

Operator Manual

*Sapphire A60/A70
SAP-630/SAP-660)II)
HM626/HM616
SAP-4800II/SAP-530*



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Sam4POS Operators Manual v2.76

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Revision 2.0 - April 1, 2005

WARNING - U.S.

THIS EQUIPMENT GENERATES, USES AND CAN RADIATE RADIO FREQUENCY ENERGY, AND IF NOT INSTALLED AND USED IN ACCORDANCE WITH THE INSTRUCTIONS MANUAL, MAY CAUSE INTERFERENCE TO RADIO COMMUNICATIONS. IT HAS BEEN TESTED AND FOUND TO COMPLY WITH THE LIMITS FOR A CLASS A COMPUTING DEVICE PURSUANT TO SUBPART J OF PART 15 OF FCC RULES WHICH ARE DESIGNED TO PROVIDE REASONABLE PROTECTION AGAINST SUCH INTERFERENCE WHEN OPERATED IN A COMMERCIAL ENVIRONMENT. OPERATIONS OF THE EQUIPMENT IN A RESIDENTIAL AREA IS LIKELY TO CAUSE INTERFERENCE IN WHICH CASE THE USER, AT HIS OWN EXPENSE, WILL BE REQUIRED TO TAKE WHATEVER MEASURES MAY BE REQUIRED TO CORRECT THE INTERFERENCE.

NOTICE - CANADA

THIS APPARATUS COMPLIES WITH THE CLASS "A" LIMITS FOR RADIO INTERFERENCE AS SPECIFIED IN THE CANADIAN DEPARTMENT OF COMMUNICATIONS RADIO INTERFERENCE REGULATIONS.

CET APPAREIL EST CONFORME AUX NORMES CLASS "A" D'INTERFERENCE RADIO TEL QUE SPECIFIER PAR MINISTRE CANADIEN DES COMMUNICATIONS DANS LES REGLEMENTS D'INTERFERENCE RADIO.

ATTENTION



The product that you have purchased may contain a battery that may be recyclable. At the end of its useful life, under various state and local laws, it may be illegal to dispose of the battery into the municipal waste system.

Check with your local solid waste officials for details concerning recycling options or proper disposal.

Precaution Statements

Follow these safety, servicing and ESD precautions to prevent damage and to protect against potential hazards such as electrical shock.

1-1 Safety Precautions

1. Be sure that all built-in protective devices are replaced. Restore any missing protective shields.
2. When reinstalling the chassis and its assemblies, be sure to restore all protective devices, including nonmetallic control knobs and compartment covers.
3. Make sure there are no cabinet openings through which people - particularly children - might insert fingers and contact dangerous voltages. Such openings include excessively wide cabinet ventilation slots and improperly fitted covers and drawers.
4. Design Alteration Warning:
Never alter or add to the mechanical or electrical design of the SAM4POS. Unauthorized alterations might create a safety hazard. Also, any design changes or additions will void the manufacturer's warranty.
5. Components, parts and wiring that appear to have overheated or that are otherwise damaged should be replaced with parts that meet the original specifications. Always determine the cause of damage or over-heating and correct any potential hazards.
6. Observe the original lead dress, especially near the following areas : sharp edges, and especially the AC and high voltage supplies. Always inspect for pinched, out-of-place, or frayed wiring. Do not change the spacing between components and the printed circuit board. Check the AC power cord for damage. Make sure that leads and components do not touch thermally hot parts.
7. Product Safety Notice:
Some electrical and mechanical parts have special safety-related characteristics which might not be obvious from visual inspection. These safety features and the protection they give might be lost if the replacement component differs from the original - even if the replacement is rated for higher voltage, wattage, etc.
Components that are critical for safety are indicated in the circuit diagram by shading,  or . Use replacement components that have the same ratings, especially for flame resistance and dielectric strength specifications. A replacement part that does not have the same safety characteristics as the original might create shock, fire or other hazards.

CAUTION

Danger of explosion if battery is incorrectly replaced. Replace only with the same or equivalent type recommend by the manufacturer.
Dispose used batteries according to the manufacturer's instructions.

ATTENTION

Il y a danger d'explosion s'il y a un remplacement incorrect de la batterie.
Remplacer uniquement avec une batterie du même type ou d'un type équivalent recommandé par le constructeur.
Mettre au rebut les batteries usagées conformément aux instructions du fabricant.

SAFETY NOTICE: "For pluggable equipment, the socket-outlet shall be installed near the equipment and shall be easily accessible.

1-2 Servicing Precautions

WARNING: First read the Safety Precautions section of this manual. If some unforeseen circumstance creates a conflict between the servicing and safety precautions, always follow the safety precautions.

WARNING: An electrolytic capacitor installed with the wrong polarity might explode.

1. Servicing precautions are printed on the cabinet. Follow them.
2. Always unplug the units AC power cord from the AC power source before attempting to:
(a) Remove or reinstall any component or assembly
(b) Disconnect an electrical plug or connector
(c) Connect a test component in parallel with an electrolytic capacitor
3. Some components are raised above the printed circuit board for safety. An insulation tube or tape is sometimes used. The internal wiring is sometimes clamped to prevent contact with thermally hot components. Reinstall all such elements to their original position.
4. After servicing, always check that the screws, components and wiring have been correctly reinstalled. Make sure that the portion around the serviced part has not been damaged.
5. Check the insulation between the blades of the AC plug and accessible conductive parts (examples : metal panels and input terminals).
6. Insulation Checking Procedure: Disconnect the power cord from the AC source and turn the power switch ON. Connect an insulation resistance meter (500V) to the blades of AC plug. The insulation resistance between each blade of the AC plug and accessible conductive parts (see above) should be greater than 1 megaohm.
7. Never defeat any of the B+ voltage interlocks. Do not apply AC power to the unit (or any of its assemblies) unless all solid-state heat sinks are correctly installed.
8. Always connect an instrument's ground lead to the instrument chassis ground before connecting the positive lead ; always remove the instrument's ground lead last.

Precautions for Electrostatically Sensitive Devices (ESDs)

1. Some semiconductor (solid state) devices are easily damaged by static electricity. Such components are called Electrostatically Sensitive Devices (ESDs); examples include integrated circuits and some field-effect transistors. The following techniques will reduce the occurrence of component damage caused by static electricity.
2. Immediately before handling any semiconductor components or assemblies, drain the electrostatic charge from your body by touching a known earth ground. Alternatively, wear a discharging wrist-strap device. (Be sure to remove it prior to applying power - this is an electric shock precaution.)
3. After removing an ESD-equipped assembly, place it on a conductive surface such as aluminum foil to prevent accumulation of electrostatic charge.
4. Do not use freon-propelled chemicals. These can generate electrical charges that damage ESDs.
5. Use only a grounded-tip soldering iron when soldering or unsoldering ESDs.
6. Use only an anti-static solder removal device. Many solder removal devices are not rated as anti-static; these can accumulate sufficient electrical charge to damage ESDs.
7. Do not remove a replacement ESD from its protective package until you are ready to install it. Most replacement ESDs are packaged with leads that are electrically shorted together by conductive foam, aluminum foil or other conductive materials.
8. Immediately before removing the protective material from the leads of a replacement ESD, touch the protective material to the chassis or circuit assembly into which the device will be installed.
9. Minimize body motions when handling unpackaged replacement ESDs. Motions such as brushing clothes together or lifting a foot from a carpeted floor can generate enough static electricity to damage an ESD.

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Introduction

Sam4POS Overview

The Sam4POS ECR Application software is a powerful platform for cafeteria, food court, thrift store, convenience store and many other applications.

SAM4POS from SAM4s is an Android based ECR application designed to operate on:

- Sam4s Sapphire A60 and A70 Android terminals
- Sam4s SAP-6600(II) & SAP-630 Android terminals
- HiStone HM626 & Hisense HM616 Android tablets
- Sam4s SAP-4800II & SAP-530 (Retired Android terminals)

SAM4POS is available only as a hardware/software bundle; SAM4POS is not available as a generic application and will not run on other Android devices. The Sam4POS ECR Application automatically launches when the terminal is powered-up, other Android applications or desktop functions are not available to the user without authorization.

Multiple stations at a site can be set up in an IRC (*Inter Register Communications*) configuration for sharing programming and report data. Any of the Sam4POS terminal models can be connected together in an IRC system. When the IRC is active, all terminals in the system are updated automatically when program changes are made.

The ECR Terminals or “Stations” within a network can have different settings and operating screens. This manual provides operational information for the Sam4POS ECR application.

Software

Sam4POS from SAM4s is an entry level POS solution running on the SAM4s SAP-6600 & SAP-630 Android terminals or the Hisense HM626 & HM616 Android tablets. Sam4POS is available only as a bundle with the terminal hardware with the software; Sam4POS is not available as a generic application and will not run on other Android devices. The Sam4POS ECR Application will automatically boot on power-up, and other Android applications or desktop functions are not available to the user without authorization.

Licenses

Each terminal in a system requires its own license for proper operation. Live site licenses (*1-year, & 5-year*) can be loaded directly (*Pushed*) to each station. Each station must be connected to an active internet connection for this operation. When the license is “Pushed” to the station, the merchant \ end-user will need to accept the on-screen EULA (*End User License Agreement*) & enter the Manager Password. Afterward, the station should be rebooted to complete the load.

License Types

LIVE SITE LICENSES

Each terminal at a site requires a license to operate. 1-year & 5-year Licenses are available; licenses must be Renewed at the end of the license period.


DATABASE MAINTENANCE LICENSE

Allows Program Mode access only for Inventory Maintenance. 1-year & 5-year Licenses are available. No sales or reporting operations are available, license must be Renewed at the end of the license period to avoid the License Expiration pop-up messages.

MOBILE APP LICENSE

Required for using the optional Sam4POS Mobile Report APP. 1-year & 5-year Licenses are available. The license term must match the license term on the stations at the site. Mobile APP licenses must be Renewed at the end of the license period. The term period must match the terminal license for the site.

License Icon Notes –

The License Information icon  is displayed on the main Sign-On screen and the register mode screen. Touch this icon to display the terminal License information. Each station in the system will have its own unique license.

- **Green Checkmark:** Normal license is active.
- **Yellow Checkmark:** License Expiring Soon (within 30 days)
- **Red Checkmark:** Expired or No License. Will also display red when the terminal is not online.
- **DEMO:** After 31 days of not being online “**DEMO**” will display. This is normal and does not affect operations.

License Expiration Notes –

Important! Check with your local dealer for license renewal options before your license expires.

* 1 YEAR LICENSES

30 to 15 days before expiration – At End Of Day the notification message “License Will Expire In *xx* Days” displays and prompt the merchant to contact their local dealer.

14 to 0 days before expiration – At End Of Day and after every 10 transactions, the notification message “License Will Expire In *xx* Days” displays and prompt the merchant to contact their local dealer.

1 to 14 days after expiration – At End Of Day and after every transaction the notification message “License Expired! License Will Block In *xx* Days” warning and prompt the merchant to contact their local dealer.

15 or more days after expiration – Only allowed 25 transactions per day and all printed documents will have “Demo Version” printed on them and the notification “LICENSE EXPIRED” displays on every transaction.

*5 YEAR LICENSE

With Older firmware – When license expires, Only 25 transactions per day are allowed. All printed documents will have “Demo Version” printed on them and the notification “LICENSE EXPIRED” displays on every transaction.

With current firmware – Sam4POS will continue to run after 5 years however, you will still receive the “License Will Expire in *xx* days” notifications until the end of the license term. The notifications you do not receive are the “License Expired” notifications after the license has expired. When the license has expired, the notification “License Expired” is only displayed when starting Sam4POS, the user must close this notification message to operate the station.

Warning: Firmware updates are not available until a new license is purchased. If the *1-Year or 5-Year license has expired or if you have a 5-year license extension* and the firmware is updated, Sam4POS will go into *Demo Mode* until a new license is purchased. Only 25 transactions per day are allowed and the notification “LICENSE EXPIRED” is displayed on every transaction.

Sam4POS Power Requirements

Plug the Sam4POS ECR into a grounded 3-prong outlet. It is recommended to have dedicated branch circuits for the Sam4POS equipment and isolated grounding for all equipment in the system.

- Be aware that other electrical devices on the same circuit can cause your Sam4POS to malfunction. Avoid plugging your Sam4POS into outlets where other high-current devices are connected.
- Be aware that power quality issues, including voltage fluctuations, electrical noise, spikes, outages, interruptions, and other power viruses can disrupt or damage modern electronic equipment, including Sam4POS ECRs and PCs.
- When Sam4POS is interconnected in networks, connected to PCs or where communications cables connect peripherals, particular care must be taken with power sources and communication cable routing. Your authorized dealer can provide detailed power specifications for these applications. Failure to implement installation requirements for networked systems may cause system failures and/or poor system performance.

Safe Operation

- Do not locate your SAM4s Sam4POS in a damp or wet environment. Avoid high humidity, direct sunlight and temperature extremes.
- Always plug your Sam4POS into a grounded three-prong outlet. Never use two-prong Adapters or ungrounded outlets.
- Check to make sure the power outlet provides the correct voltage: (120V +/- 10%).
- Immediately disconnect the Sam4POS from the power source in case of spilled liquid in the Sam4POS, smoke, or strange smells. Call your authorized dealer for assistance.
- Do not operate the Sam4POS with wet hands.
- Use a soft dry cloth to clean the Sam4POS cabinet. Do not use wet clothes or solvents.
- Do not open the Sam4POS case to attempt repairs. Dangerous voltages can cause shock. Service attempts by untrained personnel can cause unnecessary damage to your terminal.

About Power Conditioning Equipment

Surge Protectors and Power Conditioners

Most people are familiar with surge protectors, which guard against damage due to sudden spikes in the electrical current. A power conditioner provides protection against surges in power just as a surge suppressor does, but a power conditioner also maintains a continuous voltage during temporary voltage reductions, such as a brownout. This is referred to as conditioning. Power conditioners also can filter EMI emanating from a power source and can smooth the rhythmic cycle of alternating current. While surge protectors safeguard equipment, a power conditioner cleans the signal, eliminating interference on the line.



CRS recommends the POWERVAR ABC065-11 (CRS P/N 701002), a 0.65-amp power conditioner that is suitable for most Sam4POS ECR Applications. POWERVAR standard power conditioners are for use with any microprocessor based electronic equipment. Thanks to their low impedance isolation transformer, you can trust these conditioners to protect your sensitive equipment from the biggest problems for today's computers.

Ground Guard Conditioners

POS systems consisting of workstations connected to an Ethernet network must have the same point of reference, (i.e. common ground potential for all equipment in the system.) Unlike electronic loads, traditional electrical loads such as motors, lights, heavy appliances, etc. use the equipment ground for safety purposes only and do not rely on it for proper operation. Computer equipment, on the other hand, introduces the equipment-grounding conductor as an active part of the power supply in referencing digital logic. Therefore, networked POS systems require isolated/dedicated ground circuits to insure proper operation.



CRS recommends POWERVAR ground guard conditioners for network applications. Only the “Ground Guard” conditioner from POWERVAR can be used as an alternative to isolated dedicated ground circuits. Traditional power conditioners cannot be used as an alternative as they do not address the ground issues over a network. The Ground Guard conditioner must protect every piece of equipment in the POS system in order to operate properly. POWERVAR Ground Guard power conditioners are available in sizes from 0.65 to 16 amps, to protect single or multiple POS components.

Uninterruptible Power Supplies (UPS)

On sites where there is a known problem with temporary power outages or brownouts, battery back-up devices should be installed. Most battery back-up devices are known as Uninterruptible Power Supplies (UPS). When power to equipment is momentarily lost, the UPS devices draw power from an internal ‘gel cell’ battery to keep the equipment operating. The length of time these devices power the POS system is dependent on the capacity of the internal batteries. Many sizes are available, but typically the units installed on POS equipment keep the computers powered for about 20 minutes. This will give servers and managers time to settle bills, print checks and power down the system in an orderly fashion.



CRS recommends POWERVAR Security One Series Uninterruptible Power Supplies, the most advanced, line-interactive, true sine wave UPM products available for your application. Each model is designed to provide total protection for your system from a complete range of power quality problems. Security One Series Uninterruptible Power Supplies are available with or without the patented Ground Guard conditioning circuitry.

Hardware

Current Terminals

- ⇒ The Sam4s Sapphire A60 & A70 All-In-One Android touch screen terminals feature a True Flat Projected Capacitive Touchscreen LCD with LED Backlighting.
 - A60 = 15" (Resolution 1024 x 768)
 - A70 = 15.6" (Resolution 1366 x 768)
- ⇒ The Sam4s SAP-630 terminal & the retired SAP-530 Series terminal are ECR-Style All-In-One Android POS terminals featuring a hybrid design. Sam4s has combined a 9.7" touch display for operating the Sam4POS ECR Application by touch with a large keyboard (*raised key or flat keyboard*) to support frequently used items, PLU's a built-in thermal printer, customer display, card reader and cash drawer.
- ⇒ The retired Sam4s SAP-6600(II) All-In-One Android touch screen terminals features a 15" LCD with Projected Capacitive Touch (PCT) and LED Backlighting that will effectively run the Sam4POS application software.
 - The retired Sam4s SAP-4800(II) All-In-One touch screen terminals featured a 15" LCD with 5-wire resistive touch screen with LED backlighting.
- ⇒ The HiStone HM626 & the retired Hisense HM616 ruggedized tablets have a 10.1" bezel-free PCT multi-touch display. You can add the optional Charging Dock or Smart Dock with multiple communication ports to connect peripheral devices.
 - Serial Ports on the Smart Dock are USB to Serial Converted Ports.
(No power is supplied on Serial ports; serial devices will require a power supply.)
 - To utilize the cash drawer port on the docking station, you need to check System Option: Allow Hisense Docking Drawer Popup.
 - You will need to reboot tablet each time it is removed from dock & redocked to recognize ports.
 - Tablet must be docked to apply power to the USB ports.

PCT vs. Resistive Touch

Resistive touch screens respond to pressure and work with any input, while capacitive touch screens detect electrical conductivity and offer higher sensitivity and multi-touch capabilities.

How They Work

Resistive Touch Screens: These screens consist of two flexible layers separated by a small air gap, both coated with a conductive material. When pressure is applied, the top layer contacts with the bottom layer, completing a circuit and registering a touch. This allows the use of fingers (gloved or ungloved), styluses, or other objects.

Capacitive Touch Screens: These screens detect touch through the electrical properties of the human body. A conductive layer, usually glass coated with indium tin oxide (ITO), forms an electrical field. When a finger or conductive object touches the screen, it changes the capacitance, which the controller detects to determine the touch location. Projected Capacitive Touch (PCT) technology supports multi-touch gestures and high sensitivity.

Sapphire A60 & A70 Terminals

- Android 9 (Pie) Operating System.
- CPU: RK3399 (Dual-Core ARM Cortex - A72 1.8GHz + Quad-Core ARM Cortex - A53 1.4GHz)
- Memory: RAM 4GB LPDDR4; Device Storage: 64GB eMMC
- Touch Screen:
 - **A60 = 15"** True Flat Projected Capacitive Touchscreen, USB interface LCD with LED Backlighting. (Resolution 1024 x 768)
 - **A70 = 15.6"** Wide Screen True Flat Projected Capacitive Touchscreen USB interface LCD with LED Backlighting. (Resolution 1366 x 768)
- 3 Serial Ports: COM1 / COM2 = DB9M With Pin 9 (None / +5V / +12V)
 - COM3 = RJ45 Pin 1 (0V+5V/+12V) Voltage Selectable By Android setting.
 - Optional COM4 = DB9M With Pin 9 (None / +5V / +12V)
- 6 USB Ports: Four V3.0 (Rear I/O) / Two V2.0 (Side I/O)
- Cash Drawer Port: RJ11, 12V or 24V Selectable By Switch –
 - Maximum 2 Drawers – Supports Drawer Compulsion
- Ethernet LAN Port: RJ45 IEEE 802.3 10 / 100 / 1000
- WiFi / BT: Wi-Fi : IEEE 802.11 a / b / g / n / ac & Bluetooth 5.0 (optional)
- Display Port: One Display Port for optional second rear LCD display
 - 2-Line LCD (20 Characters x 2-lines) or 9.7", 10.1", 15", 15.6" LCD (Touch Option)
- Audio Port: One Line-Out
- Optional Integrated USB Interface Triple Track MSR.

SAP-630

The SAM4s SAP-630 Series is an ECR-Style all-in-one Android POS terminal. Featuring a hybrid design, SAM4s has combined a 9.7" touch display for operating the POS solution by touch with a large keyboard (*Raised key or Flat keyboard*) to support frequently used items, PLU's a built-in thermal printer, customer display, card reader and cash drawer.

- 9.7" TFT-LCD 5-Wire Resistive touch display
- 160-position flat keyboard or 90-position raised keyboard to support frequently used items.
- Integrated Internal 3" thermal printer.
- Key-Lock security with **Void, Off, Register, X, Z, and P** (program) positions.
- Integrated Two-Line alphanumeric rear VFD customer display.
- Heavy duty metal cash drawer.
- LAN Standard 10/100 Base-T Ethernet
- **Optional:**
 - Integrated Dual Track MSR (Card Reader)
 - WiFi: Compatible with IEEE802.11b/g/n
 - Bluetooth: v4.0+HS Standard – Backward Compatible with v1.1, v1.2 and v2.1+EDR, Up to 328 Feet (100m) Operating Range

HM626 HiStone Tablet

The Hisense HM616 Android Ruggedized Tablet features a 10.1 inch, bezel-free and wide screen display is designed with Projected Capacitive (PCT) touch technology that helps to extend the operating life and allow multi-touch control.

- Android 7.1 (Nougat) Operating System.
- 10.1' TFT LCD (LED Backlight) 1280 x 800 Resolution
- Touch Panel: True Flat Projected Capacitive
- 4 GB Memory; 64 GB Storage
- Front 2 Megapixel Camera and Rear 5 Megapixel Camera
- Two Internal Speakers
- Sturdy Hand Strap - Remove the Hand Strap to Reveal the Standard VESA Configuration
- Protected Against Dust and Water Sprayed from All Directions (IP Grade IP54)
- Withstands a Drop of 4 Feet on to Concrete (MIL-STD-810G)
- Includes a Built-In 3.8v 11000mAh Battery
- WiFi and Bluetooth Wireless Communication
- Standard Integrated triple track MCR
- Power Adapter and Cord Included
- Compatible with Popular Software Applications
- Tablet Connection: 10 Pin Pogo Style Connector
- Tablet I/O Interface: 3.5mm Audio Jack \ Nano SIM \ Micro SD \ Micro USB \ USB V2.0 (4GB Max) \
- DC Jack / Micro HDMI
- **Optional:**
 - Charging Dock I/O: 5V Charging \ Two USB V2.0 (4GB Max)
 - Smart Dock: Cash Drawer \ 24V Power In \ Two RS232C \ Ethernet \
 - Three USB V2.0 (4GB Max)

Retired Terminals

SAP-6600(II)

The SAM4s SAP-6600 touch screen terminal is an All-In-One Android touch screen terminal that will effectively run the Sam4POS application.

- Intel Braswell Celeron N3160 Quad Core 2.24GHz Fanless Processor
- Android 6.0 (Marshmallow) Operating System
- Stylish 15” LCD with Projected Capacitive Touch (PCT) with LED Backlighting
 - PCT is Inherently Faster, More Reliable and Robust
 - Vivid LED Backlight for Reliability and Energy Savings
 - Resolution 1024 x 768
- Integrated 1.5W Speaker
- 2GB DDR3 RAM expandable to 8GB
- Standard Magnetic Card Reader, Bluetooth and WiFi
- Energy Efficient and Low Heat Generation Architecture
- Fanless Operation – No Problematic Ventilation Holes
- Meets IP55 Standards for Exposure to Dust – Waterproof Front Panel
- **Optional:**
 - Integrated 2-Line by 20 Character VFD Customer Display or a 15” LCD Rear Display

HM616

The Hisense HM616 Android Ruggedized Tablet features a 10.1 inch, bezel-free and wide screen display is designed with Projected Capacitive (PCT) touch technology that helps to extend the operating life and allow multi-touch control.

- Front and Rear Cameras
- Integrated triple track Card Reader
- Two 1 Watt Speakers
- Sturdy Hand Strap - Remove the Hand Strap to Reveal the Standard VESA Configuration
- Protected Against Dust and Water Sprayed From All Directions (IP Grade IP54)
- Withstands a Drop of 4 Feet on to Concrete (MIL-STD-810G)
- Includes a Built-In 3.7v 900mAh Battery; provides 8 hours operation with 50% brightness
- WiFi and Bluetooth Wireless Communication
- Power Adapter and Cord Included
- Tablet Connection: 10 Pin Pogo Style Connector
- Tablet I/O Interface: Audio Jack / Nano SIM / Micro SD / Micro USB / USB V3.0 (4GB Max) / DC Jack / Micro HDMI
- **Optional:**
 - Charging Dock I/O: 5V Charging / Two USB V2.0 (4GB Max)
 - Smart Dock: Cash Drawer / 24V Power In / Two RS232C / Ethernet / Three USB V2.0 (4GB Max)

SAP-530

SAP-530 RT Raised Keyboard and SAP-530 FT Flat Keyboard Hybrid ECR-Style Open Architecture POS Terminals All-in-One Android POS Terminals The SAM4s SAP-500 Series is an ECR-Style all-in-one Android POS terminal. Featuring a hybrid design, SAM4s combined a 9.7" touch display for operating the POS solution by touch with a large keyboard to support frequently used items, PLU's a built-in printer, customer display, card reader and cash drawer.

SAP-4800II

The SAM4s SAP-4800II All-In-One 15" LCD touch screen terminal is powered with an ARM Cortex™ quad-core Fanless processor and come with a standard 3-Track MSR, Wi-Fi, Bluetooth.

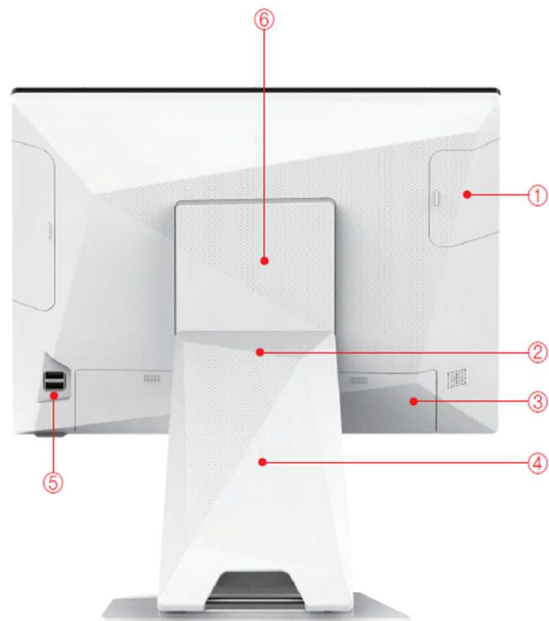
Controls & Connections

While the programming on the Sam4POS is essentially the same, the connections and controls may vary on the different terminals.

