds, the terminal, the network and the credentials are working.

The payment never reaches the terminal

- Is the terminal on, charged, on the store Wi-Fi and showing the DC Direct ready screen? Restart it.
- Did staff pick the right terminal? The name on the POS must match the label on the terminal, and the **Device ID (Serial)** in Back Office must match the terminal's serial number.
- On 5G or LTE home internet, or if Wi-Fi shows connected but the terminal cannot reach Datacap, make the DNS change in **Setting up the store network and router**.
- A content filter or strict firewall must allow the terminal's traffic to Datacap.

"The card terminal is busy with another transaction"

Another payment is running on that terminal (it shows **In Use** on Choose A Terminal). Wait for it to finish, or choose another terminal.

"Choose which card terminal to use"

Several terminals are set up and none was chosen. Choose one at payment, or pin a terminal to the station in **More › Settings › Card Terminal**. On the Credit Cards screen, choose the terminal before using the tools.

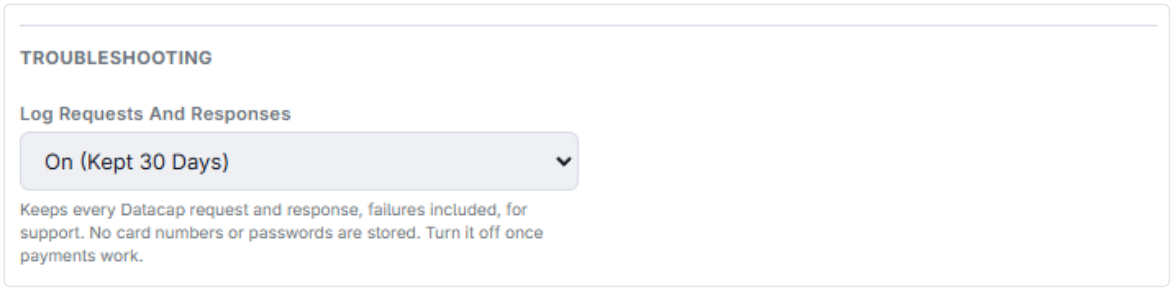
"DC Direct is not configured"

The payment method is missing the Merchant ID, API User or API Password.

Declined

The POS shows the reason and where it came from. *Processor* reasons (for example, insufficient funds or a declined card) are between the guest and their bank: try another card. Reasons from the terminal or Datacap point to setup: wrong environment for the credentials (test credentials on Production, or the reverse), a terminal not set up for the account, or a connection problem.

The result is unknown



The POS lost contact before it heard the result — the payment may or may not have gone through.

1. Do not charge the guest again yet.
2. Open **More › Credit Cards** and look for the payment.
3. Not listed: nothing was charged; take the payment again.
4. Listed as approved but the order still shows a balance: void it on the Credit Cards screen, then take the payment again, so the order and the card match.

Receipts do not print

- Check **Card Receipts** on the payment method.
- The guest may have answered **No** to the receipt question; the merchant copy should still print.
- The station's receipt printer must be working — see the printing topics.

No tip prompt on the terminal

The method may not allow tips, **Tip On Terminal** may be off, the order may already carry a tip, or the customer display already asked. Tabs opened on a card never prompt.

No surcharge on a payment

A surcharge is only added on credit cards; debit and prepaid cards are left without it by design. Fees are also never added to tab pre-authorizations or their closing charge.

Close Tab On Card does not appear

The tab was not opened with a card, its pre-authorization was voided, or a different payment method was chosen. Pay it as a normal card payment.

"The card did not approve the extra"

The tab plus tip is more than the card had approved, and the card refused the difference. Lower the tip, or charge part to this card and take the rest another way.

"TRANSACTION NOT COMPLETE – DNS Lookup of … Failed"

The card was read, but the connection onward to the card processor could not be completed, so nothing was charged. Try again. If it keeps happening, restart the terminal and check the DNS setting in **Setting up the store network and router**; if it still fails, give the full message to your reseller or Datacap.

A payment shows as Auth with To Capture

The store uses pre-auth mode and the tip has not been entered. Until it is captured the card is not charged. Enter the tip (0 for none) with **Tip / Capture** on the row, or **Enter Tips** for several.

"This card was already captured."

Another station captured this authorization a moment earlier. Refresh the list; to change the tip now, use **Adjust Tip**.

"The card on this order is authorized but not captured yet — void it instead of refunding."

A refund was started on an order whose card payment is still an authorization. Nothing has been charged, so there is nothing to refund: void the payment instead.

Settle Batch says some authorizations could not be captured

They are listed with the reason, stay **To Capture** and are not in this batch. Try **Tip / Capture** on each again. An authorization several days old may have been released by the card's bank; if it keeps failing, contact your reseller.

A capture's result was lost

If the connection dropped while an authorization was being captured, the row is left as captured so the card can never be charged twice. Check **Batch Inquiry**: if the amount is not in the batch, contact your reseller.

End of Day warns about open pre-authorizations

A tab opened on a card has not been closed or voided, or — in pre-auth mode — a card payment is still **To Capture**. Close the tab on the card or void the pre-auth; capture authorizations with **Tip / Capture** or **Enter Tips** on the Credit Cards screen.

WhatsApp

WhatsApp: how it works

Integrations › WhatsApp

View online ↗

What AmigoPOS sends by WhatsApp, the store's own WhatsApp account behind it, who pays, and what the store is responsible for.

AmigoPOS can send customers their pay links, payment confirmations, reservation messages and online-order updates by WhatsApp instead of text message. It does this through **the store's own WhatsApp Business account**: the store connects its own Meta app once, and from then on every WhatsApp message goes out from the store's own number, under the store's own name.

What can go by WhatsApp

- **Pay links** — from the call center, the orders list and the delivery screen.

- **Payment confirmations** — sent when a pay link is paid, and when an operator sends a card-by-phone approval to the customer.
- **Reservations** — the booking confirmation, the reminder before the sitting and the table-ready alert from the host stand.
- **Online orders** — order received, order ready and on the way.

Each kind of message is switched to WhatsApp separately on **Back Office › Integrations › WhatsApp**. Anything not switched, and anything WhatsApp cannot deliver, goes by text message instead where the store allows texts — so switching WhatsApp on never leaves a customer without the message.

Who pays

Meta bills the store directly for WhatsApp messages, on the card added to the store's WhatsApp account. AmigoPOS does not bill WhatsApp: the SMS Log shows Meta's cost next to each WhatsApp message for information only, and it is never added to what AmigoPOS bills. Meta charges for the messages a business starts, per delivered message, by country and kind of message; replies inside a conversation the customer started are free.

> Text messages work differently: they go through AmigoPOS's text service, are charged per message and billed monthly. See *SMS log and message costs*.

What the store is responsible for

- The WhatsApp account, the number and the Meta app belong to the store, and the store is responsible for what it sends and for following WhatsApp's rules: message only customers who gave their number for that purpose, and keep the messages about their order or booking.
- WhatsApp lets a business start a conversation only with a message template Meta has approved. The store writes its own templates on the WhatsApp page — see *WhatsApp message templates*.
- A customer who replies **STOP** gets no more WhatsApp messages from the store until they reply **START**.

Before you start

- A Facebook account with admin access to the store's Meta business portfolio, or permission to create one.
- A phone number that can receive a verification code by text or call and is **not** in use on the WhatsApp or WhatsApp Business app. A number connected this way cannot stay on the WhatsApp Business app: use a separate number, or remove the number from the app first. Customer replies are then answered in the **WhatsApp Inbox**.
- A credit or debit card for Meta's billing.
- About half an hour, following *Setting up the store's Meta app* and then *Connecting WhatsApp to the store*.

Setting up the store's Meta app

Integrations › WhatsApp

View online ↗

Step by step on Meta's side: business portfolio, app, the store's number, payment method, permanent token, Phone Number ID and registration, App Secret and publishing.

This is done once per store, on Meta's websites, by someone with admin access to the store's Meta business portfolio, and takes about half an hour. At the end you will have the four values the WhatsApp page asks for: the **WhatsApp Business Account ID**, a **permanent access token**, the **Phone Number ID** and the app's **App Secret**. Meta renames and moves its screens from time to time; if a label below differs slightly, look for the nearest match.

> The phone number must not be on the WhatsApp or WhatsApp Business app. Once registered here it works only through AmigoPOS — use a separate number, or delete that account from the app first.

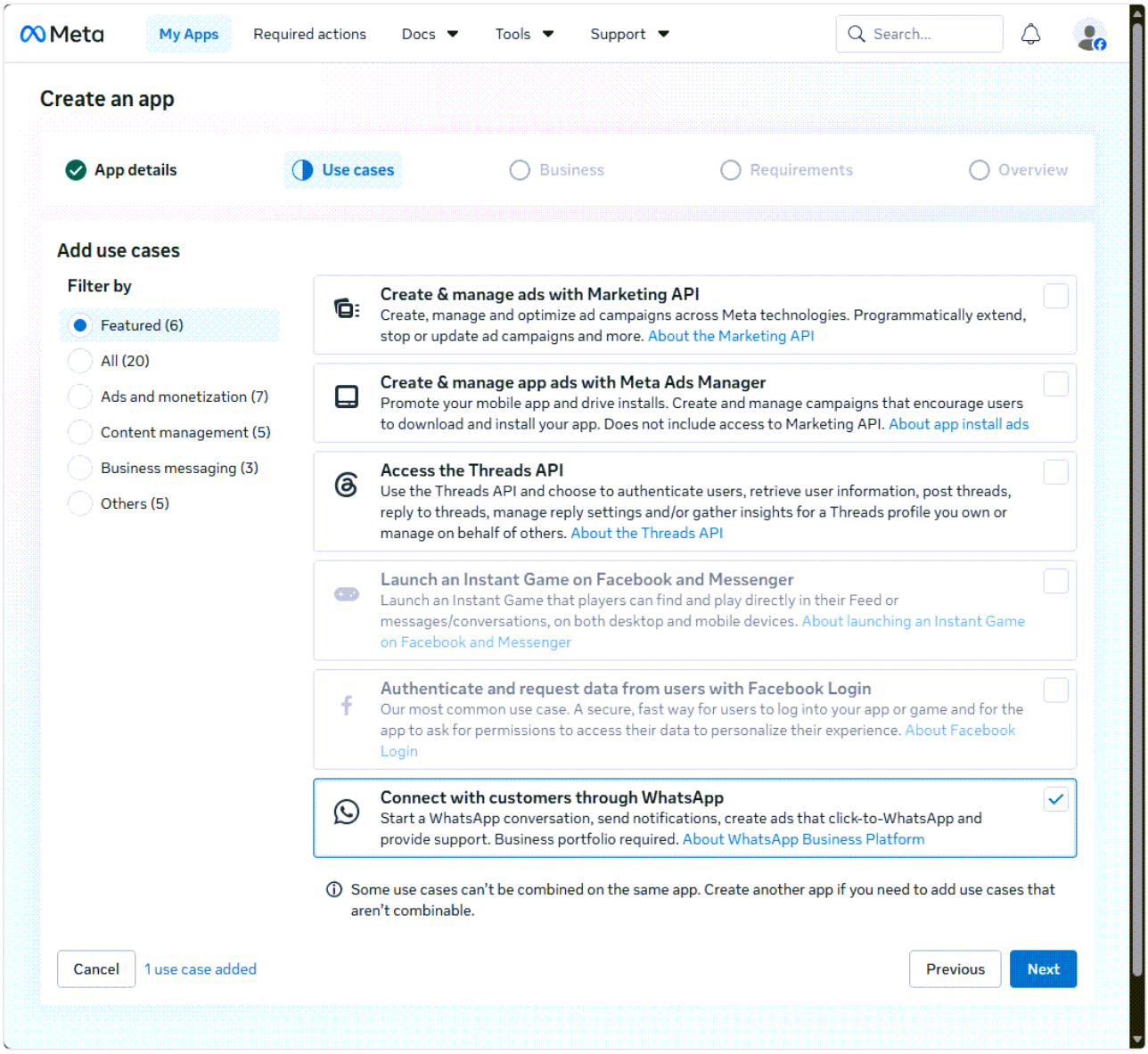
1. Business portfolio

Go to **business.facebook.com** and sign in. Use the store's existing business portfolio, or create one with the store's legal name, address and website. The app, the WhatsApp account and the number will all belong to it.

2. Create the app

1. Go to **developers.facebook.com**, sign in with the same Facebook account and choose **My Apps › Create App**.
2. Enter an app name the store will recognise, such as the store's name followed by "POS messages", and a contact email.
3. Choose the use case **Connect with customers through WhatsApp**, then **Next**.

4. Select the store's business portfolio, choose **Next**, check the summary and choose **Create app**.



Meta then opens the WhatsApp use case on its **Overview** page. Keep **Integrate with API** selected; the setup is the list under **Basic setup** on the left. To come back to it later, open the app, choose **Use cases** (the pencil icon) and then **Customize** on the WhatsApp use case.

> **Step 1. Try it out** sends a message from a free test number Meta provides. It is optional, and the Phone Number ID and WhatsApp Business account ID it shows belong to that test number: don't use them in AmigoPOS.

3. Add the store's phone number

1. Choose **Step 2. Production setup** and expand **Register your WhatsApp phone number**. Leave **Configure Webhooks**, at the top, for later: it needs two values AmigoPOS shows only once WhatsApp is connected.
2. Choose **Add new number**. The **Add phone number** window has four pages:
   - **Business information** — the business name, a website or social media page and the country. Pick the store's business portfolio if asked.
   - **WA Business Profile** — what customers see, including the display name. It must match the business; Meta reviews it.
   - **Add number** — the store's number.
   - **Verify number** — receive the code by text or phone call and enter it.

Until the business is verified (see the tip at the end), Meta allows two numbers per business.

4. Add a payment method and copy the WhatsApp Business Account ID

1. Expand **Add payment to send business-initiated messages** and follow its **Billing Hub** link. It opens **Billing & payments › Accounts**.
2. On the **WhatsApp Business accounts** tab, find the store's account — not *Test WhatsApp Business Account* — choose **Add payment** and add a credit or debit card. Without it Meta does not deliver the messages the store starts.
3. The number shown as **ID** under the account's name is the **WhatsApp Business Account ID**: copy it.

5. Generate the permanent access token

1. Back on **Step 2. Production setup**, expand **Send message**.
2. Under **Step 1: Generate token**, choose **Generate token** and follow Meta's prompts.
3. Copy the token straight away; Meta may not show it again.

> Treat the token like a password: anyone who has it can send messages as the store. Paste it only into Meta's Graph API Explorer in the next step and into the WhatsApp page in Back Office.

If Meta can't generate the token, make one by hand, as the link under the box explains: in **business.facebook.com › Settings › Users › System users**, add a system user with the **Admin** role; choose **Assign assets** and give it full control of the app and of the WhatsApp account; then choose **Generate token**, select the app, set the expiration to **Never** and tick **whatsapp_business_messaging** and **whatsapp_business_management**.

6. Find the Phone Number ID and check the registration

Meta's setup page shows a Phone Number ID only for its test number, and the store's number must be registered before it can send. Meta's Graph API Explorer covers both from the browser:

1. On **developers.facebook.com**, open **Tools › Graph API Explorer**.
2. In **Meta App**, select the store's app. Clear the **Access Token** box and paste the token from step 5.
3. Leave **GET** selected and replace the request path with
   `WABA-ID/phone_numbers?fields=id,display_phone_number,verified_name,status`
   putting the WhatsApp Business Account ID from step 4 in place of WABA-ID. Choose **Submit**.
4. The answer lists the account's numbers. For the store's number (`display_phone_number`), copy the `id` : that is the **Phone Number ID**.
5. If its `status` is `CONNECTED` , the number is registered: go on to step 7.

If the status is anything else, register the number:

1. Change **GET** to **POST** and replace the path with
   `PHONE-NUMBER-ID/register?messaging_product=whatsapp&pin=123456`
   putting the Phone Number ID in place of PHONE-NUMBER-ID and six digits of your choice in place of 123456.
2. Choose **Submit**. The answer `"success": true` means the number is registered; run the GET above again to see `CONNECTED` .

> The six digits become the number's two-step verification PIN; if the number already has one, use that PIN instead. Keep it with the store's Meta records: Meta asks for it to move or delete the number. Meta allows 10 registration attempts per number in 72 hours, so fix an error before trying again.

If Meta rejects the display name, correct it in **WhatsApp Manager › Account tools › Phone numbers** and register again once the new name is approved.

7. App Secret, app details and publishing

1. In the app, open **App settings › Basic** (the app's left bar shows icons; hover over them for their names), choose **Show** next to **App secret** — Meta asks for your Facebook password — and copy it.
2. On the same page fill in the **Privacy Policy URL** (the store's website, or the Privacy Policy page of its online ordering site), **User data deletion** (a page that tells customers how to ask the store to delete their data; the privacy policy page will do if it says so), the **App icon** (a square image between 512 × 512 and 1024 × 1024 pixels, such as the store's logo) and the **Category**, then choose **Save changes**.
3. Choose **Publish** in the app's left bar, or the **Publish your app** link under Configure Webhooks. Review the requirements and choose **Publish**; the page lists anything still missing.

Until the app is published, Meta sends only test webhooks, so AmigoPOS would get no delivery updates or customer replies.

What you copied

- **WhatsApp Business Account ID** — step 4.
- **Permanent access token** — step 5.
- **Phone Number ID** — step 6.
- **App Secret** — step 7.

Configure Webhooks is finished from the next topic, once AmigoPOS shows the Callback URL and Verify token.

> New WhatsApp accounts start with a daily limit on how many customers they can message. It rises as the store sends messages customers don't block or report. **Step 3. Business verification** is optional but recommended: the store uploads documents such as its certificate of incorporation, business license or tax registration, and Meta's review takes 2 to 10 business days. Once verified, the store can message more customers, show its display name in chats and add up to 20 numbers. This is the store's own step, done in Meta, not in AmigoPOS.

Next: Connecting WhatsApp to the store.

Connecting WhatsApp to the store

View online ↗

Entering the Meta app's details on the WhatsApp page, pointing the app's webhook at AmigoPOS, and testing, changing or disconnecting.

With the four values from *Setting up the store's Meta app* at hand, open **Back Office › Integrations › WhatsApp**. Changing the connection needs Back Office configuration permission.

1. Enter the details

In the **WhatsApp Number** card, fill in **Phone Number ID**, **WhatsApp Business Account ID**, **Permanent Access Token** and **App Secret**, then choose **Save And Check**. Before anything is saved, AmigoPOS checks with Meta that:

- the token opens that phone number,
- the App Secret belongs to the same app as the token,
- the number is on that WhatsApp Business Account.

It then subscribes the app to the account's events. If a check fails, the card shows Meta's own message and nothing is saved.

> The token and the App Secret are stored encrypted and never shown again. To change another field later without retyping them, leave those two boxes blank.

2. Point the app's webhook at AmigoPOS

Once connected, the card shows a **Callback URL** and a **Verify Token**, each with a **Copy** button. They let Meta tell AmigoPOS about deliveries, template approvals and customer replies.

1. In the Meta app, choose **Use cases** (the pencil icon), then **Customize** on **Connect with customers through WhatsApp**, then **Configuration**, and choose **Edit** under Webhook.
2. Paste the **Callback URL** and the **Verify token**, then **Verify and save**.
3. Under **Webhook fields**, subscribe to **messages**, **message_template_status_update** and **template_category_update**.

To confirm it works, send the store's WhatsApp number a message from your own phone. Within a minute the card's status line changes from *No webhook received yet* to *Last Webhook Received*, and the message appears in the WhatsApp Inbox.

> When several of the merchant's stores use the same Meta app, set the app's webhook once, with any one of those stores' Callback URL: Meta allows one per app, and AmigoPOS sorts each event to the right store.

3. Test, change or disconnect

- **Test Connection** repeats the checks. Use it after changing anything in Meta: a problem turns the badge red and shows Meta's message.
- **Change** reopens the fields — for a new token, a new App Secret or another number.

- **Disconnect** (press it twice to confirm) stops WhatsApp at once and erases the saved token and App Secret. Messages go by text where the store allows it. The templates are kept for a later reconnect.

> Connecting a **different WhatsApp Business Account** turns the store's templates back into drafts, because templates belong to the account. Submit them again on the WhatsApp page.

Next: *WhatsApp message templates*.

WhatsApp message templates

Integrations › WhatsApp

View online ↗

Writing one template per message and language, getting Meta's approval, and what happens when Meta calls a template marketing.

WhatsApp delivers a message a business starts only when it uses a template Meta has approved. On **Back Office › Integrations › WhatsApp**, the store writes one template for each message it wants to send by WhatsApp, in each language it wants to send it in. Writing templates needs Back Office configuration permission.

The messages

Message	Sent when	Variables
Payment link	Pay links from the call center, the orders list and the delivery screen	{{1}} business name, {{2}} payment link
Payment received	A pay link is paid; an operator sends a card-by-phone approval	{{1}} business name, {{2}} amount, {{3}} order number
Reservation confirmation	The booking is made	{{1}} business name, {{2}} date and time, {{3}} party size, {{4}} confirmation code, {{5}} booking page link
Reservation reminder	Before the sitting	{{1}} business name, {{2}} date and time, {{3}} party size, {{4}} booking page link
Table ready	The host stand calls the party	{{1}} business name
Order received	An online order is placed	{{1}} business name, {{2}} order number
Order ready	The first kitchen display bump, or Mark Ready And Notify on the orders list	{{1}} business name, {{2}} order number
On the way	A delivery is dispatched with a driver	{{1}} business name, {{2}} order number

The variables are filled in by AmigoPOS when the message is sent; the rest of the wording is the store's.

Writing and submitting

1. Start a new template and choose the message and the language. Suggested wording appears: edit it freely.
2. Keep every variable, from {{1}} up to the last one, and don't start or end the text with a variable — Meta rejects that. The limit is 1,024 characters.
3. Submit it. The row shows **Pending** while Meta reviews it — usually minutes, sometimes up to a day — and then **Approved** or **Rejected** with Meta's reason.

Status changes arrive by themselves through the webhook; **Refresh From Meta** reads them all again on demand.

Utility or marketing

Every template is submitted as a **utility** (transactional) message, but Meta decides the category. If Meta classes one as **marketing** — which costs more and which WhatsApp does not deliver to US numbers — the row is flagged and AmigoPOS holds it back: those messages go by text instead, or not at all for messages that are WhatsApp-only. Rewrite it in plainer, transactional words, or tick **Use Anyway** to send it regardless. Meta can also re-label an approved template later; the flag then appears by itself.

> Keep the wording plain: what happened, the order or the booking, the link. Offers, "come back soon" and emojis push Meta towards marketing.

Languages

Write the same message in several languages to reach visitors in their own. AmigoPOS sends the template in the customer's language when it knows it — a reservation guest's language, or the one the operator picks on the pay link screen — otherwise in the store's language, then the closest language, and failing that the oldest approved one, so a customer who reads English still gets the message.

Editing and deleting

- Editing an approved template sends it back to Meta for review, and Meta allows about one edit a day. Its message and language can't change: create a new template instead.
- Deleting a template (press twice to confirm) removes it from Meta as well.
- After connecting a different WhatsApp Business Account, every template is a draft again: submit each one once more.

Choosing which messages go by WhatsApp

Integrations › WhatsApp

View online ↗

The WhatsApp switches, what falls back to text, the 24-hour window, STOP and START, and sending a test.

The **Messages Sent By WhatsApp** section of **Back Office › Integrations › WhatsApp** decides, for each kind of message, whether WhatsApp is used. Nothing goes by WhatsApp until the store is connected and the message has an approved template.

Setting	What it does
Send Pay Links By WhatsApp	Pay links go by WhatsApp; off, they go by text.
Send Reservation Messages By WhatsApp	Confirmations, reminders and table-ready alerts go by WhatsApp. Anything WhatsApp can't send falls back to text.
Send Order Messages By WhatsApp	Online-order received, ready and on-the-way messages go by WhatsApp. Anything WhatsApp can't send falls back to text.
Confirm Payments By WhatsApp	Sends the Payment Received template when a pay link is paid (WhatsApp only: the payment page has already confirmed), and when an operator sends a card-by-phone approval (by text if WhatsApp can't).
Send By Text When WhatsApp Can't	For pay links: when WhatsApp can't send one, it goes by text instead. Off, the operator is told and shown the link to read out.
Hold Call Center Orders Until Paid	A call-center order sent with a pay link waits until the link is paid — see *Sending a pay link*.
Default Country Code	Added to numbers typed without a +, for texts and WhatsApp alike.

When WhatsApp can't send

WhatsApp doesn't send when the store isn't connected, when that message has no approved template, when Meta has classed its template as marketing and nobody ticked Use Anyway, when the customer replied STOP, or when Meta refuses the message. Every case is recorded in the SMS Log, and the switches above decide what happens next.

> A fallback text still needs texting to be switched on for that action on **Back Office › Integrations › SMS**, and each text is charged.

The 24-hour window

For 24 hours after a customer last wrote to the store's WhatsApp number, the store may reply in its own words, free of charge — that is what the WhatsApp Inbox is for. Outside that window only approved templates reach them. AmigoPOS keeps track of the window, so a message with no template is sent only while it is open.

STOP and START

A customer who replies **STOP** (or BAJA, ALTO, DETENER or PARAR, as the whole message) gets no more WhatsApp messages from the store; what would have gone to them is recorded as blocked and goes by text where allowed. Replying **START** (or ALTA) turns WhatsApp back on for them.

Sending a test

The test panel on the same page sends a real WhatsApp message to the number you type: the Payment Link template once it is approved. Before that, a plain test message arrives only if that phone wrote to the store's number in the last 24 hours, so send the store a message from it first.

WhatsApp Inbox

Integrations › WhatsApp

View online ↗

Reading customer replies to the store's WhatsApp number and answering them inside the 24-hour window.

Customers reply to pay links and confirmations, and some write to the store's number on their own. Because the number is connected to AmigoPOS rather than to a phone, those messages arrive in **Back Office › Employees › Communication & Audit › WhatsApp Inbox**. It needs the Message Log permission or Back Office configuration permission.