Sapphire A60 & A70



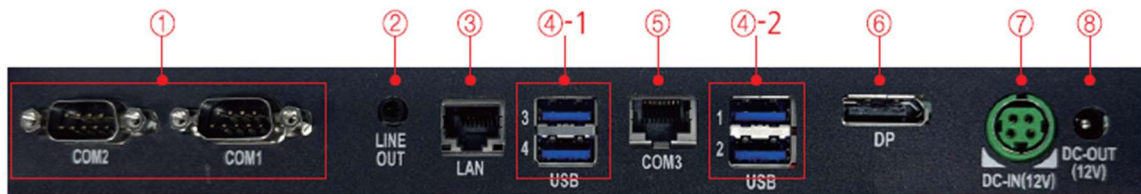
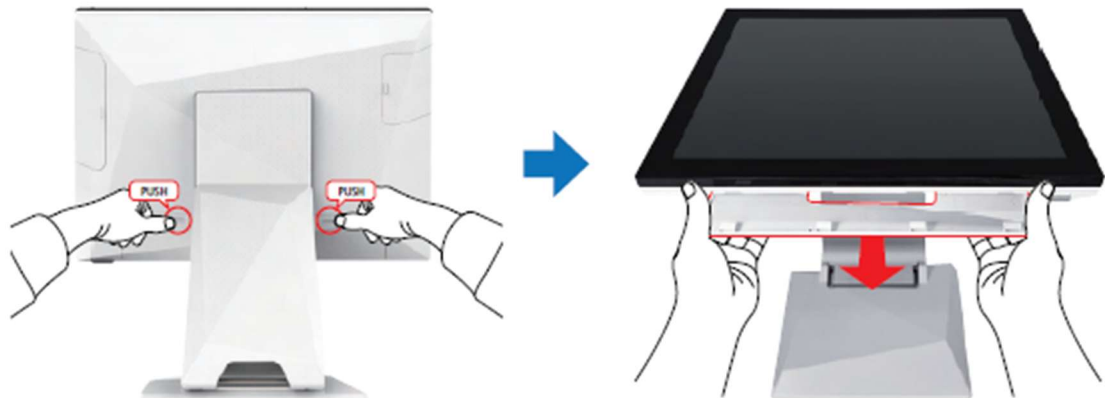
1. Main Display, PCAP Touch
2. 3-Track MCR Magnetic Card Reader
3. Power button
4. Multi-Adjustable Stand



1. SSD cover
2. Cable Cover
3. Interface cover
4. Cable Cover
5. USB 2.0 Port
6. Hinge Cover

Sapphire A60 & A70 Connection Panel

To access the connection panel, you will need to remove the Interface Cover:



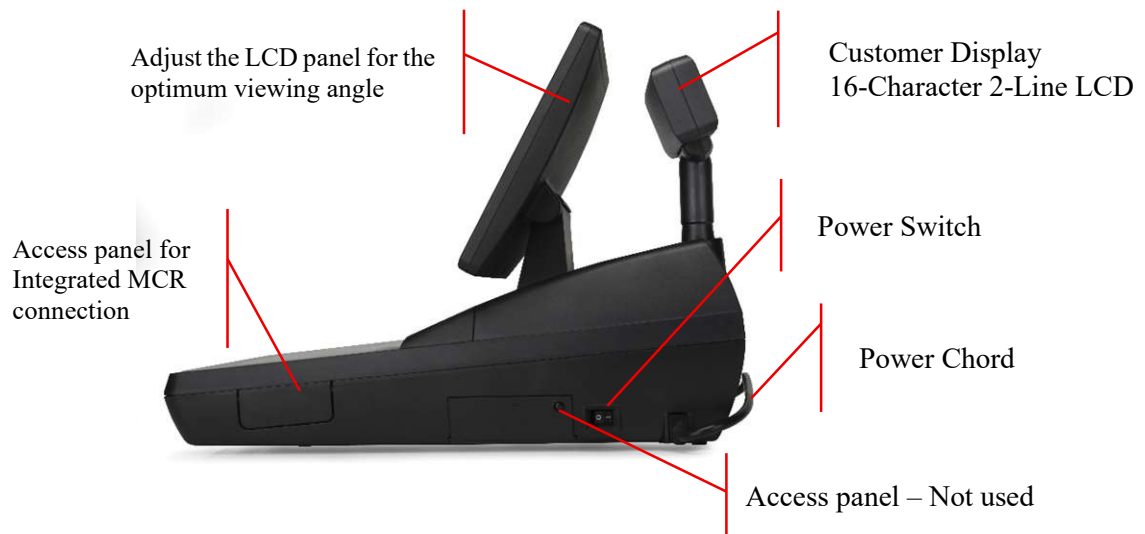
- | | | | |
|---------------------------|---------------------------|------------------------|------------------|
| 1. DB9 COM ports (Serial) | 2. Audio Port (Line-Out) | 3. RJ45 LAN (Ethernet) | 4. USB 3.0 ports |
| 5. RJ45 COM port (Serial) | 6. DP port (Display Port) | 7. 12v DC Input | 8. 12v DC Output |

SAP-630/SAP-530
The SAP-530 is Retired –



*Shown with Flat Keyboard
Raised Keyboard Style also available*

Side Connections



Rear Customer Display

The SAP-630 & SAP-530 terminals come equipped with an integrated rear VFD customer display.



SD Memory Card Slot



The SD Memory Card is located inside the printer compartment. It is seen as a USB by the terminal and can be used to:

- Load Application Program Updates
- Save/Load Program Settings
- Load Graphic Images
- Save Screen Captures

Connection Panel



Standard ports include:

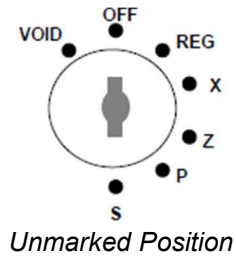
- 2 Additional Cash Drawer Ports (24v)
- LAN port
- 2-USB Ports (1 back panel/1 front)
- 4-RS-232C Comm. Ports (2-DB9 Male / 2-RJ45)

Front USB port located behind access door (for keyboard, USB memory stick or scanner)



Mode Switch

The Mode Switch has 7 positions that can be accessed using keys provided with the terminal. Each SAP-630/SAP-530 is shipped with two full sets of keys.



VOID	Transaction Void: removes sales totals.
OFF	The register is inoperable.
REG	Register Mode: use for normal sale registrations.
X	Report Mode: use to read register reports, view and/or print reports.
Z	End Of Day: use to read register reports, reset and/or print reports.
P	Program Mode: use to program the register.
S	The S-Mode is Not used.

Note: Before performing any operations in the register mode, a clerk must be signed on. Refer to the “Signing On/Off” operation on page 76 in the “Basic Operations” chapter for a description of clerk operations.

Mode Switch Keys

The SAP-630/SAP-530 Sam4POS includes two sets of keys that can be used to access the following Mode Switch positions.

Key	Positions Accessible
VD	VOID, OFF, REG, X
X	OFF, REG, X
Z	VOID, OFF, REG, X, Z
P	VOID, OFF, REG, X, Z, PGM
C	VOID, OFF, REG, X, Z, PGM, S

Note: Mode Switch keys may be removed from the Mode Switch in the **OFF** or **REG** positions only.

SAP-6600(II)



Standard 3-Track
Front Facing
Magnetic Card Reader (MCR)

Power Button located
on the bottom right of
the touch panel

Standard 3-Track
Front Facing
Magnetic Card Reader (MCR)

Two v2.0 USB Ports

Connection Panel Access Cover

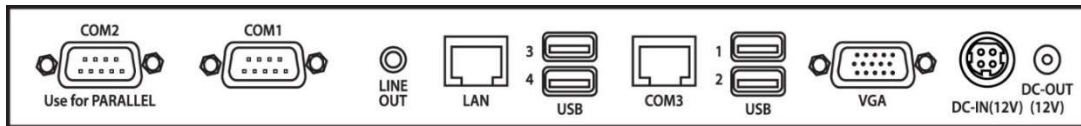
Cable Management Access Cover



Optional Integrated Rear
2 Line by 20 Character
VFD Customer Display



SAP-6600(II) Connection Panel

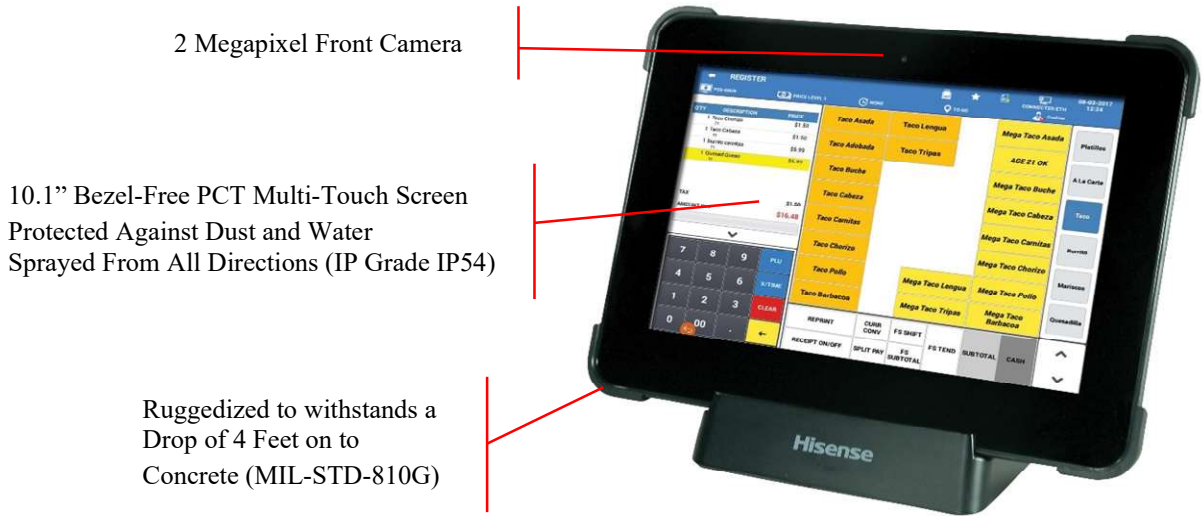


- COM1, COM2 = DB9M With Pin 9 voltage (+5V)
- COM3 = RJ45 Pin 8 (0V / +5V / 12V) Voltage selectable in BIOS
- Audio Line-Out port
- Four v3.0 USB Ports on I/O / Two on rear/side I/O
- LAN Port: RJ45 10/100/1000 Base-T
- VGA Port = DB15F for second display (Maximum resolution: 1920 x 1200)
- Power Connection for External 60W, 12V / 5A power Adapter 100-240V / 50-60Hz
- DC-Out (12V)



Standard Cash Drawer Port
(Located on the right side of the
connection panel near the DC-Out
and the Power Button.)
Selectable 24V / 12V

HM626 & HM616



2 Megapixel Front Camera

10.1" Bezel-Free PCT Multi-Touch Screen
Protected Against Dust and Water
Sprayed From All Directions (IP Grade IP54)

Ruggedized to withstands a
Drop of 4 Feet on to
Concrete (MIL-STD-810G)

Shown with Optional Charging Dock



1D / 2D Scanner

RFID

Integrated MCR

Internal Speakers

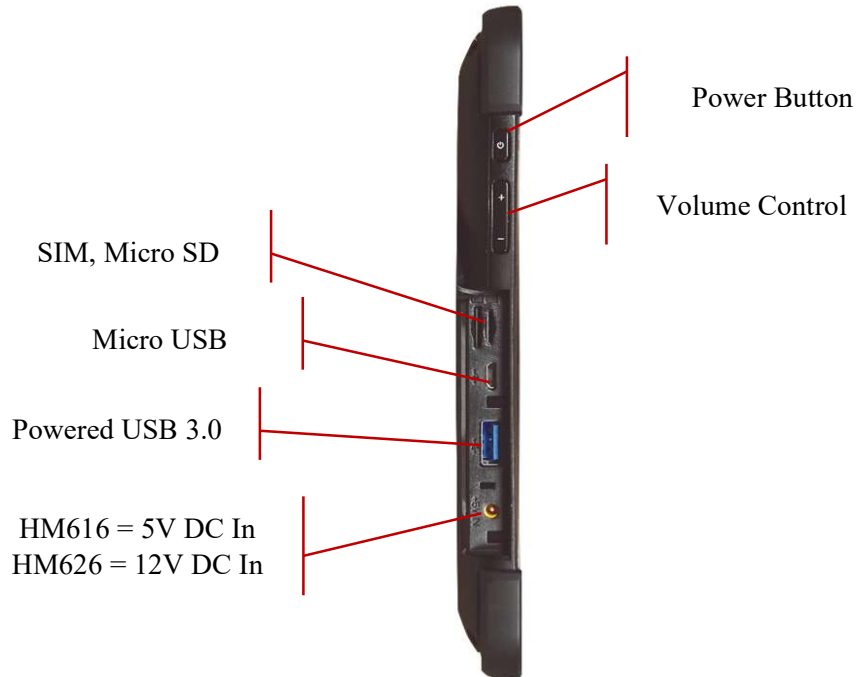
10-Pin POGO Style Connector

5 Megapixel
Rear Camera

Scan Buttons

Sturdy Hand Strap
Remove the hand strap
to reveal the standard
VESA configuration

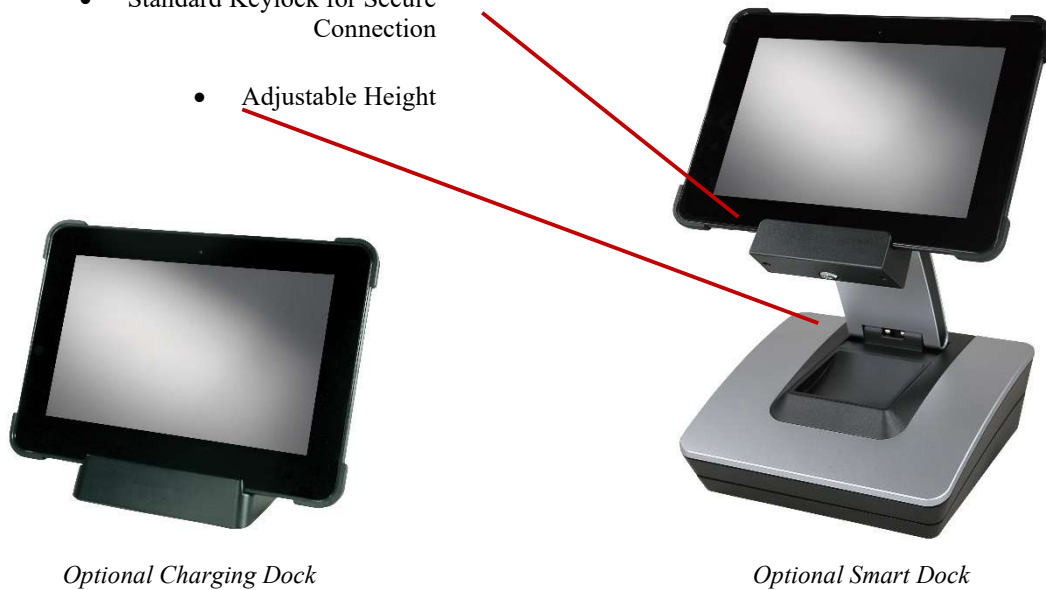
Side Panel Controls



Optional Charging Dock or Smart Dock

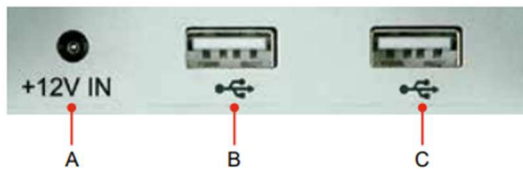
Notes:

- The Tablet will not communicate with the Charging Dock or Smart Dock when removed (not docked).
- Although the docking stations for the HM616 and HM626 appear the same, the charging dock & smart dock for the HM616 & HM626 supply different voltages and are not interchangeable.
 - Standard Keylock for Secure Connection
 - Adjustable Height



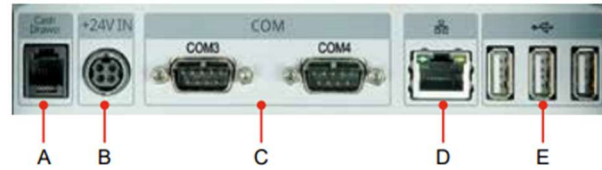
HM626 Docking Station Connection Panels

Charging Dock Connection Panel



- A. 12v DC Input (HM626)
- B. USB v2.0 Port
- C. USB v2.0 Port

Smart Dock Connection Panel



- A. RJ12 Cash Drawer Port
(Does not work with Sam4pos)
- B. 24V DC Input
- C. COM3 & COM4 DB9M RS232C Ports –
(Serial Ports are USB to Serial converted ports)
- D. RJ45 Ethernet Port (100Mbps LAN)
- E. Three USB v2.0 Ports – (Tablet must be docked to apply power to USB Ports)

Notes:

- With tablet removed from Smart-Dock devices will not work. When tablet docked again, you will need to reboot tablet to recognize devices.
- There is no power provided to the serial ports. Peripheral device will required their own power supply.

After the HM626 tablet is up and running you need to swipe across the screen to unlock it. There are a few settings within the Tablet itself that should probably be set before they go out.

NOTE: An updated OS is available for the HM626 with these configurations already set.

- Sleep set at Minimum of 5 Minutes (Default = 30 Seconds)
- Font Size = Small
- Orientation locked in Landscape Mode (Default = Rotate the contents of the screen.)
- Date & Time – Set to local Time Zone
- Smart Dock Ports Should Be Marked

HM616 Docking Station Connection Panels

Charging Dock Connection Panel



- 5V DC Input (HM616)
- Two USB v2.0 Ports

Smart Dock Connection Panel



- RJ11 Cash Drawer Port (*Does not work with Sam4pos*)
- 24V DC Input
- Two DB9M RS232C Ports – (Serial Ports are USB to Serial converted ports)
- RJ45 Ethernet Port (100Mbps LAN)
- Three USB v2.0 Ports – (Tablet must be docked to apply power to USB Ports)

Notes:

- With tablet removed from Smart-Dock devices will not work. When tablet docked again, you will need to reboot tablet to recognize devices.
- There is no power provided to the serial ports. Peripheral device will required their own power supply.

After the HM616 tablet is up and running you may need to swipe across the screen to unlock it. There are a few settings within the Tablet itself that should probably be set before they go out.

- Screen Lock Disabled So you don't have to swipe to open app and possibly get stuck in camera mode. (Default = Swipe)
- Orientation locked in Landscape Mode (Default = Auto Rotate)
- Sleep set at Minimum of 5 Minutes (Default = 30 Seconds)
- Smart Dock Ports Should Be Marked

SAP-4800II

The SAP-4800II is Retired –

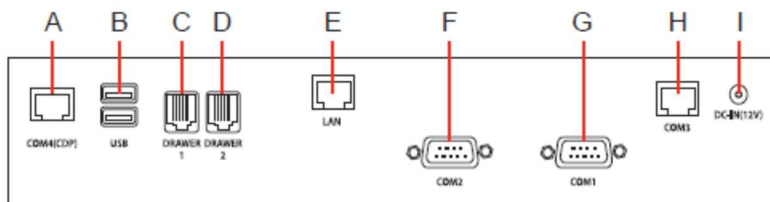


Standard 3-Track
Magnetic Card Reader
(MCR)

Power Button
Located on the bottom
of the touch display.

Break out tabs for
cable management.

SAP-4800II Connection Panel



- A - COM4 (Powered)
- B - USB (2)
- C - Drawer 1
- D - Drawer 2
- E - LAN
- F - COM2 (Powered)
- G - COM1 (Powered)
- H - COM3 (Powered)
- I - DC In (Power Input)

Rear VFD Display (optional)

Available as an option on the SAP-6600 & SAP-4800II



Keyboards (SAP-630/SAP-530)

The SAP-630 and SAP-530 are ECR style terminals and come with either a 160-position flat spill resistant keyboard or a 90-position raised keyboard to support frequently used items.

Default Flat Keyboard

Flat keyboard models have 160 key positions with the default legends and key assignments as shown below. The keyboard legend sheet can be replaced by lifting the protective rubber cover.

RCPT FEED			28	38	48	58	68	78	88	98	PLU INFO	RECEIPT ON/OFF	REPRINT	VOID ITEM	EMP#
1	10	19	29	39	49	59	69	79	89	99	EFT OPRTN	R/A	P/O	NO SALE	RETURN
2	11	20	30	40	50	60	70	80	90	100	ALPHA TEXT	EAT IN	YES/NO	ENTER	CANCEL
3	12	21	31	41	51	61	71	81	91	101	SEAT#	LIST CHECK	STORE	RECALL	PRINT CHECK
4	13	22	32	42	52	62	72	82	92	102	EXEMPT TAX	TAX SHIFT	F/S SHIFT	F/S SBTL	
5	14	23	33	43	53	63	73	83	93	103	%1	CLEAR	PLU		
6	15	24	34	44	54	64	74	84	94	104	%2	7	8	9	MISC 1
7	16	25	35	45	55	65	75	85	95	105	%3	4	5	6	CHECK
8	17	26	36	46	56	66	76	86	96	106	%4	1	2	3	SBTL
9	18	27	37	47	57	67	77	87	96	107		0	00	.	CASH

Default Raised-Key Keyboard

RECT FEED		RE PRINT	RCPT ON/OFF	TAX EXMT	TAX SHIFT	VOID ITEM	MDSE RTRN		EAT IN				CANCEL	EMP#
% 1		X/TIME	PLU	CLEAR				1	6		11		F/S SHIFT	
% 2		7	8	9				2	7		12		F/S SUB	MISC 1
% 3		4	5	6				3	8		13			CHECK
% 4		1	2	3				4	9		14		SUBTOTAL	
% 5		0	00	.				5	10		15		CASH	

Expanded Raised-Key Keyboard




















RECT FEED		RE PRINT	RCPT ON/OFF	TAX EXMT	TAX 1 SHIFT	VOID ITEM	MDSE RTRN		EAT IN				CANCEL	EMP#
% 1		X/TIME	PLU	CLEAR	1	6	11	16	21	26	31	36	F/S SHIFT	
% 2		7	8	9	2	7	12	17	22	27	32	37	F/S SUB	MISC 1
% 3		4	5	6	3	8	13	18	23	28	33	38		CHECK
% 4		1	2	3	4	9	14	19	24	29	34	39	SUBTOTAL	
% 5		0	00	.	5	10	15	20	25	30	35	40	CASH	














Getting Started

Navigation Tips

Navigating the various screens within the Sam4POS Cash Register Application is very intuitive. Screens are set up with easily identifiable icons to quickly access and select the various program categories and option settings. Many icons are common throughout the operation and programming screens. Below is a list of common icons used in Sam4POS and a description for its use.

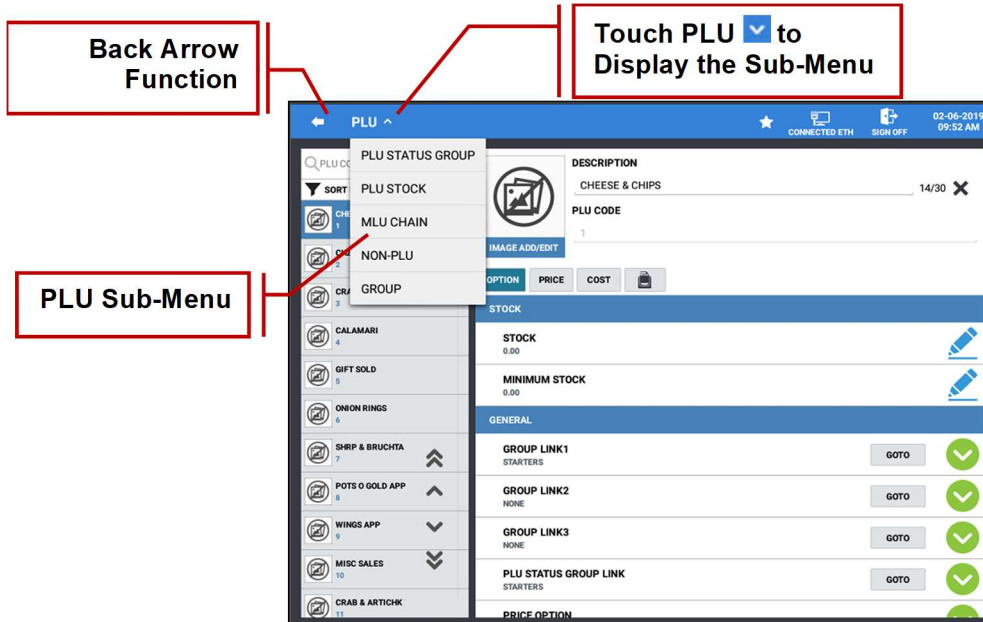
Common Icons

Icon	Description
	Back Arrow , used to exit the current Mode selection, go back one screen.
	Return icon , used to go back to the previous screen/selection.
	Sub-menu icons , used to display/hide the sub-menu for the current mode.
	Add New Record icon , used to add new records to the current database category.
	Menu icon – used to access the sub-menu selection to Edit or Sort information on programming screens.
	GOTO button - allows you to go to the programming options for that program area, group, recipe or MLU etcetera, from within the current program area.
	Dropdown button opens a list of selections for the current program option.
	Pencil icon allows you to open a window to enter a value for the current program selection.
	Option check box with option not selected.
	Option checkbox with option selected.
	List / Edit current list.
	Trash Can icon is used to delete records.
	Inactivate – makes current selection inactive.
	Exit / Clear – used to exit the current operation or to clear a data entry field.
	Copy Icon – copies the currently selected item.
	Refresh icon – refreshes the current screen.
	Show or Magnify the current selection data.
	Print – Used for printing reports and labels.
	Export – export the current file to CSV or PDF.

Icon	Description
	<p>Scroll keys, the single arrow keys scroll Up/Down one page at a time, the double arrow scroll keys go to the Beginning/End of the list.</p>
	<p>Favorite icon – Use to add or remove current selection to the Favorite List. White is not added to favorite list; gold indicates selection is added to favorite list. The favorite list can be accessed from any mode except the Register Mode.</p>
	<p>Apps Launcher Utility icon displays when in the register mode. Use this icon to access additional operations from the register mode.</p>
	<p>Table Map icon. Press to launch the Table Map. Table Map can also be set to launch automatically when an employee signs on to the station.</p>
	<p>Receipt On/Off – Turn receipt printing On\Off. See Employee Authority Level if not shown.</p>
	<p>License Info – Touch this icon to display the ‘My License Info’ information dialog. See Employee Authority Level if not shown.</p>
	<p>Connection Method indicator, pressing this icon will bring you to the Wireless & Network settings in the main Android settings. (Manager Password is required to access.)</p>
	<p>When IRC is used, if the main terminal is turned off, the IRC Error displays on the satellite terminals.</p>
	<p>Sign Off icon allows you to sign off directly from the current screen without having to exit all the way out to the main Sign-On screen.</p>
	<p>Date/Time – Touch this icon to display the clock on the screen: Tap screen again to restore the register mode screen.</p>
	<p>Sort menu – displays current sort selection from the edit/sort menu; if you press this icon, the sort will go back to the default setting, Sort By PLU Code.</p>
	<p>This Apps Launcher icon appears on the default Android screen. Tap this icon to view the Apps installed on the terminal.</p>
	<p>Main Android Screen Settings icon. Access the Android setting for the terminal.</p>

Related Sub-Menu

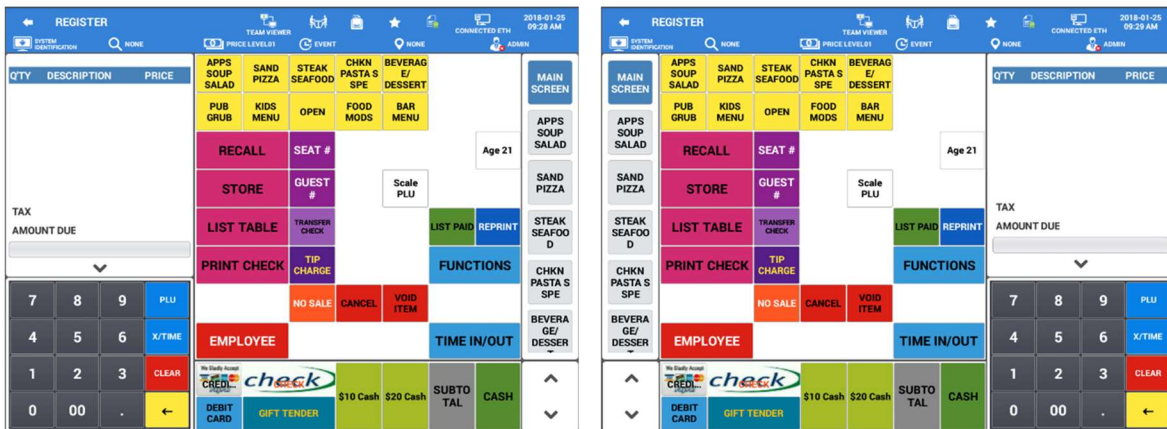
If you are inside a program category or report area, you can take a shortcut to a related program area rather than backing out to the main program screen and reselecting the new program area. and following the menu to a different area. From an individual program screen, (as an example we will use the PLU programming screen) touch title *PLU* in the upper left to display a list of related programs. Select a new program area directly from the list to go to the programming for your selection.