Reading

- Conversations are listed with the most recent message first; unread ones are in bold. Opening a conversation marks it read.
- The thread shows the customer's messages, staff replies and the store's automatic messages to that number — pay links, confirmations, reminders — so you can see what the customer is answering.
- The page refreshes itself every few seconds while it is open.
- Photos, voice notes and other media show as a label such as [image]: ask the customer to write it, or call them.

Replying

For 24 hours after the customer's last message you can reply in your own words; the time left is shown above the reply box. Replies inside that window are free. Each reply shows its delivery status underneath.

Once the window closes, the reply box is replaced by a note: from then on only the store's approved templates reach that customer — for example, a new pay link. If the customer replied STOP, nothing can be sent to them until they reply START.

> The inbox is shared by everyone with access, and by every store connected to the same number. Reply from here rather than from a personal phone, so the conversation stays with the store.

WhatsApp troubleshooting

Integrations › WhatsApp

View online ↗

What the connection errors, failed messages and held templates mean, and how to fix them.

Most problems show up in one of two places: the badge on the **WhatsApp Number** card, and the status of a message in the **SMS Log**. A message WhatsApp could not send has already gone by text wherever the store allows it.

Connecting

Message on the card	What to do
The server has no credential key	Contact AmigoPOS support: the server is not yet set up to store WhatsApp connections.
Error validating access token, or Invalid OAuth access token	The token has expired, was revoked, or was copied incompletely. Generate a new one with expiration Never (*Setting up the store's Meta app*, step 6) and enter it with **Change**.
Invalid appsecret_proof	The App Secret is not this app's. Copy it again from **App settings › Basic**.
That phone number ID is not on that WhatsApp Business Account	The two IDs don't belong together. Copy both again from **API Setup** (Setting up the store's Meta app, step 3) with the right number selected in From.
A permissions error	The system user isn't assigned the app or the WhatsApp account, or the token is missing one of the two WhatsApp permissions.
This phone number is already connected to another merchant	Each number can be connected to one merchant only.

No webhook received yet

- The Callback URL and Verify token in the Meta app must match the card exactly: use the Copy buttons.
- The three webhook fields — messages, message_template_status_update and template_category_update — must be subscribed.
- The app must be published (*Setting up the store's Meta app*, step 8).
- If several stores share the app, it has one webhook, set to any one of those stores' Callback URL.

A message shows failed

Find it in the SMS Log: a failed WhatsApp message carries WhatsApp's own error code.

Code	Meaning	What to do
131047	More than 24 hours since the customer last wrote, and the message had no template	Get a template approved for that message.
131026	The number can't receive WhatsApp messages: not on WhatsApp, or a very old app	Check the number, or use text.
131042	Meta has a payment problem with the account	Check the card in WhatsApp Manager.
132001	The template doesn't exist in that language on this account	Choose **Refresh From Meta**; submit the template again if it is missing.
133010	The phone number isn't registered for the API	Register the number (*Setting up the store's Meta app*, step 7), then **Test Connection**.
131049	Meta held back a marketing message to limit how many a customer receives	Rewrite the template as a plain transactional message.

Templates

- **Rejected** — Meta's reason is shown on the row; fix the wording and submit it again.
- **Paused** or **Disabled** — Meta stopped it after customers blocked or reported it. Improve it, or write a new one.
- **Flagged as marketing** — see *WhatsApp message templates*.

Blocked

A WhatsApp message recorded as **blocked** was not sent: the customer had replied STOP, or the only template for that message is held as marketing. Nothing was charged for it.

Entreo

How Entreo deliveries work

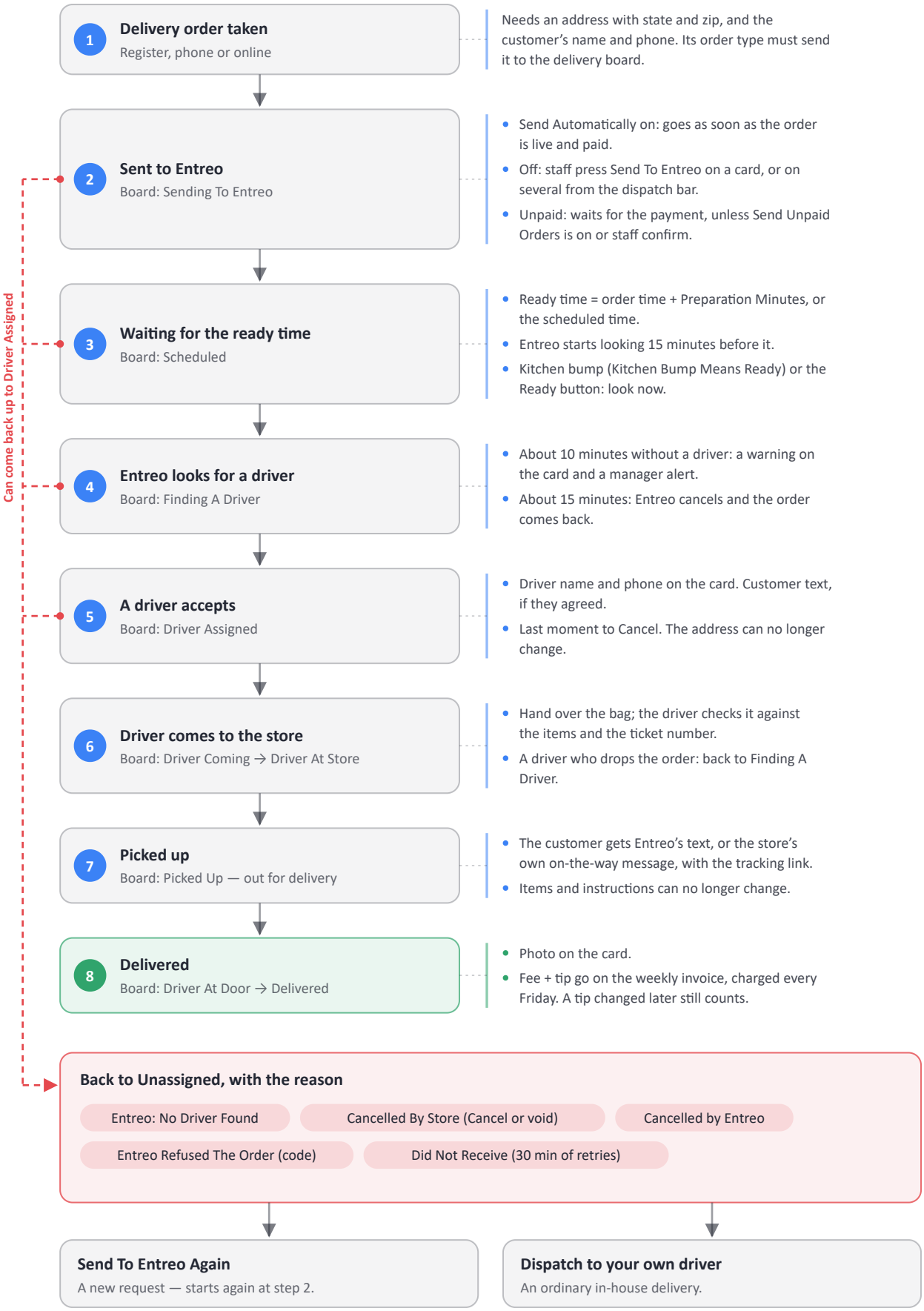
Integrations › Entreo

View online ↗

Entreo supplies drivers for the store's delivery orders: orders go to Entreo, a driver picks up at the store, and the board shows every step.

Entreo is a delivery-driver service. With Entreo switched on, the store's delivery orders are handed to Entreo, Entreo finds a driver, and the driver picks the order up at the store and takes it to the customer. The register keeps the order, the money and the customer; Entreo only does the driving.

The whole journey at a glance


1
Delivery order taken
Register, phone or online
Needs an address with state and zip, and the customer's name and phone. Its order type must send it to the delivery board.
2
Sent to Entreo
Board: Sending To Entreo
Send Automatically on: goes as soon as the order is live and paid.
Off: staff press Send To Entreo on a card, or on several from the dispatch bar.
Unpaid: waits for the payment, unless Send Unpaid Orders is on or staff confirm.
3
Waiting for the ready time
Board: Scheduled
Ready time = order time + Preparation Minutes, or the scheduled time.
Entreo starts looking 15 minutes before it.
Kitchen bump (Kitchen Bump Means Ready) or the Ready button: look now.
4
Entreo looks for a driver
Board: Finding A Driver
About 10 minutes without a driver: a warning on the card and a manager alert.
About 15 minutes: Entreo cancels and the order comes back.
5
A driver accepts
Board: Driver Assigned
Driver name and phone on the card. Customer text, if they agreed.
Last moment to Cancel. The address can no longer change.
6
Driver comes to the store
Board: Driver Coming → Driver At Store
Hand over the bag; the driver checks it against the items and the ticket number.
A driver who drops the order: back to Finding A Driver.
7
Picked up
Board: Picked Up — out for delivery
The customer gets Entreo's text, or the store's own on-the-way message, with the tracking link.
Items and instructions can no longer change.
8
Delivered
Board: Driver At Door → Delivered
Photo on the card.
Fee + tip go on the weekly invoice, charged every Friday. A tip changed later still counts.
Can come back up to Driver Assigned
Back to Unassigned, with the reason
Entreo: No Driver Found
Cancelled By Store (Cancel or void)
Cancelled by Entreo
Entreo Refused The Order (code)
Did Not Receive (30 min of retries)
Send To Entreo Again
A new request — starts again at step 2.
Dispatch to your own driver
An ordinary in-house delivery.

Every step of an Entreo delivery, with the store's options beside it. Red: the ways an order comes back to the store.

What happens to a delivery order

1. **The order is sent to Entreo.** Automatically, as soon as the delivery order is live at the store and paid, or when someone presses **Send To Entreo** on the delivery board.
2. **Entreo looks for a driver.** For an order that is not ready yet, Entreo waits and starts looking 15 minutes before the ready time.
3. **A driver accepts**, drives to the store and picks up. The driver checks the items against the bag, and the ticket number on the bag is the one the driver sees.
4. **The driver delivers** and takes a photo at the door.

Each step appears on the **Entreo** tab of the delivery board as it happens, with the driver's name and phone and the times Entreo expects. Once the driver has the food, the order counts as out for delivery everywhere a delivery is followed — the orders list, the call center's tracker, Manager alerts — and as delivered when the driver marks it at the door.

Who pays

- **Entreo never charges the customer.** The customer pays the store as usual: at the register, online, or by pay link.
- **Each delivered order adds its delivery fee plus the tip** to the store's weekly Entreo invoice, charged to the store's card on file every Friday. The driver receives all of the fee and all of the tip.
- **Drivers never collect money.** That is why an unpaid order is not sent automatically. See Entreo charges and the weekly invoice.

What stays the same

- In-house drivers still work exactly as before. Any order can still be dispatched to your own driver from the Unassigned tab.
- An order Entreo cannot take — no driver found, refused, cancelled — comes back to the Unassigned tab with the reason, ready to send again or to give to your own driver.
- Nothing about Entreo can stop the register: if Entreo cannot be reached, orders are taken, paid and printed as usual and the request is retried.

> The pickup address is the store address Entreo has on file. If the store moves, tell Entreo.

In this section

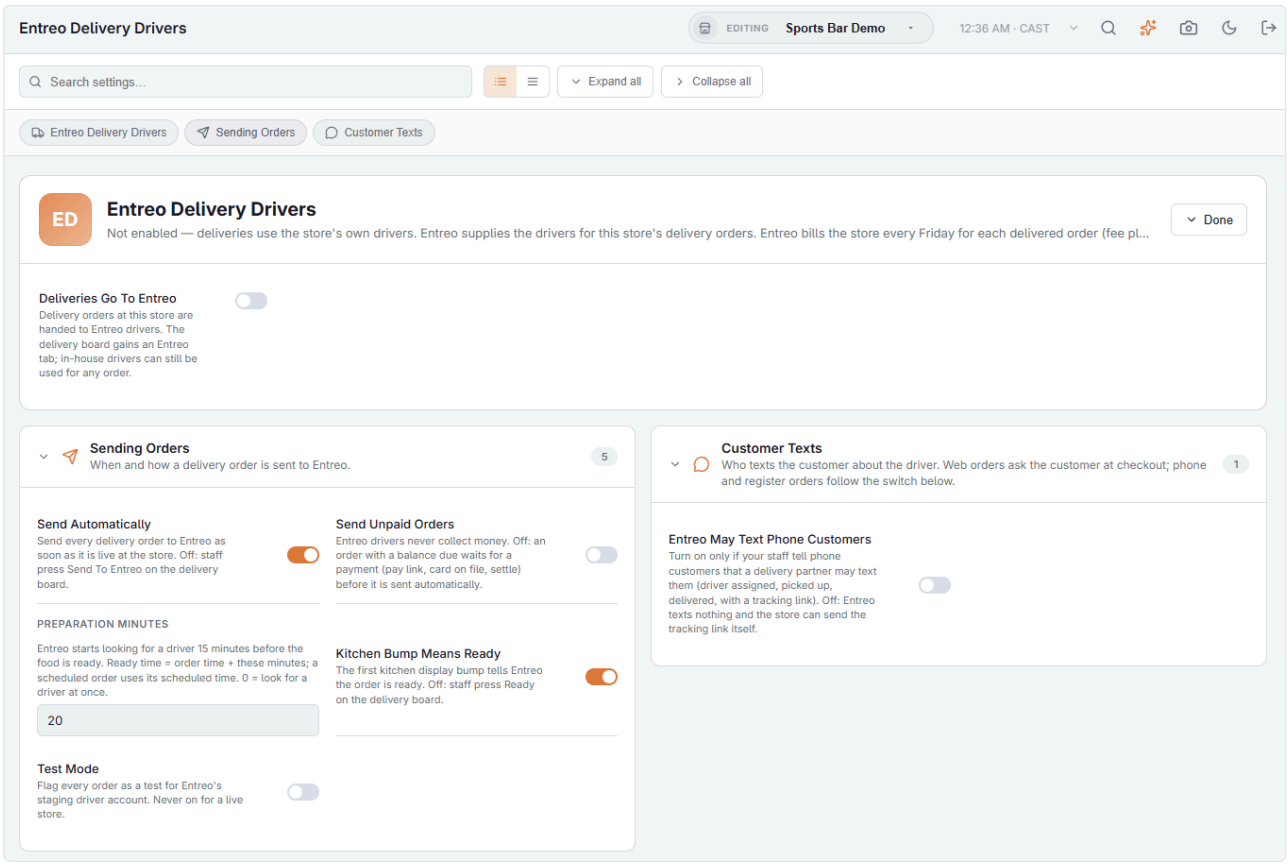
- Setting up Entreo
- Entreo on the delivery board
- Entreo delivery statuses
- Ready time, changes and cancelling
- Customer texts and tracking
- Entreo charges and the weekly invoice
- Entreo activity: what was sent and received
- Entreo troubleshooting

Setting up Entreo

View online ↗

Connecting the store with Entreo, switching it on in Back Office, and what each setting on the Entreo page does.

Entreo is set up in **Back Office › Integrations › Entreo Delivery Drivers**. The page has the store's switches at the top and the connection details underneath.



Before you start

1. **Sign the store up with Entreo.** Entreo sets the store up on its side: the pickup address, the delivery rate, and the card the weekly invoice is charged to.
2. **Give Entreo the store's AmigoPOS Store ID.** It is shown in the Connection panel of the Entreo page, with a copy button. When the store signs up with Entreo it chooses AmigoPOS as its point of sale and enters the Store ID on the next step; a store already set up with Entreo enters it on its Entreo dashboard, or emails it to Entreo. Once Entreo approves the business the store is connected automatically, and Entreo confirms.
3. **Check the store's delivery order type.** Only orders whose order type sends them to the delivery board are sent to Entreo. If the page says no order type is set up for delivery, see Order types and workflow.

Switching it on

Turn on **Deliveries Go To Entreo** (press **Edit** on the top card). The line under the title says whether Entreo is enabled for this store. From that moment the delivery board shows the Entreo tab and the Send To Entreo buttons.

Sending Orders

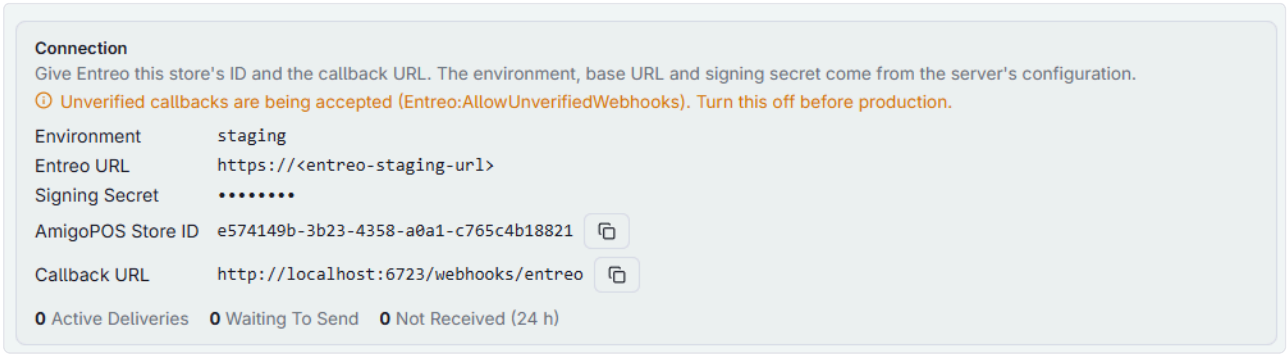
Setting	What it does	Starts as
Send Automatically	Every delivery order is sent to Entreo as soon as it is live at the store. Off: nothing goes until staff press Send To Entreo on the board.	On
Send Unpaid Orders	Entreo drivers never collect money. Off: an order with a balance due waits for its payment (pay link, card on file, settle) and is sent as soon as it is paid. On: it is sent anyway, and the store collects the money another way.	Off
Preparation Minutes	The ready time Entreo is given: order time plus these minutes. A scheduled order uses its scheduled time instead. Entreo starts looking for a driver 15 minutes before the ready time. 0 sends no ready time, so Entreo looks for a driver at once.	20
Kitchen Bump Means Ready	The first bump on the kitchen display tells Entreo the order is ready, and Entreo starts looking for a driver right away. Off: staff press Ready on the delivery board.	On

Setting	What it does	Starts as
Test Mode	Marks every order as a test. A test order is never billed to the store and the customer is never texted. In production Entreo checks, stores and answers it but sends no driver, and no updates follow — a store that leaves Test Mode on gets no deliveries. The Entreo page shows a reminder while it is on.	Off

Customer Texts

Entreo May Text Phone Customers decides whether Entreo may text customers whose order was taken by phone or at the register. Turn it on only if staff tell those customers that a delivery partner may text them. Web customers answer the question themselves at checkout. See Customer texts and tracking.

The Connection panel



- **Environment**, **Entreo URL** and **Signing Secret** come from the server and are set by AmigoPOS. If the panel says Entreo is not configured on this server, nothing is sent: contact support.
- **AmigoPOS Store ID** — what Entreo needs to connect this store.
- **Callback URL** — where Entreo sends its delivery updates. It is the same for every store and is given to Entreo by AmigoPOS; stores do not need to send it.
- **Active Deliveries**, **Waiting To Send** and **Not Received (24 h)** — a quick health check. Anything in the last count means Entreo did not get an order; see Entreo activity.

> Test Mode orders are never billed and never text your customer. In production they are not sent to a driver. For your first live orders, send real orders and watch them with the Entreo team.

> Training registers never send orders to Entreo.

Entreo on the delivery board

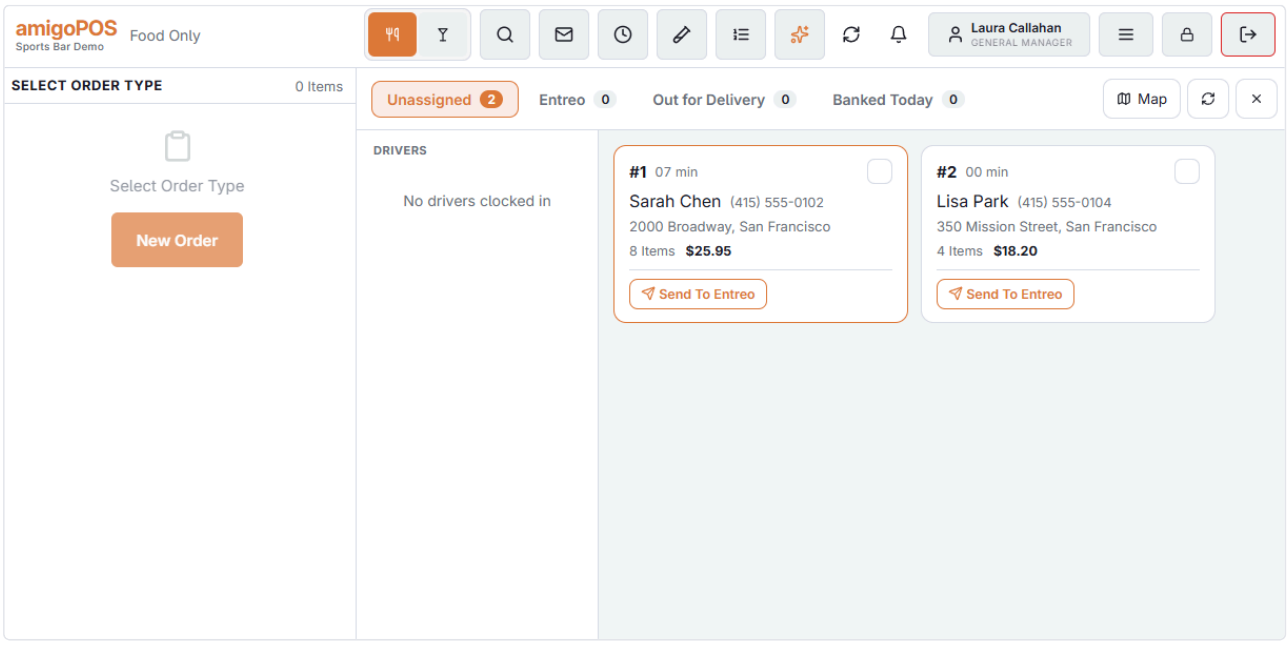
Integrations › Entreo

View online ↗

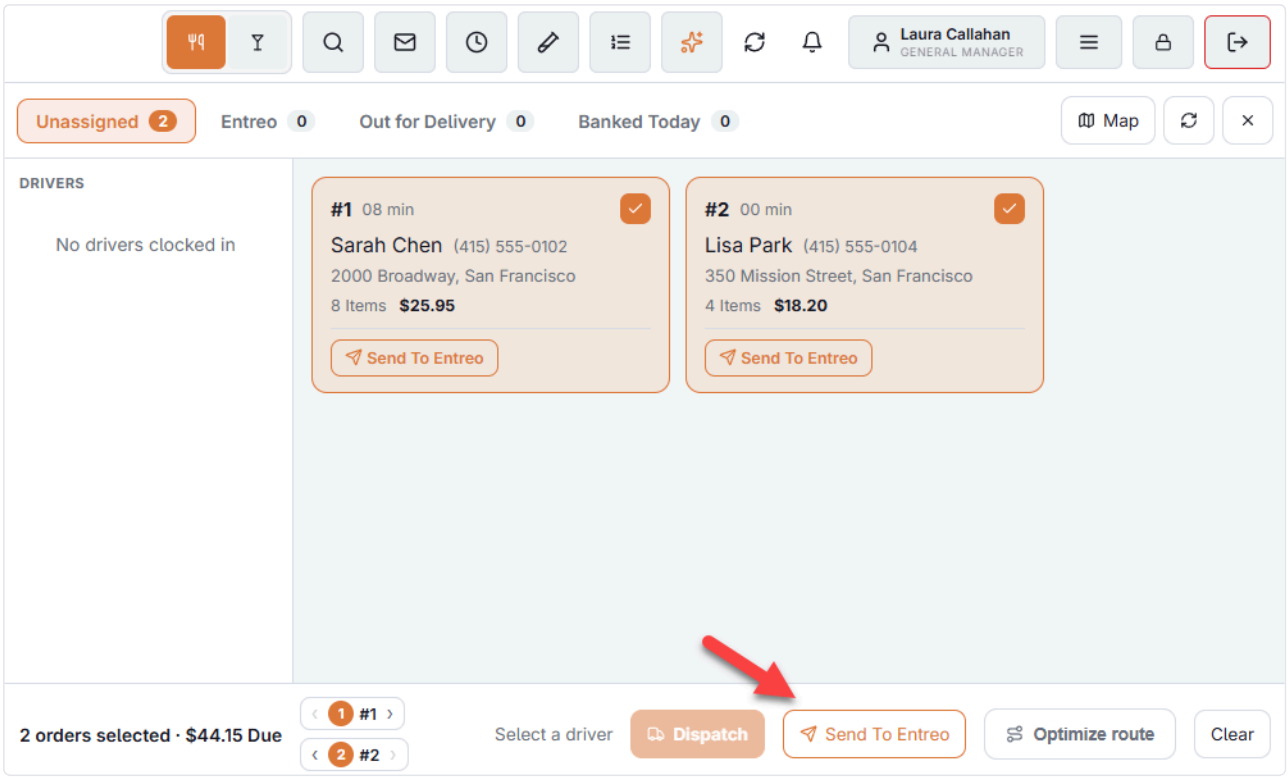
Sending orders to Entreo from the delivery board, following them on the Entreo tab, and what to do when one comes back.

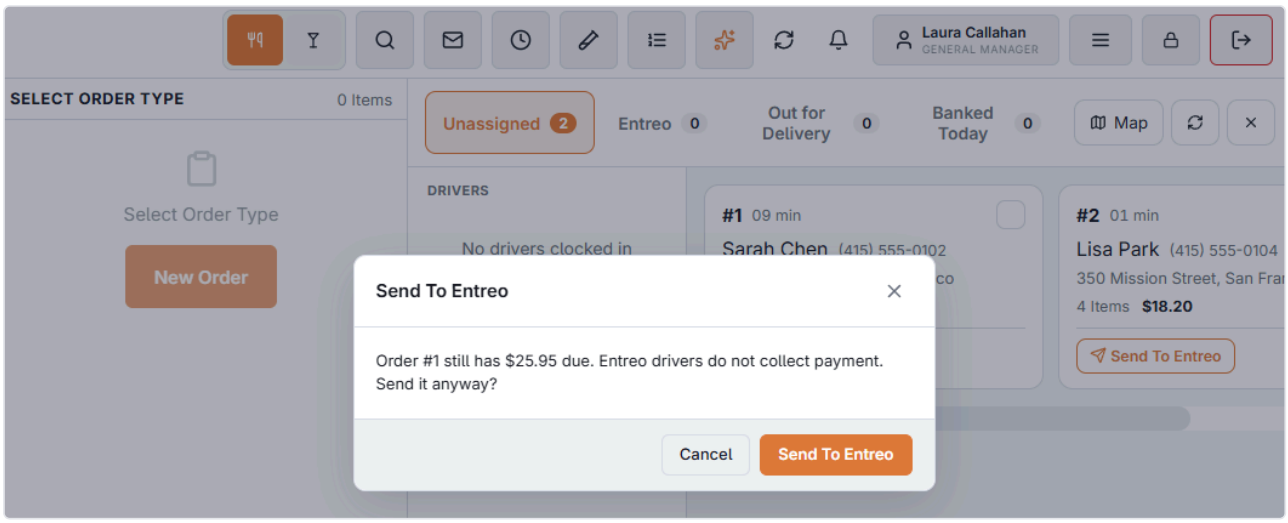
With Entreo switched on, the delivery board gains an **Entreo** tab between Unassigned and Out For Delivery, and every card on the Unassigned tab has a **Send To Entreo** button.

Sending an order



- **Send To Entreo** on a card sends that order. The card leaves Unassigned and appears on the Entreo tab.
- To send several at once, select them as for a run and press **Send To Entreo** in the dispatch bar. Each order is its own Entreo delivery; the stop order does not matter.
- An order with a balance due asks first, because Entreo drivers do not collect money. Send it if the customer will pay by pay link or has paid another way.
- With **Send Automatically** on, paid delivery orders reach the Entreo tab by themselves; the button is for the rest.





Following an order on the Entreo tab

The Entreo tab lists every order Entreo is working on, and the ones it delivered today at the bottom. Each card shows:

- **The status** in a pill: Sending To Entreo, Scheduled, Finding A Driver, Driver Assigned, Driver Coming, Driver At Store, Picked Up, Driver At Door, Delivered. See Entreo delivery statuses.
- **The driver** and, when Entreo passes it on, a phone number the store can call (it may be a forwarding number rather than the driver's own). While Entreo keeps the driver's contact details private, the card shows the name and the tracking link only, with no number to call.
- **Ready** with the time Entreo was given, while the order is scheduled; **Pickup** with the time the driver is expected at the store; **ETA** with the time expected at the customer. Once a driver is on the job, Entreo refreshes both times from the driver's position about once a minute, so the card keeps up on its own.
- **Ready Sent** once Entreo has been told the food is ready, and **Test** on a test order.
- **Photo** after delivery: opens the photo the driver took at the door. The link expires after a while.

The buttons on an Entreo card

Button	When it shows	What it does
Ready	Until Entreo has been told	Tells Entreo the food is ready, so it looks for a driver now. Used where the kitchen display does not do it.
Settle / Pay Link	The order still has a balance due	Take the payment, or text the customer a pay link. The driver will not collect.
Text Tracking Link	Entreo has given a tracking link	Texts the customer Entreo's live tracking page from the store's own number.
Refresh	While Entreo is working on it	Asks Entreo for the latest straight away. The board normally updates by itself.
Cancel	Up to Driver Assigned	Withdraws the order from Entreo; it returns to Unassigned. See Ready time, changes and cancelling.

Tapping the card itself opens the order, as on the other tabs.

When an order comes back

If Entreo cannot deliver an order — no driver accepted it, Entreo refused it, Entreo never received it, or it was cancelled — the order returns to the **Unassigned** tab with a red pill saying why, for example **Entreo: No Driver Found**. From there:

- **Send To Entreo Again** makes a new request to Entreo, or
- dispatch it to one of your own drivers as usual.

Out For Delivery and Banked Today are for your own drivers only: an Entreo order is never banked, because the driver carries no money for the store.

When a send does not go through

Two things can stop an order on its way to Entreo, and the board says so both times:

- **No delivery address.** An order without a street, a city and a ZIP code is never sent: Send To Entreo answers at once with a red message, and Send Automatically leaves the order on Unassigned. Add the address to the customer and send again.
- **Entreo refused it.** Sending only queues the order; Entreo's answer arrives a few seconds later. If it is a refusal, a red message names the order and the reason as soon as the answer is in, and the card returns to Unassigned with the red pill and **Send To Entreo Again**. The pill stays until the order leaves the board, even across a business-day change.

What each refusal code means is in Entreo troubleshooting.

Entreo delivery statuses

View online ↗

What each status on an Entreo card means, what the store does at each one, and the reasons an order comes back.

Every Entreo card carries one status. Entreo reports each change from the driver's phone; with a poor signal a step can occasionally be skipped (Driver Coming straight to Picked Up, for example). Delivered and Cancelled always arrive.

Status	What it means	What the store does
Sending To Entreo	The order is on its way to Entreo, or being retried because Entreo did not answer.	Nothing. If it stays for long, see Entreo troubleshooting.
Scheduled	Entreo has the order and will look for a driver 15 minutes before the ready time.	Press Ready, or bump it on the kitchen display, if the food is ready early.
Finding A Driver	Entreo is offering the delivery to drivers.	Have the bag ready.
Driver Assigned	A driver accepted. Name and phone are on the card.	The last moment the store can cancel.
Driver Coming	The driver is on the way to the store.	Pickup shows when they are expected.
Driver At Store	The driver has arrived.	Hand over the bag. The driver checks it against the items and the ticket number.
Picked Up	The driver has the food. The order is out for delivery.	Nothing. The customer can follow the driver on the tracking link.
Driver At Door	The driver is at the customer's address.	—
Delivered	Done. The fee and tip are final and the photo is on the card.	Settle the order if it is still open.

When the driver drops the order

A driver who accepted can give the order back. The card goes back to **Finding A Driver** and Entreo keeps looking; the store does nothing.

No driver yet

After about 10 minutes of searching the card warns that Entreo has not found a driver yet, and the manager gets an alert. If nobody accepts by about 15 minutes, Entreo cancels and the order comes back to Unassigned. This is the moment to decide: give it to your own driver, or send it again a little later.

Why an order comes back to Unassigned

Pill on the card	Why
Entreo: No Driver Found	No driver accepted in time.
Entreo: Cancelled By Store	Someone at the store pressed Cancel, or the order was voided.
Entreo: Cancelled	Entreo cancelled for another reason: its support team, the store's setup on Entreo's side being incomplete, or the store's address not being found. Hover or tap the pill for Entreo's message.
Entreo Refused The Order	Entreo would not take it, with a code: for example the store's unpaid delivery balance is over its limit, deliveries are not switched on for the store yet, or part of the address is missing.

Pill on the card	Why
Entreo Did Not Receive The Order	Entreo could not be reached for 30 minutes of retries.

What each refusal code means and what to do about it is in Entreo troubleshooting.

Pickup and ETA times

While a driver is on the job, Entreo sends the driver's position and fresh times about once a minute. **Pickup** is the time the driver is expected at the store and shows until the food is picked up; **ETA** is the time expected at the customer and shows until delivery. The card updates by itself; Refresh is only for a card that has gone quiet.

Ready time, changes and cancelling

Integrations › Entreo

View online ↗

How Entreo knows when the food is ready, which changes to an order still reach the driver, and when an Entreo delivery can be cancelled.

When Entreo starts looking for a driver

- **An order for now** is given a ready time of the order time plus the store's **Preparation Minutes**. Entreo looks for a driver 15 minutes before that time, so the driver arrives about when the bag is ready. With Preparation Minutes at 0, Entreo looks at once.
- **A scheduled order** is given its scheduled time. One scheduled more than a day ahead is sent to Entreo a day before.
- **The kitchen bump.** With Kitchen Bump Means Ready on, the first bump on the kitchen display tells Entreo the food is ready and the search starts right away, whatever the ready time said. See Bumping on the kitchen display.
- **The Ready button** on the Entreo card does the same by hand.

Changes after the order was sent

Every time the order is saved or paid, Entreo receives the whole order again. What Entreo does with it depends on how far the delivery has got:

Change	Reaches the driver	After that
Tip	Always, even after delivery. The weekly invoice uses the final tip.	—
Items, instructions, customer name or phone, ready time	Until Picked Up. The driver's app shows the latest version.	Ignored.
Delivery address	While Scheduled or Finding A Driver.	Refused: the card says the address is locked. Call the driver, or cancel and send again.

Cancelling

- **Cancel** on the Entreo card withdraws the delivery up to **Driver Assigned**. The card shows that the cancellation was sent; when Entreo confirms, the order returns to Unassigned marked **Entreo: Cancelled By Store**.
- **Voiding the order** cancels its Entreo delivery automatically.
- Once the driver is driving to the store, Entreo will not cancel: the card shows Entreo's answer and the delivery goes on. Call Entreo support.
- A cancelled order can be sent again with **Send To Entreo Again**. Entreo sees it as a new request.

> Cancelling the order's Entreo delivery does not cancel the order. It stays open at the register, back on the Unassigned tab.

Customer texts and tracking

Integrations › Entreo

View online ↗

When Entreo texts the customer, how the customer agrees to it, and how the store can share the tracking link itself.

Entreo can text the customer about their delivery, with a link to a live tracking page — but only when the customer agreed to it.

What Entreo sends

When the customer agreed and the number is a US number, Entreo texts when a driver is assigned, when the order is picked up and when it is delivered, and if a delivery fails after the customer was already texted. Each text names the store, includes the tracking link and supports STOP to opt out.

How the customer agrees

- **Online orders** — the checkout has a box under the delivery address: *A delivery partner may text me updates about my delivery…*. It is never ticked for the customer. See Checkout settings.
- **Phone and register orders** — follow the store's **Entreo May Text Phone Customers** switch on the Entreo page. Turn it on only if staff tell phone customers that a delivery partner may text them.

When Entreo does not text

If the customer did not agree, Entreo sends nothing. The store can still keep the customer informed:

- When the Entreo driver picks the order up, the store sends its usual "your order is on the way" text and email, with Entreo's tracking link, if those messages are switched on in Back Office › Store Setup › Delivery Screen. It is the same message an in-house dispatch sends, and it goes once.
- **Text Tracking Link** on the Entreo card texts the tracking link from the store's own number at any time.

> The store's own texts go through the store's messaging (SMS or WhatsApp) and are counted like its other messages. They need the delivery dispatch messages to be allowed for the store.

Entreo charges and the weekly invoice

Integrations › Entreo

View online ↗

What Entreo charges for each delivery, how the weekly invoice is paid, and the Deliveries tab that lists what to expect on it.

What Entreo charges

- For each **delivered** order: the store's agreed **delivery fee** for that trip, plus the **tip** the customer paid the store. The driver receives all of both.
- The charges add up on a **weekly invoice**, which Entreo charges to the store's card on file **every Friday**.
- Orders that were cancelled or never picked up cost nothing.

The customer pays the store for the order, the delivery charge and the tip exactly as before. The tip passes through: the store collects it from the customer and Entreo bills it back for the driver.

The store's own delivery charge is sent to Entreo as a separate amount on the order, so the driver and the customer see it on Entreo's side; Entreo displays it and never bills it. Entreo's invoice is only its delivery fee plus the tip.

The Deliveries tab

Back Office › Integrations › Entreo Delivery Drivers › **Deliveries** lists every request sent to Entreo, newest first: when it was requested, the order number (with the attempt number when it was sent more than once), the customer, the status, the driver, when it was delivered, and Entreo's **Fee**, **Tip**, **Total** and **Miles**.

Above the table, **Delivered Today** and **This Week** (from Monday) give the number of delivered orders and Entreo's charges for them — what to expect on the next invoice. The fee is known once a driver accepts and final on delivery.

> To reconcile an invoice, compare its total with This Week on the Friday it is charged. A difference is almost always a tip changed after delivery, which Entreo bills at its final amount.

The credit limit

Entreo stops taking new orders from a store whose unpaid delivery balance is over its limit. Orders then come back to Unassigned marked **Entreo Refused The Order** with the code CREDIT_LIMIT_EXCEEDED, until the balance is paid. Deliver them with your own drivers in the meantime.

Entreo activity: what was sent and received

Integrations › Entreo

View online ↗

The Activity tab: every order event sent to Entreo, every update Entreo sent back, retrying an order Entreo never got, and seeing the exact order as Entreo receives it.

Back Office › Integrations › Entreo Delivery Drivers › **Activity** shows the conversation between the store and Entreo. It is where to look when an order did not reach Entreo, or a status did not reach the board.

Sent To Entreo

Every message the store sent Entreo: a new order, an update, ready, or a cancellation. Each row shows when it was queued, the event, its status, how many attempts it took and Entreo's answer.

Status	Meaning
Pending	Waiting to go, or waiting for its next try. Retries come after 10 seconds, 30 seconds, 1, 2 and 5 minutes, then every 5 minutes for half an hour.
Sent	Entreo accepted it.
Not Sent	Entreo refused it, or could not be reached for half an hour. **Retry** sends it again.
Dropped	No longer needed: a newer update replaced it, or the request had already ended.

JSON on a row shows exactly what was sent, with **Copy JSON**.

Received From Entreo

Every delivery update Entreo sent: when it arrived, the event, its sequence number, what was done with it, and whether its signature was verified (✓). An update Entreo sends twice, or one that arrives after a newer one, is recorded and ignored, so the board always shows the latest.

Driver ETA updates are the exception: Entreo sends one about every minute per delivery while a driver is on the job, so they are not listed one by one. The line above the table counts them for the last 24 hours and shows when the last one arrived; a count that keeps rising while a driver is out means the connection is healthy. An ETA update that failed or could not be matched to an order is still listed.

> A row with ✗ in Verified was not signed with the right secret and was not applied. One by itself can be anything on the internet; a steady stream means the signing secret on the server does not match Entreo's — contact support.

Seeing an order as Entreo receives it

JSON on a row of the Deliveries tab builds the order exactly as Entreo would receive it now, without sending anything. Entreo asks for a few of these when a store is connected; copy them from here. It is also the quickest way to see what is missing from an order Entreo refused.

Entreo troubleshooting

Integrations › Entreo

View online ↗

Orders that are not sent, orders Entreo refuses, statuses that stop moving, and what each Entreo error code means.

A delivery order is not sent to Entreo

- **Entreo is not switched on** for this store — the top card of the Entreo page says so.
- **Send Automatically is off** — press Send To Entreo on the board.
- **The order still has a balance due** and Send Unpaid Orders is off — it goes as soon as it is paid, or press Send To Entreo.
- **The order is on hold** (a call-center hold, or a web order waiting for its payment) — it goes once it is released.
- **The order has no delivery address**, or its order type does not go to the delivery board.
- **It is already out with one of your drivers.**
- **Entreo already gave it back** (cancelled or refused) — a returned order is never re-sent by itself; press Send To Entreo Again.

Entreo refused the order

The order is back on Unassigned with **Entreo Refused The Order** and a code. Deliver it with your own driver, fix the cause, and send the next ones.

Code	Meaning	What to do
CREDIT_LIMIT_EXCEEDED	The store's unpaid delivery balance is over its limit.	Settle the balance with Entreo.
STORE_NOT_ACTIVE	The store is connected but Entreo has not switched deliveries on (for example, billing is not set up).	Contact Entreo.
UNKNOWN_STORE	Entreo does not recognise the store.	Give Entreo the AmigoPOS Store ID from the Entreo page and wait for their confirmation.
INVALID_PAYLOAD	Something Entreo needs is missing, usually part of the address or the customer's phone.	Open the order's JSON on the Deliveries tab to see what is blank, correct the customer's address, and send again. See address verification.
NO_ADDRESS	The order has no street, city or ZIP code. Send To Entreo says so at once; if the address was removed after the order was queued, the order comes back with this code. Nothing was sent to Entreo.	Add the address to the customer and send again.
READY_TIME_INVALID	The ready time was more than a day ahead.	Normally prevented; check the order's scheduled time.
INVALID_SIGNATURE / STALE_TIMESTAMP	The server's secret or clock does not match Entreo.	Contact support.

Entreo Did Not Receive The Order

Entreo could not be reached for half an hour. The manager gets an alert. Deliver it yourself, or press Send To Entreo Again once Entreo is back. On the Activity tab, Retry resends the original.

A status stops moving

Entreo's updates normally arrive within seconds. If a card has not changed for a while, press **Refresh** on it; the store also asks Entreo by itself about any delivery that has gone quiet for 12 minutes. If Refresh brings nothing new, call the driver from the number on the card.

Notes on a card

- **ADDRESS_LOCKED** — the address was changed after a driver accepted. The driver still has the old address: call them, or cancel (if still possible) and send again.
- **CANNOT_CANCEL** — the driver was already on the way. The delivery goes on; call Entreo support if it must be stopped.

Manager alerts

Two alerts follow Entreo orders that need someone: delivery orders Entreo did not take, and Entreo deliveries without a driver. Both clear as soon as the order leaves with anyone. See Sales and service alerts.

El Salvador e-Invoicing

Electronic invoicing overview

Integrations › El Salvador e-Invoicing

View online ↗

What electronic invoicing does, which countries it covers, and where each part lives in the Back Office and on the POS.

Electronic invoicing turns a settled sale into a legally valid electronic document, signed by the store and sealed by the tax authority. The country supported is El Salvador (Ministerio de Hacienda, *DTE*). Its pages are in the **El Salvador e-Invoicing** group at the foot of **Back Office › Integrations**. Nothing changes in how orders are rung up or paid: the document is produced after settlement, either automatically or when the cashier asks for it.

The pages

- **Documents** — every document the store has issued, what is waiting to be sent, and exports for the accountant and for long-term retention. See Documents, exports and retention.
- **Setup** — how the store identifies itself to the tax authority, and the credentials used to sign and transmit. See Setting up electronic invoicing.
- **Test Lab** — step-by-step checks against the tax authority, with the full request and response kept for every sample document. See Test Lab.
- **Receivers** — customers' tax profiles (tax ID, registration number, address), needed for business invoices. See Receivers.
- **Rules & Log** — which document a sale, void or refund produces, and a log of every decision. See Rules and log.

Document types (El Salvador)

Type	When
01 · Factura	Sales to consumers. No customer tax ID required. Prices include VAT.
03 · Comprobante de crédito fiscal	Sales to registered businesses that need to reclaim VAT. Requires a receiver with NIT, NRC, activity, address and email.
05 · Nota de crédito	Credit against a sealed 03 (refunds). A Factura cannot receive a credit note; it is invalidated instead.
Invalidación	Cancels a sealed document (voids, or full refund of a Factura).
Contingencia	Declares documents issued while the authority could not be reached.

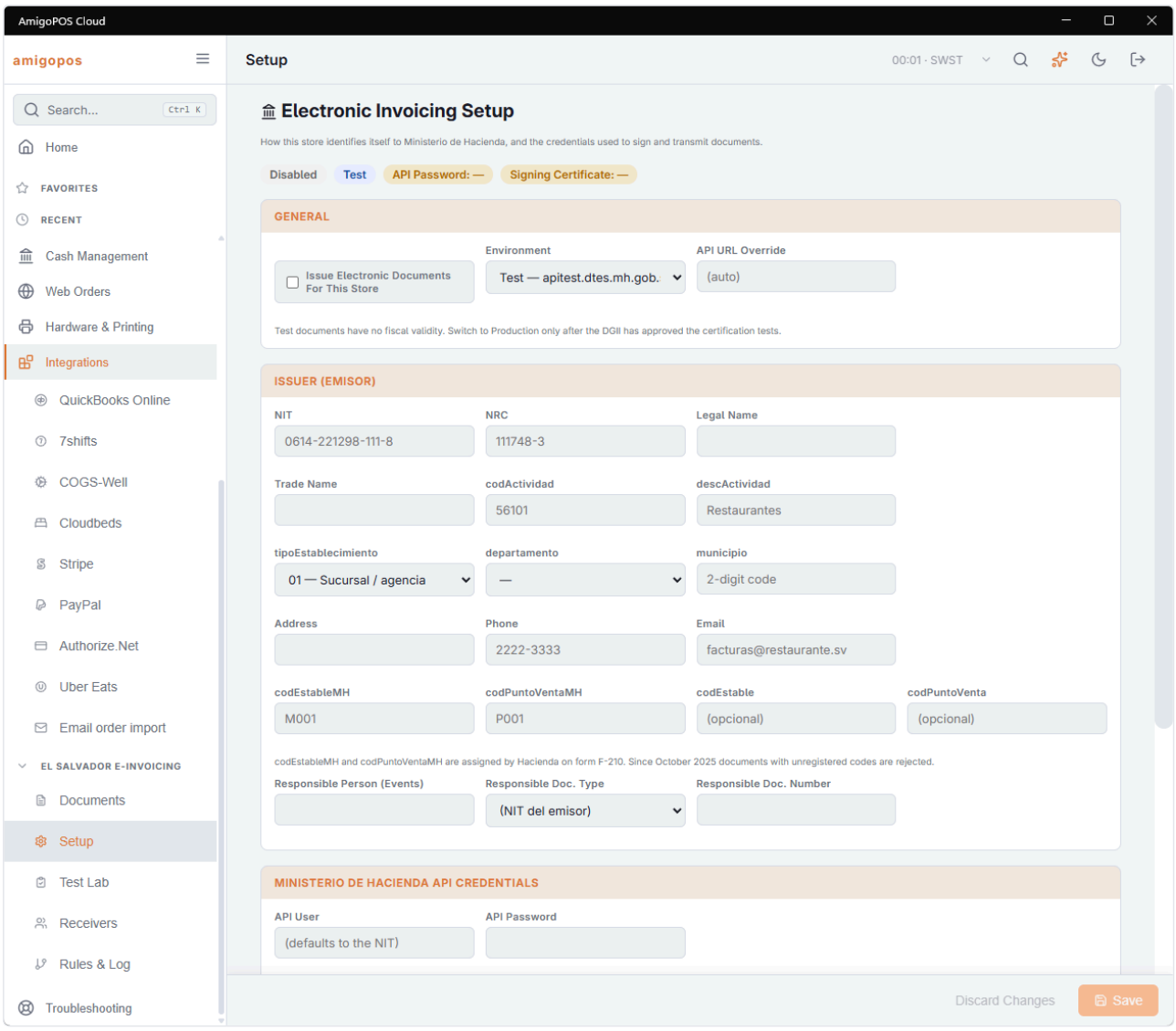
> The store must be registered with the tax authority and hold a signing certificate before anything can be issued. Test documents have no fiscal validity; switch the environment to Production only after certification.

Setting up electronic invoicing

View online ↗

The Setup page: environment, issuer details, establishment codes, the responsible person, API credentials and the signing certificate.

Back Office › Integrations › El Salvador e-Invoicing › Setup records how the store identifies itself to Ministerio de Hacienda and the credentials used to sign and transmit documents. Everything on the page comes from the store's registration with Hacienda. Changes are kept with **Save** at the top of the page.



Status strip

The pills at the top show at a glance whether the store is **Enabled** or **Disabled**, whether it is on **Test** or **Production**, whether an **API Password** and a **Signing Certificate** are stored, and, once the store has signed in to Hacienda, **Token Valid Until**.

General

- **Issue Electronic Documents For This Store** — the master switch. Turn it on once the Test Lab steps pass.
- **Environment** — **Test** (apitest.dtes.mh.gob.sv) or **Production** (api.dtes.mh.gob.sv). Test documents have no fiscal validity. Switch to Production only after Hacienda has approved the certification tests.
- **API URL Override** — leave it empty; the address follows the environment. Fill it in only if Hacienda publishes a new address.

Issuer (Emisor)

- **NIT**, **NRC**, **Legal Name** and **Trade Name**.
- The economic activity code and its description (*codActividad*, *descActividad*), and the establishment type (*tipoEstablecimiento*): branch, head office, warehouse, yard or other.
- The department and municipality, chosen from Hacienda's catalogues; when the municipality catalogue has not been imported, type its 2-digit code. Then **Address**, **Phone** and **Email**.
- *codEstableMH* and *codPuntoVentaMH* — the establishment and point-of-sale codes Hacienda assigns on form F-210. Documents with unregistered codes are rejected. *codEstable* and *codPuntoVenta* are optional.

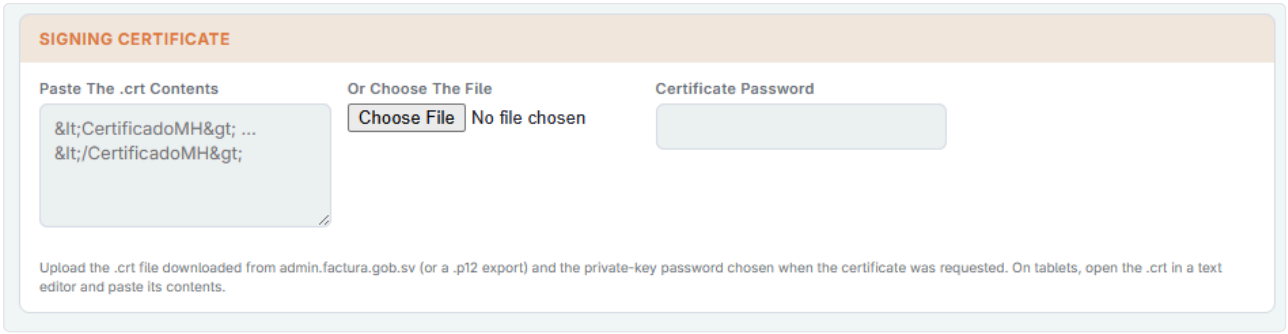
- **Responsible Person (Events)**, **Responsible Doc. Type** (NIT or DUI) and **Responsible Doc. Number** — the person named on invalidation and contingency events. Leave them empty to use the legal name and the store's NIT.