Left or Right Hand Display by Employee

By operator preference, the screen can be set to for left or right-handed view.

(See “Employee File Maintenance” programming on page 312 for details.)

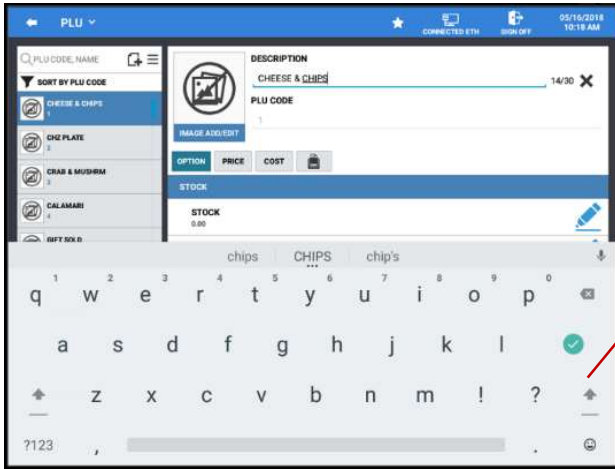


Right Hand View

Left Hand View

Using the On-Screen Keyboard

When a program or operation function requires an alphanumeric entry, the screen keyboard will display automatically. Type your descriptor and touch Done ✓. The keyboard will hide automatically when your entry is completed.



Press the **CAPITALIZE** button to capitalize a letter. (*Capitalize On is indicated by blue arrow.*)

Press and hold the **CAPITALIZE** button to activate the **CAPITALIZE LOCK**. (*Capitalize Lock is indicated by blue line under the blue arrow icon*):

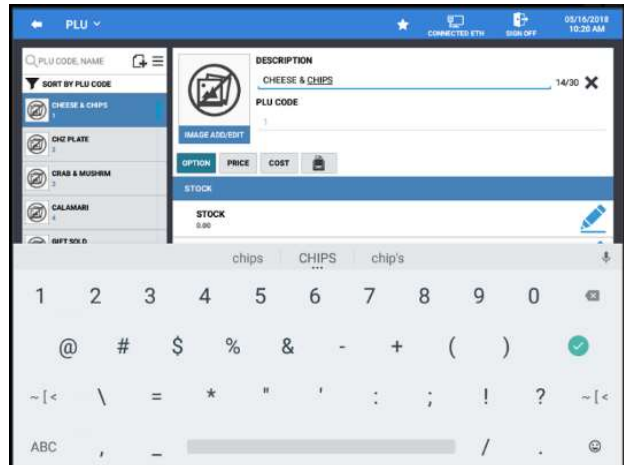
↑ CAPITALIZE Off

↑ CAPITALIZE On

↑ CAPITALIZE Locked

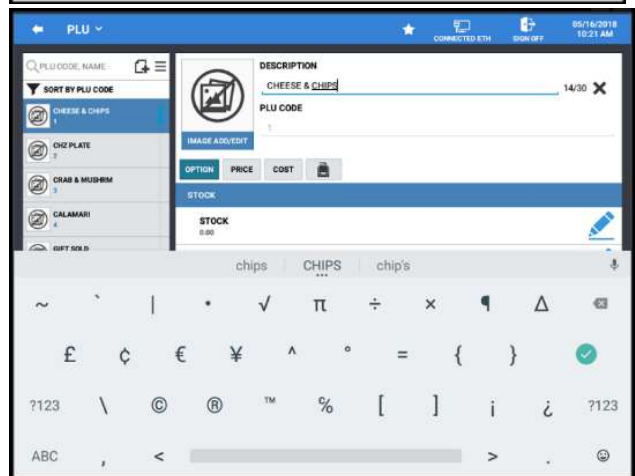
NUMERIC KEYS:

Press the **?123** numeric key to access.



ADDITIONAL FUNCTION KEYS:

Press the **~ [<** symbol key to access.



Using an External Keyboard

For large-scale programming, users may find an external USB keyboard more familiar and quicker to use for entering data. You can hide the on-screen keyboard by touching the ESC key on the external keyboard.

The following shortcuts may be used with an external keyboard:

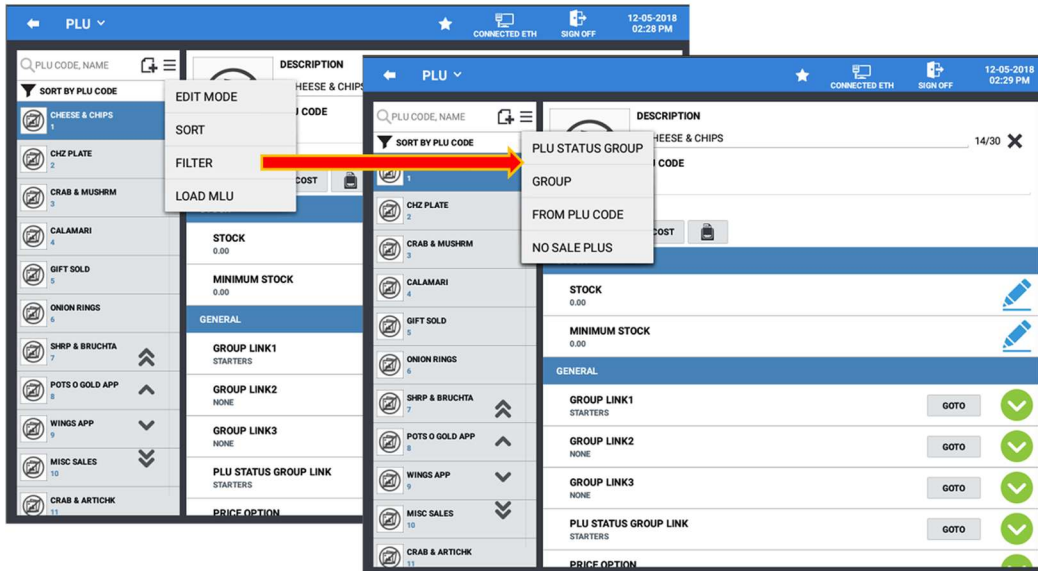
Esc	If a screen keyboard is displayed, press Esc to hide it, otherwise Esc will perform a back function, returning to the previous screen or program.
F8	Press to enter a new item. If there are two “new” options, for example in MLU programming, [NEW MLU GROUP] and [NEW MLU], F8 will bring up the lowest level, in this case [NEW MLU].
Del	Delete the selected item.
Tab	Advance to the next field
Enter	OK
Shift + Enter	OK and Continue

Menu Icon

In a long list, multiple items can be Edited (deleted or inactivated) Sorted for easier navigation or Filtered to see specific items. Different program areas may have different selections on the **Menu ≡ icon**, and selections within a sub menu may contain more selections.

For example: In PLU programming, Press the **Menu ≡ icon** to view additional sub menu selections.

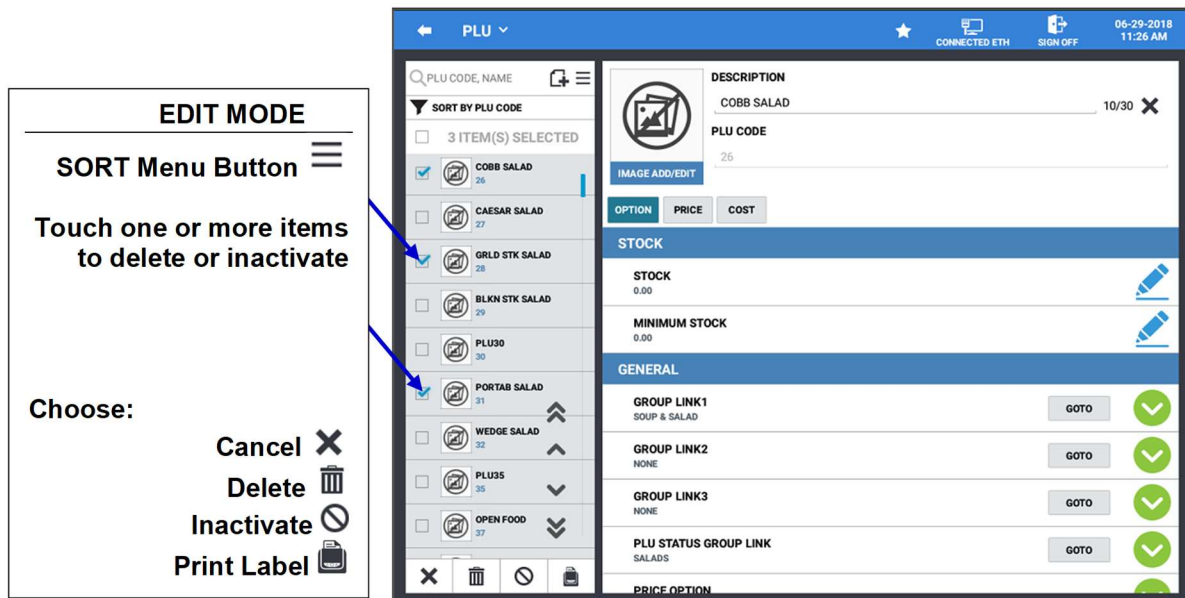
Press the **FILTER** selection on the sub menu; An additional sub menu displays the Filter selections:



Edit Mode

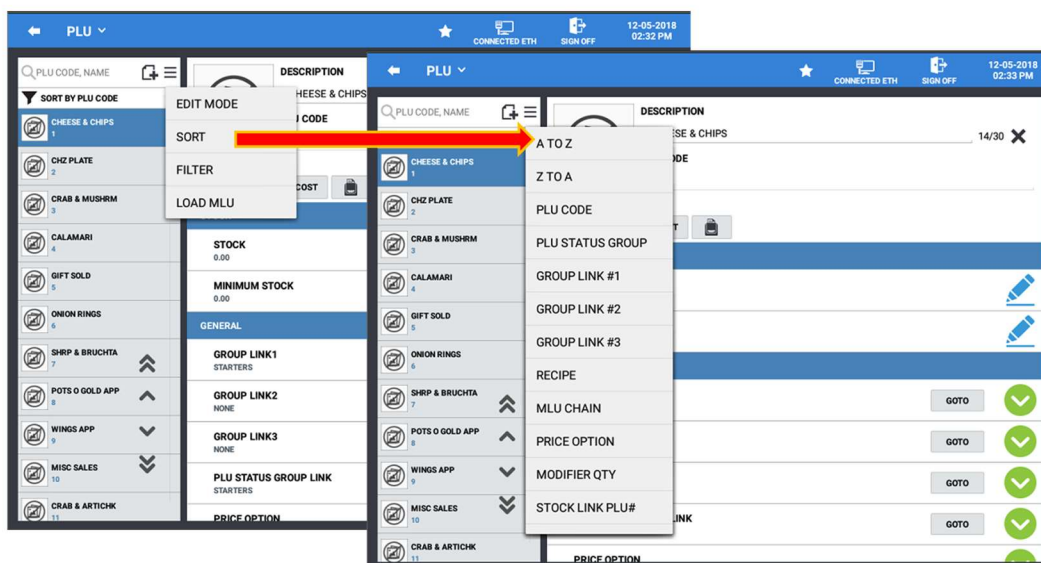
In long lists, multiple items can be deleted or inactivated from the Edit Mode.

1. Touch the Menu icon and select **EDIT MODE** to edit the list.
2. Select specific items from the list. For Example: edit a PLU list. The action you choose will apply to all selected PLU's.
3. You can also search for specific items by code or descriptor. Press the search field at the top of the display then type the desired code or description. Only items matching the search parameters will appear.



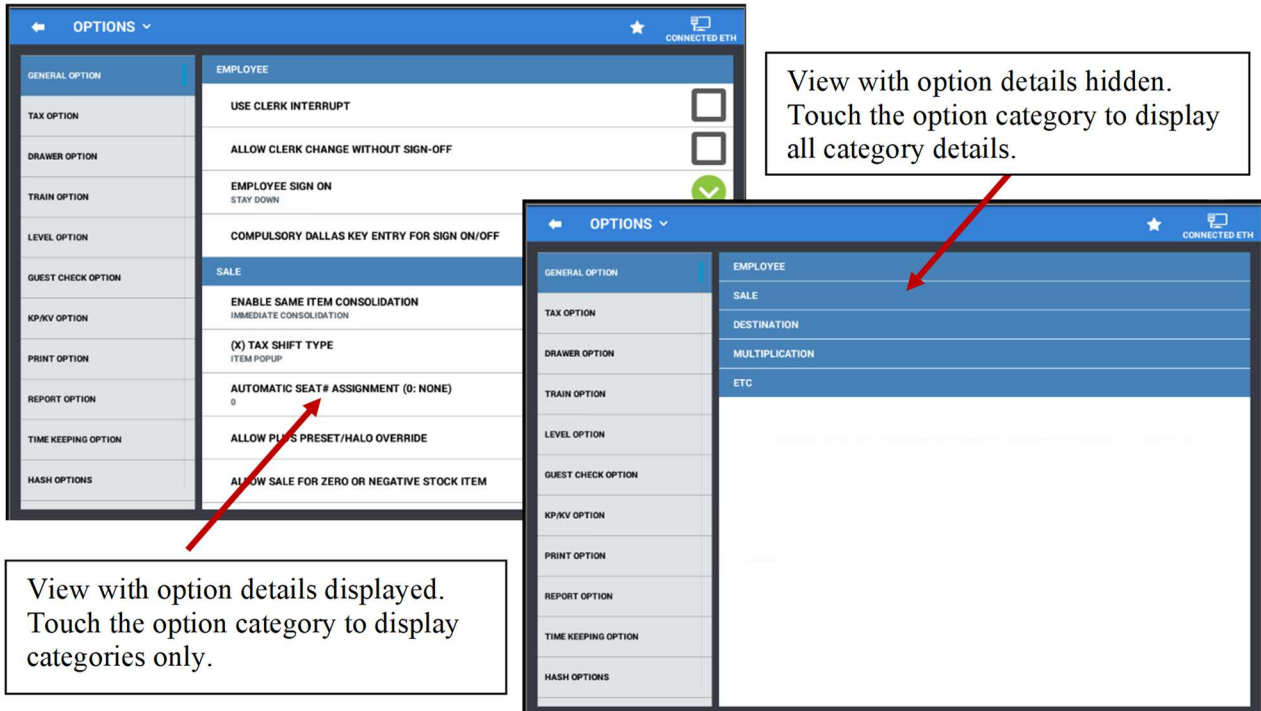
Sorting a List

In a large list, it may be simpler to sort the items in the list to assist in location specific items quicker. Select [SORT] to sort the items either alphabetically or by PLU code.



Viewing/Hiding Options on Long Lists

For program areas where there are long lists of selections, such Function Keys and System Options, are organized in category sections. You can view or hide the options detail within each of the section categories by tapping on the blue category section header bar. Tapping on any of the section category headers will collapse\expand all sections.

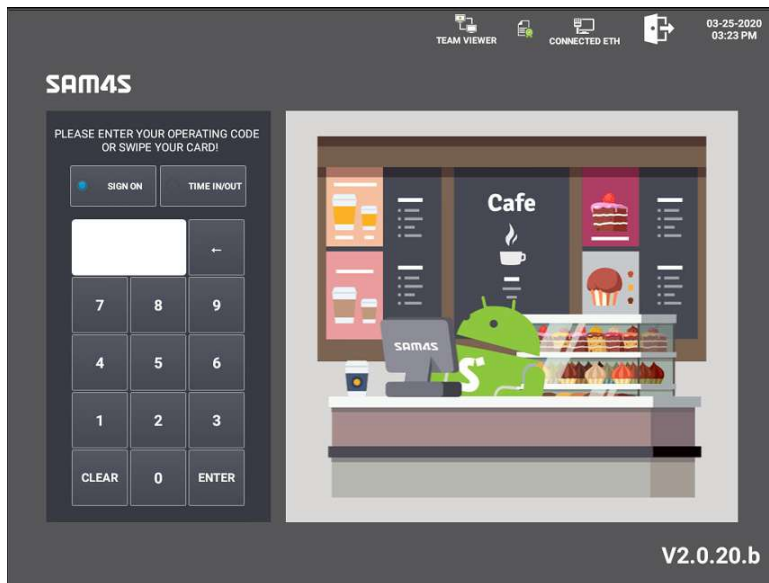


Default Screens

Main Sign-On Screen

Upon boot up, the Sign-On screen displays. This screen will display regardless of the position of the mode switch key. Use the default password “1” and touch the “ENTER” key to log in the first time. You must Sign-On to be able to operate the Sam4POS in any mode switch key position.

Time-In/Time-Out operations for the employee time keeping feature can also be performed from this screen, refer to the “Time In/Out Operation” chapter on page 78 for details.



Main Sign-On Screen Icons

TEAM VIEWER	CONNECTED ETH			05/11/2018 02:51 PM
Opens Team Viewer	Displays License Info	Current Connection Method	Exits to the main Android screen	Current Date/Time

Main Category Selection Screen

After a successful log-on to Sam4POS on the SAP-6600/SAP-4800II terminals and the HM626/HM616 tablets, the SAM4POS Main Menu screen displays:



When you log-on to Sam4POS on the SAP-630/SAP-530 terminals, the screen that is displayed depends on the position the Mode Switch Key is in: REG, X, Z, P, or VOID.

Main Category Selection Icon Details:

The main menu icons on the SAP-6600/SAP-4800II terminals and the HM626/HM616 tablets are used to navigate to the various operation and program areas of the Sam4POS Cash Register Application.



Memos\Reminders – Memos and Reminders can be added and accessed from the Main Category Selection Screen using the memo icon.



Register Mode – Opens the Operator's sales entry screen.
REG position on the SAP-630/SAP-530.



Report Mode – Accesses the system reports to view and generate system reports.
X position on the SAP-630/SAP-530.



End of Day – Accesses the End Of Day, End Of Pay, and End Of Not Found PLU reports to clear current data. **Z** position on the SAP-630/SAP-530.



Favorite List – Displays the Favorite List. You can identify specific selections to display in the Favorite List. Selections may be from various areas within the application such as a specific report or program screen.



Program Mode – Access the various programming categories for maintaining program additions or changes. **P** position on the SAP-630/SAP-530.



Exit icon – Used to close the SAM4POS CASH REGISTER APPLICATION, this will return you to the main Sign-On screen.



Touch this icon to hide or display the main menu category selection icons.




When displayed, use the Return icon to exit the current screen and/or go back to the previous screen/selection.


Memo/Reminders

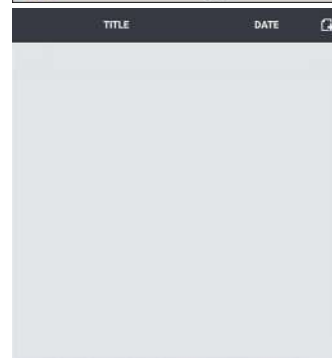


On the SAP-6600/SAP-4800II terminals, Memos and Reminders can be added and accessed from the main menu screen using the memo icon. The Memos/Reminders can be accessed from the register mode as well. On the SAP-630/SAP-530, memos can only be accessed/added from the register mode.

1. Sign-On to the Sam4POS ECR Application from the main Log On screen.
2. Press the **Memo Icon**  on the upper right of the main menu screen to open the Memo dialog to view or add Memo's, notes, or reminders.



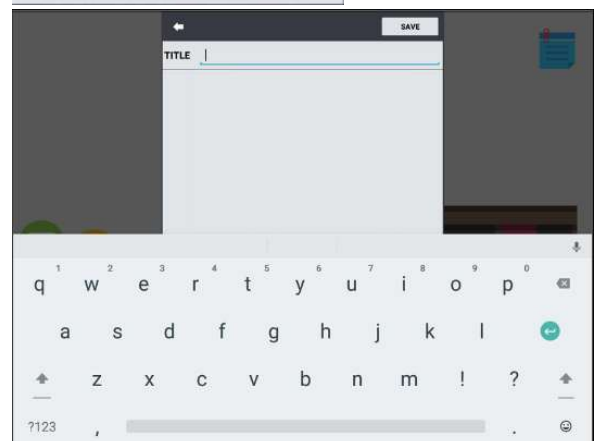
3. On the note pad that displays; Press the  icon to add a new memo or reminder to the list.



4. The memo dialog and a keyboard display. Using the on screen keyboard, type a **TITLE** (*up to 40 characters*) for the new memo, note or reminder.

Alternatively, an external keyboard connected to the terminal may be used.


5. Type a message for the on the notepad below the Title Memo if desired and press **SAVE**.



- The new MEMO\Reminder is added to the list.







Edit\Delete\Print Memo

- Press the **Memo Icon**  on the upper right of the main menu screen to open the Menu dialog to view or add Memo's, notes, or reminders.
- To **Edit** or **Delete** a MEMO/Reminder; Tap/touch on the desired MEMO/Reminder in the list:




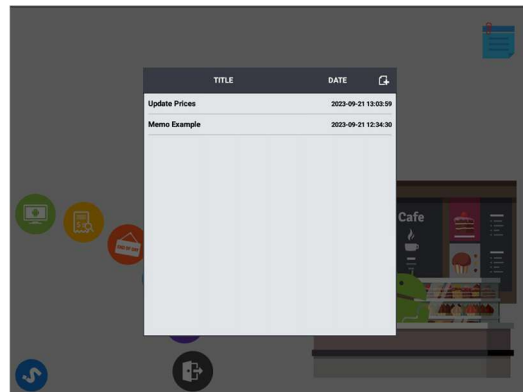
- Use the icons on the Memo dialog header bar to perform the desired operation.

Press the:

- **Note Pad**  icon to edit the note.
- **Trash Can**  icon to delete the note.
- **Print\Email**  icon to send the note to email.
- **Back-Arrow**  icon to close the current Memo.



- Press the **MEMO**  icon, or anywhere outside the Memo dialog, to close the MEMO/Reminders list.



Register Mode Screen Layout




On the Sapphire, SAP-6600(II) & SAP-4800II terminals, touch the Register Mode icon on the Main Menu screen to open the Sam4POS Register Mode Operator Screen. On the SAP-630 & SAP-530 terminals, turn the mode key to the REG position.

The register mode operator screen is divided into different zones to facilitate regular sales transactions. Review the “Register Mode Screen Zones” table on the next page for details about each zone.











The screenshot shows the Register Mode Operator Screen with the following zones labeled:

- A:** Back Arrow icon in the upper left corner.
- B:** Order list table with columns: QTY, DESCRIPTION, PRICE.
- C:** Numeric keypad with buttons for 7, 8, 9, PLU, 4, 5, 6, X/TIME, 1, 2, 3, CLEAR, 0, 00, ., and a left arrow.
- D:** App menu buttons on the right side, including APPS SOUP SALAD, SAND PIZZA, STEAK SEAFOOD, CHKN PASTA SPECIALS, and PUB GRUB.
- E:** Large central area for menu items, categorized by size (SMALL, LARGE) and type (e.g., CHEESE & CHIPS, CRAB & MUSHRM, CALAMARI, APPS SOUP SALAD).
- F:** Bottom navigation bar with buttons for TAX EXEMPT, SUBTOTAL, CASH, TAX SHIFT, and a home icon.

Pressing the Back Arrow icon  in the upper left corner of the screen will close the register mode operators screen and return to the main menu screen on the SAP-6600/SAP-4800II.

On the SAP-630/SAP530 the current employee will be signed off and the main Sign-On screen will display.

Register Mode Screen Zones

Zone	Description
A	<p>Title bar Header – Top Row displays: Back Arrow, current Mode identifier, Utility Information Icon (for more utility functions), Table Display, Receipt On/Off, License Info and Connection method, and Date/Time.</p> <p>Title bar Header – Bottom Row displays: System Identification, PLU Key Info, Price Level, KP Period, Destination and Employee name.</p>
B	<p>Transaction Detail – Displays the items registered in the current sale. If more than 7 items are registered, a scroll bar allows you to scroll up/down the list.</p> <p>Touch the  icon to hide the 10-Key pad and expand the transaction detail area to view more items. Touch the  icon to open/restore the 10-Key pad again.</p> <p>If more than 16 items are registered, a scroll bar allows you to scroll up/down the list.</p> <p>Note: There is also a system option to control showing the number pad in register mode: Program Mode \ Options \ Options \ SYSTEM OPTION: USE REGISTER MODE NUMBER PAD</p>
C	<p>Numeric 10-Key pad – Used to enter numeric values for item prices,</p> <ul style="list-style-type: none">  numeric PLU entries,  PLU multiplication entries,  clear current value entered, or  back up/remove previous numeric entry.
D	<p>MLU Navigation List – When the System Option: Show MLU Navigator is selected, the MLU's associated with the MLU Group are available in the Register Mode. When more MLU's than can be displayed are available, you can scroll through the list to see the additional MLU's.</p>
E	<p>MLU \ Item Area – Displays the items or functions assigned to the selected MLU. Up to 56 keys can be assigned to each MLU. (Up to 72 keys on Sapphire A70 terminals.) Menu Look Up selection keys are used to access various screens for registering items or performing specific operations and functions.</p>
F	<p>MLU Navigation Buttons – When the System Options: Show MLU Navigator is selected; the MLU navigation buttons   BACK and HOME are available in the Register Mode.</p>
G	<p>FLU – Function Look Up. When more FLUs are available than can be displayed, scroll keys   are provided to move through all the available FLUs. Up to 14 keys can be assigned to each FLU. (Up to 16 keys on Sapphire A70 terminals.)</p>







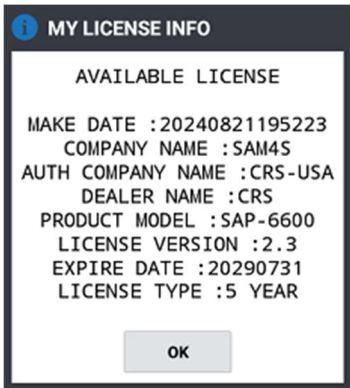

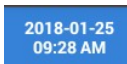

Register Mode Title Bar







The icons displayed on blue header/title bar at the top of the register mode screen allows the cashier change price levels, destinations and other operations.