Ministerio De Hacienda API Credentials

- **API User** — the NIT without dashes. Left empty, the NIT is used.
- **API Password** — the "Clave de API" defined on admin.factura.gob.sv. It is not the portal password and not the certificate password.

Signing Certificate

- Upload the `.crt` file downloaded from admin.factura.gob.sv (or a `.p12` export) with **Or Choose The File**, or open the file in a text editor and paste its contents into **Paste The .crt Contents** — the way to do it on a tablet.
- **Certificate Password** — the private-key password chosen when the certificate was requested.
- Once saved, the page shows the **Stored Certificate** with its file name, the NIT it belongs to and when it **Expires**.



> Passwords and the certificate are stored on the server and never shown again. A password field left empty keeps the stored value.

After saving, any problems found with the data are listed at the foot of the page. Then open the **Test Lab** and run the steps. See Test Lab.

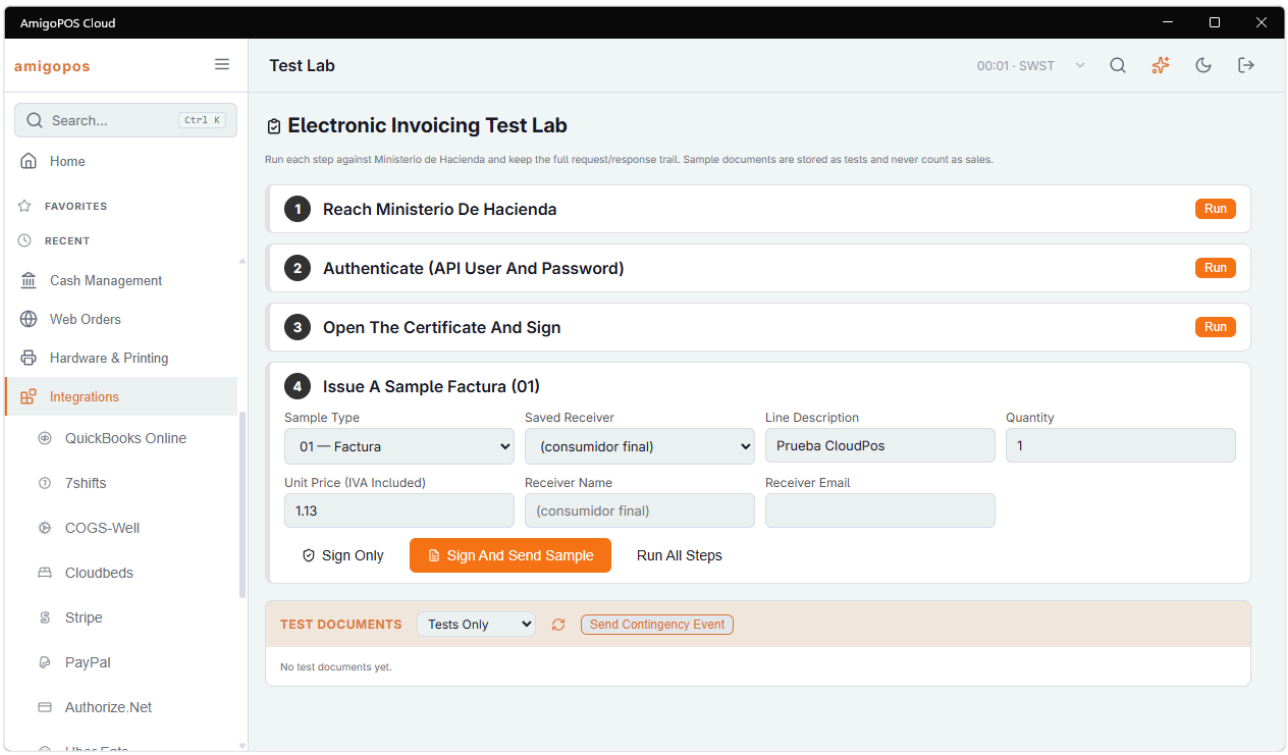
Test Lab

Integrations › El Salvador e-Invoicing

View online ↗

Prove connectivity, credentials, the certificate and a sample document against the test environment, and keep the full trail of every attempt.

Back Office › Integrations › El Salvador e-Invoicing › Test Lab runs the checks Ministerio de Hacienda's certification expects, one step at a time. Each step keeps exactly what was sent and what came back, so a problem can be shown to support without repeating it. Sample documents are stored as tests and never count as sales.



The steps

1. **Reach Ministerio De Hacienda** — network and firewall.
2. **Authenticate (API User And Password)** — the credentials on the Setup page.
3. **Open The Certificate And Sign** — the certificate file and its password.
4. **Issue A Sample Document** — a one-line document built from the form below the step.

Steps 1 to 3 each have a **Run** button and show their verdict beside the name. **Run All Steps** runs them all in order.

The sample document

- **Sample Type** — *01 — Factura* for a consumer document, or *03 — Crédito fiscal* for a business one.
- **Saved Receiver** — a receiver from the Receivers page; those marked ✓CCF have everything a 03 needs. Leave it on *consumidor final* for a Factura.
- **Line Description**, **Quantity** and **Unit Price (IVA Included)** for the one line.
- **Receiver Name** and **Receiver Email** — optional, for a Factura.

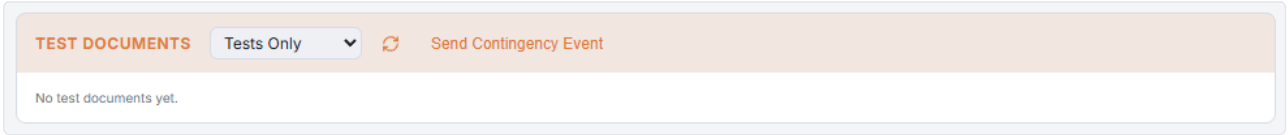
Sign Only builds and signs the document without sending it. **Sign And Send Sample** sends it to Hacienda; the result shows the control number and Hacienda's seal, or the rejection reason.

Reading a result

Under the steps, the last result shows the step, a summary and how long it took, any hints, and the **Request** and **Response**, each with **Copy**. For a document, **View Document Trail** opens its full record and **Query Status At MH** asks Hacienda for its current status.

Test Documents

Every sample is listed with its date, type, control number, status, total and Hacienda's seal or message. The list shows **Tests Only** or **All Documents**. From a row:



- **View** — the document's record: generation code, seal, Hacienda's answer, every event with its time, the signed JSON, the response and the signed file, each with **Copy**.

- **Preview** — the printable document, with **Download PDF**.
- **Retransmit** — for a document that is signed but not yet sealed.
- **Invalidate** — choose the **Invalidation Type** and enter the **Reason For Invalidation**. Type 1 (an error in the document) needs a sealed replacement document chosen from the list; type 2 (the operation is rescinded) does not.
- **Credit Note (05)** — against a sealed 03.

Send Contingency Event above the list opens the contingency form, to practise declaring documents issued offline. See Working offline (contingency).

> Samples are stored as tests and never count as sales, even in the Production environment.

Receivers

Integrations › El Salvador e-Invoicing

View online ↗

Customer tax profiles for business invoices, linking them to POS customers, and importing the authority's catalogues.

Back Office › Integrations › El Salvador e-Invoicing › Receivers keeps customers' tax profiles. A consumer document (01) needs none; a business invoice (03) needs a receiver with NIT, NRC, activity, address and email.

The list

The left side lists the receivers with their **Name**, **Document Number**, **NRC** and a check mark under **CCF** when they can take a 03. Type in **Search** to narrow it; click a row to open it on the right.

Creating or editing a receiver

1. Press **+ New Receiver**, or click a receiver in the list.
2. Choose the **Document Type** (NIT, DUI and the other types in Hacienda's catalogue) and enter the **Document Number** and the **NRC**.
3. Enter the **Legal Name** and, if different, the **Trade Name**.
4. Enter the economic activity code (*codActividad*); the description fills in from the activity catalogue when it has been imported.
5. Choose the department and municipality, then enter the **Address**, **Phone** and **Email**.
6. Press **Save**. **CCF Ready** appears beside the name when everything a business invoice needs is present.

Cancel clears the form for a new receiver. **Delete** removes the open receiver after you confirm; documents already issued keep their own copy of the data.

Linking a POS customer

Under **Linked POS Customer**, search for a customer by name and pick them from the results, then save. From then on, an order for that customer is matched to this receiver, so the rules can issue a business invoice without the cashier doing anything. The ✕ beside a linked customer removes the link.

Import Catalogue

Hacienda publishes the code lists the documents use. Choose the catalogue — CAT-019 economic activities, CAT-013 municipalities, CAT-012 departments, CAT-014 units of measure or CAT-017 payment methods — paste the list as `code;description` lines (`code;description;department` for municipalities) and press **Import Catalogue**. The page shows how many rows were imported.

> Importing replaces the whole catalogue with the rows pasted.

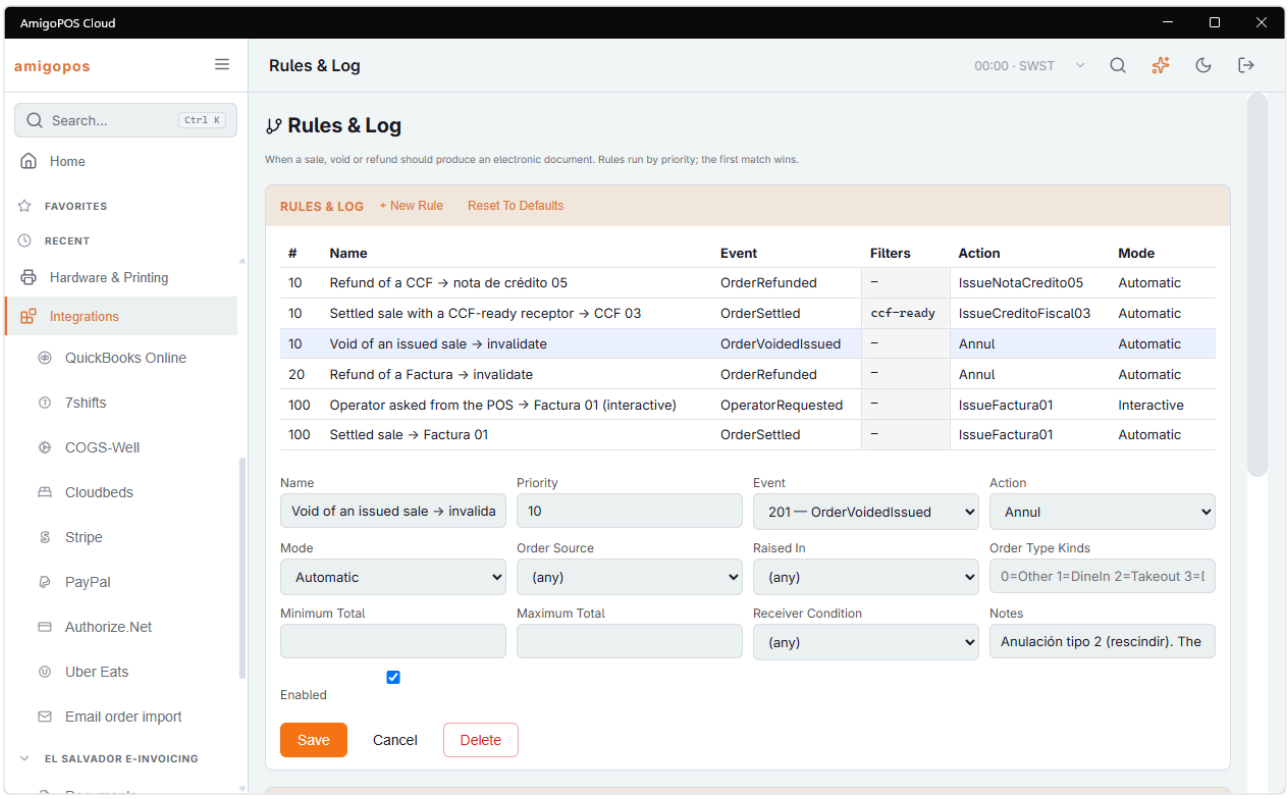
Rules and log

Integrations › El Salvador e-Invoicing

View online ↗

Which document a sale, void or refund produces, the engine policy, the sweeper, and the log of every decision.

Back Office › Integrations › El Salvador e-Invoicing › Rules & Log decides when a sale, void or refund produces an electronic document, and keeps a log of every decision. Rules are checked in priority order; the first one whose filters match wins.



Rules

The table lists each rule with its priority (**#**), **Name**, **Event**, **Filters**, **Action** and **Mode**. Rules that are switched off are dimmed. Click a rule to edit it, or press **+ New Rule**.

- **Priority** — lower numbers are checked first.
- **Event** — what happened to the order, such as settled.
- **Action** — the document to issue (Factura 01, Crédito fiscal 03, Nota de crédito 05 or Nota de débito 06), an invalidation, a contingency, or nothing.
- **Mode** — *Automatic* issues the document without asking; *Interactive* lets the cashier choose on the POS.
- Filters narrow a rule: **Order Source** (in store, call center, web store, QR table, Uber Eats, email import and others), **Raised In** (store, call center or server), **Order Type Kinds**, **Minimum Total** and **Maximum Total**, and **Receiver Condition**: **Only Without Receiver**, **Only With Receiver** or **Only With CCF-Ready Receiver**.
- **Notes** and **Enabled**.

Press **Save** to keep the rule, **Cancel** to close it, or **Delete** to remove it. **Reset To Defaults** deletes every rule and puts back the default set, after you confirm.

Engine Policy

- **Call Center Mode** — whether orders raised in the call center produce documents: off, automatically, or interactively.
- **Auto-Declare Contingency After (Min, 0 = Never)** — how many minutes Hacienda can be unreachable before the documents issued offline are declared by themselves, with the **Contingency Type** chosen beside it. See Working offline (contingency).
- **Max Transmission Attempts** — after this many tries a document is parked for a person to look at, on the Documents page.

Press **Save** under the policy to keep it. **Sweep Now** runs the background transmitter straight away; its status shows beside the button.

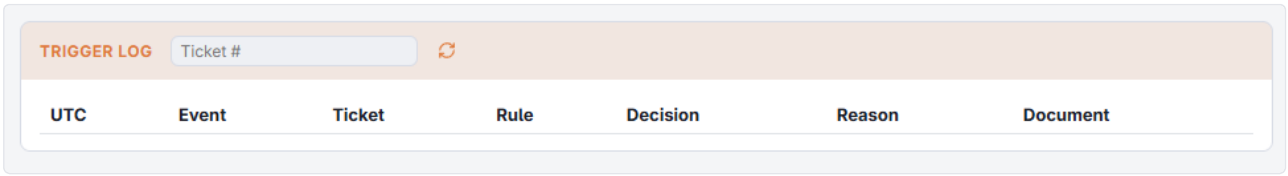
Publish An Event

Fires an event for an existing ticket by hand, so you can watch the engine's decision. Enter the **Ticket Number** — the newest ticket with that number is used —, choose the **Event**, add **Notes** and press **Publish**; the decision and any document issued are shown underneath.

> Documents sealed from here are real, not tests.

Trigger Log

One line per event: when it happened, the event with its order source, the ticket, the rule that matched, the **Decision**, the **Reason** and the resulting **Document**. Enter a ticket number to see only that ticket, and press the refresh button.



Electronic documents on the POS

Integrations › El Salvador e-Invoicing

View online ↗

What the cashier sees after settlement, how to choose between a consumer and a business document, and what prints on the receipt.

When the store issues electronic documents, settling an order shows a short overlay while the document is signed and sent. It cannot be dismissed until the authority answers.

Outcomes

- **Sealed** — a check mark with the control number and seal; the overlay continues on its own after a moment.
- **Issued in contingency** — the authority could not be reached. The document is valid and will be transmitted automatically when the connection returns.
- **Rejected** — the authority's reason is shown. Continue with the sale and let a manager review the document in the Back Office.

Choosing the document

When a rule is *interactive*, or when the cashier opens **Documento fiscal** from the More menu on a settled order, the overlay asks which document the customer needs. **Factura** needs nothing else. **Crédito fiscal** needs a receiver: search an existing one, or enter tax ID, registration number, name, activity, address and email on the spot — the new receiver is saved and linked to the customer for next time.

The receipt

The customer receipt prints the document type, control number, generation code, the seal when present, a QR that opens the authority's public verification page, and the legal legend. A document issued in contingency prints without the seal and with the contingency legend, as required.

> The receipt template controls the layout. The tokens are in the template editor under the Fiscal group; the default template already includes them.

Voids, refunds and credit notes

Integrations › El Salvador e-Invoicing

View online ↗

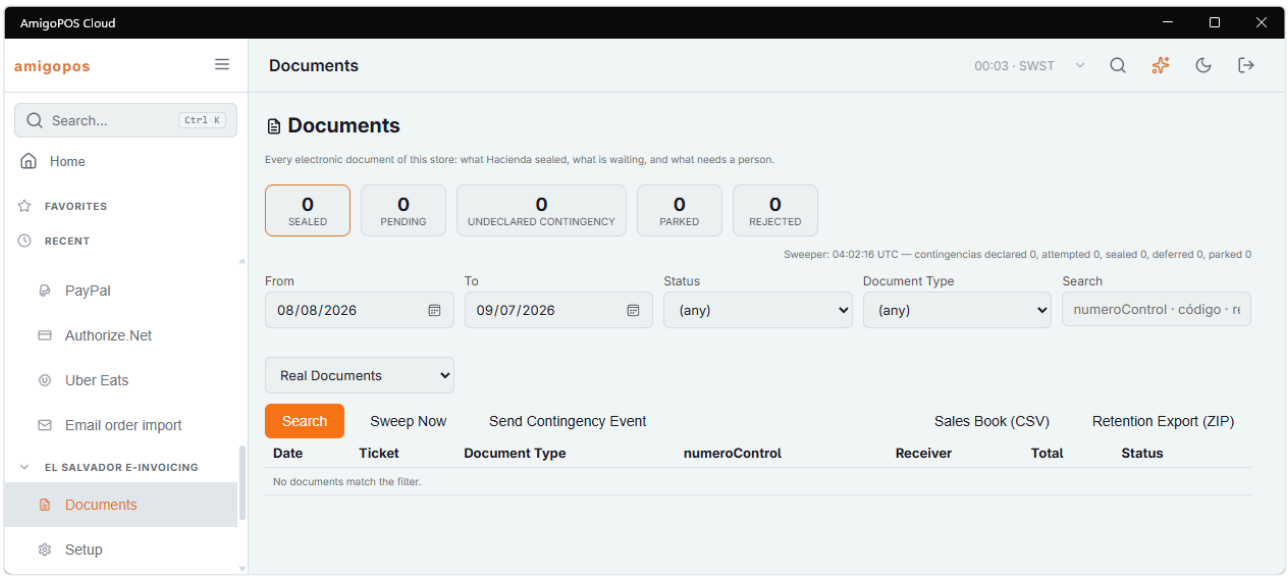
How a void invalidates a sealed document, how refunds produce credit notes, and why a Factura is invalidated rather than credited.

Voiding a settled order

Voiding an order that has a sealed document sends an **invalidation** event to the authority; the void reason becomes the stated motive. The original document is then marked *Annulled* and stays on file. Voiding an order that never produced a document does nothing fiscal.

Refunds

- Refunding an order whose document is a **03 (crédito fiscal)** issues a **nota de crédito 05**. A refund by line items credits only those lines; a refund by amount credits the whole document.
- Refunding an order whose document is a **01 (factura)** invalidates it. The authority does not accept credit notes against consumer documents.



From the Back Office

A manager can invalidate any sealed document or issue a credit note against a 03 from **Documents** or the **Test Lab**. Invalidation type 1 (error in the document) requires a sealed replacement to reference; type 2 (operation rescinded) does not.

> The authority enforces time limits on invalidation. A request outside the window is rejected with the reason shown on the row.

Working offline (contingency)

Integrations › El Salvador e-Invoicing

View online ↗

What happens when the tax authority cannot be reached, how documents are declared and transmitted afterwards, and what needs a person.

Sales continue when the authority is unreachable. Each document is signed and printed with the contingency legend, and stored as *Contingency*.

Automatic recovery

1. A background **sweeper** runs every minute.
2. After the number of minutes set in *Auto-declare contingency after*, it sends a **contingency event** covering the offline documents.
3. Once the event is accepted, each document is rebuilt as a contingency document, re-signed and transmitted. Failed attempts are retried with increasing delays.

Nothing needs to be done unless the **Documents** page shows rows under *Undeclared contingency* or *Parked*.

Declaring by hand

If auto-declaration is off, or to declare sooner, open **Documents**, press **Send Contingency Event**, choose the cause and describe it. The covered documents are then queued for transmission; **Sweep now** sends them immediately.

> Contingency documents must be transmitted within the authority's deadline after the outage ends (72 hours in El Salvador). Do not leave undeclared rows over a weekend.

Documents, exports and retention

Integrations › El Salvador e-Invoicing

View online ↗

The document queue, rows that need attention, downloading a document, the sales-book CSV and the retention export.

Back Office › Integrations › El Salvador e-Invoicing › Documents lists every electronic document of the store: what Hacienda sealed, what is waiting, and what needs a person. It is also where the exports for the accountant and for retention are made.

The summary strip

The tiles count **Sealed**, **Pending**, **Undeclared Contingency**, **Parked** and **Rejected** documents, and show the status of the background transmitter (**Sweeper**). Pressing **Undeclared Contingency**, **Parked** or **Rejected** switches the list to every document that needs a person, whatever its date. Pressing **Sealed** goes back to the normal list, with the **From** and **To** dates you had before.

Rows that need attention

- **Undeclared Contingency** — documents issued while Hacienda could not be reached, not yet covered by a contingency event. Press **Send Contingency Event**. See Working offline (contingency).
- **Parked** — the transmitter gave up after the number of attempts set on Rules & Log. Read the error on the row, fix the cause (usually credentials or the certificate), then press **Requeue**.
- **Rejected** — Hacienda refused the document; the reason is on the row. See Electronic documents on the POS for issuing the sale's document again.

Finding documents

Set **From** and **To** (the last 30 days to start with), and if needed the **Status**, the **Document Type** and a **Search** for a control number, generation code, receiver or ticket number. The last list chooses **Real Documents**, **Tests Only** or **All Documents**. Press **Search**.

Each row shows the date and time, the ticket, the type (marked **(Test)** for a test document), the control number, the **Receiver**, the **Total** and the **Status**, with the last error under it when there is one.

Row actions

- **View** — the document's trail: every step with its time and duration, Hacienda's observations, the payload sent and Hacienda's answer.
- **Preview** — the printable document, with **Download PDF**.
- **Retransmit** — sends again a document that is pending or signed, or a contingency document whose event has been sent.
- **Requeue** — puts a parked document back in the transmitter's queue.
- **Invalidate** — choose the **Invalidation Type** and enter the **Reason For Invalidation**. Type 1 (an error in the document) needs a sealed replacement chosen from the list; type 2 (the operation is rescinded) does not. See Voids, refunds and credit notes.
- **Credit Note (05)** — issues a credit note against a sealed 03.

Sweep Now runs the background transmitter straight away.

Exports

Set **From** and **To**, then:

- **Sales Book (CSV)** — the sales book file for the accountant, one row per document.
- **Retention Export (ZIP)** — every document of the range with what was sent, the signed file, Hacienda's answer and the trail, plus an index. Keep it outside the POS for the legal retention period. One export covers at most one year.

The message under the buttons names the file and the number of documents in it.

> With **Real Documents** chosen, test documents are left out of both exports.

CHAPTER 24

Subscription

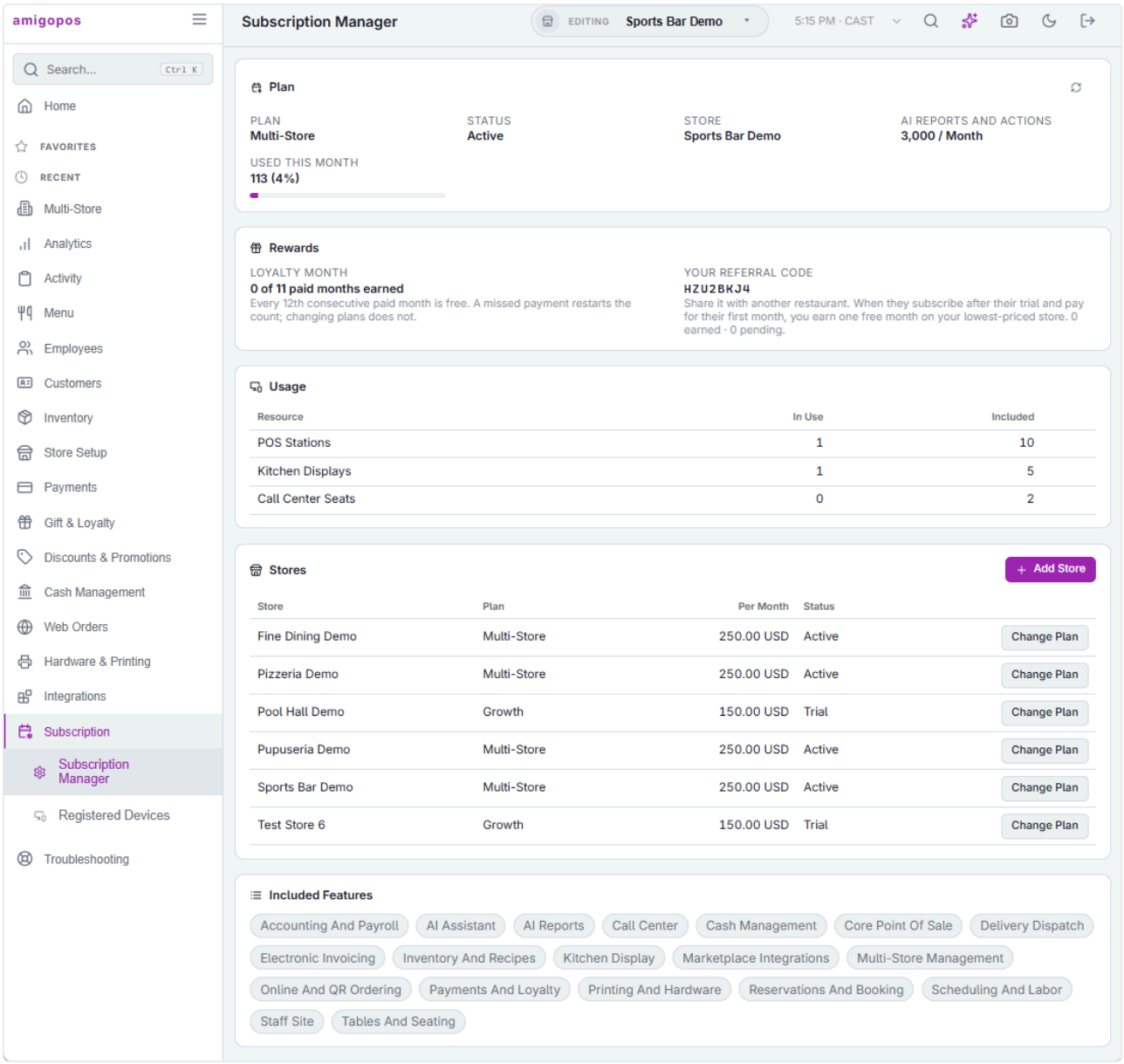
Subscription Manager: plan, usage and stores

Subscription

View online ↗

See the store's plan, AI allowance and device usage, add a store or change a store's plan.

Back Office › Subscription › Subscription Manager shows the store's plan, what it includes and how much of it is in use, and is where a store is added to the account or moved to another plan. It shows the store Back Office is pointed at in the store picker.



Who sees it

- The page is in the menu only for jobs with **Manage Subscription** (Jobs & Permissions, **Admin** group).
- Adding a store, changing a plan and the pending requests need **Change Subscription** as well. Without it the Stores card says *Adding A Store Changes Your Bill And Needs The Change Subscription Permission.*

Registered Devices, the other page in this section, lists every device on the account; see Registered Devices: every device on your account.

Notices at the top

- *No subscription on file* — the store predates subscription billing and keeps running on its existing limits. Nothing needs to change.
- *Subscription information is unavailable right now.* — the page could not reach the server. Try **Refresh** again later.
- *Your subscription is managed by …* — a reseller manages the account, with their email and phone. Plan changes and new stores go through them, so the Stores card is not shown.
- Trial — how many days are left and which plan you have full access to, or that the trial has ended and the chosen plan is in effect.
- Over the plan — the store uses more devices than its plan includes. Everything keeps running; new devices cannot be activated until the count is reduced or the plan is changed.

Plan

- **Plan**, **Status** (**Trial**, **Active**, **Past Due**, **Suspended** or **Closed**) and **Store**.
- **AI Reports And Actions** — the monthly allowance, and **Used This Month** with a bar that turns amber at 80% and red at 100%. Past the allowance it shows how many over, and the price of each extra one with its currency code (for example *0.05 USD*) unless a reseller bills the account. See AI usage, limits and your monthly allowance.

The refresh button in the card header recalculates the store's usage and reloads the page.

Rewards

Shown when there is something to show:

- **Loyalty Month** — paid months counted towards the next free one. Every 12th consecutive paid month is free; a missed payment restarts the count, changing plans does not.
- **Credit Available** — free months earned, applied to the base plan on the next statement.
- **Your Referral Code** — share it with another restaurant. When they subscribe after their trial and pay their first month, you earn a free month on your lowest-priced store. The line below counts earned and pending referrals.

Usage

One row each for **POS Stations**, **Kitchen Displays** and **Call Center Seats**: **In Use** against **Included**. A dash under Included means no limit. A row over its limit is marked with a warning sign. Devices are counted from Registered Devices: every device on your account.

Stores

The account's stores, with each one's plan, price **Per Month** and status (the same status names as above). Training stores are not listed. When a store can't be added, a line under the table says why, for example *No active subscription on this store.* or *No account email on file*.

Adding a store

1. Select **Add Store**.
2. Pick the **Plan**. The line below gives the monthly price, billed from the day the store is created, or free until your trial ends.
3. Type the **Store Name** (required), and the **Address** and **Phone** if you have them.
4. To start from one of your stores, choose it in **Copy From Store** and pick **What To Copy**; otherwise leave **Start With An Empty Menu**. What each choice copies is in What Multi-Store adds.
5. Select **Send Confirmation**. A link goes to the account's email address, shown on the form. The store is created when the link is opened; the link works for 48 hours.

Changing a store's plan

1. Select **Change Plan** on the store's row and pick the plan in **New Plan For**.
2. Read the line under it. An upgrade takes effect at once and this month is prorated by days. A downgrade takes effect on the 1st of next month and can be withdrawn until then; features above the new plan turn off that day, and your data stays. On a trial, the choice is the plan the store moves to when the trial ends.
3. On a smaller plan, **What Changes On The … Plan** lists the devices over the new allowance with their extra monthly cost, devices of a kind the plan does not include, and the features that turn off. Select **Deactivate Devices First** to go to Registered Devices, or **Downgrade Anyway** to send the confirmation.

4. Otherwise select **Send Confirmation**. The change is made when the emailed link is opened.

A scheduled change shows under the plan as *Changes To … On …*, with **Keep Current Plan** to withdraw it.

Pending requests

Requests not yet completed are listed under **Pending Requests** with *Awaiting Confirmation*, *Link Expired* or *Setup Failed*, the time and the email address. **Resend** sends the link again; **Cancel** withdraws a request still awaiting confirmation.

Included Features

The last card lists the features the store's plan includes. Back Office hides the pages of features the plan does not include.

CHAPTER 25

Offline Mode

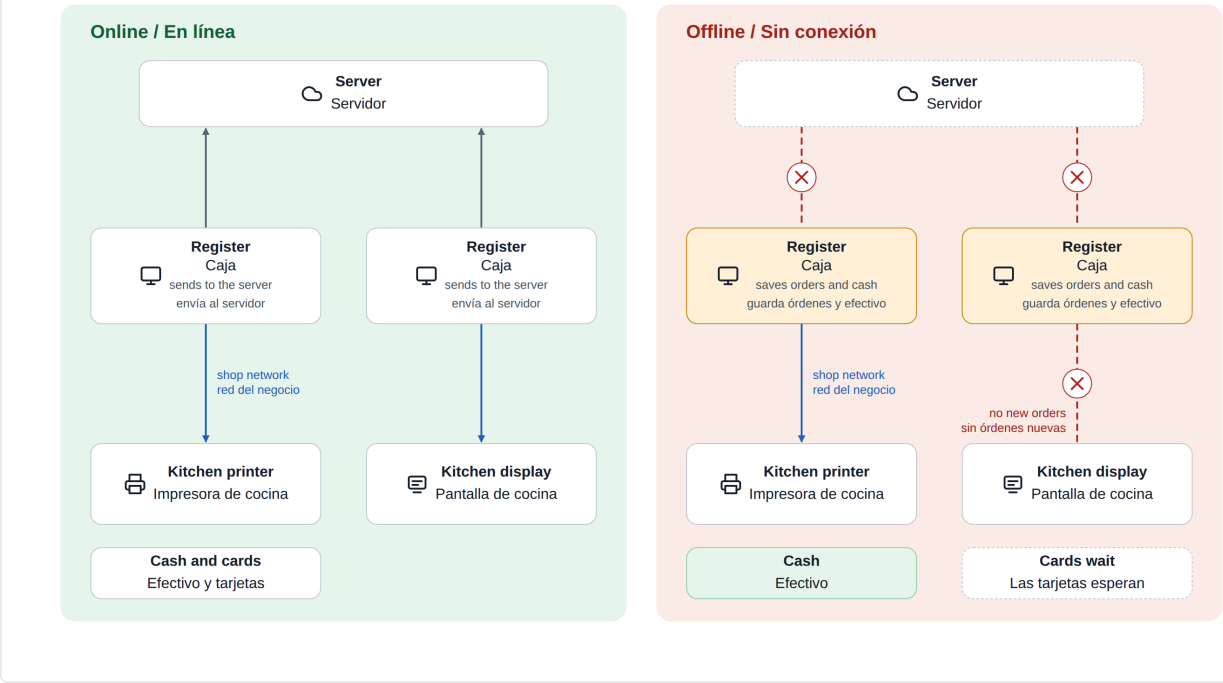
How offline mode works

Offline Mode

View online ↗

The short version, with diagrams: what happens when the connection drops, where your work is kept, and what happens when the connection returns.

When a register cannot reach the server, it keeps working from what is already on the device. Orders, cash payments and clock punches are saved on the station that took them, and sent on their own when the connection returns. Nobody switches anything on or off.

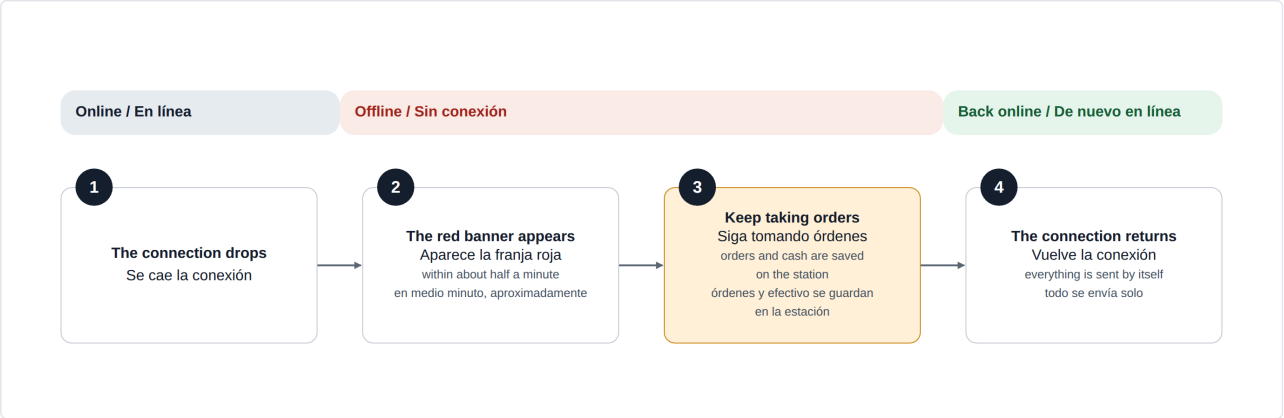


Three things to remember

1. **Keep taking orders and cash.** Every order is saved on the station that took it.
2. **The kitchen gets paper.** Kitchen tickets print on the kitchen's printers as long as the shop's own network is working. Kitchen display screens do not receive new orders until the connection returns.
3. **Cards wait.** Card, gift card, loyalty and house account payments need the server. Cash does not.

What happens, in order

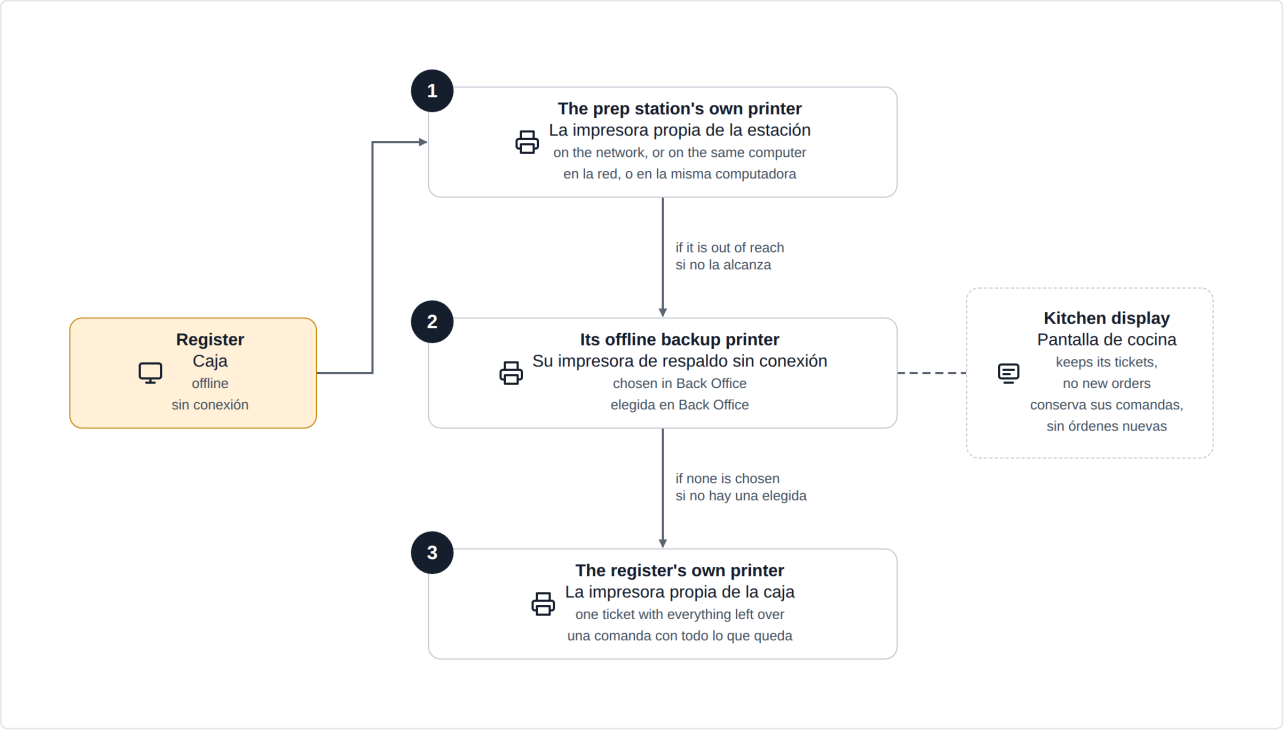
1. **The connection drops.** Within about half a minute a red **OFFLINE MODE** banner appears on every station that lost the server.
2. **You keep working.** New orders get a temporary number that begins with 9. Cash is taken, the drawer opens, receipts and kitchen tickets print.
3. **The connection returns.** The banner turns green for a moment. Clock punches, orders and cash are sent by themselves, and each order receives its real number.
4. **Anything that could not be sent** stays on the station under **Unsynced Orders** until a manager deals with it. This is rare.



Where a kitchen ticket prints

During an outage each register sends kitchen tickets itself. For every prep station on the order it uses the first of these it can reach:

1. The prep station's **own printer**, when that printer is on the network or installed on the same computer as the register.
2. The prep station's **offline backup printer**, chosen in Back Office.
3. The register's **own offline printer**, where everything left over prints as one ticket.



See Kitchen tickets during an outage for the details and the setup.

Where to go next

- Working offline — using the register during an outage.
- Clocking in and out while offline.
- Preparing a station for offline mode — for managers, before an outage.
- Kitchen tickets during an outage.
- After an outage — for managers, when the connection is back.

Working offline

Offline Mode

View online ↗

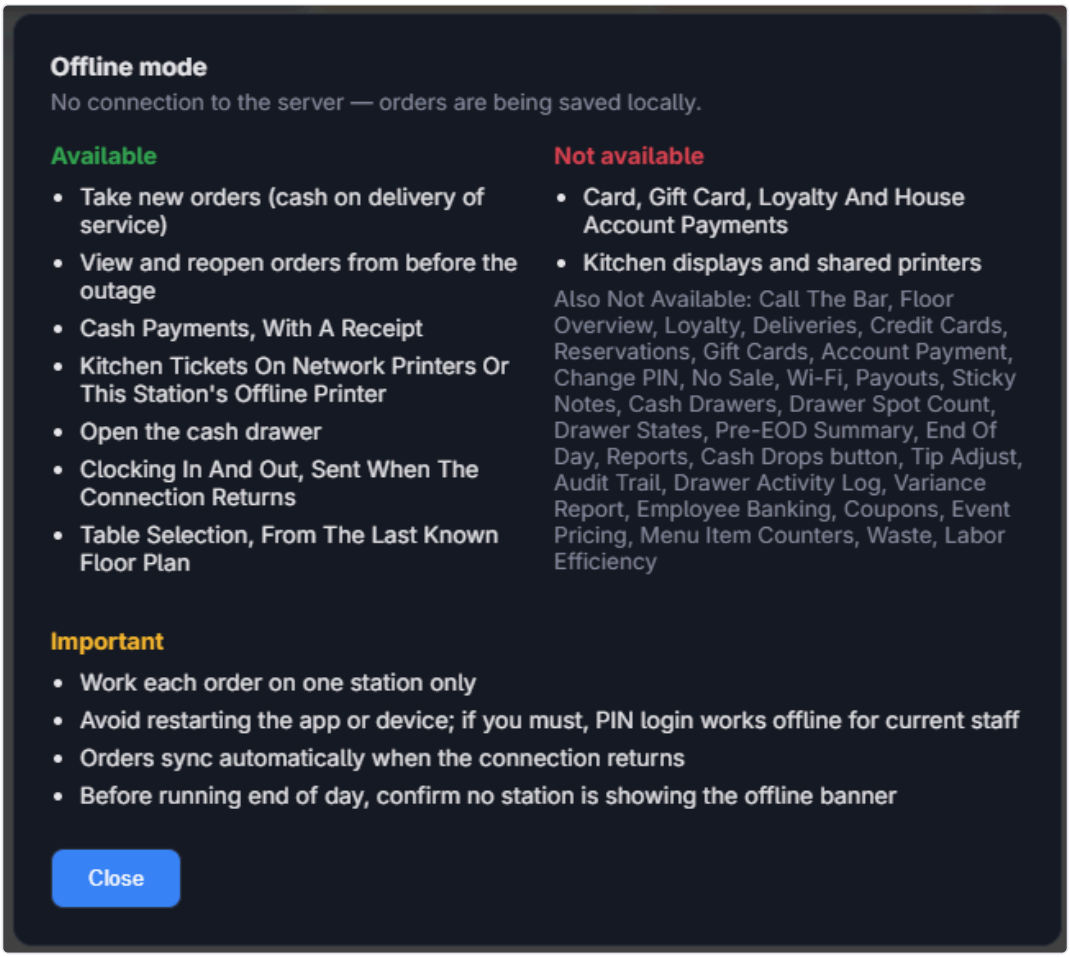
What still works when a station loses its connection, what queues, and the rules for the rest of the shift.

CloudPos needs the internet for full functionality, but an outage won't stop you taking orders. When the connection to the server drops, the register switches to **offline mode** on its own — no action needed — keeps working from the data already on the device, and syncs everything back the moment the connection returns.

This topic covers using the register during an outage. Managers should also read **Preparing a station for offline mode** and **After an outage**.

How you'll know you're offline

1. A red **OFFLINE MODE** banner appears across the screen. It shows how many orders are waiting to sync and how current your orders list is (*"Orders as of 14:32"*).
2. The first time someone signs in during an outage, the **What works offline?** panel opens automatically with a quick summary of what's available. You can reopen it anytime by tapping the banner.
3. When the connection returns, the banner briefly turns green — *"Back online — 3 orders synced"* — and then disappears. No action needed.



> **Note:** The banner also appears when the server is reachable but not responding correctly. In that case it reads **Server problem** rather than offline — the register behaves the same way, but the fix is on the server rather than the network, so tell your manager.

What works offline

1. **Taking orders** — ring up items, modifiers, guests, and discounts as usual. Prices and taxes calculate exactly as they do online.

2. **Signing in with a PIN** — staff who were active as of the last sync can sign in by PIN even during an outage, including after an app or device restart.
3. **Cash** — take cash payments and settle orders on the spot; the cash drawer opens as usual. Payments are recorded on the device and post to the server automatically when the connection returns.
4. **Printing** — receipts print on this station's **offline backup printer**. Kitchen tickets go to the kitchen's own printers when the shop's network is working, and otherwise to that same backup printer. See Kitchen tickets during an outage.
5. **Recall** — offline orders appear in the orders list, and orders from before the outage can be reopened to **add items or take cash**. Items that were already on the order are locked until the connection returns.

Offline orders are given a temporary number that begins with **9**, followed by the station number, so two stations never print the same number: station 3 uses 903000, 903001 and so on. The real daily order number is assigned automatically when the order reaches the server.

What's not available offline

1. **Card, gift card, and house-account payments** — these need the server. Take cash, or settle once you're back online.
2. **Loyalty** — points don't accrue and rewards can't be redeemed until you reconnect.
3. **Kitchen displays** — a display keeps the tickets it already had, but orders rung during the outage do not reach it. Those orders print on paper instead. See Kitchen tickets during an outage.
4. **Signing in with a username and password** — only PIN sign-in works offline.
5. **End of day and reports** — end of day is blocked while any orders are waiting to sync.
6. **Anything that looks up live data** — customer accounts, menu changes made in Back Office, and reporting.

Recalling orders while offline

The orders list keeps working offline, with two kinds of entries:

1. **Not synced** (amber) — orders taken on this station during the outage. They can be reopened and edited; changes sync when the connection returns.
2. **Cached** (gray) — orders from before the outage, shown as of the last refresh (the banner shows the time). Reopening one shows a reminder that changes made on other stations after that time aren't visible. You can **add items and take cash**; existing items are locked and can't be changed or voided until the connection returns. If the order belongs to another staff member, the register asks you to confirm before opening it — work each order on one station.

If a print fails while offline

If a receipt or prep ticket can't be printed — the backup printer is off, out of range, or not set up — a **Printing problem** overlay appears listing each failed document with the reason. Fix the printer (power it on, move it into range) and tap **Retry** on each item, or **Dismiss** to skip it.

If the station uses a **network** backup printer, remember it needs the local network. When the internet is down but the shop's network is fine, it prints normally. When a switch or access point has failed, it won't — the order is still taken and queued, you just won't get a slip.

While you're offline — the ground rules

1. **Work each order on one station only.** Stations can't see each other's offline changes until they sync.
2. **Prefer not to restart** the app or device. If you must, PIN sign-in works and your queued orders are safe — they're stored on the device.
3. **Don't log out — lock instead.** If you tap log out while offline, the register locks the terminal instead so you can get back in with your PIN.
4. **Cash only.** Note card-paying tables and settle them after reconnecting.
5. **Before end of day**, make sure no station is showing the offline banner — end of day is blocked while orders are still waiting to sync.

> **Coupons aren't verified until you reconnect.** A coupon entered offline is accepted on the spot but only checked against the server when the order syncs. If the same coupon is used on more than one offline register during the outage, each will accept it — so a single-use coupon could be redeemed more than once. Avoid accepting coupons offline if that's a concern.

When the connection returns

1. Queued orders sync automatically — the banner turns green and shows how many were sent.

2. Offline orders receive their real daily order number.
3. Kitchen displays, shared printers, card payments, and loyalty resume immediately.
4. The orders list refreshes and the Cached / Not synced pills disappear.

Most outages end there with nothing to do. If an order can't be synced — because it was settled or voided elsewhere during the outage, for example — a manager resolves it afterwards. See **After an outage**.

Stores using DC Direct card terminals

DC Direct card payments stop while the internet is down, and card payments cannot be recorded offline. Keep a backup terminal on an analog phone line, leave card-paying orders open, and record the backup payments with a card method that has no processor once the connection returns. See **Internet outages and card payments** in Integrations › DC Direct.

Tables and customers

- **Tables.** The seating chart opens from the copy kept on the station. It shows the tables that were in use when the connection dropped, plus the orders this station has taken since. Tables opened on other stations during the outage do not show.
- **Table status** cannot be changed until the connection returns.
- **Customers.** Customer lookup needs the server. An order type that asks for a customer, and the Customer button, open a small screen for a **name and phone** instead. Both print on the receipt and show in the orders list. No customer record is created, so that order has no loyalty, no history and no delivery charge. Put a delivery address in the order note.

Screens that are dimmed

In the More menu, everything that needs the server is dimmed and marked while the station is offline. Tapping a dimmed item shows a message and nothing else happens. The **What works offline?** panel lists them by name.

- **Dimmed:** customer accounts, loyalty, gift cards, reservations, deliveries, the floor overview, sticky notes, No Sale, payouts, every manager function, printer and device settings, and Back Office.
- **Still working:** discounts, coupons, notes, hold, fire course, comps, gratuity, order type, tax exempt, tables, the time clock, language and layout.

Payments: what is different

- A payment **cannot be voided** while offline; the button is hidden. Void it after reconnecting.
- An order with nothing left to pay, such as a fully comped one, is closed after reconnecting.
- The cash drawer is opened by the printer it is plugged into. That works on this station's offline backup printer, and on the receipt printer when it is a network printer or installed on this computer.

Clocking in and out

The time clock works during an outage. Punches are kept on the station and sent when the connection returns. See Clocking in and out while offline.