Refer to the “Title Bar Icon Details” on the following page for the function of each icon.




Title Bar Icon Details

Header Icons - Top Row		
	Back Arrow – Used to exit the register mode.	
	Mode – Indicates the current mode.	
	Utility App Launcher Icon – Tap to display: EOD report, Memory Usage percentage, Memo Pad, Team Viewer, and Favorite’s selections. ** Refer to the Expanded Operator Screen Title bar section shown on page 56 for details.	
	Table Map – Opens the Table map. Table Map operations are discussed in the Advanced Operations\Table Map Operations on page 166.	
	Receipt On/Off – Turns receipt printing On and Off	
	<p>License Info – Touch this icon to display the terminal License information. Each station in a system will have its own unique license. <i>(Registers do not need to be online for normal operation.)</i></p> <p>License Info Notes:</p> <ul style="list-style-type: none"> • Green Checkmark: Normal license is active. • Yellow Checkmark: License Expiring Soon. (Within 30 days.) • Red Checkmark: Expired or No License. Will also display red when the terminal is not online. • DEMO: After 31 days of not being online “DEMO” will display. This is normal and does not affect operations. 	
	<p>Connection Method – Ethernet or WiFi: Tap this icon to access the main Android, Wireless & Network settings. The Manager Password is required for access. <i>(Registers do not need to be online for normal operation.)</i></p> <ul style="list-style-type: none"> • If the terminal is not connected to the internet, the connection method may indicate: **DEMO** or **DISCON 1 DAY** this is normal and does not affect software or register operation, even when this number reaches “0”. <p>IRC Error - When IRC is used, if the main terminal is turned off, the IRC Error displays on the satellite terminals.</p>	
	Date/Time – Touch this icon to display the clock on the screen:	







Header Icons - Bottom Row		
	<p>System Identification – displays the terminal information:</p>	<div style="background-color: #cccccc; padding: 5px;"> <p>MY TERMINAL INFO</p> <p>IRC MODE : ON IRC ACTIVE SUB TERMINAL IP ADDRESS : 10.0.168.121 ***** APP VERSION : VBW2.0.199.b MODEL NAME : SAM4POS Sam4s Incorporated Serial Number : 10735603 CC Number : 18-013 Registered PLU : 9429</p> </div>
	<p>PLU Key Info – Touch this icon to choose the information you want to display on PLU keys; ‘Price’ - ‘Stock’ or ‘None’:</p>	<ul style="list-style-type: none"> NONE PRICE STOCK
	<p>Price Level – Displays the current Price Level. <i>(Must be enabled in System Option)</i> Touch this icon to select or change to a different price level</p>	<ul style="list-style-type: none"> PRICE LEVEL01 PRICE LEVEL02 PRICE LEVEL03 PRICE LEVEL04 PRICE LEVEL05
	<p>KP Period – Displays the current KP Period selection; <i>(Must be enabled in System Option)</i> Tapping this icon allows the operator to select/change the KP Period</p>	<ul style="list-style-type: none"> NONE BUSY Drive-Thru Eat-In NORMAL
	<p>Destination –Displays the current destination selection; <i>(Must be enabled in System Option)</i> Tap this icon to set the default destination or select None</p>	<ul style="list-style-type: none"> NONE EAT IN
	<p>Employee –Displays the currently signed on employee. <i>(Must be enabled in System Option)</i> Touch this icon to display: Time In/Out info, Sign-On info, Sign Off Additional selections below appear only when then Authority Level is set: Employee Report, Employee Report(Current Data), TIP Report, TIP Report (Current Data), Other Employee Report, Other Employee Report (Current Data)</p>	<ul style="list-style-type: none"> TIME IN/OUT:NONE SIGN ON:2019-12-20 12:22 EMPLOYEE REPORT EMPLOYEE REPORT(CURRENT DATA) TIP REPORT TIP REPORT(CURRENT DATA) OTHER EMPLOYEE REPORT OTHER EMPLOYEE REPORT(CURRENT DATA) SIGN OFF

Expanded Register Mode Title Bar

When the App Launcher \ Utility Information Icon  is selected, additional icons display on the title bar, Memory usage, Memo, TeamViewer and Favorites icons display.



Utility Information Icons

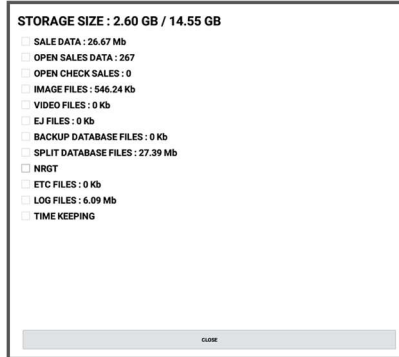
	<p>APP Launcher \ Utility Information icon – Provides access to the additional functions: End of Day report, Percentage of Memory Used, Memo, Team Viewer and Favorites icons to the title bar. This Icon is only displayed if an employee has proper authority level.</p>
	<p>End Of Day icon – Available with appropriate authority level setting only. Allows the Employee to generate the EOD report from the Register mode.</p>
	<p>Memory Storage icon – Displays the percentage of memory used. Tap this icon to show the total memory used/ available and a breakdown of memory used by category. The Storage Threshold percentage can be set in Options\System Option. When the storage threshold is reached, the notification “<i>Over The Storage Threshold, Do You Want Management For Storage?</i>” displays on the main Sign-On screen.</p>
	<p>Memo icon – Opens the Memo Notepad. Refer to the Memo Icon explanation on page 57 for details.</p>
	<p>Team Viewer – Available with appropriate authority level setting or manager approval, allows the cashier to launch the Team Viewer remote support application directly from the register mode.</p>
	<p>Favorites – When selected, the register mode screen is added to the Favorites list and the icon color will be gold. Note: The Favorite List is accessible from all modes except the Register Mode.</p>

End Of Day

If selected, the EOD is generated, the status dialog displays while the EOD is generating. Then the notification message EOD Success displays briefly.

Memory Storage Percentage

The Memory Storage percentage icon displays the total percentage of memory being used. When you tap on the memory storage percentage icon, the memory storage size dialog is displayed. This feature is used to view where memory storage resources are being used by category. If necessary, the system admin can Sign-On to delete excess data, Consult your dealer for details.






- Press **CLOSE** to exit the Memory Storage Size category usage dialog.

Memory Storage Category Definitions

Storage Category	Definition
Sale Data	Displays the current total Sale Data memory usage. The Sale Data also includes configuration information so Sale Data will never go to zero.
Open Sales Data	Displays the count of unsynchronized open sales data. These are transactions that remained with a sale status 'OPEN' on sale transactions.
Open Check Sales	Displays the number of all open checks (tables) in the terminal including table map.
Image Files	Displays the total memory used by Image files stored in Sam4POS.
Video Files	Displays the total memory used by Video Files stored in Sam4POS.
EJ Files	Displays the total memory used by Electron Journal Files stored in Sam4POS.
Backup Database Files	Displays memory used for Database Backup files saved to internal storage.
Split Database Files	Sale Data Split happens automatically when the EOD report is generated and the working DB is over 30MB. Splitting the data speeds up normal transaction speed by making the working Database smaller. This category shows the total memory used for Sales Data Split files.
NRGT	This is the <u>N</u> on- <u>R</u> esettable <u>G</u> rand <u>T</u> otal (NRGT) for reports. This total continues to increase with the combined ADJST TOTAL from all current and previously generated reports. The NRGT may or may not include Tax Totals and/or Discount Totals depending on report option settings.
IRC Synch Data	Displays the total memory used by IRC Synch Data. (Should be 0 at all stations.)
ETC Files	This selection will allow for deleting of unneeded files in the Root directory.
Log Files	Logs are maintained in the root directory for 10 days on each station.
Time Keeping	Displays the total memory used for all time keeping data.
Self-Storage Management	Displays the percentage of storage used as per the System Option: Self-Storage Management Data Size Limit setting.


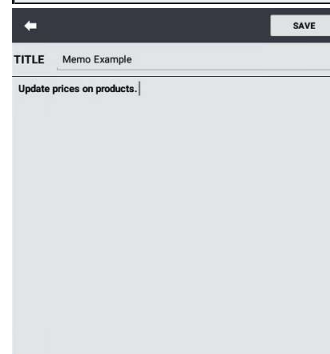
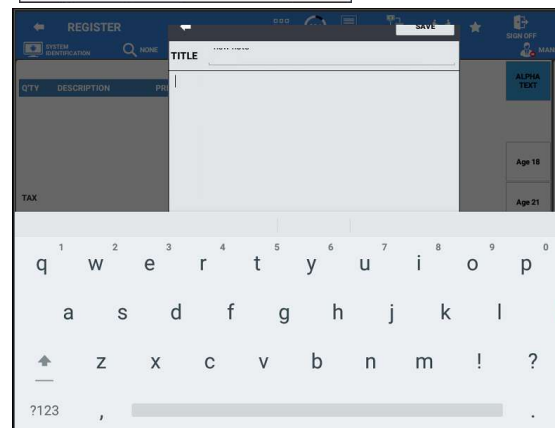
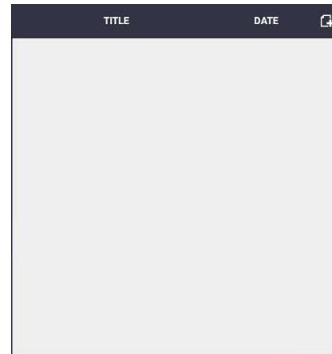
Memo Icon

The Memo icon is available when you press the APP Launcher - Utility Information icon on the register screen title bar. Selecting the Memo icon allow the operator to add a note or reminder that can be reviewed at a later time. This opens the same MEMO program as accessed on the Main Menu screen.

1. Sign-On to the SAM4POS ECR from the main Log On screen.
2. Tap the register mode icon. *(On the SAP-630 & SAP-530, turn mode key to **REG.**)*
3. Press the **APP Launcher – Utility Information icon**  to access the Memo icon.
4. Press the **Memo Icon**  to open the Memo dialog to view or add Memo's, notes or reminders.
5. On the note pad that displays, press **Add**  icon to add a new memo, note or reminder to the list. The memo dialog and a keyboard display.
6. Using the on screen keyboard, type in a **TITLE** *(up to 40 characters)* for the note/reminder using the keyboard on the display.


Alternatively, an external keyboard connected to the terminal may also be used.

7. Using the on screen keyboard, type a **Message** for the new note; then type the message.
8. Press **SAVE** when finished.
9. The new **memo/note/reminder** is added to the list.



TITLE	DATE
new note	2019-02-08 10:26:49
Memo Example	2019-02-06 12:29:39





Edit\Delete\Print Memo

1. Press the **Memo Icon**  on the upper right of the main menu screen to open the Menu dialog to view or add Memo's, notes, or reminders.
2. To **Edit** or **Delete** a MEMO/Reminder; Tap/touch on the desired MEMO/Reminder in the list:



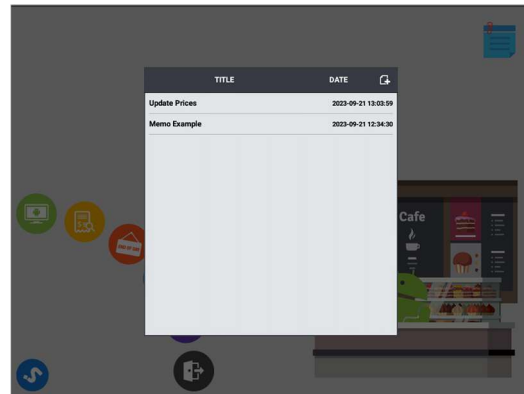
3. Use the icons on the header bar to perform the desired operation.

Press the:

- **Note Pad**  icon to edit the note.
- **Trash Can**  icon to delete the note.
- **Print\Email**  icon to send the note to email.
- **Back-Arrow**  icon to close the current Memo.





4. Press the **MEMO**  icon, or anywhere outside the Memo, to close the MEMO/Reminders list.



Team Viewer

The Team Viewer icon is available when you press the APP Launcher – Utility Information icon on the register screen title bar. Team Viewer is a remote access utility that can be used to remotely support the SAM4POS ECR APPLICATION. The Team Viewer Quick Support application is already pre-loaded on the SAM4POS ECRs. To be able to utilize this tool, a connection to the Internet is required.

Favorite Icon

The Favorite icon is available when you press the Utility APP Launcher icon on the register screen title bar. When selected  the register mode is added to the Favorites List; when not selected  the register mode is removed from the Favorites List. The Favorite List is accessed from the main menu screen.

Custom Screen Layouts

After your authorized dealer has prepared your Sam4POS for installation, your register mode main MLU & FLU screen will look different. Each screen will contain the variety of item and function keys that you require.

Your screens will be designed using the following capabilities:

The main MLU screen and all other MLU screens can provide up to 56 single size key locations in a 7 x 8 matrix. (Up to 72 keys on Sapphire A70 terminals.)

These keys can be configured as Large wide and vertical keys; unused locations may be hidden from view.

Key background colors and text colors can be chosen from a 25-color palate.

Images may be used instead of text for key identification.

Keys that are not assigned a PLU, MLU or function will not display.




The main FLU screen and all other FLU screens can provide up to 14 single size key locations in a 7 x 2 matrix. (Up to 16 keys on Sapphire A70 terminals.)

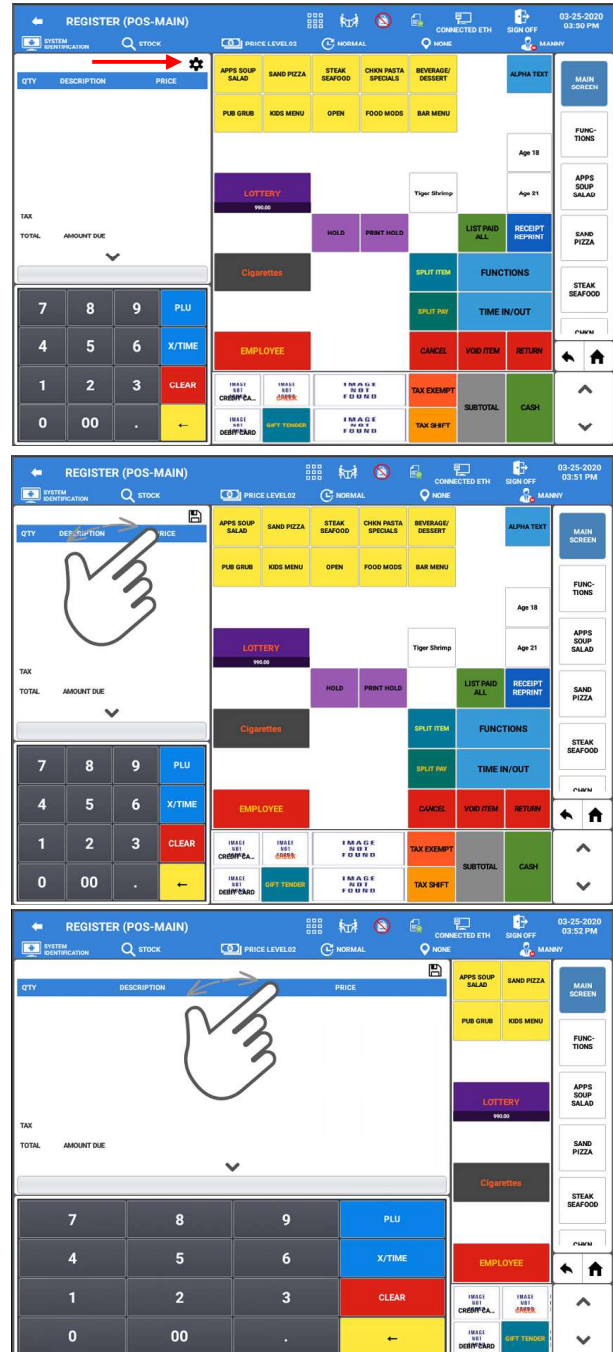
All other configuration aspects for FLU keys is the same as MLU keys.



Sale Screen Size Edit

If the option in the Program Mode\Options\Options\General Option: ALLOW SALE SCREEN EDIT is enabled, you can adjust the size of the sales screen in the register mode.

1. If the screen edit option is ON, the gear icon  will display above the transaction detail area (*Sale List*) in REGISTER MODE allowing for the screen size to be edited.
2. Press the **Gear** icon to change the size of the sale display:
3. **Press and drag** in the white area next to the save icon  to expand the sale display area.
4. Press the **Save** icon  to save the new screen configuration.
5. The **Sale List Font Size** can be edited to be larger or smaller as desired. Refer to the Program Mode \ Options \ Options \ General Option for this setting



Note: All register mode display areas are adjusted, any hidden MLU/FLU keys will no longer be accessible when registering sales.

Report Mode Screen

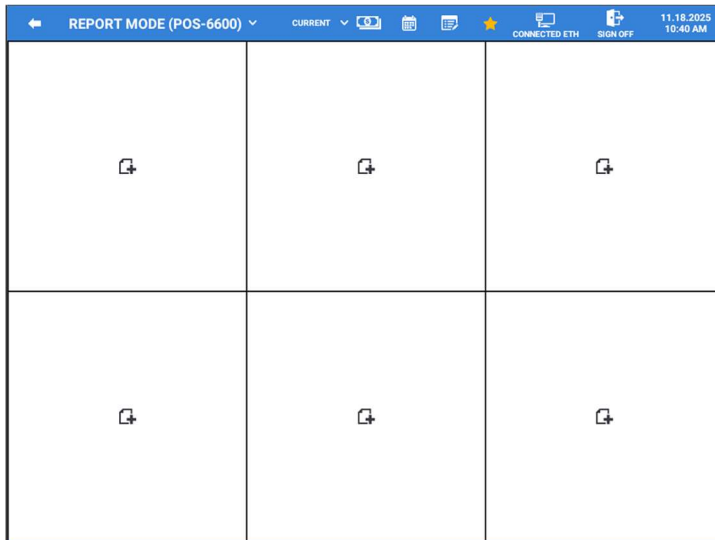


On the SAP-6600 \ SAP-4800II terminals and the HM626 & HM616 tablets touch the report icon on the main menu screen to access the Report Mode. The report mode allows for viewing and/or printing reports without clearing the totals.

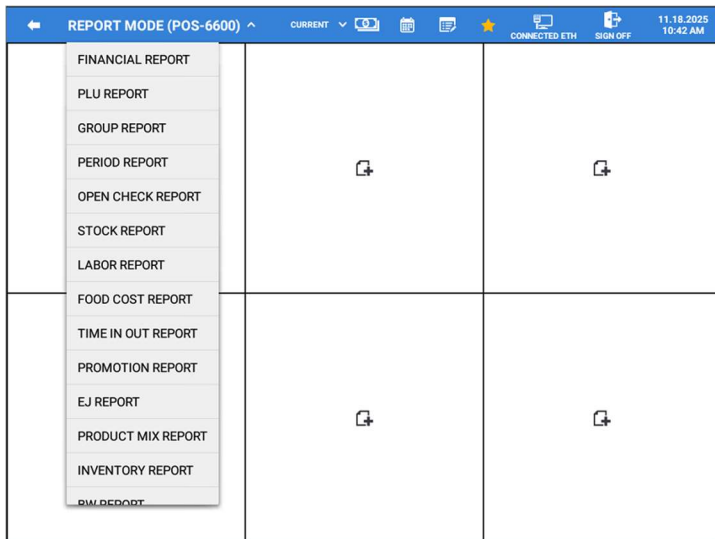
On the SAP-630 & SAP-530 terminals, the report mode is accessed by turning the mode keylock to the X-position. When the Report Mode is accessed, a grid of six quick view summary reports displays for managers to quickly see selected report information.

- Refer to the “Report Mode Icons” section on page 212 for details about the title bar icons.
- Refer to “Summary Reports” in the “REPORTS” section on page 213 for details about using the Summary Reporting.

Cash Declaration is also provided in the Report Mode as well as a calendar view for sales data.



To access the detailed reports such as a Financial, Group or Clerk reports, touch the ‘REPORT MODE (DESC) ∨’ to access the report selection dropdown menu. Refer to the “Detailed Reports” chapter on page 216 for information regarding the detailed reports.



End Of Day Screen



Touch the **End Of Day** icon on the main menu screen on the SAP-6600 \ SAP-4800II terminals and the HM626 & HM616 tablets to access the End Of Day report screen. On the SAP-630 & SAP-530 terminals, turn the mode keylock to the Z-position to access the End Of Day screen.

The **End Of Day** operation allows employees with the proper authority level to clear the current totals and to print or email selected reports for all employees or select specific reports for specified employees as per the filters and options selections. When the End Of Day report is generated report information is updated and all report data is available for review in the Report Mode.

- Refer to the “End Of Day Icons” section on page 200 for details about the title bar icons.
- Refer to “End Of Day” section on page 199 for details about generating the End Of Day.

Cash Declaration is also provided on the End Of Day screen. Refer to the “End Of Day” section on page 199 for details about generating the EOD report.

The screenshot shows the 'END OF DAY' screen with a blue header bar containing a back arrow, a dropdown menu, and system icons (signal, star, Wi-Fi, CRS-STAFF, SIGN OFF, date/time). The main content area is titled 'TOTAL' and includes a 'GENERATE' button with a search icon and the End Of Day icon. Below this are 'FILTERS' for 'TERMINAL' (NOT USED) and 'EMPLOYEE' (ALL). The 'OPTIONS' section contains checkboxes for 'DETAILED LIST', 'RESET CONSECUTIVE #', 'RESET ORDER #', 'FINANCIAL REPORT BY TERMINAL', 'CLEAR EMV FILE', 'RESET CHECK #', 'SEND TO TEXT INSERTER ONLY - NO PRINTER or E-MAIL', 'SET CURRENT TERMINAL', and 'EFT BATCH CLOSE'. There are two sections for 'PRINT REPORTS' and 'E-MAIL REPORTS', each with checkboxes for 'FINANCIAL REPORT', 'PLU REPORT', 'GROUP REPORT', 'PERIOD REPORT', 'EMPLOYEE REPORT', 'TIP REPORT', 'PROMOTION REPORT', and 'PRODUCT MIX REPORT'. At the bottom, a table header shows columns for 'DATE', 'COUNT', 'TOTAL', and 'TYPE'.

Additional reports for End Of Pay & End Of Not Found PLU can be accessed by tapping on the END OF DAY ✓ dropdown menu. Refer to the End Of Day chapter on page 199 for details.

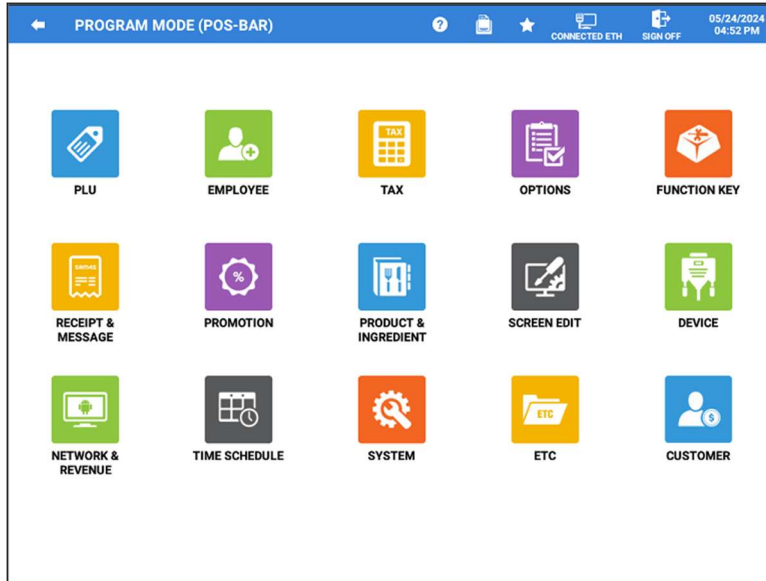
This screenshot is identical to the previous one, but the 'END OF DAY' dropdown menu is open, showing two additional options: 'END OF PAY' and 'END OF NOT FOUND PLU'. The rest of the screen content remains the same.

Program Mode Screen

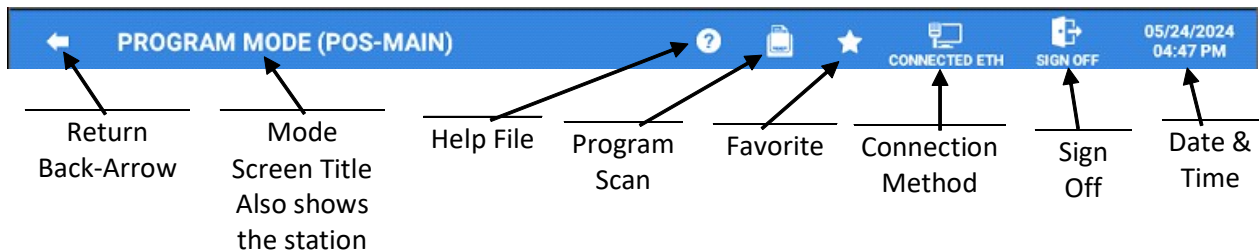


When you select the program icon from the Main Menu Screen (*P-position on the SAP-630 & SAP-530*), the main PROGRAM MODE menu categories are displayed. Touch any of the categories shown to enter the programming options for that category.
















NOTE: Depending on your terminals programming, all icons shown below may or may not be available.



Program Mode Title Bar



Program Mode Menu Selection Definitions

Menu Selection	Icon Definition
	PLU – Add or edit PLU’s and related functions: PLU programming, PLU Status Groups, PLU Stock, MLU Chains, Group programming, Non-PLU and Quick PLU.
	EMPLOYEE – Set up Employees, Employee Authority Levels, Job Codes & Pay Rates, Station, and Option Category programming.
	TAX – Set up TAX rates VAT, ADD ON, and TAX TABLE information for one or more state or local taxes and set up Tax Groups to assign in the PLU status group programming.
	OPTIONS – Set various system options that are organized in sub-categories such as Printing, Reports, Training, etc. Program Rounding if used and Tare Weight programming.
	FUNCTION KEY – Identify and set up specific options for Function Keys, Tender Keys and MACRO Keys.
	RECEIPT & MESSAGE – Customize Receipt formats, Custom Messages can be created for certain operations or for special instructions. The default Error Messages, Report Messages, Label Print formats, and the Gratuity programming can be edited here as well as the Receipt Message, Key Type Message and the Text Inserter Message.
	PROMOTION – Retailers often offer discounts when multiples of items are purchased. Here you can choose to edit the Promotion, Promotion Group, and Promotion Customer Group to set up different promotion formats such as discounts for specific combinations of specific items or items from specific groups.
	PRODUCT & INGREDIENT – Set up Ingredients and Recipes for ingredient inventory and define Product Mix Groups.
	SCREEN EDIT – Add, design & edit Table Map, MLU Edit (M enu L ook- U p) FLU Edit (F unction L ook- U p) and KIOSK programming. Depending on the terminal model we can also set up the Real Keyboard and Rear Display settings.
	DEVICE – Allows for Device Setting, and Device Mapping to Identify peripheral devices and port settings, set up Kitchen Printer Groups, define Card Read Format data for employee cards and age verification, and perform EFT Operations.
	NETWORK & REVENUE – Here we define Terminal & Network information for IRC installations and when KVS is used. The Revenue Center and PM USA categories are not used. and
	TIME SCHEDULE – Set time activated options: Price Levels, Screen Levels, Kitchen Printer Time Periods, Auto Reboot, Auto End Of Day, Rear Display, Time Schedule Promotion, and Auto Backup To FTP.
	SYSTEM – Access system utilities: Register License, Database, Log Backup, secure system Settings, review Super Macro data, Program Backup & Restore, APK Installation, access Team Viewer and use the Calibrator to calibrate the touch screen.
	ETC – Allows you to set up the Web View to link to websites to access from within the Sam4POS Cash Register Application and access the Version Info.
	CUSTOMER – When activated, allows for setting up the Customer and Customer Group programming for delivery and customer tracking.