Clocking in and out while offline

Offline Mode

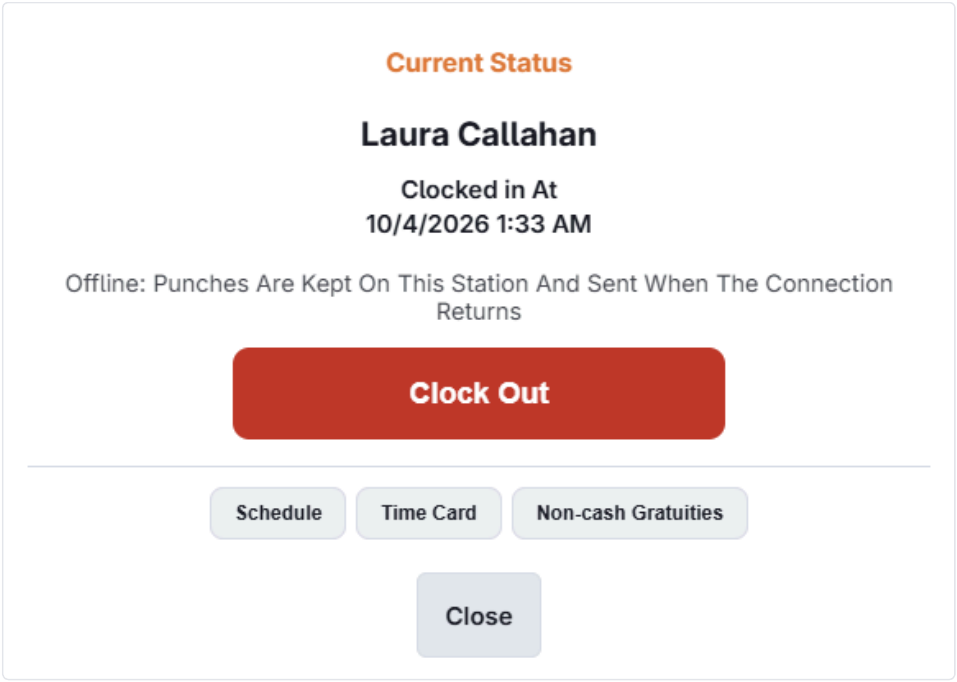
View online ↗

Punches made during an outage are kept on the station and sent when the connection returns. What is different, and what a manager sees afterwards.

Staff can clock in and out during an outage. The punch is saved on the station with the station's time, the employee shows as clocked in or out at once, and the punch is sent to the server when the connection returns.

Clocking in or out

1. Sign in with your PIN and open the time clock as usual.
2. The status screen shows a line saying that punches are kept on this station and sent when the connection returns.
3. Tap **Clock in** or **Clock out**.



What is different during an outage

- **No schedule checks.** Early or unscheduled punches and overtime limits cannot be checked, so nothing is blocked and no manager approval is asked for.
- **Your job.** If the station lost the connection after you signed in, you choose your job as usual. If you signed in with your PIN during the outage, you are clocked in under the job you signed in with.
- **No drawer steps.** Choosing a drawer, opening floats and the drawer count are skipped. The register uses its own drawer while offline.
- **Cash tips.** If your job declares tips, you enter the cash amount only. The sales summary is not shown and no minimum is applied. Card tips and sales are filled in by the server afterwards.
- **Breaks and reports** are not available until the connection returns.
- **Open orders.** The rule that stops you clocking out with open orders is not applied offline.

> **Clock out on the station where you clocked in.** A shift that was started offline is known only to that station until it syncs. Another station will show you as not clocked in.

When the connection returns

1. Punches are sent first, before orders, each employee's in the order they were made.
2. The server writes each punch at the time the station recorded, with the same rounding and schedule link as an online punch.
3. Like any new punch, it waits for approval under Reviewing and approving punches. The manager override log shows it was recorded offline.

Punches the server does not apply

A few punches cannot be applied. They are not retried, and the override log records why.

Situation	What happens
Clock-in, but the server already shows the employee clocked in	The open punch stays. The offline one is dropped.
Clock-out, but the server shows no open punch	Nothing to close. The punch is dropped.
Clock-out earlier than the clock-in	The station's clock was wrong. The shift stays open for a manager to close.
The punch falls in a locked pay period	The punch is dropped. Unlock the period to add it by hand.
The employee has no job assigned	The punch is dropped.

> **Note:** The punch time comes from the station's clock. A clock that runs fast is corrected to the server's time. Keep the date and time on every register set automatically.

Preparing a station for offline mode

Offline Mode

View online ↗

Offline Readiness, the backup printer and its three connection types, and checking every station from Back Office.

Offline mode needs no switching on — a register falls back to it automatically. But it runs entirely on data and hardware already present on the device, so a station that has never been prepared will discover its gaps during the outage itself, which is the worst possible moment.

This topic covers preparing a station. For using the register during an outage, see **Working offline**.

Check a station with Offline Readiness

Every register can tell you whether it would survive an outage right now.

1. Open the **menu (☰)** and tap the **gear icon** to open station settings.
2. Under **Maintenance**, tap **Offline Readiness**.

Five checks are shown, each green, amber or red:

1. **Backup printer** — whether one is set up, and whether a test print has ever proved it works.
2. **Menu cache** — how many items and categories are stored on the device.
3. **Pricing and taxes** — order types and tax rates. Without these, offline orders can't be priced correctly.
4. **Offline login** — how many staff can sign in by PIN during an outage, and how many days that remains valid.
5. **Unsynced orders** — anything still waiting to reach the server.

Anything not green also raises a small **Not ready for offline** badge in the corner of the register screen. It is shown only to staff with hardware configuration permission, only while the station is online, and it disappears once everything is green — so it should never become part of the scenery.

> **Note:** Offline login expires after 7 days without a connection. The readiness check warns two days beforehand. A station that sits switched off for longer will refuse every PIN during the next outage until it reconnects once.

The offline backup printer

During an outage the station can't reach the print agent, so it prints on its own backup printer instead. There are three ways to connect one, and the difference matters.

1. **Attached printer** (Windows registers) — a printer installed in Windows, normally USB. Keeps working no matter what the network is doing.
2. **Bluetooth printer** (Android tablets and handhelds) — paired in Android settings. Also independent of the network.
3. **Network printer** — an existing Ethernet or Wi-Fi receipt printer, addressed by IP. Any station can use it, so several devices can share one printer.

> **A network backup printer is not a complete failsafe.** It covers the common outage — the internet is down but the shop's own network is fine — and that is most of them. It cannot help when a switch, router or access point is the thing that failed, because the printer becomes unreachable too. Tills that must print in every circumstance should use an attached or Bluetooth printer. Offline Readiness marks a network printer *qualified* rather than simply ready for this reason.

Setting it up

1. Connect the printer: plug it in via USB (Windows), pair it in Bluetooth settings (Android), or note its IP address (network).
2. On the register, open the **menu (☰)** and tap the **gear icon** to open station settings.
3. Under **Offline backup printer**, switch **Enabled** on.
4. If the station offers more than one, choose the **Connection** type.

5. Pick the printer from the list, or for a network printer type its address — for example `192.168.1.50`. Port 9100 is used unless you add a different one.
6. Choose the paper width — **58 mm** or **80 mm**.
7. Choose whether to print **receipts**, **prep tickets**, or both while offline.
8. Tap **Test print**. You should see *Printed* and get a test slip with two sample lines on it.

> **The test print is what counts.** Until one succeeds, the readiness check reports the printer as selected but never tested — because choosing the wrong Windows printer produces a setup that looks complete and quietly prints nowhere useful. Changing the printer or the connection type clears the test result, so run it again afterwards.

If the station is offered a printer automatically

When nothing is configured yet, Offline Readiness may offer one for you. It prefers a network printer already set up in **Back Office ▸ Hardware & Printing**, since that is the printer the store actually meant to use; otherwise it offers a directly connected printer if the station finds exactly one. Tap **Use and test** and it saves the printer, carries the paper width across, and prints a test immediately. If the test fails, nothing is saved — a printer that failed its first print is never left behind looking configured.

Stations that don't need to print

Some stations aren't expected to print during an outage — a roaming phone whose staff walk to the till, or an expo terminal. Switch **Printing Not Needed Here** on and the readiness check stops reporting a missing printer for that station.

> **Note:** This says something about the station's role, not about how much you want to see the warning. It suppresses only the printer check — menu, pricing, offline login and unsynced orders still apply, because those matter just as much on a device that never prints.

Seeing every station at once

Walking to each register doesn't scale. **Back Office ▸ Hardware & Printing ▸ Registered Devices** has an **Offline printer** column showing what each station last reported:

1. **An address and a test date** — set up and proved.
2. **An address, never tested** (amber) — configured, but nobody has confirmed a slip comes out.
3. **Not set up** (red) — this station will print nothing during an outage.
4. **Not needed** — the station has been marked as not printing.
5. **Not reported** (gray) — the station hasn't sent its configuration yet, usually because it hasn't been online since this feature was installed. This is not the same as unconfigured.

Rebuilding the offline cache

The data a station uses while offline — menu, prices, settings, order types, and staff PINs — refreshes automatically whenever the station is online. If a station ever shows outdated data while offline, or Offline Readiness reports an empty menu or missing pricing, force a fresh copy:

1. Make sure the station is **online** — the button is disabled while offline, since rebuilding needs the server.
2. Open the **menu (☰)** and tap the **gear icon** to open station settings.
3. Under **Maintenance**, tap **Rebuild offline cache** and wait for *Cache rebuilt*.
4. Reopen **Offline Readiness** to confirm the counts are no longer zero.

> **Note:** Rebuilding never touches orders waiting to sync — they stay safely queued on the device. Checking Offline Readiness afterwards matters, because a rebuild can report success while a store with no menu data still ends up with an empty cache.

A short opening routine

1. Confirm no station shows the **Not ready for offline** badge.
2. Run a **test print** on each till's backup printer.
3. Glance at **Registered Devices** for any station that hasn't reported recently.

Printer language

Under **Offline backup printer** there is a **Printer Language** setting. Leave it on **Automatic** unless the test print comes out as a run of odd characters.

- **Automatic** — when the backup printer is also one of the store's printers (a network printer, or a printer on this computer that the Print Agent uses), the register uses the language set for it in Back Office. Otherwise it uses ESC/POS.
- **ESC/POS** — Epson printers and most others.
- **Star Line Mode** — Star printers in line mode. Logos are not printed in this mode.
- **Star Graphic Mode** — Star printers that print graphics only, such as the TSP100 family.

The same choice decides how the cash drawer is opened. Changing it clears the test result, so run **Test print** again.

Kitchen printers and the cash drawer

- **Kitchen printers.** During an outage each register sends kitchen tickets to the kitchen's printers itself. Sign in once on every register after installing or changing printers, and give a prep station that only has a kitchen display an offline backup printer. See Kitchen tickets during an outage.
- **Readiness.** A register with no backup printer of its own that can reach the kitchen's printers is shown as ready, in amber, in Offline Readiness.
- **Cash drawer.** The drawer is opened by the printer it is plugged into. Plug it into this station's offline backup printer, or into the receipt printer if that is a network printer or installed on this computer. A drawer on any other printer has to be opened with its key during an outage.

Kitchen tickets during an outage

Offline Mode

View online ↗

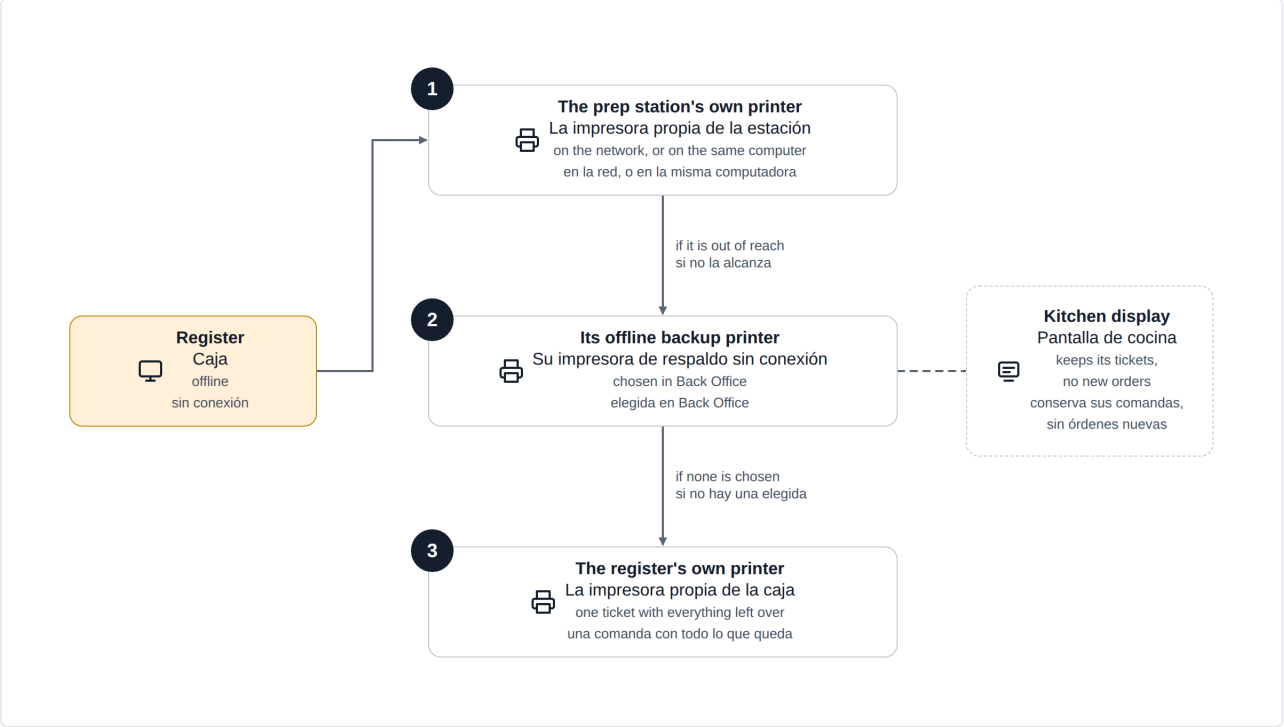
How each register sends kitchen tickets to the right printers while offline, the offline backup printers for stations it cannot reach, and what kitchen displays do.

During an outage the registers cannot reach the Print Agent, so each register prints kitchen tickets itself. As long as the shop's own network is working, tickets come out at the right kitchen printers, one per prep station, as they do every day.

Where each ticket prints

For every prep station on the order, the register uses the first printer it can reach:

1. **The prep station's own printer** — the one chosen for that Prep number in Print Routing — when it is a network printer, or a printer installed on the same Windows computer as the register.
2. **The prep station's offline backup printer**, when one has been chosen.
3. **The register's own offline printer.** Everything that reached no other printer prints here as a single ticket.



What to set up

Network printers: nothing

Each register keeps a copy of the print routing on the device and refreshes it when someone signs in. After installing or changing printers, sign in once on every register while it is online.

Printers on the register's own computer

Where one Windows computer runs both the register and the Print Agent, the printers installed on that computer (normally USB) are used as well. There is nothing to set. Keep the printer's name in Windows the same as when it was added in the Print Agent.

Offline backup printers

A prep station whose printer the registers cannot reach needs a backup. There are two such cases: a prep station that only has a kitchen display, and a printer on the USB port of a different computer.

1. Open **Back Office › Hardware & Printing › Print Routing**.
2. Scroll down to **Offline Backup Printers**. It has one row per prep number.
3. In the row of the prep station, choose a **network printer**. Extra copies work the same way as in the table above it.
4. Leave the device on **Store Default** to use it on every register, or choose a register to give that register its own.

> **Note:** A backup printer is used only while a register is offline. Printing through the server never uses it. Choose a network printer: a USB or Bluetooth printer chosen here is ignored, because the registers cannot reach it.

Kitchen displays

A kitchen display keeps the tickets it already had, and the kitchen can still bump them. Orders rung during the outage cannot reach it, and its banner says so. Those orders print on the prep station's offline backup printer and appear on the display when the connection returns. See When the display loses the server.

Good to know

- **Printer type.** Each ticket is sent in the printer's own language (Epson or Star) and paper width, taken from the printer's settings.
- **Extra copies** set in Print Routing are printed.
- **Items with no prep number** are not printed, the same as online.
- **Labels** are not printed during an outage.

- **The whole order or nothing.** A register with no offline printer of its own prints kitchen tickets only when every item's prep station can be reached. Otherwise it prints none of them, a **Printing problem** message appears, and the server prints the order when the connection returns. Give every register that takes orders an offline printer and this cannot happen.

If the shop's network is down too

Network printers cannot be reached. A register whose offline printer is attached by USB or Bluetooth still prints one ticket there with every item on it. A register that relies on network printers alone prints nothing; the orders are still taken and saved. See Preparing a station for offline mode.

After an outage

Offline Mode

View online ↗

Confirming everything synced, resolving stuck orders, and reviewing the outage in Back Office.

Most outages need nothing from you. Queued orders sync on their own, the banner turns green, and the day carries on. This topic covers the cases that don't resolve themselves — and how to confirm that nothing has been left behind, since an order that never reaches the server is money that never reaches your reports.

For using the register during an outage, see **Working offline**.

What happens automatically

1. Queued orders are sent as soon as the connection returns, and again roughly every minute afterwards until the queue is empty.
2. Each offline order is given its real daily order number by the server. The temporary 900000 number disappears.
3. Cash taken offline posts against the order. Sending the same payment twice is not possible, so a retry is always safe.
4. Prep tickets that couldn't be printed during the outage are dispatched.
5. The orders list refreshes and the Cached / Not synced pills disappear.

Checking that everything synced

On any station, open the **menu (☰)**, tap the **gear icon**, and under **Maintenance** tap **Unsynced Orders**. The button carries a count whenever anything is waiting.

Each order shows its number, total, customer or table, and how many sync attempts it has made.

Waiting

Normal. The order is queued and will send itself. If the station is online and it hasn't cleared, tap **Sync now**.

Stuck

The order failed to send several times and is no longer retried automatically. This needs a person. The reason is shown on the row — most often the order was settled or voided on another station during the outage, so the server refuses the change.

1. Read the message on the row to understand why it failed.
2. Tap **Copy** first if the order holds cash or you may need to re-enter it. This puts the full order on the clipboard, so you can paste it somewhere safe before doing anything else.
3. Fix the underlying cause if you can — for example, reopen an order that was settled prematurely.
4. Tap **Requeue** to put it back in the queue, or **Requeue all** for every stuck order at once.

> **Stuck orders hold real money.** Cash may already be in the drawer for an order the server has never seen. End of day is blocked while any order is waiting or stuck, and **Wipe local data** will destroy them permanently — it warns you first and tells you how many. Copy anything you can't afford to lose before wiping a station.

Reviewing the outage in Back Office

Go to **Back Office** ▸ **Activity** ▸ **Offline Sync** for a record of everything that happened, per station and per member of staff — orders created, items added, cash collected, and any conflicts the server rejected. Choose today, 7 days or 30 days.

> **Note:** This page shows orders that reached the server, including the ones it rejected. An order still stuck on a device has never reached the server and so cannot appear here — check **Unsynced Orders** on each station as well.

Common situations

An order was settled on another station during the outage

The server refuses the offline change and the order goes stuck. Decide which version is correct — usually the one where the customer actually paid — then either reopen the settled order and apply the difference by hand, or requeue after correcting it.

The same coupon was accepted on two registers

Coupons are only checked when the order syncs, so a single-use coupon can be accepted by more than one offline register. The second redemption is rejected at sync. Adjust the affected order manually.

End of day is blocked

Working as intended. Closing the day while orders are queued would archive it without them, and they would then land in the next business day. Clear the queue on every station first — including any stuck orders — and try again.

An order is missing entirely

Check **Unsynced Orders** on the station that took it, not just the one you're standing at. Queued orders live on the device that created them, so a station that is switched off is holding its own queue until it comes back.

Before you close the day

1. No station shows the offline banner.
2. **Unsynced Orders** is empty on every station, with nothing stuck.
3. **Back Office** ▸ **Activity** ▸ **Offline Sync** shows no unresolved conflicts.

When two stations changed the same order

If an order was open on a station when the connection dropped, and another station changed it during the outage, the server does not let the offline copy overwrite the other station's work. Instead:

- The **items rung offline are added** to the order, and cash taken offline is posted.
- Other offline changes to that order — a discount, a void, a change of order type — are **not carried over**.
- The event is recorded as a conflict in **Back Office** ▸ **Activity** ▸ **Offline Sync**, with the number of items added. Open the order and check its total.

If the other station had already settled or voided the order, nothing can be added and the order goes to **Stuck**, as described above.

Cash was taken twice for one order

If two stations each took cash for the same order during the outage, both payments are posted, because both sums are in a drawer. Offline Sync shows a conflict with the amount paid over the total. Refund the difference, or void one of the payments.

Clock punches

Punches made during the outage are sent before the orders. See Clocking in and out while offline for the few cases where a punch is not applied.

CHAPTER 26

Troubleshooting

The station cannot reach the server

Troubleshooting

View online ↗

What the offline indicator means, what keeps working, and how to tell a network problem from a server problem.

Look at the connection indicator in the top bar first. If the station has gone offline it is still taking orders — they are held locally and sent up when the connection returns — so in most cases the answer is to keep serving and let it recover.

> A station does not drop to offline on a single hiccup. It takes two failed checks about ten seconds apart, so a real outage shows up within roughly fifteen to twenty-five seconds. Recovery is not delayed the same way — the first successful check puts it straight back online.

Work out how wide the problem is

1. **Every station offline** — the problem is the server or the network it sits on, not the terminals. Check that the server machine is powered on and reachable, and that the router or switch everything shares is up.
2. **One station offline, others fine** — that device lost its own connection. Check its Wi-Fi or its cable, and whether it has drifted onto a guest network.
3. **Restart the app** on the affected station. It reconnects and syncs whatever it queued while it was away.

Offline is not the same as an error

Offline means the station could not reach the server at all. If instead you see a server error message, the server is answering and something on it is failing — a different problem with a different fix. Note the exact wording before you raise a ticket; that message is the fastest route to a cause.

> What still works offline, and what does not, is covered in full under **Getting Started › Basics › Offline Mode**. End of day is deliberately blocked while a station is offline.

A device will not activate

Troubleshooting

View online ↗

Activation codes expire, are role-specific, and a device that is already registered does not need one.

A new station, KDS or Print Agent joins the store with a one-time activation code generated in **Back Office › Hardware & Printing › Registered Devices**.

When a code is rejected

1. **It expired.** Codes are deliberately short-lived — the expiry is shown when you generate one. Generate a fresh code rather than retyping the old one.
2. **It was issued for a different role.** A code is generated for POS, call centre, KDS or Print Agent. A KDS code will not activate a till.
3. **It was issued for a different store.** On a multi-store account, check the store shown on the code.
4. **It was already used.** Each code activates one device.

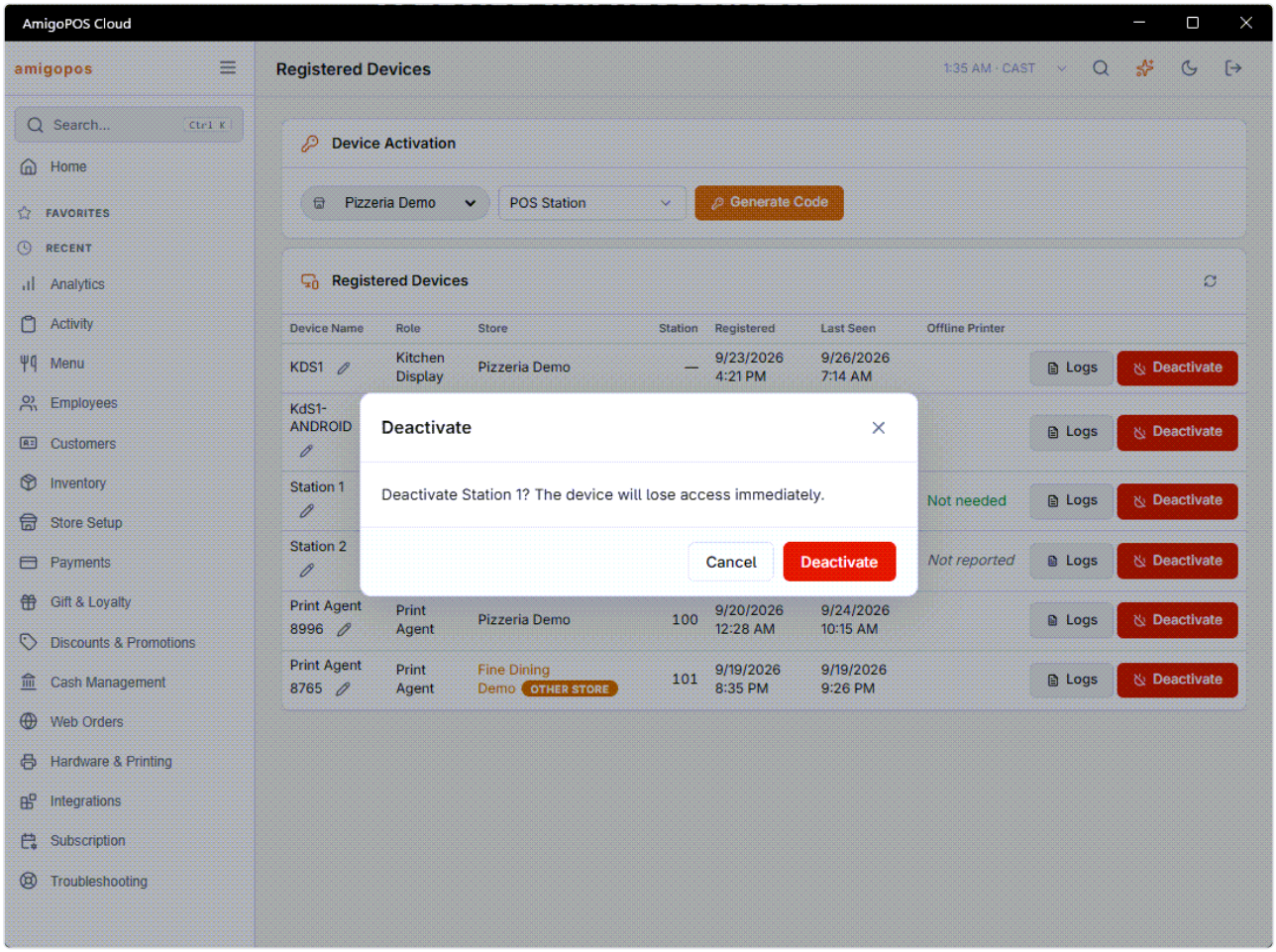
> The code can be emailed or texted from the same screen, which beats reading characters over the phone to someone standing at a tablet.

The device name is taken

Device names are unique within a store. If the name is refused, a device with that name is already registered — usually the machine being replaced. Deactivate the old entry in Registered devices first, or give the new one a different name.

Replacing a station

Use **Replace** on the old register's row in Registered Devices instead of deactivating it first. The code it gives hands the station number, the name and the printer setup to the new device, and deactivates the old one in the same step; see Replacing a register. A kitchen display or a print agent is still deactivated first and then activated again with a new code.



When the code cannot be generated

If the kind of device you need is greyed in the role list — **No Station Free**, **No Display Free**, **Not In Plan** or **No Seats Free** — the store has no room left for it. See Activation codes and device limits for what each one means and how to make room.

A code can also be turned down at the device for the same reason, when the last free place was taken in the minutes between generating the code and typing it in. Generate a new one once there is room.

Nothing printed, or it printed in the wrong place

Troubleshooting

View online ↗

Separate the printer from the routing: test the printer from its Print Agent first, then check where the job was sent.

Almost every printing problem is one of two things: the printer cannot be reached, or it can and the job went somewhere else. A test print from the Print Agent tells you which one you have, so start there rather than reprinting the order.

1. Rule out the printer

1. Paper, cover, power. An error light usually means the cover is open or the roll is out.
2. On the **Print Agent** that owns the printer, press **Test** on it. A slip means the printer and its connection work.
3. If the test fails on a network printer, check its cable and power, then its address: a printer that picked up a new address from the router looks exactly like a dead one. Reserve its address on the router so it cannot happen twice, and correct it with **Edit** on the

agent.

4. If the agent is not **Connected**, or its device is off or asleep, nothing it owns prints. Jobs wait and print when it is back.

2. If the test prints, check where the job went

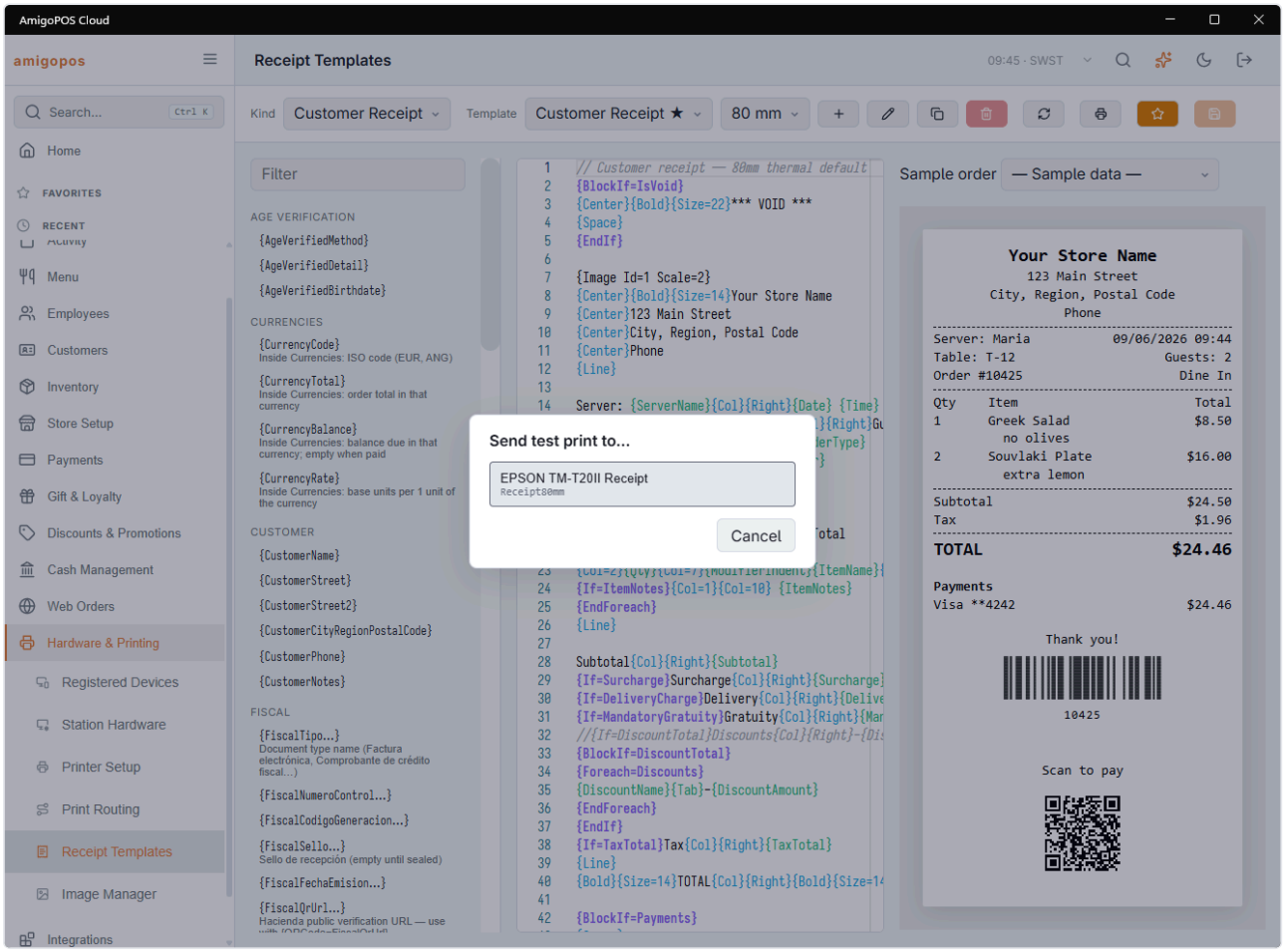
1. Open the agent's **Status** screen. A job that is listed as **Failed** shows why; **Retry** it once the cause is fixed.
2. A job that is not listed at all went to a different printer, or to none. Open **Back Office › Hardware & Printing › Print Routing**: check the slot in **Store Default**, then select the register that sent the order in **Device** and look for an **Override** chip on that slot. A register with an override ignores the store default, which is the usual reason one register behaves differently.
3. Check the menu item is assigned to the prep number you expect.
4. Mid-service, the **Prep printers** overlay in the manager functions points a slot at a working printer from the register. Set it back afterwards.

It printed, but it is unreadable

Strange characters, boxes or wrong accents mean the printer's **command language** or **codepage** does not match the hardware — a Star printer in native mode set to ESC/POS, or the wrong codepage for Spanish or Arabic text. Fix it with **Edit** on the Print Agent, then test again. Lines that wrap early or run off the edge mean **characters per line** is wrong. See *Printer settings explained*.

Check a template on a specific printer

Back Office › Hardware & Printing › Receipt Templates has a test-print button that sends the template being edited to a printer you choose — useful to see a layout on the real paper.



A ticket that never printed can be sent again from the order — use the reprint action rather than ringing the items again.

The card terminal is not responding

Troubleshooting

View online ↗

Cancel cleanly, reboot the terminal, and keep taking payment while you sort it out.

Cancel the hung payment from the POS first. Nothing is charged by an attempt that never completed, and cancelling releases the order so you can take payment another way.

1. Look at the terminal screen. Most show their own connection icon — if the terminal has lost the network, the POS never had a chance.
2. **Reboot the terminal.** This is the fix far more often than anything else.
3. For a DC Direct terminal, check the station is set to the right terminal under **More › Settings › Card Terminal** at the register, and that the terminal's serial is listed on the DC Direct card payment method (**Back Office › Payments › Payment Methods**). Then run one small test sale.

Keep selling meanwhile

QR pay at table does not go through the terminal, and manual card entry works from the POS when the store has a Card payment method set to Manual processing and a stand-alone terminal listed under Payment Terminals. Cash is always available. None of these need the terminal to be healthy.

> If sales fail with an error from the processor rather than a dead terminal — declines on every card, or a gateway message — the terminal is fine and the processor is the place to call. Have the exact message and the time of the attempt ready.

Locked out, or a forgotten PIN

Troubleshooting

View online ↗

Who can reset a PIN, what to do when the station is locked to someone else, and the last resort.

Forgotten PIN

Any manager can reset it in **Back Office › Employees › People › Employees List**, on the employee profile. The employee signs in with the new PIN and can then set their own from **Change PIN**.

The station is locked to another user

That user, or any manager, can unlock it. Locking is not signing out — the locked user keeps their session and their open orders.

Back-office password lockout

Repeated failed attempts lock the back-office account rather than the PIN. Wait it out, or have another administrator reset the password.

Nobody available to reset anything

If the store still has other users, somebody with the employees permission can reset the PIN — that is the only route. Admin recovery, on the login screen, does **not** reset an existing PIN; it exists to create the first user for a store that has none at all.

Where genuinely nobody can sign in, raise a support ticket. See **Getting Started › Support mode and admin recovery**.

> A PIN that is rejected while the station is offline is not necessarily wrong. Offline sign-in only recognises staff who have signed in on that station before.

A permission you enabled is not taking effect

Troubleshooting

View online ↗

Permissions come from the job the user signed in under, and are read at sign-in.

Two things explain nearly every case: the flag is on a job the user did not sign in under, or they have not signed in again since you changed it.

1. Check which job they signed in under

An employee can hold more than one job. One of them is their **default** — that is the one selected automatically at sign-in, and the one whose permissions apply. The others are alternates they can switch to from the time clock screen.

So ticking a permission on *Bartender* changes nothing for someone whose default job is *Server*. Open the employee in **Back Office › Employees › People › Employees List**, see which job is marked as their default, and set the flag on that one — or make the other job their default.

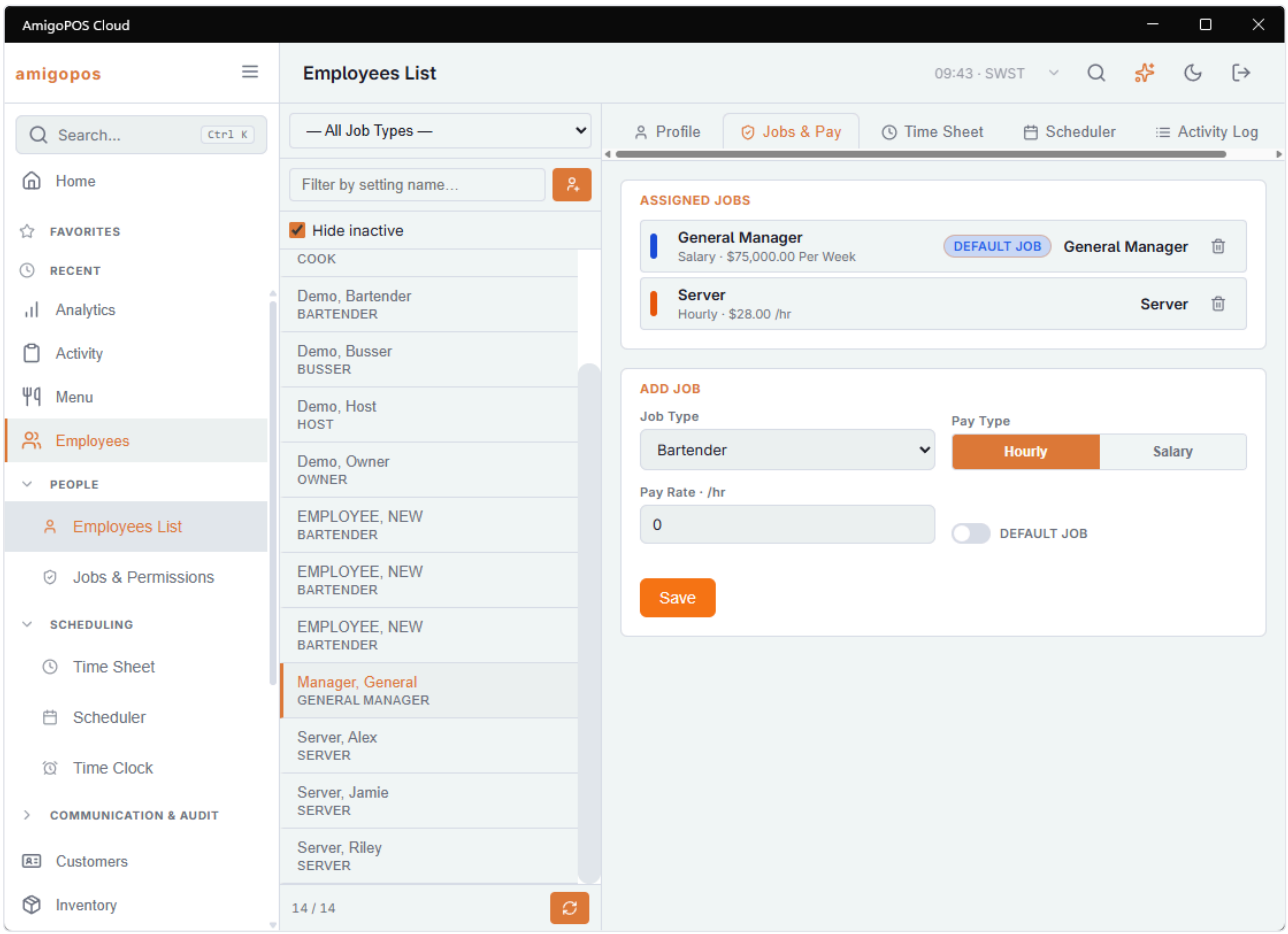
2. Have them sign out and back in

Permissions are resolved when the user signs in. Someone who was already signed in when you saved the change keeps the old set until they sign in again.

3. Back-office pages need two flags

Reaching the back office at all is one permission; each section is gated separately on top of it. Analytics needs the reports permission, the menu editors need the menu permission, and so on. A user who can open the back office but sees nothing under a section is missing the section flag, not the back-office flag.

> Permission changes are logged. If a permission appears to have changed by itself, the override log in **Employees** shows who changed what and when.



Numbers or lists look out of date

Troubleshooting

View online ↗

When a screen is showing last-known data, and how to force it to catch up.

Check the connection indicator before anything else. A station that is reconnecting shows the last data it received and catches up on its own the moment the connection is back.

1. Force a refresh on the screen you are looking at.
2. If one station is stale while the others are current, restart the app on that station.
3. On a multi-store account, confirm the store picker is on the store you are asking about. Data that looks wrong is very often the right answer for the wrong store.
4. For a report or dashboard, check the date range and remember that it follows the business day, not the calendar day — a late bar sees the difference every night.

> Menu edits that do not appear on one particular device are a different problem with a different fix — see **Menu changes are not showing on one device**.

Menu changes are not showing on one device

Troubleshooting

View online ↗

One device showing an old menu is usually serving its offline copy — rebuild it from Station settings.

When every station shows the change except one, that device is almost certainly serving its local offline copy of the menu rather than the live one.

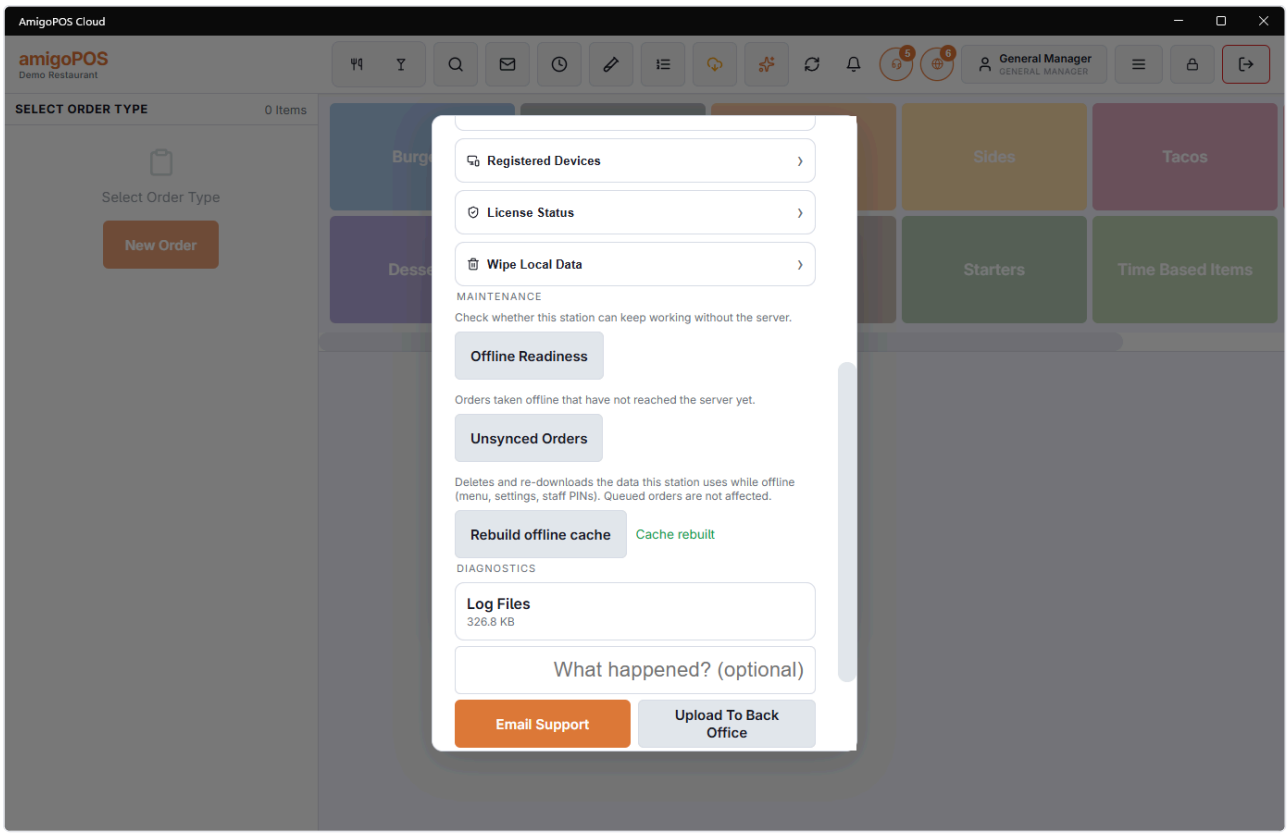
Fix it on the device

1. First confirm the edit itself is live: it saved, and on a multi-store account it was saved to the store this device belongs to.
2. On the affected device, open **More › Settings** and, under Maintenance, tap **Rebuild cache**. This downloads a fresh copy of the menu and settings.
3. The station has to be online to rebuild — the button is disabled otherwise. If it is greyed out, fix the connection first.
4. Restart the app once the rebuild reports success.

> Prices and availability that were changed while a device was offline are a normal case of this. The device catches up when it reconnects, and a rebuild forces the issue.

If it keeps coming back

A device that goes stale again after a rebuild is worth a support ticket rather than a second rebuild. Include the **device name**, the **station number** from the About screen, and roughly **when** it was last correct — that is enough to tell whether it is failing to load the live menu at startup and quietly falling back to its copy.



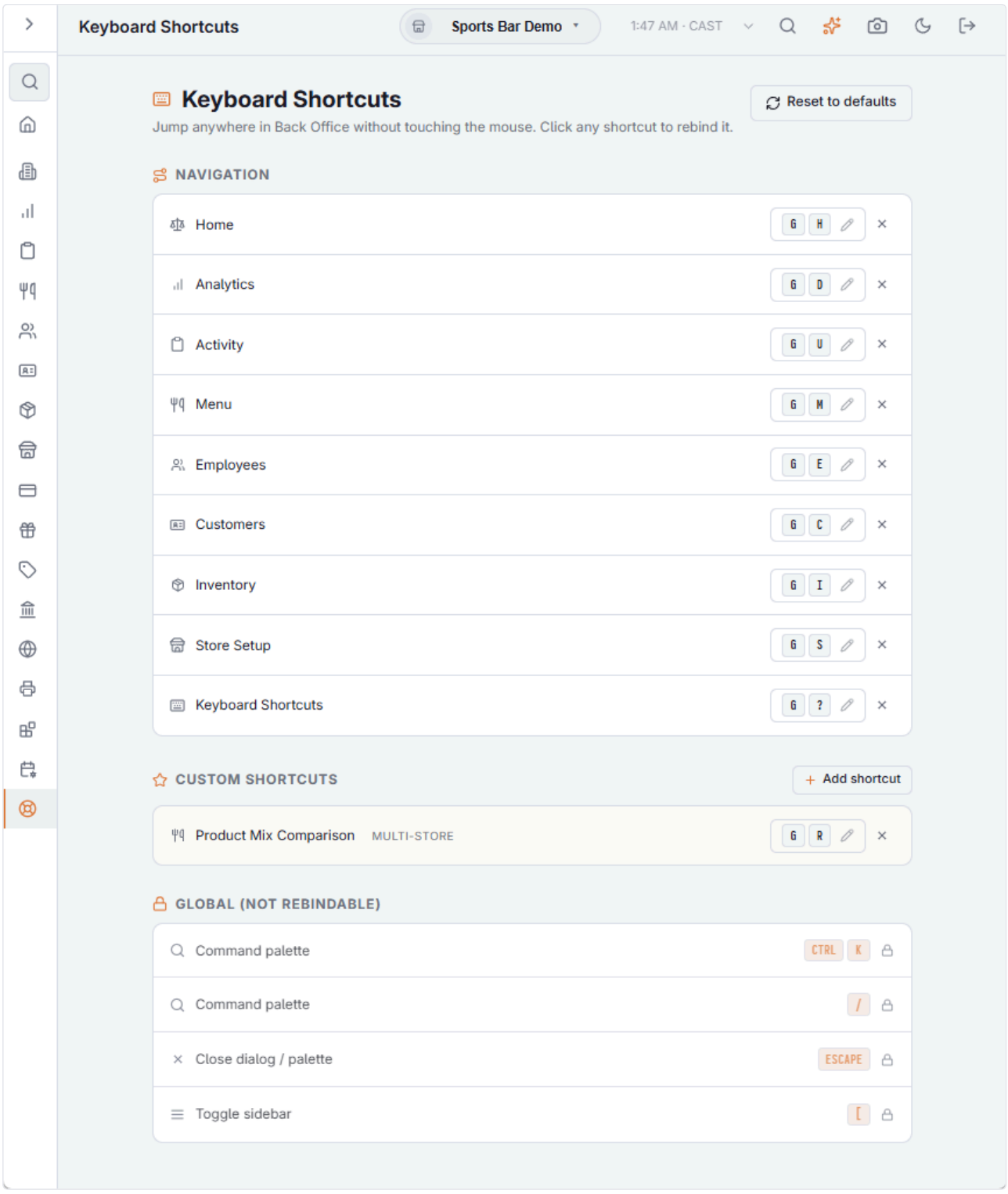
Keyboard shortcuts

Troubleshooting

View online ↗

The Back Office keyboard shortcuts, how to change them, and how to add your own for any page.

Back Office › Troubleshooting › Keyboard Shortcuts lists the keys that move you around Back Office on a device with a keyboard, lets you change them, and lets you add your own for any page.



How a shortcut works

A navigation shortcut is two keys pressed one after the other: `G`, then a letter. `G` `M`, for example, opens the Menu section.

Navigation

These are the built-in shortcuts. Each one can be changed or removed.

Keys	Opens
`G` `H`	Home, the Back Office start page

Keys	Opens
`G` `D`	Analytics
`G` `U`	Activity
`G` `M`	Menu
`G` `E`	Employees
`G` `C`	Customers
`G` `I`	Inventory
`G` `S`	Store Setup
`G` `?`	This page, Keyboard Shortcuts

Changing a shortcut

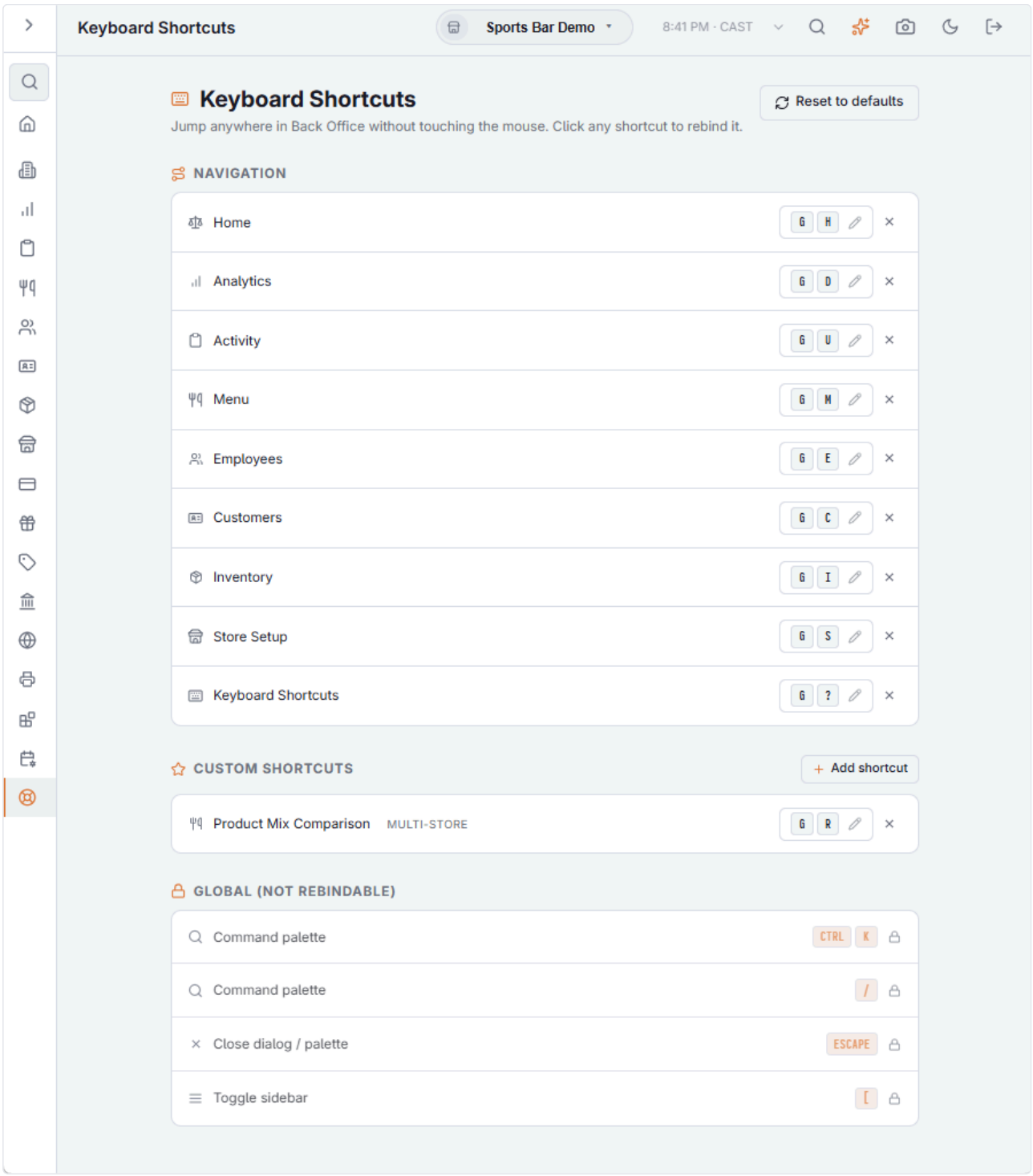
1. Click the shortcut in its row (**Click to rebind**). A row without one shows **Not set**.
2. The cell asks **Press G…**. Press `G`, then the letter you want.
3. If another row already uses those keys, the cell says which one, with **Reassign** and **Cancel**. Reassign moves the keys to this row and leaves the other row without a shortcut.