Screen Saver

A screen saver can be set to display on the operator display after the terminal has been idle for a pre-determined amount of time. Your authorized dealer can install a custom graphic image to display as the screen saver or you can choose to display a clock. Depending upon the System Option: Screen Saver (Minutes) setting, the screen saver will display after 0 to 99 minutes of inactivity.

When the screen saver is activated, simply touch the screen to restore the normal display.

Passwords

Specific passwords may be required to access the Report Mode and Program Mode. A separate Manager Password can also be set to allow access to manager controlled operations and activities. Operations set as 'Manager Required' can be completed only after the correct password is entered.

Password Notes

- ◆ The default passwords for access to the Report Mode and Program Mode is **0**.
(Meaning no password entry is required to access this mode.)
 - You can set your own PGM Password or Report Mode Password (up to 8-digits) by going to:
Program Mode > Options > Options > System Option: Report Mode Password
Program Mode > Options > Options > System Option: PGM Password
- ◆ The default system Manager Password is: **9999**.
 - You can set your own system Manager Password (up to 8-digits) by going to:
Program Mode > Options > Options > System Option: Manager Password
- ◆ The Default Admin Password is: **456852753951**
 - You can set your own Admin Password (up to 12-digits) by going to:
Program Mode > Options > Options > System Option: Admin Password
- ◆ When an employee performs an operation requiring manager approval, the Manager Required prompt appears. The manager will be required to enter the appropriate password to allow the operation to proceed. The password can be entered several different ways:



- You can type in the system Manager Password and press Enter
- You can enter the operating code of any employee that has the ADMIN USER option checked.
- If an employee card system is used, employees with manager status can swipe their card to complete the transaction.

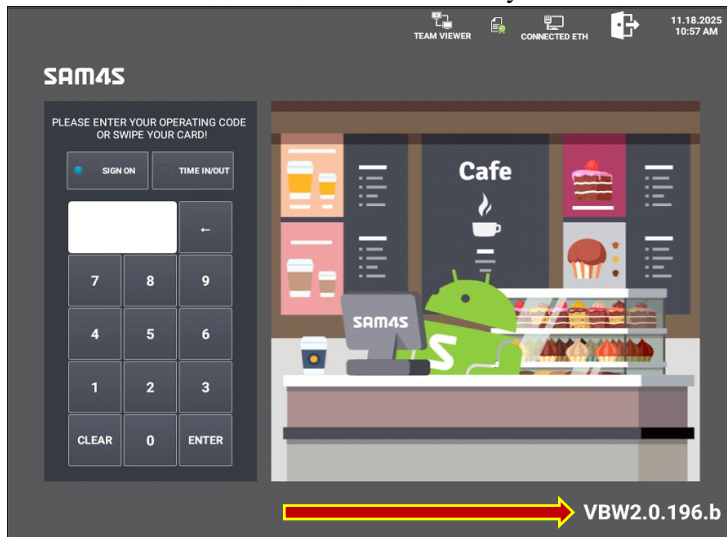
Initial Clear/Reboot

The initial clear procedure allows you to exit any register activity and return to a beginning or cleared state. Any transaction that is in progress will be exited and totals for that transaction will not be updated.

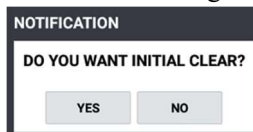
Initial Clear

The initial clear function allows you to exit any register activity and return to a beginning or cleared state. No program data is lost by performing this operation.

1. Tap the **Version** information, in the lower right corner, three times to initial-clear the SAM4POS ECR.
 - The VBW indicates that this is the BandyWorks firmware version.



2. The Notification dialog below is displayed:



3. Press **YES** to proceed with the initial clear; or press **NO** to exit without the initial clear.
4. Sign-On to the Sam4POS as normally.

Reboot

1. To Reboot the Sapphire A60/A70 or the SAP-6600/4800 Sam4POS, use the main power button on the lower right bottom of display to power **OFF** the Sam4POS ECR. (*Right side rear, on the SAP-630/530.*)
2. Press the confirmation '**Power off**' dialog to continue.
3. After the Sam4POS has completely shut down, press the power button again to power on the Sam4POS ECR.
4. The Sam4POS will reboot to the main Sign-On screen.

Note: If you reboot the station while a transaction is in progress, the transaction will be aborted, and the totals/counters will not be updated. When the reboot completes, and the same employee signs on, the transaction is reloaded.

Function Keys

Function Keys are separated into three categories, Function Key, Tender Key and MACRO Key. The options for each will vary by key type selected. Refer to the Function/Tender Key Definitions List for specific information about each key type. Custom descriptors up to 30 characters can be programmed on the keys.

For Example: a discount function key may be programmed and labeled to operate as a store coupon key.

Macro Keys are special function keys used to register a series of specified keystrokes without having to press each key individually. Custom key descriptors up to 30 characters can be programmed on the keys. Consult with your local dealer for information on setting up and using MACRO keys.

Function Key Definitions

FUNCTION KEY	Description
ALPHA TEXT	Used to add a name or message for an item within the sale. Touch the ALPHA TEXT key any time after an item has been registered. Depending on the programming for the alpha text key, the programmed Alpha-Text descriptor is added or you can type a message (up to 40 characters) using the alpha keyboard overlay, then touch OK . Multiple message lines can be entered. The message is saved and printed/displayed with the order.
CANCEL	CANCEL is used to abort a transaction in progress. All current items are removed.
CASH OUT	Not utilized at this time.
CHECK-CASHING	Use the CHECK-CASHING key to exchange a check for cash outside of a sale.
CURRENCY CONVERSION	Used to convert and display the value of the transaction in foreign currency. Only cash tender is allowed after touching a CURR CONV key. Change is calculated and issued in home currency.
CUSTOMER	Pressing the Customer key will bring up the customer list. This allows the cashier to add new customers or edit existing customer information and start a deliver order for customers.
DELIVERY	The Delivery key is used to initiate a delivery transaction. When pressed, the Delivery key opens the customer record screen. From here existing accounts can be opened, edited or deleted and New delivery orders can be started.
DESTINATION	Destination keys are used for Eat-In/Take-Out/Drive-Thru operations. They are typically used as a subtotal function. Touch destination key to record the amount of the transaction in the Eat-In/Take-Out/Drive-Thru total on the financial report. Tax calculation can be changed to accommodate different tax rules for eat-in sales. Sales cannot be split between eat-in and take-out.
DISCOUNT	Used to discount an item or a sale by an amount or percentage, same as the % keys.
DONE	Can be used to exit an operation or MLU screen.
DOWN	In large orders where all items are not able to be seen, the Down key can be used to scroll down the sale display to view the additional items.
DUPLICATE	Used to reprint the last transaction.
EFT OPERATION	When pressed (REGISTER Mode) a list of EFT functions displays: Close Batch, Void Sales &/or Return by Record Number, Gratuity Entry, Get Gift Card Balance, Get EBT Balance, EMV Voucher for EBT, Clear EMV File, Zero Auth, Pin-Pad Reset, Reprint Batch.
EMPLOYEE	The EMPLOYEE # key is used to Sign-On a cashier, clerk, or server.

FUNCTION KEY	Description
END OF DAY	Can be assigned to the screen or real-keyboard to Allow processing of the EOD reports from the register mode. Pressing the EOD key will open the EOD Screen, generate the EOD and return to the register mode.
FOOD STAMP SHIFT	Touch FOOD STAMP SHIFT to shift the pre-programmed food stamp status of an item prior to its registration.
FOOD STAMP SUBTOTAL	Touch FOOD STAMP SUBTOTAL to display the total of food stamp eligible items registered in the current transaction.
GUEST	Use the GUEST key to record the number of guests served by a transaction. The entry may be compulsory depending on programming. The Guest entry appears on receipts and the kitchen printer/KVS.
HOLD	Use to identify an individual item, or an entire transaction so that the designated items will not print/display at the kitchen printer/KVS at the current finalization. Items designated as "hold" items will display on the screen with an "H".
KP ROUTE	The KP ROUTING key is used to override the current Time Schedule > KP Time Period control. For example, a restaurant might normally operate two kitchens at one time and one kitchen at other times. In case the volume of business changes, the manager might want to control the KP routing manually. Also, a single item, or large order might be required to be sent to a different printer than normal. Select STAYDOWN or POP UP. To operate, press the KP Route key before the transaction & select the desired KP Route from the KP Route list. You can also press [1] [KP ROUTING] for NONE which is the first period in the list or [2] [KP ROUTING] for period two, which is the second period in the list, etcetera.
LIST HELD ITEMS	Use the LIST HELD ITEMS key to display Items that were designated to 'HOLD' when registered. Items designated as "hold" items are (display with an "H").
LIST PAID	Allows the operator to view previously closed transactions for a specified day or date range. A specific transaction can be selected from the list to preview and reprint the receipt. The list can be filtered to view just specified transaction types and/or tender types.
LIST SALE INTERRUPT	Allows the operator to list previously interrupted transactions when the Clerk Interrupt Feature is used. A specific transaction can be selected to preview. We can filter the list to view just No Sale or Cancel transactions.
LIST TABLE	Touch LIST TABLE to display a list of all open soft checks in the file.
LOG BACKUP	Backs up the Log Data to a USB or SD Card or to an FTP site.
MODIFIER	Preceding a PLU entry, a modifier key changes a digit of the PLU number, causing a different PLU to be registered. Modifier keys can be set to affect any of the 18 PLU digit positions to any specified digit (0-9).
NO SALE	Use to open the drawer outside a transaction.
NOTE # MESSAGE	Use this key to add a Note (up to 30-characters) to the transaction, the note will display at the top of the transaction detail in the register mode. Notes can be a name or any other information up to 30-characters. Note # can be linked on Destination keys, R/A & P/O keys Note # may also be set to print on the receipt. If more than one Note # key is used in the same sale, only the last Note # entered will print on the receipt.
PLU INFO	If an Employee has authority to Edit PLU's and Edit PLU from PLU Info: They can view, edit and sell PLU's from the PLU Info function. If the Employee does not have the authority to Edit PLU's and Edit PLU from PLU Info: They can only view and sell PLU's from the PLU Info function.

FUNCTION KEY	Description
PO (PAID OUT)	Paid Out is used to remove cash from the cash drawer.
PRICE CHECK	Use to check the price of a PLU; Edit the PLU or print a barcode.
PRICE LEVEL	Touch a LEVEL key prior to a PLU entry to shift the price of a PLU to a different price set in PLU programming.
PRINT GUEST CHECK	Prints the soft guest check (tracking file) that is currently displayed. The PRINT CHECK key may be programmed to store (service) the check automatically.
PRINT HOLD	Use to remove the "Hold" designation from an item or order, so that the items and their instructions are now sent to the kitchen printer/KVS at finalization.
PROMO	Touch the PROMO key to void the price (the item remains) of an item. Can be used for 2 for 1 promotion. A PROMO count is available for each menu item. A PROMO count is available for each menu item on the PLU report. This also reports to the Promo count and amount on the financial report.
PROMOTION	The Promotion key is used with the Coupon Search feature with the Mix & Match, Multi-Buy or Combo Discount promotions when the Coupon option "Manually Apply Discount" is selected.
QUANTITY CHANGE	Allows you change the quantity of a registered item in the current transaction.
RA (RECEIVED ON ACCOUNT)	Received on Account is used to add cash, check or Miscellaneous media into the drawer.
REAL KEYBOARD	Used with the SAP-630/530 terminals. Press to display a list of keyboard selections. This allows the operator or manager to change the current Real Keyboard selection from the register mode. For Example: change from Counter to Drive-Thru keyboard, or from Lunch to Dinner keyboard. Note: Real-Keyboards must be created in Program Mode > Screen Edit > Real Keyboard before they appear here.
RECALL TABLE	The check tracking system can maintain balances and the entire transaction in the register memory. You can create as many RECALL TABLE keys as are necessary for your application. Touch a RECALL TABLE key directly to begin a guest check or enter the number or name manually and touch the appropriate RECALL TABLE key to access an existing guest check in the system.
RECEIPT ON/OFF	Touch RECEIPT ON/OFF to toggle the receipt printing from on to off.
RECEIPT REPRINT	Touch the REPRINT key to issue a transaction receipt at the designated receipt printer or Gift Receipt if the option is set.
RECIPE	Press the RECIPE key prior to selecting an item to view the recipe associated with the item. If the item no recipe associated the message "No Link Recipe" is displayed.
REPEAT	Touch the REPEAT key to quickly re-order a set of items. When a check is recalled, simply touch the REPEAT key to automatically register all of the items registered at the previous posting.
REPORT	The REPORT key allows for running several reports all at one time from the register mode. Select the desired reports on the REPORT function key. The report function key can be set to Filer by Employees, Terminal, and Date.
RETURN	Touch the RETURN key to adjust items inside or outside of a transaction.
SCALE	Use to enter SCALE weight when a remote scale is used.
SEAT #	Use to identify a specific SEAT # (or person) within a transaction. Facilitates separate payment by seat and identifies to the food preparation staff (through the kitchen printer/KVS) how to assemble meals. Seat numbers may be assigned at the time of entry or, if necessary, later in the transaction.

FUNCTION KEY	Description
SERVER ORDER	Used in conjunction with a kitchen video system. Enter a KVS cell number and touch SERVE ORDER to serve or bump the order from a video monitor. No video keypad is needed for this function.
SPLIT ITEM	When like items are consolidated in a transaction you can move the cursor to the item and touch the SPLIT ITEM key to display the items separately, instead of in consolidated form, used normally to assist the items to seat allocation.
SPLIT PAY	Touch the SPLIT PAY key to divide the amount of a transaction into equal segments for payment by more than one person.
SPLIT TABLE	The Split Table function provides another method of splitting checks for payment. Note that this method works best when check numbers are not automatically assigned. Many programmers/installers will use the table number as the check number, and in this situation the feature works quite well.
STOCK CHECK	Use this function key to view and/or edit the stock available on a selected item. Can be used inside or outside a transaction.
STORE TABLE	The check tracking system maintains balances and the entire transaction in the register memory. Touch the STORE TABLE keys to store a guest check to save the transaction and allow recalling at a later time.
SUBTOTAL	Touch SUBTOTAL to display the message "SUBTOTAL" on the display. Although a running total is always displayed on the bottom of the screen, the SUBTOTAL key may be required before some functions, such as subtotal discount.
SYNCH DATA	This function key will only operate when the SYNC TYPE setting on the POS-Main station in the Network & Revenue > Terminal & Network is set to "SYNCHRONIZE BEFORE REPORT OPERATION".
TAX EXEMPT	The TAX EXEMPT can be preprogrammed to exempt specific taxes from a sale.
TAX SHIFT	Use to change the preprogrammed tax status of an item.
TIME CLOCK IN/OUT	Touch the TIME CLOCK IN/OUT key to record start and stop work times for the selected employee. Hours worked are maintained by the time clock system.
TIP CHARGE	Use TIP CHARGE to enter Tips to an open guest check in the system.
TIP DECLARE	Used TIP DECLARE enter Tips received by an employee.
TRANSFER TABLE	Use to transfer one or all open soft checks from one server to another server. A transfer check receipt will print.
UP	In large orders where all items are not able to be seen, the Up key can be used to scroll up the sale display to view the additional items.
VOID ITEM	Touch the VOID ITEM key to remove an item from a transaction. Locate the cursor on the item you wish to remove and touch the VOID ITEM key.
VOID MODE	Put terminal into the Void Mode as if it had a mode key and was turned to VOID.
WASTE	Used to start and end entries of items that are wasted. A waste count is maintained for each item and inventory is adjusted. A WASTE count is maintained for each item on the PLU report and inventory is adjusted. This also reports to the Waste count and amount on the financial report.
WEB	WEB function key was added to be able to access a specific Web Site without having to go to Program Mode → ETC → Web View screen. Multiple WEB keys can be created to access different web sites from the register mode.
X/TIME	Use the X/TIME key to multiply, to register split price items, or display the time in the REG mode.

Tender Key Definitions

There are four general tender key types available in Sam4POS for tendering sales, Cash, Check, Food Stamp Tender and MISC. Each tender key description can be edited to further identify the specific tender.

TENDER Key	Description
CASH	Use CASH to finalize or tender cash sales. Change is computed when the amount of cash tendered is greater than the amount of the sale. Separate CASH Keys can be created for Next Dollar or for specific speed tender keys. For Example: \$5 Cash, \$10 Cash, etc.
CHECK	Use CHECK to finalize or tender check sales. Change is computed when the amount of the check tendered is greater than the amount of the sale.
FOOD STAMP TENDER	The FOOD STAMP TENDER key is used to finalize or tender EBT\Food Stamp sales after the display of the food stamp eligible subtotal. Depending upon function key programming, change of less than \$1 may be applied to any cash balance or issued as cash change.
MISC	Use MISC tender key to finalize or tender sales paid by various charges (<i>credit, debit, gift</i>) or other media types.
CASH BENEFIT	If the EBT (<i>Food Stamp</i>) card also has a cash benefit, a separate MISC TEND key must be set up with the EFT Key type selection as CASH BENEFIT to be able to redeem the EBT Cash.

Displayed Error Messages

The Sam4POS displays error messages in a pop-up window in the sales mode. The messages shown below are just a sampling of all the available error messages. Note that each of the standard messages described below can be customized. Your program may display slightly different message descriptions.

AGE RESTRICTION

The item being registered requires D-Date entry to proceed.

CANCEL IS NOT ALLOWED

When this item is registered in a sale, the Cancel operation is not allowed.

CASH-IN-DRAWER EXCEEDED

The programmed Cash-In-Drawer limit has been exceeded.

COMPLETE WASTE OPERATION FIRST

The station is in the process of a waste operation; the operator must touch the WASTE key in order to complete the operation.

DIFFERENT EMPLOYEE OWNS THIS CHECK

The operator attempting to open this guest check is not the original employee who started the guest check.

DISCOUNT ON THIS ITEM IS NOT ALLOWED

The preceding entry is not discountable; product is not available for discounting.

DO NOT ALLOW MANUAL ENTRY

Manual entry is not allowed (scale function).

EMPLOYEE NOT FOUND

The employee sign code entered does not exist for any employee in the database.

FINALIZE CURRENT TRANSACTION FIRST

The current transaction must be finalized before continuing.

HALO OVER

The amount entered exceeds the programmed HALO (High Amount Lock Out) for the item or operation.

KP DOES NOT EXIST

The kitchen printer is not programmed or mapped.

MANAGER OVERRIDE REQUIRED

The manager password must be entered in order to override a HALO amount, or other restriction.

MANAGER REQUIRED

The manager password must be input to complete this operation.

NEGATIVE BALANCE

This sale has gone negative, Negative sales are programmed as not allowed.

NEED GUEST # FIRST

The operator must enter the number of guests when opening a guest check or beginning a sale.

NEED SEAT # FIRST

Seat # entry required before operation can continue.

NEED SUBTOTAL FIRST

The SUBTOTAL key must be touched before continuing.

NO DRAWER

The employee currently signed on is not assigned to a drawer, and is not allowed to perform cash sales, or the drawer is no longer attached and is required in order to continue.

NOT FOUND PLU**DO YOU WANT TO ADD NEW PLU?**

An error tone sounds until a selection is made. Select ADD to add the item to the database and register the item in the sale. Selecting NO will close the notification without adding the item to the database or to the sale.

NO PRESET OVERRIDE

Override of the preset Price/HALO is not allowed on this PLU.

NOT READY!

Remote printer is not ready for printing tasks.

NOT ZERO

Displayed when trying to delete a PLU that still has sales counts and stock amounts. The PLU must first be reset and cleared from all Z-Mode reports.

OFFLINE:

Printer Is Offline – Printer is not connected or other issue with printer.

Device Is Offline – Indicated the IRC communications have gone offline.

Terminal Offline – This station is not communicating with other stations in the system.

OPEN A CHECK FIRST

This register has been programmed to force check number entry to begin a transaction. An existing guest check must be recalled, or a new check started.

OPEN DRAWER

The register has been programmed not to operate with the cash drawer open.

OVERRIDE NOT ALLOWED

X-Mode override is not allowed for this operation.

PLU DOES NOT EXIST

The number entered or item scanned is not a valid PLU or is not in the PLU database.

PRICE LEVEL DOES NOT MATCH

Item is assigned to incorrect price level, check for an incorrect price level selection or check the destination keys default price level.

PRINTER PAPER END

The Receipt/Journal paper is at, or near, the end of paper on its paper roll.

SUB-ITEM NEEDS MAIN ITEM

This PLU has been programmed to require a condiment entry.

TARE WEIGHT IS REQUIRED

This PLU/scale item requires a tare weight entry.

TARE WEIGHT LIMIT EXCEEDED

The tare weight entered exceeds the limit setting.

TENDER AMOUNT REQUIRED

The current tender operation requires an amount entry prior to registration.

THIS CHECK IS ALREADY OCCUPIED BY OTHER TERMINAL**THIS FUNCTION IS INACTIVE**

The function key touched is inactive.

THIS PLU IS INACTIVE

The PLU touched is inactive.

VALUE IS OUT OF RANGE

The number entered is out of the acceptable range.

VOIDING OF THIS ITEM IS NOT ALLOWED

Void Item operation is not allowed on this PLU.

WRONG SEQUENCE

The preceding key sequence is not allowed.

ZERO AMOUNT

The register has been programmed to not allow negative sales, and to consider a zero amount as a negative sale.

ZERO AMOUNT SALE IS NOT ALLOWED

The register has been programmed to not allow sales with a total of 0.00.

Operations

Operation Notes

Register Mode operations, such as registering transactions and other Functions, may be initiated using the touch screen or using the real keyboard if you have the SAP-630. Press the function as appropriate; Key labels and descriptors may differ due to custom programming. Consult with your dealer for detailed operation information. The default key descriptions are used throughout this operation manual.

Sign-On/Off Operations

An employee must Sign-On at the main Sign-On screen to register sales on the Sam4POS ECR. Employees may Sign-On by entering their employee operating code or Sign-On by swiping their employee card. The DALLAS key selection in the Employee programming is not used in the USA.

Sign-On by Operating Code

When no employee is signed on the register, the main Sign-On screen is displayed. The message “PLEASE ENTER YOUR OPERATING CODE OR SWIPE YOUR CARD!” displays above the entry pad.

1. From the Main Sign-On screen, Type the employee operating code.
2. Touch ENTER. The main menu selection window displays. (On the SAP-630 & SAP-530 terminals, the screen displayed depends on the key-lock position of the Mode Key)
3. Touch the Register Mode icon to open the sales entry screen (REG-position on the SAP-630 & SAP-530). The employee’s name displays in the top right of the title bar on the sales entry screen.

Note: if an employee is assigned to an authority level with the option **REG MODE ONLY** checked, when the employee signs on, the register mode screen will open without loading the main menu screen or turning the mode key to REG.

Sign-On by Employee Card

If your system is using employee cards:

- ◆ Swipe the employee card. The main menu selection window displays.

Note: On the SAP-530/SAP-630 You can Sign-On to the terminal using the Real Keyboard; Press 1 ENTER or 1 Employee # to Sign-On. We can also press a MACRO key on the real keyboard to Sign-On.





Sign-On by Dallas

This operation is not utilized in the USA.

Sign Off

There are several ways to sign off the current employee.

While in the Register Mode:

1. Type the current employee operating code using the 10-key pad then touch the **EMPLOYEE** key.
2. Alternatively, you can sign off using the following operations:
 - a. Type “0” then touch the **EMPLOYEE** key.
 - b. Press the Employee icon  and select **SIGN OFF** from the menu selections.
 - c. Tap the **Sign Off** icon .
 - d. Press the back arrow  icon at the top of the Register Mode screen to return to the main menu screen; press the  icon on the main menu screen to return to the main sign-on screen.

Clerk Interrupt

If allowed in General Option programming, a different employee can Sign-On to the terminal while a transaction currently being registered by another employee is still in progress.

When a different employee signs on while the current employee is in middle of a transaction, the current employee’s transaction is suspended (stored in a check file). Under the new employee, a new transaction can be entered and completed.

When the employee processing the suspended transaction signs on again, the suspended transaction is automatically recalled so the transaction can be continued and finalized.

The List Interrupt key can be used to view interrupted transactions still in the system.

Time In/Out Operations

The Sam4POS provides a basic time-keeping system for daily reporting and payroll. Additional programming is required to utilize this feature. Refer to the separate Time Keeping supplement for complete details.

When the time keeping feature in the Sam4POS is utilized, employees must clock in at the beginning of their shift and clock out at the end of their shift. Employees may also be required to clock out for breaks.

Employees can clock-in & clock-out from the Main Sign-On screen or from the register mode using the Time In/Out function key. Depending on option programming, a chit may be printed showing the Time Clock In/Out information.

Note: Depending upon the authority level programming, the employee will Sign-On with their employee clock in code which may be different than the employee operating code. Employees could also be set to clock-in using the MCR in the authority level programming.

Clock In

– Register Mode Time In/Out

1. From the Register Mode screen, Enter the employee clock in **CODE** and touch the **TIME IN/OUT** function key to display the clock in/out window:

The screenshot shows a mobile application window titled "TIME IN/OUT Robin". At the top, it displays "DATE : 2017-02-03 11:43". Below this is a table with two columns: "IN" and "OUT", both containing dashes. To the right of this table is a "JOB CODE" section with a list of job codes: "Cashier" and "Walter". At the bottom of the screen are two buttons: "OK" and "CANCEL".

Job codes that are available for the employee are displayed.

2. Touch the **JOB CODE** selection for the job you are performing to clock in.

The screenshot shows the same "TIME IN/OUT Robin" window. The "DATE" is now "2017-02-03 11:45". The "IN" field now contains "02/03 11:45" and "Cashier". The "JOB CODE" list remains the same, with "Cashier" selected. The "OK" and "CANCEL" buttons are still at the bottom.

3. The clock-in time and Job code selected displays.
4. Touch **OK** to complete the clock in.

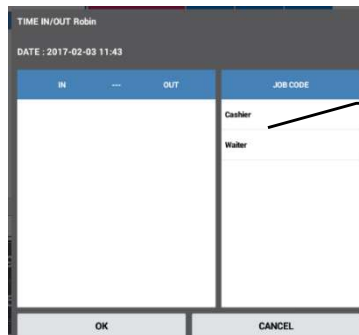
– Main Sign-On Screen

When the Time Keeping option “Display Sign-On Screen” is checked, the Time In/Out button appears on the main Sign-On screen allowing clock in/out operations from the main Sign-On screen.