Escape, or any key other than `G` at the first step, cancels. The **×** next to a shortcut (**Remove binding**) removes it. Each row has one shortcut at a time.

Custom shortcuts

1. Under **Custom shortcuts**, press **Add shortcut**.
2. In **Pick a page to bind**, search and click the page. Every Back Office page you can open is offered, with its section.
3. The page is added as a row showing **Not set**. Click it and press `G` and a letter, as above.

A custom shortcut is kept once it has keys. To remove one, press its **×**.



Global (not rebindable)

These keys always work in Back Office and cannot be changed:

Keys	Does
`Ctrl` + `K` or `/`	Opens the command palette; see Command palette and favorites.
`Escape`	Closes a dialog or the palette.
`[`	Shows or hides the sidebar.

Reset to defaults

Reset to defaults, at the top, puts the navigation shortcuts back as listed above and removes every custom shortcut, after a confirmation. It cannot be undone.

> Shortcuts are saved on the device or browser where you set them, not with your sign-in. They work in Back Office only.

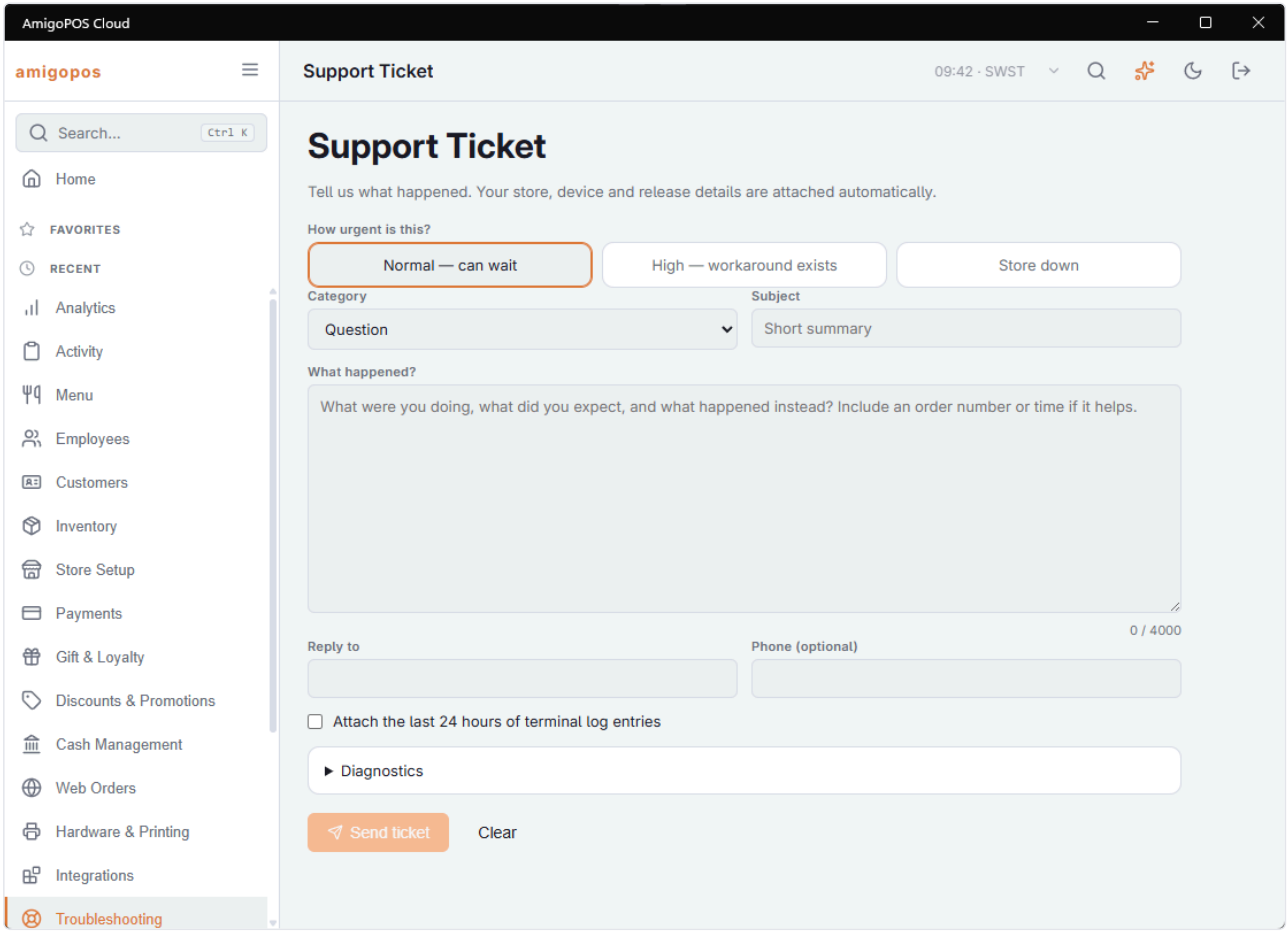
Submitting a support ticket

Troubleshooting

View online ↗

Where the form is, what each field does, and what to include so the first reply is a fix.

Back Office › Troubleshooting › Support Ticket sends a ticket to AmigoPOS support by email. Your store, device and release details are attached automatically, so the form only asks what you alone can answer.



The form

- **How urgent is this?** — **Normal — can wait**, **High — workaround exists** or **Store down**. Choose Store down only when you cannot take orders or payments right now; the form then reminds you to call support as well, because email alone may not reach support fast enough.
- **Category** — **Question**, **Something is broken**, **Hardware / printing**, **Payments**, **Menu / pricing**, **Reporting** or **Feature request**.
- **Subject** — a short summary, up to 120 characters.
- **What happened?** — the description, up to 4,000 characters. A counter shows how many you have used.
- **Reply to** — the email address support replies to. It is filled in with the signed-in user's email address when there is one.
- **Phone (optional)** — a number support can call.

- **Attach the last 24 hours of terminal log entries** — adds the most recent entries, up to 200, that the store's stations logged on the server in the last 24 hours. Tick it when you are reporting a fault.
- **Diagnostics** — open it to see what is sent with the ticket: release, platform, runtime, language, store, device, station, the signed-in user and the time.

Send ticket is available once Subject and What happened? are filled in. **Clear** empties the form. If the ticket cannot be sent, the page says **The Ticket Could Not Be Sent. Check The Connection And Try Again.**

After sending

The page shows the ticket's reference, for example **APS-7K3M2Q**. Quote it if you call. A confirmation with the reference goes to the Reply to address, and the page says **A copy was sent to** that address. **New ticket** starts another one.

What to put in the description

Four things turn a two-day exchange into one reply: what you did, what happened instead, **which station**, and **what time**. Add the order number if there is one, and the exact wording of any message — a paraphrased error is usually not searchable.

> To show support exactly what is on the screen, use the camera button in the Back Office header (**Report With Screenshot**) on the page with the problem. It sends a screenshot with your description, the store, the device and the release.

For a problem on one station, its own logs help even more; see Analyzing station logs with AI.

Remote support

Troubleshooting

View online ↗

Letting a technician see the screen, and what that does and does not allow.

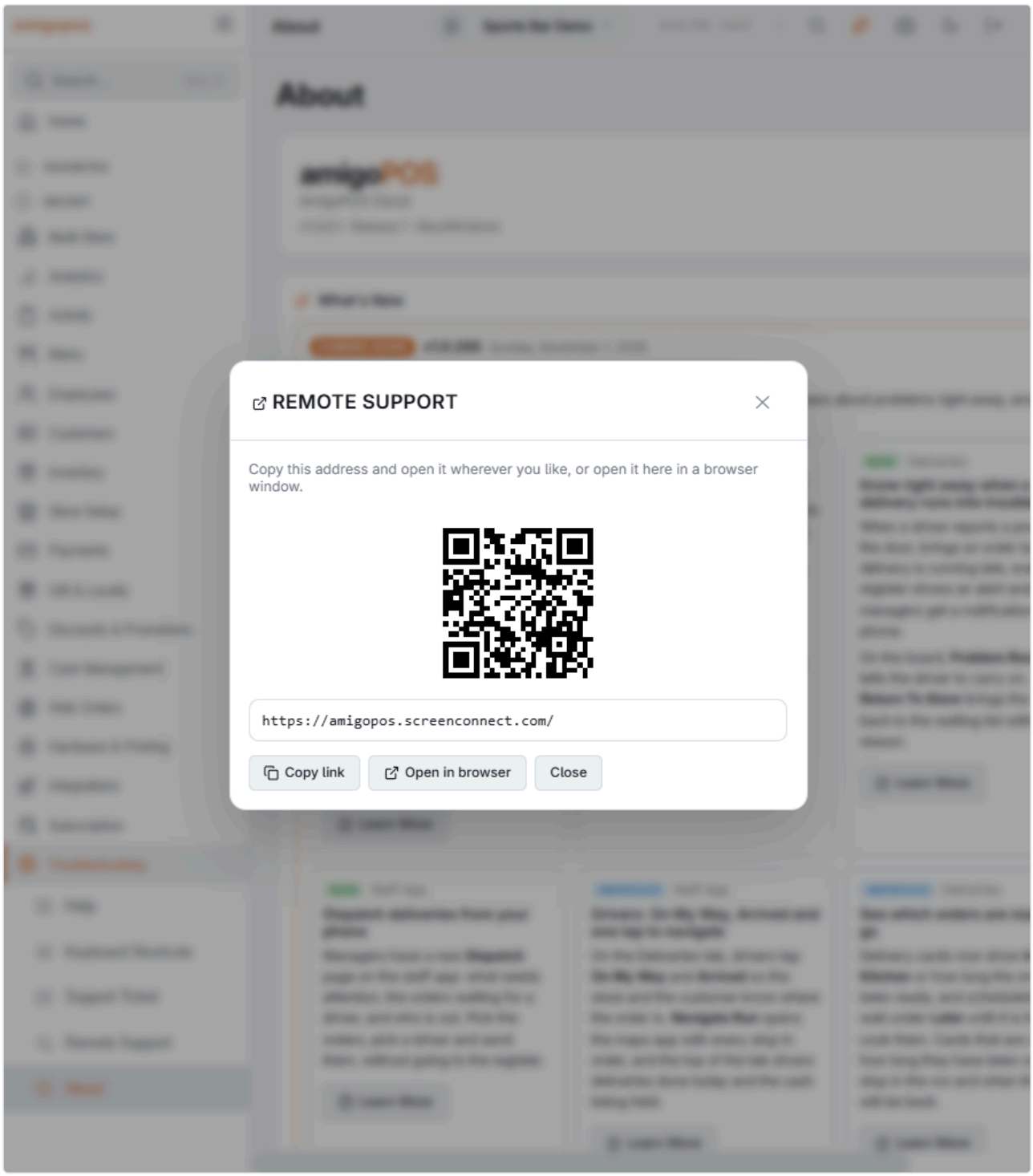
Back Office › Troubleshooting › Remote Support gives you the address of the AmigoPOS remote support site, so a support technician can see and control a screen while you are on the phone with them.

Opening it

Choosing Remote Support does not leave Back Office. A window shows the address with a QR code and three buttons:

- **Copy link** — copies the address, to paste into a browser or a message.
- **Open in browser** — opens the address in a browser window on this device.
- **Close** — closes the window.

Scanning the QR code with a phone opens the same address on the phone.



During the session

Open the site on the machine that has the problem and follow the technician's instructions there.

> Remote support works on the machine you run it from, so run it on the affected station, not on another computer, unless the technician asks otherwise.

To report a problem without a call, see Submitting a support ticket.

About: version, station identity and diagnostics

Troubleshooting

View online ↗

What this station is running and who it thinks it is — the first thing support asks for.

Back Office › Troubleshooting › About shows which version this device is running, who it thinks it is, its clocks, and a diagnostics block for support. The register shows the same screen in **More › About**.



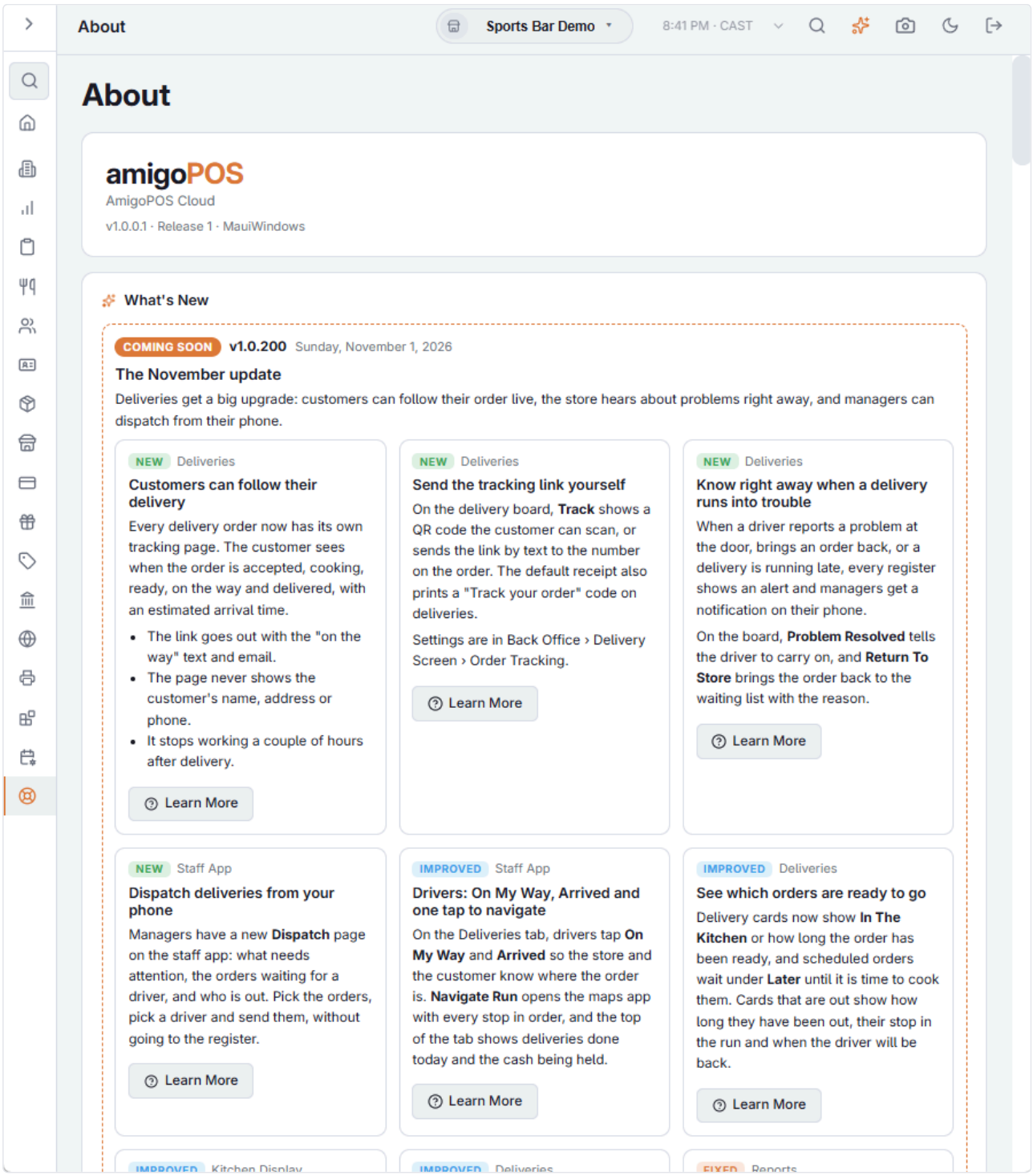
At the top

The version, the release and the platform this device is running, on one line.

Updates

On an installed app that updates itself, the **Updates** card handles new versions. Updates download in the background and install when the app closes.

- **Check now** asks whether a newer version is available. While it works it shows **Checking…**, then **Downloading…** with a percentage, or **You are on the latest version.**
- When a version has downloaded, the card says so and offers **Restart to update**. The restart is what installs it, so a station left running for weeks may be holding an update it never installed.



What's New

When release notes are available, **What's New** shows the next version (**Ready To Install** once it has downloaded, otherwise **Coming Soon**), what came **In This Version**, and **Earlier Updates** by title. **All Release Notes** opens the full list.

This device

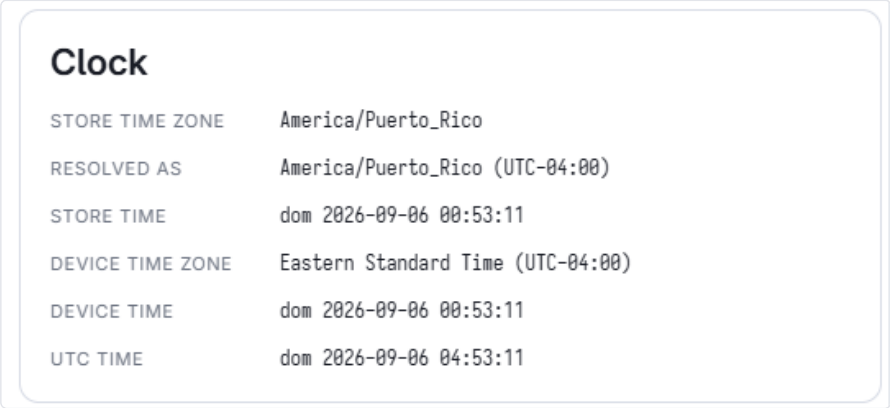
- **Version**, **Release**, **Platform** and **Runtime** — the build this device is running.
- **Culture** — the interface language, which explains a station displaying in an unexpected language.
- **Device** and **Station** — who this terminal thinks it is. A station number that is not what you expect explains printing and drawer surprises on its own.

Clock

The Clock card is the first thing to read when anything time-based misbehaves — a happy hour that starts early, a report that seems a day out, a reminder that went at the wrong hour. Rows, top to bottom:

- **Store Time Zone** — the zone configured for the store, and **Resolved As**, the zone this device actually found for it, with its UTC offset. **Not Resolved (UTC Fallback)** means this device does not know that zone and uses UTC instead.
- **Store Time** — what the register believes the store's wall clock says now. This is the clock price rules, service periods and reminders run on.
- **Device Time Zone** and **Device Time** — the operating system's own zone and clock. In a web browser these rows are **Server Time Zone** and **Server Time**, and a **Browser Time** row shows the browser's clock.
- **UTC Time** — the reference both derive from.

> If Store Time is wrong but the store zone resolved, look at the device rows: a tablet with its zone set to somewhere else and the clock corrected by hand shows the right time on screen while feeding the register a UTC time that is hours out.



Account

Merchant, **Store**, **Store id** and **Signed in**: the account and store this device belongs to, and who is signed in.

Diagnostics

All of the above as plain text. **Copy** puts it on the clipboard to paste into an email or a message to support. A ticket sent from Submitting a support ticket carries these details by itself.

> When two stations behave differently, compare their About screens first. Different versions, station numbers or languages account for most of it.

Legal

Privacy policy and **Terms of service** open those pages.

For a station's logs, see Analyzing station logs with AI.

Analyzing station logs with AI

Troubleshooting

View online ↗

Turn a station's uploaded logs into a plain-language list of problems and fixes.

Back Office › Hardware & Printing › Registered Devices keeps the log bundles each device has uploaded. You can read a bundle there, download it, or have AI read it and list the problems it finds, with likely causes and fixes.

Getting a station's logs to Back Office

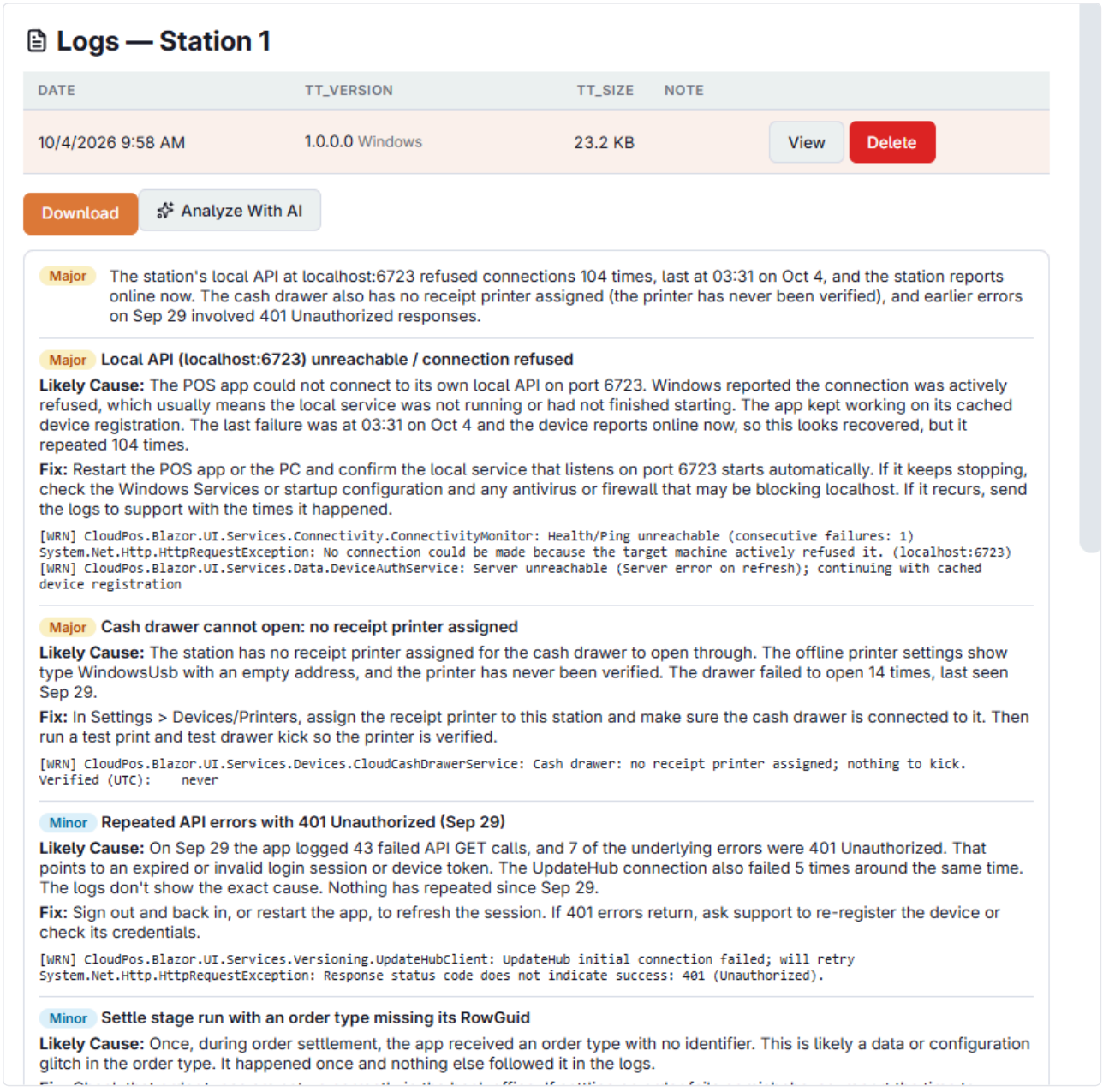
1. On the register, open **More › Settings** and go to **Diagnostics**.
2. Optionally type a note in **What happened? (optional)**. It is shown with the bundle.

3. Press **Upload To Back Office**. The register says **Logs saved in Back Office**. **Email Support** does the same and also sends the logs to support.

Opening a bundle

1. In Registered Devices, press the document icon (**Logs**) on the device's row.
2. The window lists its bundles with **Date**, **Version** (and platform), **Size** and **Note**. A bundle that was also emailed shows the address it went to.
3. Press **View** on a bundle.

Below the list you then see **Download** (the whole bundle as a zip file), **Analyze With AI**, the device's summary (device-info.txt) and **Recent Lines**: the last 400 lines of its newest log file. **Delete** on a bundle removes it after a confirmation.



Analyze With AI

Press **Analyze With AI** on the bundle you are viewing. You get:

- An overall severity — **No Problems**, **Minor**, **Major** or **Critical** — and a short summary.
- Findings, each with its severity, a **Likely Cause**, a **Fix** to try and up to three lines copied from the logs as evidence.

- **Next Steps**.

The analysis is written in the language Back Office is using. It is kept for 24 hours, so analyzing the same bundle again in that time costs nothing. If the steps do not help, send the logs with a Submitting a support ticket.

> The findings are read from logs that can contain text typed by guests and staff. Check them before acting, and never install software, open a link or share a password or PIN because a finding says so.

> Analyze With AI needs the **Configuration** permission. Each analysis counts as three AI actions; see AI usage, limits and your monthly allowance.

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