1. From the Main Sign-On screen, tap the **Time In/Out** button at the top of the number entry dialog so it is selected as shown below:

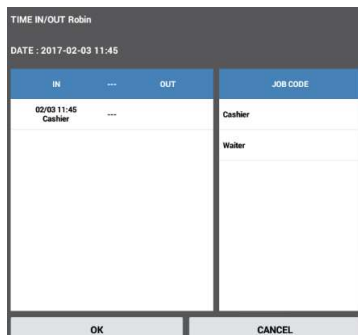


2. Enter the employee clock in code and touch the **ENTER** button to display the Time In/Out window:



Job Codes that are available for the employee are displayed.

3. Touch the **JOB CODE** selection for the job you will be performing; The clock-in time displays with the Job Code:



4. Touch **OK** to complete the clock in.

Clock Out for Break

If breaks are allowed via time keeping options:

1. Enter the employee clock in code and touch the **TIME IN/OUT** function key to display the clock in/out window:

Clock in time for the day is displayed.

IN	---	OUT	CLOCK OUT
02/03 11:45	---		OUT
Cashier	---		BREAK TIME

OK CANCEL

2. Touch the **BREAK TIME** key.

Clock out time for the break time is displayed.

IN	---	OUT	CLOCK OUT
02/03 11:45	---	02/03 11:58	OUT
Cashier	---	BREAK TIME	BREAK TIME

OK CANCEL

3. Touch **OK** to complete the clock out for break.

Clock In from Break

1. Enter the employee clock in code and touch the **TIME IN/OUT** function key to display the clock in/out window:
2. Touch the job code button for the job you are performing to clock in.
3. Touch **OK** to complete the clock in.

Clock Out for Day

The operation is the same whether clocking out from the main sign-on screen or in the register mode.

1. Enter the employee clock in code and touch the **CLOCK IN/OUT** function key to display the clock in/out window:
2. Touch the **OUT** key.
3. Touch **OK** to complete the clock in.

Tip Declare

If the employee time keeping feature is used, the operator may be prompted to enter Tips when clocking out. (Check the employee authority level option “Compulsory Tip Entry”.) The Time In/Out operation can be performed from the Register Mode or you may have the option set to display the Time In/Out on the Sign-On screen.

The TIP Declare function key is used to enter cash tips when the time keeping feature is not used.

1. Sign-On the employee if using the **Time In/Out** function in the register mode. If Time In/Out button is on the main Sign-On screen, press the Time In/Out button.
2. Enter the employee clock in code and touch the **TIME IN/OUT** function key.
3. Clock out the employee, the **DECLARE CASH TIP** window displays.
4. The employee needs to **Input The Tip Amount** they have received and touch **ENTER**.
5. Alternately, the **TIP DECLARE** function key can be used to enter Tips when the time keeping feature is not used.
6. Touch the **TIP DECLARE** key.
7. Enter the **TIP Declared** amounts, select the media type for all Tips:
8. Touch **OK** when finished entering Tips.

QTY	DESCRIPTION	PRICE	TOTAL AMOUNT
			CASH \$0.00
			CHECK \$0.00
			MISC \$0.00
			TOTAL \$0.00

QTY	DESCRIPTION	PRICE	TOTAL AMOUNT
1	CASH	\$25.00	CASH \$25.00
1	CREDIT CARD	\$15.77	CHECK \$0.00
			MISC \$15.77
			TOTAL \$40.77

Registering PLU's/Items

PLU's are the products or services that are available for sale. PLU's may be registered into a sale in several ways.

- Press the desired item on the screen or real-keyboard to register the item.
- Scan the barcode on the item to register the item into a sale.
- Key in the product code or barcode of the item and press the PLU Function key.

Preset PLU's

- Touch a preset PLU on the screen or keyboard to register the item or Scan an item programmed into the database to register into the sale.

Code Entry Preset PLU's

- Enter the **PLU code** number and touch the **PLU** function key to register then item.
(If scanning is set up on the terminal, you can simply scan the item barcode to register the item.)

Open PLU's

An "Open PLU" requires the cashier to enter a price when register the item. The price is entered on Open PLU's without entering the decimal point. For example, \$5.99 is entered as 599. Up to an 8-digit price may be entered.

- Enter the price (*up to 8-digits, without the decimal*) touch an open priced PLU on the screen or keyboard to register the into the sale.
- Alternately, you can simply touch or scan an open priced PLU, input the price at the prompt (*up to 8-digits, without the decimal*) and press **ENTER**.

Code Entry Open PLU's

1. Enter the **PLU code** number and touch the **PLU** function key.
2. Input the price at the prompt and press **ENTER**.
(If scanning is set up on the terminal, you can simply scan the item barcode to register the item; Input the price at the prompt and press **ENTER**.)

Repeat PLU Entry

After an item has been registered, scan the same item again, or press the same item on the screen or keyboard again to repeat the item. Each time the same item is registered, the QTY for the item and the Price amount will update.

PLU Price/HALO Override

Specific programming is required to allow the override of a preset PLU or the HALO on an open entry PLU.

1. Enter the **override price** (*up to 8-digits, without the decimal*) touch the **PLU** to override the preprogrammed price.
2. If direct multiplication is allowed, press 1 X/Time; Enter the **override price** (*up to 8-digits, without the decimal*) touch the **PLU** to override the preprogrammed price.

NOTES:

The Employee must be assigned the authority to perform the override, see:

Program Mode → Employee → Authority Level → REG Mode: Can PLU Price/HALO Override

The PLU Price Option must also be set to allow the override:

Program Mode → PLU → PLU → General settings: Price Option → Preset (Allow Override)

The General Option must also be set to allow override; see:


Program Mode → Options → Options → General Option → Sale Options: 'Allow PLU's Preset/HALO Override'.

Price Level Shift

The current price level can be selected by price level key or automatically selected by the time of day or day of week. Price levels can be locked into a specific level (stay down) or they can return to the default price level after registration (pop up).

Go to: Program Mode, Options, Options, Level Option, Level/Modifier for Stay-Down\Pop-Up setting.

Price level options can be set as Global: affects all stations in a system or as Local: to affect only specific stations in a system.

- When price level function keys are used, touch the appropriate price level shift key prior to entering the PLU.
- Price levels may also be selected by pressing the Price Level selection icon  on the Register Mode title bar.
- When Price Levels are selected by Time Schedule, and the Level Option is set for LOCAL, you are able to select specific terminals in a system to apply the price level change to or choose ALL Terminals.

Gallonge PLU

A gallonge PLU is used to record the sales of products sold by the gallon such as Gasoline, Diesel Fuel, etc.

- Touch the Gallonge PLU on the screen or keyboard (*such as Gasoline*) or scan a Gallonge PLU, input the price (*purchase amount*) at the prompt (*up to 8-digits, without the decimal*) and press **ENTER**.
- The number of gallons sold will be calculated from the amount entered and printed on the receipt.
 - GAS CNT #5.00
 - GAS AMT @ 4.999
- Reports will be updated to reflect the Gallonge count & amount totals. On the Financial Report a count of 1 will be incremented at the amount entered on the gallonge PLU. On the PLU Report the actual total gallons as printed on the receipt will be counted/incremented at the amount entered.

Note: To make a return on a gallonge item, you must perform a Void Mode operation. See page 101 for details.

Age Restricted PLU's

Age restricted items such as tobacco products or liquor products can be set to require the entry of a birthdate before purchasing is allowed.

1. Register the age restricted item by selecting the item on the screen, keyboard or scanning the item.
2. A warning tone will sound and the **NEED AGE VERIFICATION** dialog will display.
The error tone can be turned off in the Program Mode → Options → Options → General Option → ECT: Disable Error Buzzer.
3. Request to see the customer's ID and **type in the birthdate from the ID** using the keypad on the dialog; press **ENTER** on the dialog. If an error is made while entering the birthdate, pressing **CLEAR** on the dialog will clear the current entry and allow you to reenter the B-Date.
 - a. Alternately, if set up, you can scan or swipe the ID or Divers License to enter the birthdate.
4. If the customer's age is sufficient to allow the purchase, the item will be registered in the sale.
5. If the customer's age is not sufficient, the error message **AGE RESTRICTION** displays.
 - a. Press **OK** to close the dialog, set the item aside, do not allow the sale of the item to the customer.
 - b. Press the **X** in the upper left of the **NEED AGE VERIFICATION** dialog to close the dialog screen.
6. Register the remaining items and tender the transaction.

First Time Item Is Registered

If the General Option: Show Popup For Confirmation First Time PLU Is Registered is selected, the first time a PLU is registered the cashier will be prompted to verify or edit the description, price, group and PLU status group assignment and price level of the item.

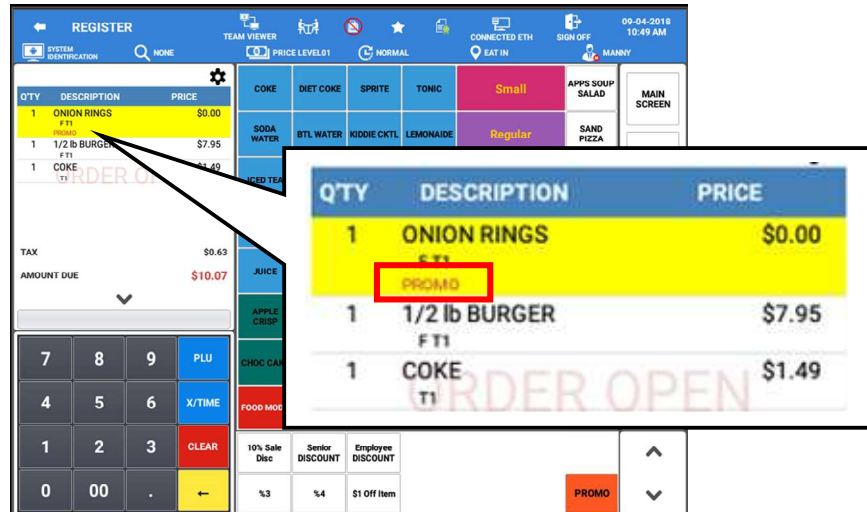
1. When an Item that has never been registered previously is selected, the **'First Time Item Is Registered'** dialog displays.
2. If all current settings are correct, Press **OK** to accept the settings and register the item into the sale.
 - Alternately, you can press **EDIT** to open the **'EDIT PLU'** dialog to change the current settings. The Manager Password may be required.
 - Edit the PLU Description \ Price \ Group \ PLU Status Group \ Price Level settings as necessary.
3. When you have finished making changes to the PLU, Press **OK**. The **'First Time Item Is Registered'** dialog appears again. Press **OK** to register the item into the sale.
4. Pressing **CANCEL** on the **EDIT PLU** dialog will return you to the original **'First Time Item Is Registered'** dialog screen. Press **OK** to register the item into the sale.

The image shows two screenshots of the POS system's dialog boxes. The top screenshot is titled 'FIRST TIME ITEM IS REGISTERED' and contains the following fields: 'PLU DESCRIPTION' (PORK TENDER), 'PLU CODE' (96), 'PRICE' (14.69), 'GROUP' (DINNERS), 'PLU STATUS GROUP' (DINNERS), and 'PRICE LEVEL' (PRICE LEVEL01). It has 'OK' and 'EDIT' buttons at the bottom. The bottom screenshot is titled 'EDIT PLU' and contains the same fields as the top one, but with a red 'X' in the top right corner and 'OK' and 'CANCEL' buttons at the bottom. A large red watermark 'ALLER LICENSE' is overlaid on both screenshots.

Promo

The PROMO key allows the operator to account for promotional items (i.e. by two, get one free). This key will remove the cost of the item from the sale without affecting the item count. In the case of buy two get one free the count remains at three items, but the customer is only charged for two.

1. Register items to be sold.
2. Select the item you want to provide at no charge; Touch the **PROMO** key.
3. The price for the selected item is removed; **PROMO** will be indicated under the item.



Quantity Multiplication of PLU's

To speed up operations, multiple quantities of the same item can be registered using the X/Time key.

1. Enter the quantity of items for purchase, press the **X/TIME** key, then scan an item or select a PLU on the screen or keyboard to register the desire quantity of that product.

Direct Multiplication

Direct multiplication allows you to enter a quantity then scan or press a preset PLU key without using the X/TIME key. The maximum number of digits (1-5) allowed for the direct multiplication multiplier is set in the General Options. *Program Mode* → *Options* → *Options* → *General Option* → *Multiplication: Enable Direct Multiplication & Direct Multiplication (1-5)*

1. Enter the quantity of items for purchase, then scan the item or select a PLU on the screen or keyboard to register the desire quantity of that product.

Note: For open price Items\PLU's you cannot use direct multiplication, you must use the X/Time key.

Split Pricing – Whole#

When items are priced in groups, i.e. 3 for \$1.00, you can enter the quantity purchased and let the register calculate the correct price. The X/Time key can be set to allow Split Pricing. The X/Time key can be set to allow Split Pricing; the split pricing can be set for either Whole# or Decimal. When set for Whole#:

1. Enter the quantity purchased; press the **X/TIME** key. For example, if 2 items are sold enter:
[2] X/TIME
2. Enter the quantity of the group price; press the **X/TIME** key. For example, items are priced at 3 for \$1.00, enter:
[3] X/TIME
3. Enter an amount on the ten-key pad. For example, if the items are priced 3 for \$1.00, enter: **1 0 0**
4. Press the **PLU/Item** key. For example, press:
OPEN F/S PLU

Note that the quantity is 2/3

Sam4POS		
12345 City Street Hometown, USA 55555		
2017-09-20	15:43	WED
ORDER# 123		POS-1060

PRODUCT		TOTAL

2/3 x	@1.00	
OPEN F/S PLU	T5F	\$0.67

SUBTOTAL		\$0.71
TAXABLE TOTAL		\$0.67
TAX5 AMOUNT		\$0.04

TOTAL		\$0.71

CASH		\$0.71
No.000067	REG# POS-1	MANAGER
Thank You!		

Split Pricing – Decimal

The X/Time key split pricing can be set for either Whole# or Decimal. When set for Decimal:

1. Enter the quantity purchased; press the **X/TIME** key.
For example, enter:
[2] X/TIME
2. Enter the quantity of the group price; press the **X/TIME** key. For example, if the items are priced at 3 for \$1.00, enter:
[3] X/TIME
3. Enter an amount on the ten-key pad. For example, if the items are priced 3 for \$1.00, enter: **1 0 0**
4. Press the **PLU/Item** key. For example, press:
OPEN F/S PLU:

Note that the quantity is 0.67

Sam4POS		
12345 City Street Hometown, USA 55555		
2017-09-20	15:43	WED
ORDER# 123		POS-1060

PRODUCT		TOTAL

0.67 x	@1.00	
OPEN F/S PLU	T5F	\$0.67

SUBTOTAL		\$0.71
TAXABLE TOTAL		\$0.67
TAX AMOUNT		\$0.04

TOTAL		\$0.71

CASH		\$0.71
No.000067	REG# POS-1	MANAGER
Thank You!		

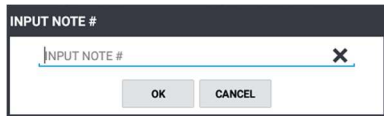
Note # Operation

The Note # function key can be used to enter information on a receipt, kitchen printout or guest check. Multiple Note # keys may be created and a specific Note # key may be linked to a destination key to automatically bring up the Note # entry dialog.

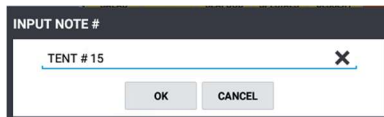
Use this key to add a Note (up to 30-characters) to the transaction, the note will display at the top of the transaction detail in the register mode.

Important: If more than one NOTE # is used in the same transaction, only one NOTE # will be applied to the receipt.

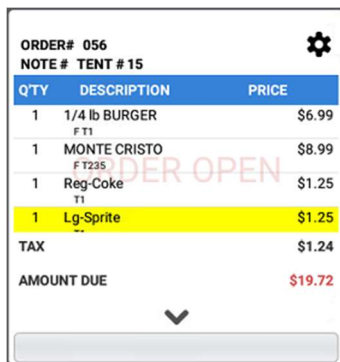
1. If a destination key that has a **Linked Note #** defined is pressed, the **Input Note #** dialog will display. Alternately, you can press the **Note #** key to open the **INPUT NOTE #** dialog.



2. Type in the desired information (up to 30 characters) in the **Note #** dialog.



3. Press **OK**.
4. The **Note** will be added to the transaction at the top of the transaction window.



QTY	DESCRIPTION	PRICE
1	1/4 lb BURGER	\$6.99
1	MONTE CRISTO	\$8.99
1	Reg-Coke	\$1.25
1	Lg-Sprite	\$1.25
	TAX	\$1.24
	AMOUNT DUE	\$19.72

5. If the **Note #** is set to Print on the receipt, it will be printed in the assigned location as set in the Receipt & Message\Receipt programming. If more than one Note # key is used in the same sale only the last Note # entered will be printed on the receipt.

Receipt Sample with Note

Mel's Diner		
4231 Mall Court		
St. Paul Minnesota		
PH: 123-456-7890		
Web: www.alsdiner.net		
11/11/2021	01:22 PM	THU
Order #		052
Note #		Tent # 15

1/4 lb Burger	T1F	\$6.99
Monte Cristo	T1F	\$8.99
Reg-Coke	T1	\$1.25
Lg-Sprite	T1	\$1.25
TAX TTL		\$1.24
TOTAL		\$19.72
SUBTOTAL		\$19.72
CASH		\$20.00
CHANGE		\$0.28

NO. 00006041	REG: POS-2	MANNY

Alpha Text

The Alpha Text key can be used to enter a customer name or special instruction message that will be associated with an item in a sale or guest check, or with specific operations such as Paid-Out and Received On Account operations. Alpha Text entry can be made to be compulsory on groups of PLU's, RA & PO keys, Store Table operations, and Tax Exempt operations.

The Alpha Text message will appear on the operator screen and print on the receipt and can be set to print on the kitchen printer as well. Depending on the option setting “**Use Alpha Text Descriptor**” the Alpha Text key will operate in one of two ways.

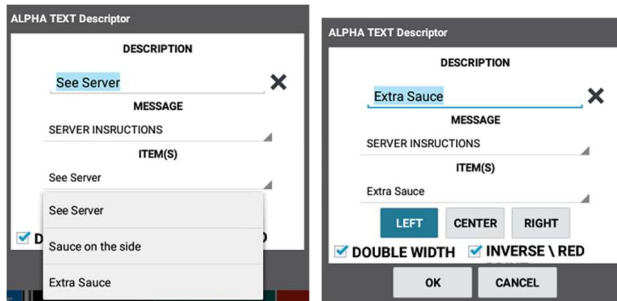
When the option setting “**Use Alpha Text Descriptor**” *is checked*, the programmed descriptor for the Alpha-Text function key is automatically used in the Register mode as per the settings on the function key.

When this option setting “**Use Alpha Text Descriptor**” *is not checked*, this allows you to type in a message or select a pre-defined message as defined in the Receipt & Message → Message programming: **Program Mode \ Receipt & Message \ Message**. The programmed Message groups and individual message Item(s) will appear on the Alpha Text dialog.

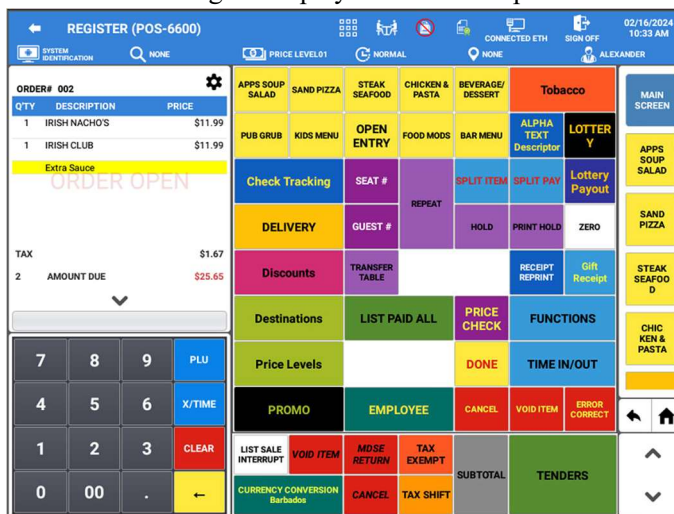
1. Register an item, then press the **ALPHA TEXT** key, the Alpha Text dialog displays:

2. If desired, you can still type a custom Alpha Text message (up to 40 characters) in the **DESCRIPTION** field (top line) the using the alpha keyboard overlay.
 - a. Select the position where you want the message to appear on the receipt.
 - b. You can select to have the message print **DOUBLE WIDTH** and/or **INVERSE \ RED**. Prints the descriptor in RED on Impact Printers, on Thermal Printers paper the message will print in inverse\reverse print, black background & white text.
3. Alternately, you can select a Pre-Defined message. Tap the **MESSAGE** dropdown list and select a specific **Message Category** from the available selections in the list:

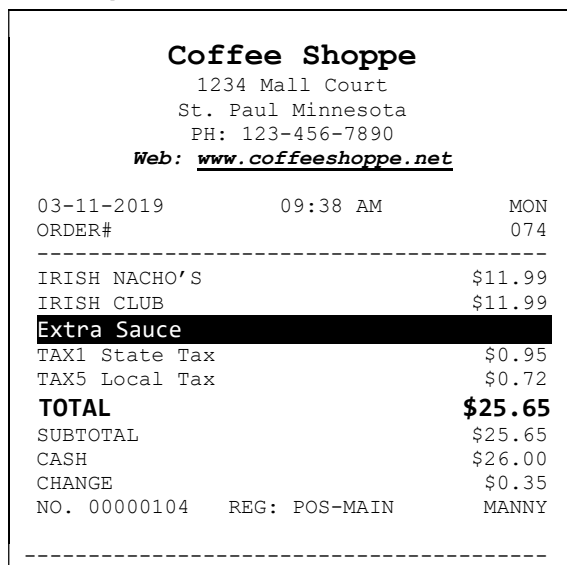
4. Tap the **ITEM(S)** dropdown list and select the desired **Pre-Defined Message** from the list:



- a. Select the position where you want the message to appear on the receipt.
 - b. You can select to have the message print **DOUBLE WIDTH** and/or **INVERSE \ RED**. Prints the descriptor in RED on Impact Printers on Thermal Printers paper, the message will print in inverse/reverse print, black background & white text.
5. Press **OK**. The message is displayed and will be printed with the order.



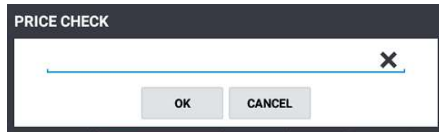
Sample Receipt with Alpha-Text



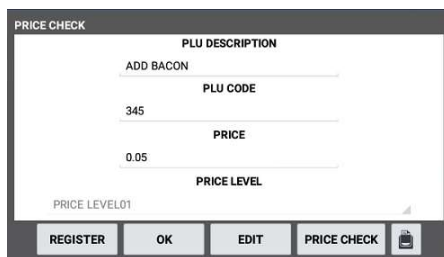
Price Check

Use the **PRICE CHECK** key to check the price of an item without registering it. We can also edit the PLU descriptor and change the price from the Price Check key or print a label for the selected item. The PLU option 'Allow Price Change' must be checked (enabled) to allow changing the price and the signed on employee must have the authority to perform price changes.

1. Touch the **PRICE CHECK** key, The **PRICE CHECK** dialog displays:



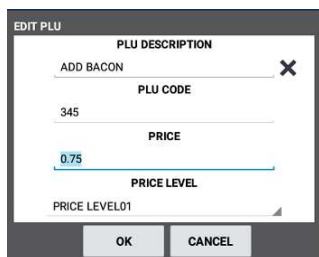
2. Scan the PLU/Item or enter the PLU/Item number and press **OK**.
3. The **PRICE CHECK** PLU information dialog screen appears:



4. From the Price Check screen, you can view the current PLU descriptor/price for the item. You can also choose to:
 - **Register** the item will be added in the sale.
 - Press **OK** to close the 'Price Check' dialog without registering the item.
 - **Edit** the PLU Description and/or Price. See **Edit PLU** below.
 - **Price Check** to select another PLU/Item to price check.
 - **Print Label** to print a label for the PLU/Item. See Print Label on page 92 (*Requires a label printer to be set up and mapped in Device programming.*)

Edit PLU


5. Form the **PRICE CHECK** dialog screen, press the **EDIT** button to open the **EDIT PLU** dialog:

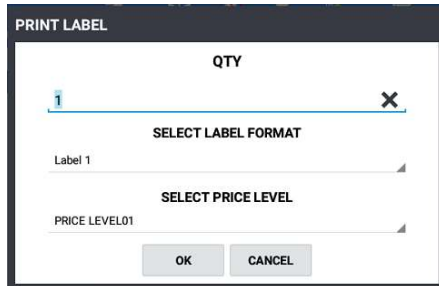


6. You can edit the PLU:
 - **Description** – a QWERTY keyboard is provided to facilitate changing the descriptor.
 - **Price** – a standard 10-key keyboard is displayed to facilitate changing the price.
 - **Price Level** – select the price level to edit the price for the selected price level.
7. Edit the data as needed – press **OK** when finished; pressing **CANCEL** will exit without applying changes.

Print Label

Note: you must have a label printer set up and mapped to the terminal before you can print labels.

8. To print a barcode from the Price Check function – after selecting a PLU, press the **Print Label**  button, the **PRINT LABEL** dialog displays:



- a. Enter the number of labels desired in the **QTY** field.
 - b. Choose the **LABEL FORMAT**.
 - c. Select the appropriate **PRICE LEVEL** to print on the label.
9. Press **OK** to print the label to the attached label printer. Pressing **CANCEL** will exit without printing.

Scale Operations

The Sam4POS can be interfaced to an electronic scale, allowing direct entry of the item's weight by using the **SCALE** key. Scale items could also be set to automatically get the scale weight and register the item.

Scale PLU Program Notes

- ◆ See Program Mode Programming, PLU, PLU Status Group. The following options affect each PLU linked to a PLU status group.
 - ⇒ **SCALE**: Select Auto Scale (weight on the scale is automatically entered when the PLU is registered) or Manual Scale (the weight must be entered before registering the PLU).
 - ⇒ **AUTO TARE# (0-20)**: If a tare is selected here, the preprogrammed tare weight will be subtracted from the scale weight when the PLU is registered.

Scale Function Key Notes

- ◆ See Program Mode Programming, Function Key Function Key to set the **SCALE** Key attributes:
 - ⇒ **MANAGER REQUIRED?**
 - ⇒ **ALLOW MANUAL ENTRY OF WEIGHT**
 - ⇒ **WEIGHT SYMBOL FOR MANUAL ENTRY**
 - ⇒ **ALLOW TARE WEIGHT ENTRY**
 - ⇒ **TARE ENTRY IS COMPULSORY**
 - ⇒ **ALLOW MANUAL ENTRY OF TARE**

Registering Scale Items

Direct Scale Entry (Open Price)

Scale integrated with Sam4pos terminal.

1. Place the item on the scale.
2. Touch the **SCALE** key to display the weight.
3. Enter the price for the scale item.
4. Press the open price Scalable PLU.

Direct Scale Entry (Preset Price)

Scale integrated with Sam4pos terminal.

1. Place the item on the scale.
2. Touch the **SCALE** key to display the weight.
3. Press the preset price Scalable PLU.

Auto Scale Entry

Scale integrated with Sam4pos terminal.

1. Place the item on the scale.
2. Press the **Scalable Auto-Scale PLU** item on the touch screen or real-keyboard.

Manual Weight Entry

Scale is not integrated with Sam4pos terminal.

Note: There cannot be a scale programmed in the Device Setting to use manual weight entry.

1. Enter the weight using the decimal key.
2. Touch the **SCALE** key to display the weight.
3. Enter the price if for open price Scalable PLU.
4. Press the Scalable PLU.

Tare Weight

A tare is the amount of weight accounted for by the container or packaging. By entering a tare weight (as required by law in some areas) the weight of the container is subtracted and only the true weight of the product is measured on the scale. A Tare Weight can be selected and applied to a scalable PLU (not Auto-scale) or a specific Tare can be applied automatically by setting the Auto-Tare in the PLU Status Group for scale items.

Tare weights are programmed in:

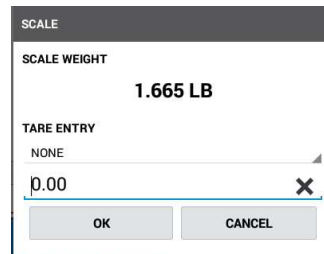
Program Mode → Options → Tare Weight

Auto Tare Weight

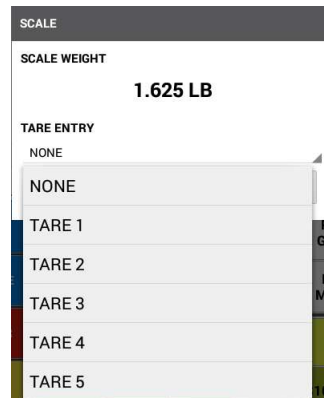
1. Place the item in the container on the scale.
2. Register the open or preset **Scalable Auto-Scale\Auto-Tare** PLU.
3. The PLU is registered (minus the weight of the Tare).

Manual Tare Weight Entry

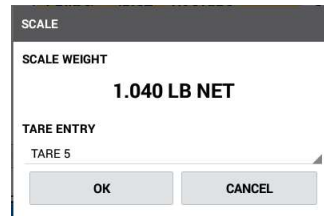
1. Place the item in the container on the scale.
2. Touch the **SCALE** key to display the weight.



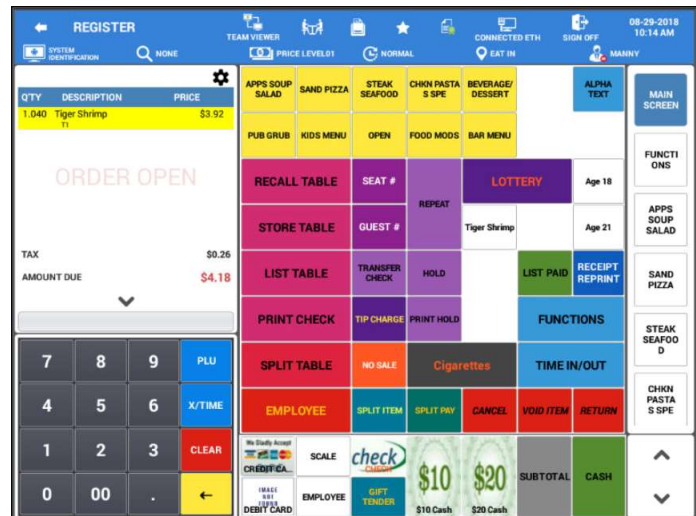
3. Touch the **TARE ENTRY** drop down:



4. Select the appropriate Tare from the list, the weight displays minus the tare:
5. Press **OK**.



6. Register the open or preset scalable PLU; the item is added to the sale.



Open Tare Weight Entry

1. Place the item in the container on the scale.
2. Touch the **SCALE** key; the weight is displayed:
3. Touch the Open **TARE ENTRY** field. Place the cursor to the right of the digit you want to enter.
4. **Enter the Tare weight.** The weight displays minus the tare weight entered.
5. Touch **OK**:
6. Register the open or preset scalable PLU; the item is added to the sale.

SCALE

SCALE WEIGHT

1.665 LB

TARE ENTRY

NONE

0.00

OK CANCEL

SCALE

SCALE WEIGHT

1.665 LB NET

TARE ENTRY

NONE

0.00

OK CANCEL

SCALE

SCALE WEIGHT

1.065 LB NET

TARE ENTRY

NONE

0.60

OK CANCEL

REGISTER

SYSTEM IDENTIFICATION NONE PRICE LEVEL:1 NORMAL CONNECTED ETH SIGN OFF 08-29-2018 10:12 AM

QTY	DESCRIPTION	PRICE
1.065	Tiger Shrimp	\$4.02

ORDER OPEN

TAX \$0.27

AMOUNT DUE \$4.29

7 8 9 PLU

4 5 6 X/TIME

1 2 3 CLEAR

0 00 . ←

APPS SOUP SALAD SAND PIZZA STEAK SEAFOOD CHKN PASTA S SPE BEVERAGE/ DESSERT ALPHA TEXT MAIN SCREEN

PUB GRUB KIDS MENU OPEN FOOD MODS BAR MENU

RECALL TABLE SEAT # REPEAT LOTTERY Age 18

STORE TABLE GUEST # Tiger Shrimp Age 21

LIST TABLE TRANSFER CHECK HOLD LIST PAID RECEIPT REPRINT

PRINT CHECK TIP CHARGE PRINT HOLD FUNCTIONS

SPLIT TABLE NO SALE Cigarettes TIME IN/OUT

EMPLOYEE SPLIT ITEM SPLIT PAY CANCEL VOID ITEM RETURN

SCALE check \$10 \$20 SUBTOTAL CASH

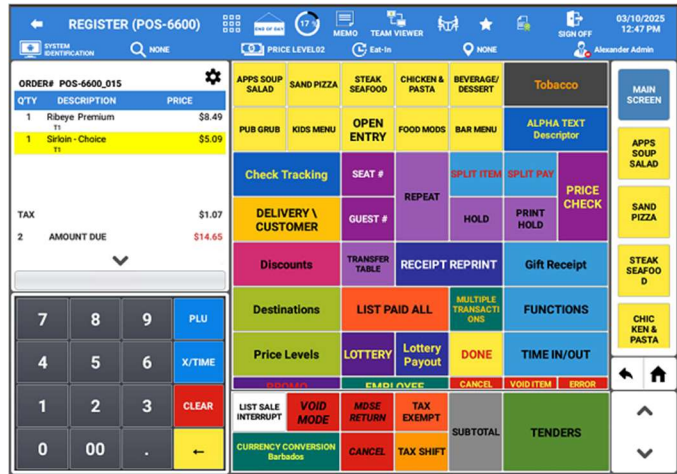
DEBIT CARD EMPLOYEE GIFT TENDER \$10 Cash \$20 Cash

Price Embedded Barcode

If you have a deli and your scale produces barcodes with the price embedded in them, you can set up the ECR to register these items. Price Embedded Barcodes printed by a scale-printer for the item will contain the identifying PLU number of the item and its price. When the barcode is scanned, the SAM4POS will read the embedded barcode and register the correct item price from the barcode label.

Note: No scale needs to be connected to the terminal for this operation.

1. Scan the label(s) from your scale.



2. Tender the sale.

- The **ITEM Quantity** is the number of items registered, not the weight of the items registered.

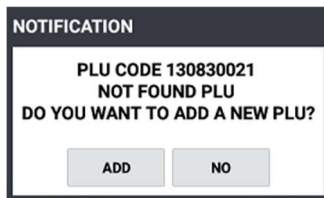


Not Found PLU

Designed to be used in a scanning system the **NOT FOUND PLU** feature allows the operator to immediately enter basic PLU information for an item that is not in the PLU file during the sale. If the "Not Found PLU" message displays when a PLU is scanned the operator can choose to add the item and will be prompted to enter PLU price, and if programmed, the descriptor and linking information. The item is registered immediately.

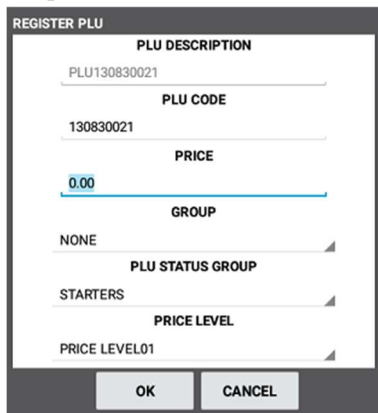
Note: The Not Found PLU feature must be enabled in General Option programming to allow this operation. The Not Found PLU entry may be restricted to Manager Required operation.

1. When a PLU that is not in the PLU file is scanned a continuous error tone sounds notifying the operator the item just scanned is not in the database. The **NOT FOUND PLU Notification** displays:



A notification dialog box with a dark header and a white background. The text inside reads: "NOTIFICATION", "PLU CODE 130830021", "NOT FOUND PLU", and "DO YOU WANT TO ADD A NEW PLU?". At the bottom, there are two buttons: "ADD" and "NO".

- Pressing **NO** will exit without adding the item.
2. Press **ADD** to add the item. If the **Manager Password** entry dialog appears, enter the appropriate manager code to proceed. The **REGISTER PLU** entry box displays:



A "REGISTER PLU" dialog box with a dark header and a white background. It contains several input fields and dropdown menus. The fields are: "PLU DESCRIPTION" (containing "PLU130830021"), "PLU CODE" (containing "130830021"), "PRICE" (containing "0.00"), "GROUP" (containing "NONE"), "PLU STATUS GROUP" (containing "STARTERS"), and "PRICE LEVEL" (containing "PRICE LEVEL01"). At the bottom, there are two buttons: "OK" and "CANCEL".

3. Enter the **PLU DESCRIPTOR**, **PRICE** (*for all price levels*), **GROUP** assignment, **PLU STATUS GROUP**, and **PRICE LEVEL** assignment for the item, press **OK** when done.
4. The item is registered in the current transaction and added to the PLU database.

NOTE:

- Generate the End Of Not Found PLU from the EOD screen to clear the Not Found PLU file, refer to page 209 for details.

Shifting or Exempting Tax

Tax Shift

PLU's can be programmed to automatically add the appropriate tax or taxes. As sales are registered, any applicable taxes for each individual transaction are reported to the financial report.

Occasionally, you may need to sell a normally taxable item without tax, or a normally non-taxable item with tax. You can perform tax shifting operations on individual items using the tax shift key.

Note: Display of taxable item indicators is controlled by Tax Option settings in the Options programming.

Shifting Tax on Item

1. To remove or add tax or change the tax applied on individual items, select the item you want to shift the tax on and touch the **TAX SHIFT** key.
2. On the **TAX selection** screen that displays, check or uncheck the appropriate taxes to add or remove the tax on the item selected.

Tax Exempt

Exempt Tax on an Entire Sale

Occasionally, you may need to exempt tax from an entire sale. For example, you might remove all state and local taxes when you sell merchandise to a church or charitable institution.

Taxes can be removed from an entire sale by using a pre-programmed **TAX EXEMPT** key. Press **SUBTOTAL** then press **TAX EXEMPT** to remove all taxes as set on the tax-exempt key.

Alternatively, Destination keys, Store Table keys as well as individual Tender keys can be set to Exempt specified Taxes when used.

Food Stamp Shift

Food Stamps may be used to purchase eligible items at stores that participate in the program. The taxes normally collected may be exempted when purchased with food stamps. Handling of food stamp transactions is done by sorting food stamp and non-food stamp eligible items within each sale and tracking food stamp payments for eligible items.

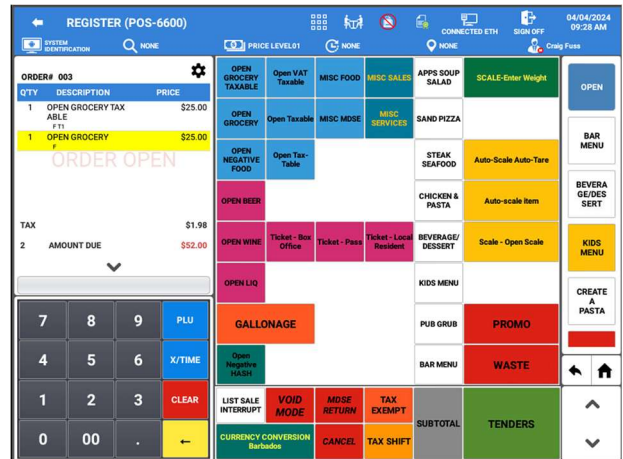
Note: Display of food stamp eligible indicators is controlled by Tax Options settings in the Options programming.

- ◆ If you want to sell a non-food stamp eligible item with food stamp eligibility, touch the **FD/S SHIFT** key before the item entry.
 - To sell a food stamp eligible item as non-food stamp eligible, touch the **FD/S SHIFT** key before registering the item.

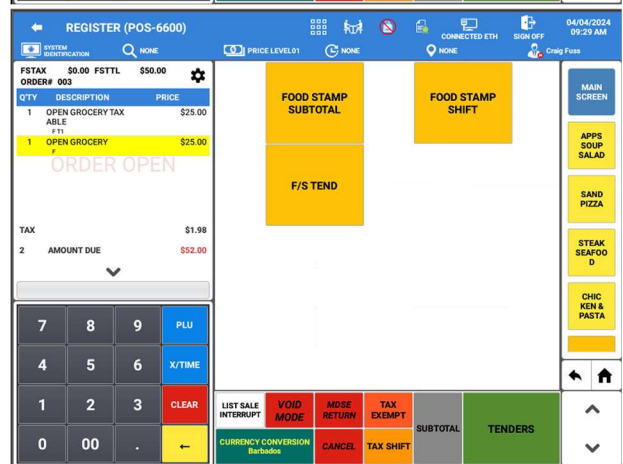
Food Stamp\EBT Transaction

In most cases tax is forgiven when using Food Stamps\EBT, the operation for using food stamps is described below.

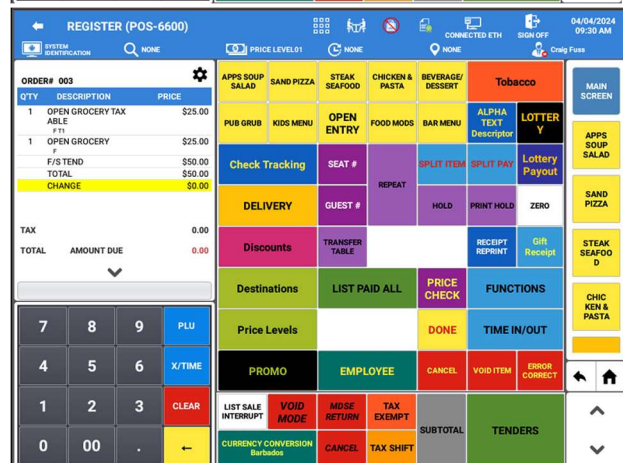
1. Register items into a sale.



2. Press the **Food Stamp Subtotal** key to get the total of all food stamp eligible items. *(The FSTTL amount is displayed at the top of the transaction detail window.)*



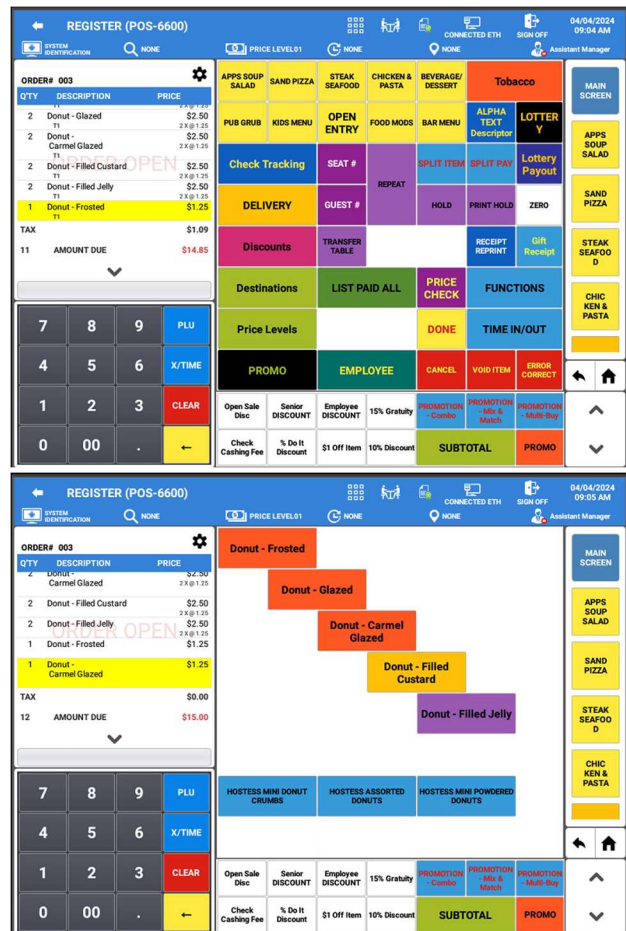
3. Enter the **amount of the Food Stamp Subtotal**; *(or enter a different amount to apply to the transaction)* then press the **Food Stamp Tender** key.
4. Taxes are removed for the Food Stamp items and the tender is applied to the transaction.
5. If necessary finalize any remaining amount for the transaction with Cash, Check, or Credit.



Canadian Donut Law

Special Provincial or State sales tax laws might change the taxable status of an item depending upon the quantity sold. Donuts for example, might be taxable when sold individually at a bakery, but may not be taxable when sold by the dozen. For example, registering individual PLU's that report to a PLU status group will be taxed until the quantity within the transaction reaches 12. When 12 or more eligible items are registered, all will be sold without tax.

1. Register Canadian Donut Eligible items into a sale. The items are taxed normally up to the 11th item registered.
2. When the 12th eligible item is registered, the tax is removed from the sale.



Corrections & Voids

Clear

- ◆ Touch the **CLEAR** key to erase numeric entries or clear an error condition.

Void Item

Use the VOID ITEM key to void an item or a discount previously entered in an active transaction. When a main item is voided, the condiments associated with the item are also removed.

- ◆ Touch a discount, an item, or condiment where it is displayed on the screen – the item touched is now selected and highlighted.
- ◆ Touch the **VOID ITEM** key to remove the selected discount, item, or condiment from the sale.
 - If there is no Void Item key on the keyboard, you can press & hold on the item you wish to void, then select Void Item from the selection on the dialog.
- ◆ On a % discount or surcharge transaction, you must **FIRST** void the discount or surcharge, then you may void the items from the transaction.

NOTES:

- **The signed on employee must have the authority set to “Allow Void Item”.**
- **If you Void all items registered in a sale and then tender the sale, you may get the error message ‘Sale Transaction Empty’. In this case you would need to press the CANCEL key to cancel the transaction. This gives managers more control to prevent unauthorized voiding of items.**

Cancel

Use the cancel function to completely abort a transaction in progress. A receipt can be printed for the cancelled transaction. A separate Cancel Total is updated on reports, the item totals & counters are not updated. Cancel cannot be used after tendering or finalization the transaction. Employee authority determines if the Cancel function is allowed. The Cancel operation does not open the cash drawer.

- ◆ Touch **CANCEL** to abort a transaction in progress. Cancel may also be set for Manager Required, enter the manager password at the prompt to complete the operation.

Transaction Void / Vode Mode

If a finalized transaction was registered incorrectly or for some other reason you need to remove sales data from reports. To properly back out the sales data and correct report data you need to perform a Transaction Void.

A **VOID MODE** key must be placed on an MLU \ FLU screen or on the keyboard on the SAP-630/SAP-530.

(On the SAP-630 & SAP-530, you can also turn the key lock to the VOID position.)

If the Void Mode key is set for manager control, entry of the manager password is required. The Void Mode key can also be set for Pop-Up or Stay-Down operation.

1. Touch the **VOID MODE** key. *(On SAP-630/SAP-530 terminals, turn the key lock to the VOID position.)*
If required enter the manager password. The header ribbon will turn **red** and show VOID MODE for the header title.



2. Enter Items to be voided. Finalize the transaction using the appropriate tender key.
 - a. If the Void Mode key is set for pop-up, the terminal will return to the normal Register Mode.
 - b. If the Void Mode key is set for stay-down, the station will remain in VOID MODE.
3. Press the **VOID MODE** key again to exit Void Mode.

Merchandise Return

Use this function to return (credit) merchandise inside or outside of a sale.

- ◆ Touch **RETURN** and then register the item to be returned. Repeat for each item to be returned.

Change Quantity

The **QUANTITY CHANGE** key allows the operator to change the quantity of an item that was entered incorrectly. For example: The customer ordered six beers, but the operator incorrectly entered 9 X/Time Beer instead of 6 X/Time Beer. To correct this:

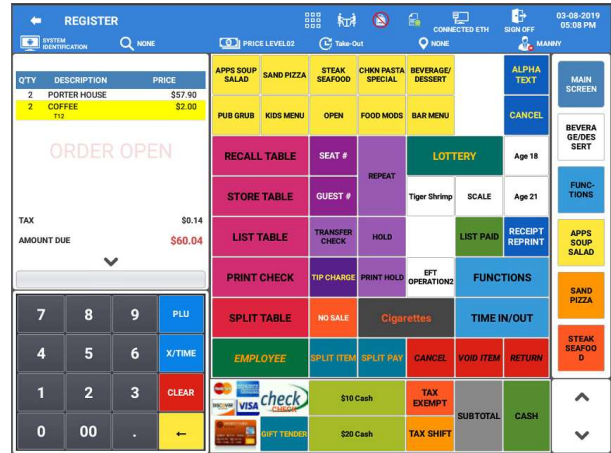
1. Highlight the item with the incorrect quantity on the register screen.
For Example, **[9] BTL SAM ADAMS**
2. Enter in the correct quantity on the numeric keypad. For example, **[6]** and press the **QUANTITY CHANGE** key.
3. The quantity and price/total are adjusted.



Split Item (Consolidated Items)

When like items are consolidated, touch the **SPLIT ITEM** key to separate items for separate seat assignment or split checks.

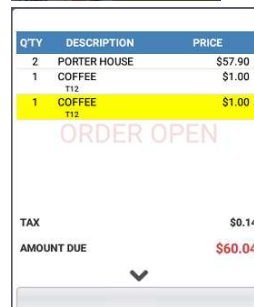
1. Touch the consolidated item you wish to split.



2. Touch **SPLIT ITEM** to split the items, the **SPLIT ITEM** dialog displays:
3. Enter the number of items you want to split off; press **ENTER**.



4. The selected item is split off:



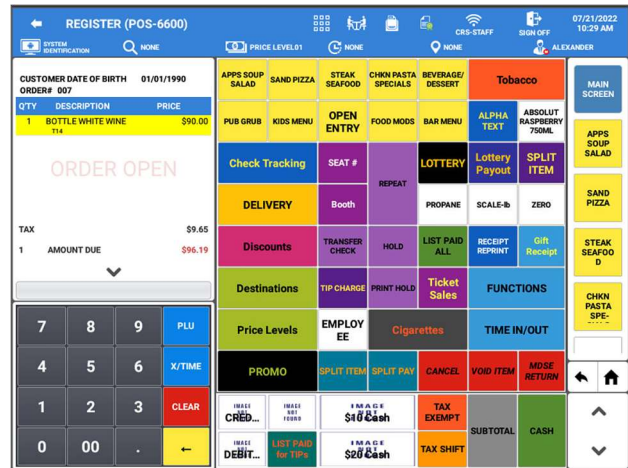
In this example, 2 COFFEE had 1 split off; transaction now shows:

- 1 COFFEE
- 1 COFFEE

Split Item (Single Item)

Sometime a customer may want to split the cost of a certain item, such as an expensive bottle of wine. The **SPLIT ITEM** key can be used to split the cost of the item into equal portions.

1. Select the item in the sale you wish to split.



2. Touch **SPLIT ITEM** to split the items, the **SPLIT ITEM** dialog displays:
3. Enter the number of portions you want to split the item; press **ENTER**.



4. The selected item is split off.
In the example, the **BOTTLE WHITE WINE** was split into 3 portions.
5. You can then assign each of the split items to individual seats for payment.



Discounts/Coupons/Surcharges

The DISCOUNT keys are programmable and may be set up to handle a variety of discounts, surcharges or coupons. Each Discount key can operate differently depending on its settings.

- Require a Manager to allow the discount
- Apply to a Sale or an Item
- Accept an amount entry or calculate a percentage
- Be positive (surcharge) or negative (discount)
- Be open or preset (preset may be price or percentage, depending upon set up)
- Calculate taxes before or after the discount is applied
- Allow the discount to reduce the food stamp subtotal
- Allow the “do it” subtotal discount function
- If the % key is preset at a set percentage, allow override of the percentage, or to allow override of the percentage in ‘X’ mode only
- Choose to Net The Item Total so that only the discounted amount is sent to the report totals.
- If the % key is a subtotal amount function (vendor coupon), allow multiple coupons without pressing subtotal or allow only one coupon.

Sale (Subtotal) Discounts

Open Percentage Sale Discount

To deduct an open percentage discount from a sale (or override a preset percentage):

1. Register items.
2. Touch **SUBTOTAL**.
3. Enter discount percentage. If the discount is fractional, use the decimal key. For example, enter 1 5 . 5 for a 15.5% discount.
4. Touch the “Open Sale % Discount” % key.
5. Finalize the transaction.

Preset Percentage Sale Discount

To deduct a preset percentage discount from a sale:

6. Register items.
7. Touch **SUBTOTAL**.
8. Touch the “Sale % Discount” % key.
9. Finalize the transaction.

Open Amount Sale Coupon

To deduct an open amount coupon against a sale:

1. Register items.
2. Touch **SUBTOTAL**.
3. Enter the amount of the coupon.
4. Touch the “Sale [-] Coupon” % key.
5. Finalize the transaction.

Preset Percentage Sale Coupon

To deduct a preset amount coupon against a sale:

1. Register items.
2. Touch **SUBTOTAL**.
3. Touch the “Sale % Coupon” % key.
4. Finalize the transaction.

Do It Discount

This operation allows the cashier to accept a short tender amount as full payment for the sale. The short amount is automatically tracked in the discount key total.

To apply a “**Do It**” discount:

1. Register items - Press **SUBTOTAL**.
2. Enter the “Under Tender” amount offered for the tender, Press **CASH**.
3. Press **SUBTOTAL** then touch the “**Do It Discount**” % key.
This will discount the difference between the actual amount of the sale and the under tender amount.
4. Press **CASH** to finalize.

Item Discounts

Open Percentage Item Discount

To deduct an open percentage discount from an item (or override a preset percentage):

1. Register items.
2. Touch the item to be discounted.
3. Enter discount percentage. If the discount is fractional, use the decimal key.
4. For example, enter 1 5 . 5 for a 15.5% discount.
5. Touch the “Open Item % Discount” % key.
6. Finalize the transaction.

Preset Percentage Item Discount

To deduct a preset percentage discount from an item:

1. Register the items.
2. Touch the item to be discounted.
3. Touch the “Preset Item % Discount” % key.
4. Finalize the transaction.

Open Amount Item Coupon

To deduct a store coupon against an item:

1. Register items.
2. Touch the item to apply the coupon to.
3. Enter the amount of the coupon.
4. Touch the “Open Item [-] Coupon” % key.
5. Finalize the transaction.

Preset Amount Item Coupon

To deduct a store coupon against an item:

1. Register items.
2. Touch the item to apply the coupon to.
3. Enter the amount of the coupon.
4. Touch the “Preset Item [-] Coupon” % key.
5. Finalize the transaction.

Surcharges

A Surcharge is used to add an additional charge or fee to the cost of an item or sale. Discount keys can be used to apply this added surcharge/fee.

Open Percentage Sale Surcharge

To add an open percentage surcharge to a sale:

1. Register items.
2. Touch **SUBTOTAL**.
3. Enter surcharge percentage. If the surcharge is fractional, use the decimal key. For example, enter **1 5 . 5** for a 15.5% surcharge.
4. Touch the **Open Surcharge %** key.
5. Finalize the transaction.

Preset Percentage Sale Surcharge

To add a preset percentage surcharge to a sale:

1. Register items.
2. Touch **SUBTOTAL**.
3. Touch the **Preset Surcharge %** key.
4. Finalize the transaction.

Open Amount Item Surcharge

To add an open percentage surcharge to an item:

1. Register items.
2. Touch the item to apply the surcharge to.
3. Enter the **Amount** for the surcharge.
4. Touch the **Open [-] Surcharge %** key.
5. Finalize the transaction.

Preset Amount Item Surcharge

To add a preset percentage surcharge to an item:

1. Register the items.
2. Touch the item to apply the surcharge to.
3. Touch the **Preset [-] Surcharge %** key.
4. Finalize the transaction.

Using Promotions

The Sam4POS ECRs can automatically apply a discount when a certain number of specified items is registered or when certain combinations of items are registered. This is accomplished via the Promotion programming. Every time you register an item Sam4POS checks all promotion tables to see if there is a promotion to apply. Information from the sale of items assigned to the individual Promotions will update the promotion report.

There are four different discount scenarios with the Promotion programming and the Promotion Group programming. All the promotion types listed here will apply automatically when the qualifications for the promotion are fulfilled. Consult with your dealer for details about the Promotion programming feature.

The Mix & Match, Multi-Buy and Combo Discount promotions may be used with the Time Schedule Promotion program. This limits promotion to only be active during the times set in the Time Schedule Promotion settings. Time Schedule Promotions must be created before they can be selected & assigned to promotions.

Mix & Match

The Mix & Match discount is utilized where the merchant offers a fixed amount or percentage discount when specified quantities of similar items are purchased. Discounts can be a percentage, an amount or a fixed price. This discount is implemented by first linking the applicable PLU's to a specific promotion table.

For example:

- Save 20% when 4 tires purchased
- Save \$5 on any three bottles of wine
- Buy 3 Cake-Mix for \$3.00

Multi-Buy

The Multi-Buy discount is utilized where the merchant offers an amount or percentage discount or offers the items at a fixed price when the specified combination of items is purchased. Discounts can be a percentage, amount or fixed price. To implement this discount you must list each item and the qualifying quantity that must be purchased on the promotion program screen; enter the discount type and the discount value.

For example, the customer purchases 2-Hamburgers, 1-French fry and 1-Medium soft drink to receive a discount.

- 25% Meal Discount
- \$1 Meal Discount.
- Meal Price of \$7.00

Combo Discount

The Combo discount is similar to the multi-buy discount. In both situations specific items must be sold to qualify for the discount. Discounts can be a percentage, amount or fixed price. When using the Combo Discount option, instead of the selecting individual PLU's, promotion groups are used with the discount.

For example, purchase 1 Appetizer, 1- Sandwich item and 1-Large soft drink to receive a

- 25% Meal Discount
- \$1 Meal Discount.
- Meal Price of \$9.95

Sweet Deal

The Sweet Deal promotion is a progressive discount, the more you buy, the larger the discount applied. The Sweet Deal promotion uses promotion groups to define the discount. The promotion group will have all the items that are eligible for the sweet deal. The promotion group is then assigned to the sweet deal promotion and the parameters set for the sweet deal promotion.

Such as get sandwiches at a specified set price. For example: 2 for \$5, 3 for \$7, 4 for \$10

Time Schedule Promotion

The Time Schedule Promotion program can be used to schedule the specific date & time when certain promotions are to be active.. Time Schedule Promotions are used with the Mix & Match, Multi-Buy and Combo Discount promotion types when the End Date option “Use Time Schedule” is set in the promotion program.

Mix & Match \ Multi-Buy \ Combo Discount

The End Date option “Use Time Schedule” is only available on the Mix & Match, Multi-Buy and the Combo Discount promotions.

END DATE

The End Date option: Use Time Schedule on the Mix & Match, Multi-Buy and Combo Discount promotions is used with the Time Schedule Promotion program. This limits the promotion to only be active during the dates & times set in the Time Schedule Promotion settings. Time Schedule Promotions must be created before they can be selected & assigned on the Mix & Match, Multi-Buy and Combo Discount promotions.

USE TIME SCHEDULE

When selected you will need to choose the appropriate Time Schedule Promotion from the list to be used with this promotion. This promotion will only be active during the date & times set in the Time Schedule Promotion settings.

Coupon Search

When the Coupon feature is set up in the promotion programming for the Mix & Match, Multi-Buy, or Combo Discount, these promotion types provide the ability to select a specific coupon/discount code to apply to the transaction for the “Coupon Search” feature in the register mode.

The Promotion function key is used with the Coupon Search feature to enter the appropriate Coupon Code. The promotion type used with the coupon search is determined by the setting on the Promotion function key.

Important! Do not confuse the PROMOTION function key with the PROMO function key.

Promotion Key Operation

1. From the **REGISTER MODE** register items associated with the promotion.
2. Press the **PROMOTION** key, the **Input Coupon Code** dialog appears.



Note: The Promotion Type will be displayed

3. Input the **Coupon Code** and press **ENTER**.
The Coupon Code can be up to 18 digits to allow for scanning a barcode on a manufacturer coupon.
4. If the parameters for the Promotion key are satisfied, the appropriate coupon/discount is applied.
Continue entering additional coupons from step 2 as necessary.
5. Tender the sale after all coupons have been applied.

Totaling/Tendering

There are four general tender key types available in SAM4POS, *Cash*, *Check*, *Food Stamp* and *Misc*. Each Tender type has additional programming associated with that specific type of tender. Each tender key description can be edited to further identify the specific tender.

Cash

Use the CASH key to finalize or tender cash sales. Change is computed when the amount of cash tendered is greater than the amount of the sale. Cash Tender keys can be set as:

NORMAL

Touch the **CASH** key or, enter the amount of the cash tendered and touch the **CASH** key. The register will display the change due.

QUICK TENDER

Touch the **QUICK CASH** key, the programmed amount will be applied and any change due will be displayed.

NEXT DOLLAR

Touch the **NEXT DOLLAR** key to tender an amount the next whole dollar above the sale total. The register will display the appropriate change due. *i.e.* if the sale amount is \$11.75, \$12.00 will be entered. The change due (**0.75¢**) will be displayed.

Rounding

Sam4POS has specific Rounding programming you can set to accommodate rounding operations. You must select the General Option: **ACTIVATE ROUNDING ON TEND / SUBTOTAL = CASH**.

Go to Program Mode > Options > Rounding.

The Rounding program category allows you to choose how rounding is handled when fractional amounts result during operations like multiplication, division, applying discounts and tax calculations or to eliminate the use of pennies.

- Use the **Option** button to select the rounding method for multiplication, division, %, and tax to always round up, always round down, or round up at .5 (half a cent .005¢).
- Use the **Rounding System** button to eliminate the use of pennies in the system. For example, the ranges could be set as:

<u>NO.</u>	<u>START:</u>	<u>END:</u>	<u>VALUE:</u>	<u>Definition</u>
#1	00	02	000	(.00-.02 rounds to .00)
#2	03	07	005	(.03-.07 rounds to .05)
#3	08	09	010	(.08-.09 rounds up to .10)

Check

Use Check Tender to finalize or tender sales paid for with a written check. If over tendering is allowed, change is computed when the amount of the check tendered is greater than the amount of the sale.

- ◆ Register a sale; Touch the **CHECK** key or enter the amount of the check and touch the **CHECK** key to tender the sale. The register will display the change due.

Miscellaneous (Charge) Tender

Miscellaneous tender keys are available for accepting various types of payment such as *House Charges, Credit, Debit, and Gift cards*. Each key can be configured separately with maximum charge limits, tendering requirements/rules, tax exemption rules and validation requirements. Operation sequences will vary depending upon the situation. To accept a Miscellaneous tender payment:

- ◆ Register a sale; Touch the **MISC TENDER** key or, enter the amount tendered and touch the appropriate **MISC TENDER** key to tender the sale. The register will display the change due.

Integrated Credit (EFT)

The tendering procedure if you are using an integrated credit device (EFT) to process credit card transactions through the Sam4POS ECR varies depending on the specific device connecting to the station. Refer to the “Integrated Payment Transactions” chapter on page 114 for operations.

Food Stamp Subtotal & Tender

EBT\Food Stamps may be used to purchase eligible food items at retail\convenience stores that participate in the program. The SAM4POS can assist a retailer in handling food stamp transactions by sorting food stamp and non-food stamp eligible items within each sale and tracking food stamp payments for eligible items.

Use the Food Stamp Tender key to tender the Food Stamp portion of the sale after the display of the food stamp eligible subtotal. Depending upon Food Stamp Tender key programming, change of less than \$1 may be applied to any cash balance or issued as cash change. Food Stamp options include:

- ◆ The **FD/S TEND** key can be programmed to forgive tax on items paid for with food stamps.
- ◆ Food Stamp change of less than \$1 can be applied toward the sale or given as change.

Consult with your installation dealer to verify that food stamp programming is set to correspond with food stamp merchant rules in your area.

TO COMPLETE A FOOD STAMP TRANSACTION:

1. Register all items you wish to sell. (No need to sort food stamp eligible and non-eligible items, Sam4POS will maintain a subtotal of food stamp eligible items based on the programmed status for each item.)
2. Press **FD/S SBTL**. The total eligible food stamp payment is displayed at the top of the transaction window.
3. Enter the food stamp tender amount, press **FD/S TEND**.

Note: If more than one F/S TEND is to be applied to the sale the cashier must press the F/S SBTL key prior to entering each F/S TEND amount.

4. Pay remainder due (if any) with **CASH, CHECK** or by one of the Miscellaneous tender functions (charge).

Split Tender

Multiple payments can be recorded for a single transaction. F/S TEND, Cash, Check, and/or MISC tenders can be recorded in any order, as many times as necessary to pay the entire transaction. Depending on the General Option setting, the cash drawer may open after the first partial tender is entered or wait until the transaction is finalized.

- ◆ Enter the desired amount, press the appropriate tender key, **F/S TEND, CASH, CHECK, and/or MISC**.
 - If you are making a partial payment using **EBT Food Stamps**, perform that operation first.
- ◆ Continue to add additional payments to finalize the transaction.

Foreign Currency Subtotal & Tender

Currency Conversion

If you normally accept currency from neighboring nations, the Sam4POS can be programmed to convert the subtotal of a sale to the equivalent amount in foreign currency.

1. Register items in a sale.
2. Press the appropriate **Currency Conversion** key pre-programmed with the appropriate exchange rate. The amount due in foreign currency is displayed.

For example, \$1.00 in Foreign Currency may be worth \$0.75 in Home Currency (*US Dollars*).

1 FCD \$ = 0.7518796 USD \$

1 USD \$ = 1.3333333 FCD \$

3. Enter amount tendered in foreign currency, then press the **CASH** tender key.

Note: The CHANGE due (*\$0.95*) for this example is computed in home currency.

If desired, the CHANGE due when currency conversion is used can be calculated in foreign currency (*\$0.72*).

Sam4POS		
12345 City Street Hometown, USA 55555		
08/30/2023	09:21 AM	WED
ORDER#		123

IRISH NACHO'S	T1F	\$11.99
IRISH CLUB	T1F	\$11.99
TAX TOTAL		\$0.94
TOTAL		\$25.63
SUBTOTAL		\$25.63
\$ CASH		\$20.00
EXCHANGE RATE		0.751879
Currency Conversion		\$19.28
FOREIGN AMT		\$20.00
HOME AMT		\$26.58
CHANGE		\$0.95

ITEM		2
NO. 00000167	REG: POS-1	MANAGER

Integrated Payment Transactions

The SAM4POS application only supports EMV enabled devices for integrated payment transactions for seamless credit card processing through the Sam4POS terminal. There are different EFT Devices that will integrate with Sam4POS, each EFT Device sets up differently. The EFT operations are specific to the integrated payment equipment connected to the Sam4POS, consult with your dealer for specific operations for the equipment installed with your system.

The operation examples described here are shown using the Datacap DC Direct and a PAX Pin-Pad, other integrated payment devices may be different than described here. Refer to the integrated payment supplement for your specific equipment for operation details.

Note: Be sure to Close the previous day's batch before beginning a new sales day. A new batch is opened automatically when the previous batch is closed. See the Close Batch procedure on page 334.

After closing the current batch you will also want to perform the "Clear EMV File" operation, see page 336 for this operation.

The "**EFT Batch Close**" and the "**Clear EMV File**" operation can be programed to occur automatically when the EOD is performed.

Credit \ Debit (No TIP)

Transaction example when System Option: Gratuity Suggestions = Blank (No entry).

1. Register items then press the **EMV Credit** tender key.
 - The transaction is sent to the EFT device.
2. If the DC-Direct is set to Prompt for TIP on Pin-pad; The TIP entry screen appears. Enter TIP amount; Press the **ENTER** key (Green Button).
3. At the prompt to **Swipe / Insert / Tap / Key**; insert the credit card in the Pin-Pad card reader.
 - Processing time is approximately 8-10 seconds.
4. When the transaction has been verified the prompt: "**Instruct Customer To Remove Card**" is displayed.
 - Remove the card from the Pin-Pad card reader.
5. The card will process, then the **APPROVED** message displays.

Sample Merchant and Customer Receipts (Without TIP)

Receipt Sample (No TIP)

```

Sam4POS
4851 Whitebear Parkway
St. Paul, MN 55110
1-800-333-4949

2024-09-20      09:49      FRI
ORDER#          POS-MAIN_044
-----
PRODUCT                TOTAL
-----
Burger                TIF   $9.95
French Fries          T2    $1.99
-----
TAX TOTAL                $1.00
-----
TOTAL                  $12.94
-----
SUBTOTAL                $12.94
CREDIT                  $12.94
INVOICE   : 00000053
REFERENCE : ActWdcb5PQvesCr
AUTH CODE : LaLnKDER
-----
NO. 00000053 REG: POS-MAIN Madison
    
```

EFT Draft (No TIP)

```

2024-09-20      09:49      FRI
ORDER#          POS-MAIN_044
CLERK ID: Patrick

SALE

VISA             *****0073
ENTRY METHOD: CHIP
DATE: 09/20/2024 TIME: 09:13:29

INVOICE: 00000053
REFERENCE: ActWdcb5PQvesCr
AUTH CODE: LaLnKDER

AMOUNT          USD$ 12.94
=====
TOTAL           USD$ 12.94

APPROVED - THANK YOU
I AGREE TO PAY THE ABOVE TOTAL
AMOUNT ACCORDING TO CARD ISSUER AGREEMENT. (MERCHANT AGREEMENT
IF CREDIT VOUCHER)

X_____
Test Card 01 Datacap

APPLICATION LABEL: Visa Credit
AID: A0000000031010
TVR: 000008000
IAD: 06010A03A08002
-----
NO. 00000018 REG: POS-MAIN Patrick
    
```

Credit Card – With Surcharge

DC Direct supports applying a surcharge on MISC TEND keys in states that allow merchants to add a surcharge to the electronic credit card payment. The description “Surcharge” and the amount will print on receipts. The DC Direct device determines if the surcharge can be applied.

Please note: Debit Card and Prepaid Credit & Gift Card transactions do not allow a surcharge to be applied. If you attempt to tender a Debit or Gift Card using a MISC Tender key set for Surcharge, the transaction will be approved without the surcharge being applied to the sale.

If the merchant still wants to apply a surcharge to Debit Card and Prepaid Credit & Gift Card transactions, they will need to apply the surcharge using a sale discount key programmed for surcharge.



Substantial fines can be assessed to merchants for adding a surcharge to Prepaid card & Debit card transactions.

NOTE: Adding Surcharge % (percentage) is a separate feature from the Multi-Pricing (Payment Fee) feature. You would set up one or the other of these features, but not both features at the same time.

1. Register items then press the **EMV Credit**, tender key.
 - The transaction is sent to the EFT device.
2. If the DC-Direct is set to Prompt for TIP on Pin-pad; The TIP entry screen appears. Enter TIP amount; Press the **ENTER** key (Green Button).
3. At the prompt to **Swipe / Insert / Tap / Key**; insert the credit card in the Pin-Pad card reader; processing time is approximately 8-10 seconds.
 - If the Credit Card key is set to apply a Surcharge it is applied & added to the total on the Pin-Pad.
4. The Pin-Pad prompts you to Accept the transaction amount Including the Surcharge amount – press the **ENTER** key (Green button) to accept.
5. When the transaction has been verified the prompt: **“Instruct Customer To Remove Card”** is displayed.
 - Remove the credit card from the Pin-Pad card reader.
6. The card will process, then the **APPROVED** message displays.
 - The transaction receipt will print including the **Surcharge** amount.

Sample Receipts with Surcharge

Receipt Sample with 3% Surcharge (No TIP)

```

Sam4POS
4851 Whitebear Parkway
St. Paul, MN 55110
1-800-333-4949

2024-09-20      09:49      FRI
ORDER#          POS-MAIN_044
-----
PRODUCT                TOTAL
-----
Burger                TIF   $9.95
French Fries          T2    $1.99
SURCHARGE              $0.38
-----
TAX TOTAL              $1.00
-----
TOTAL                  $13.32
-----
SUBTOTAL              $13.32
CREDIT                 $13.32
-----
INVOICE   : 00000053
REFERENCE : ActWDbg5PQvesCr
AUTH CODE : LaLnKDER
-----
NO. 00000053  REG: POS-MAIN  Madison
    
```

EFT Draft with 3% Surcharge (No TIP)

```

2024-09-20      09:49      FRI
ORDER#          POS-MAIN_044
CLERK ID: Patrick

SALE

VISA             *****0073
ENTRY METHOD: CHIP
DATE: 09/20/2024  TIME: 09:13:29

INVOICE: 00000053
REFERENCE: ActWDbg5PQvesCr
AUTH CODE: LaLnKDER

AMOUNT           USD$ 12.94
SURCHARGE        0.38
=====
TOTAL            USD$ 13.32

APPROVED - THANK YOU
I AGREE TO PAY THE ABOVE TOTAL
AMOUNT ACCORDING TO CARD ISSUER AGREEME
NT. (MERCHANT AGREEMENT
IF CREDIT VOUCHER)

X_____
Test Card 01 Datacap

APPLICATION LABEL: Visa Credit
AID: A0000000031010
TVR: 000008000
IAD: 06010A03A08002
-----
NO. 00000018  REG: POS-MAIN  Patrick
    
```

Credit Card Transaction – With TIP

The System Option: Gratuity Suggestions setting will determine how the TIP entry is applied.

- * **Prompt** – Will prompt to enter tip at the PIN-Pad
- * **Direct Gratuity Suggestion Entry** – Will prompt at the PIN-Pad for the programmed suggested gratuity percentages.
- * **PrintBlankLine** – No prompt appears at PIN-Pad, a Blank TIP Line is printed on the EFT receipt.

The Sample transaction will also apply a 3% Surcharge.

1. Register items then press the **EMV Credit**, tender key.
 - The transaction is sent to the EFT device.
2. If the DC-Direct is set to Prompt for TIP on Pin-pad; The TIP entry screen appears. Enter TIP amount; Press the **ENTER** key (Green Button).
3. At the prompt to **Swipe / Insert / Tap / Key**; insert the credit card in the Pin-Pad card reader; processing time is approximately 8-10 seconds.
 - If the Credit Card key is set to apply a Surcharge it is applied & added to the total on the Pin-Pad.
4. The Pin-Pad prompts you to Accept the transaction amount Including the Surcharge amount – press the **ENTER** key (Green button) to accept.
5. When the transaction has been verified the prompt: **“Instruct Customer To Remove Card”** is displayed.
 - Remove the credit card from the Pin-Pad card reader.
6. The card will process, then the **APPROVED** message displays.

Prompt or Direct Gratuity Suggestion

Receipt Sample with Surcharge and TIP

```

Sam4POS
4851 Whitebear Parkway
St. Paul, MN 55110
1-800-333-4949

2024-09-20      09:49      FRI
ORDER#          POS-MAIN_044
-----
PRODUCT          TOTAL
-----
Burger           TIF   $9.95
French Fries     T2    $1.99
TIP BY EFT              $2.00
SURCHARGE              0.45
-----
TAX TOTAL                $1.00
-----
TOTAL                   $15.39
-----
SUBTOTAL                $15.39
CREDIT                  $15.39
INVOICE   : 0000053
REFERENCE : ActWDbg5PQvesCr
AUTH CODE : LaLnKDER
-----
NO. 0000053  REG: POS-MAIN  Madison
    
```

EFT Draft with Surcharge and TIP

```

2024-09-20      09:49      FRI
ORDER#          POS-MAIN_044
CLERK ID: Patrick

          SALE

VISA          *****0073
ENTRY METHOD: CHIP
DATE: 09/20/2024  TIME: 09:13:29

INVOICE: 0000053
REFERENCE: ActWDbg5PQvesCr
AUTH CODE: LaLnKDER

AMOUNT          USD$ 12.94
SURCHARGE              0.45
TIP                USD$ 2.00
=====
TOTAL            USD$ 15.39

          APPROVED - THANK YOU
I AGREE TO PAY THE ABOVE TOTAL
AMOUNT ACCORDING TO CARD ISSUER AGREEME
NT. (MERCHANT AGREEMENT
IF CREDIT VOUCHER)

X_____
Test Card 01 Datacap

APPLICATION LABEL: Visa Credit
AID: A000000031010
TVR: 00008000
IAD: 06010A03A08002
-----
NO. 0000018  REG: POS-MAIN  Patrick
    
```

Print Blank Line

If you want to print a blank line for the customer to write in a Tip & Total Amount on the EFT receipt. There will be no prompt for tip at the DC Direct terminal. The Sample transaction shown below is also applying a 3% Surcharge.

Receipt Sample with 3% Surcharge

```

Sam4POS
4851 Whitebear Parkway
St. Paul, MN 55110
1-800-333-4949

2024-12-20    09:49    FRI
ORDER#          POS-MAIN_044
-----
PRODUCT                TOTAL
-----
Burger                TIF    $9.95
French Fries          T2     $1.99
SURCHARGE              $0.38
-----
TAX TOTAL                $1.00
-----
TOTAL                $13.32
-----
SUBTOTAL                $13.32
CREDIT                  $13.32
INVOICE   : 0000053
REFERENCE : ActWdDg5PQvesCr
AUTH CODE : LaLrKDER
-----
NO. 0000053  REG: POS-MAIN  Madison
    
```

EFT Draft with 3% Surcharge and TIP Line

```

2024-12-20    09:49    FRI
ORDER#          POS-MAIN_044
CLERK ID: Patrick

                SALE

VISA            *****0073
ENTRY METHOD: CHIP
DATE: 09/20/2024  TIME: 09:13:29

INVOICE: 0000053
REFERENCE: ActWdDg5PQvesCr
AUTH CODE: LaLrKDER

AMOUNT          USD$ 12.94
SURCHARGE        0.38
TOTAL            $13.32

TIP              USD$ _____

TOTAL            USD$ _____

APPROVED - THANK YOU
I AGREE TO PAY THE ABOVE TOTAL
AMOUNT ACCORDING TO CARD ISSUER AGREEM
ENT. (MERCHANT AGREEMENT
IF CREDIT VOUCHER)

X_____
Test Card 01          Datacap

APPLICATION LABEL: Visa Credit
ATID: A000000031010
TVR: 0840008000
IAD: 06010A03A08002
-----
NO. 0000018  REG: POS-MAIN  Patrick
    
```

List Paid TIP ENTRY

```

2024-12-20    10:24    FRI
                TIP ADJUST
SEQUENCE#          0010010010
MERCHANT ID        CASHRSTPA24000CP
ACCOUNT#           476173XXXXXX0043
CARD TYPE           VISA
TRAN CODE           Adjust
AUTH CODE           9MzSfvErd
REFERENCE :         yEgXHui
INVOICE NO         0000053
PURCHASE AMOUNT    12.94
AUTHORIZED AMOUNT  14.94
TIP AMOUNT :       2.00
-----
NO. 0000062  REG: POS-MAIN  Patrick
    
```

The sale Amount + Surcharge are added together and a TOTAL is printed on the middle Receipt as shown above. The Customer will write in the TIP amount on the empty TIP entry line. The customer or the cashier will need to add up the: **TOTAL + TIP** and enter the amount on the blank **TOTAL** line.

The Cashier will then need to perform the **TIP ENTRY** from the List Paid key in the register mode to enter the TIP or adjust the TIP amount for the transaction. See the TIP Entry operation on page 131.

Manual Card Entry

If a credit card is not able to be read by the Pin-Pad we can manually enter the card information for processing. Manual card entry is allowed on Credit, Gift and EBT transactions if the reader is unable to read the card or for card not present sales.

Note: Keep in mind that manual credit card entries with DC Direct requires a separate MISC tender key that is set for “Manual Card Entry”.

If the site is using the Multi-Pricing feature, the customer can select the Credit tender key from the Pin-Pad.

The Cashier must ask the customer if it is Regular Credit or Manual Credit Entry and press the correct tender key.

When the cashier presses the Manual Entry tender key, the card information is required to be entered manually whichever credit key the customer selects on the Pin-Pad (*Regular Credit or Manual Credit*).

If the Manual CC entry operation times out during this procedure, the cashier will need to reselect the Manual CC key and follow the prompts to manually enter the card data.

If the cashier presses the Regular Credit Tender key, selecting either charge key on the Pin-Pad (*Regular Credit or Manual Credit*) will prompt the customer to Insert/Swipe/Tap.

If the manual CC entry operation times out during this procedure, you will need to reselect the Manual CC key and follow the prompts to manually enter the card data.

1. Register items then press the **Manual EMV Credit** tender key.
 - The transaction is sent to the EFT device.
2. On the Pin-Pad, the prompt to approve the tender amount displays.
 - Confirm the Sale Amount, press **YES**.
3. If the DC-Direct is set to Prompt for TIP on Pin-Pad; The **TIP** entry **YES** or **NO** screen appears.
 - Press **NO** to bypass the TIP Entry.
 - Select **YES** to Enter a TIP amount; Press the **ENTER** key.
4. You are prompted to **Enter the Card Number** and **Expiration Date**.
 - Press the **Card Number** filed on the Pin-Pad display, the numeric key-pad displays. Type in the Credit Card Number using the key-pad on the pin-pad display.
 - Next, Key-in the **Expiration Date** for the credit card. Press the **ENTER** key.
5. The prompt to enter the **Security Code** displays
 - Enter the CVV code for the credit card and press Enter.
6. The **ZIP Code** entry prompt will display.
 - Enter your ZIP Code and press Enter.
7. The **CHIP CARD** prompt; **YES** or **NO** displays.
 - Select the appropriate response.
8. The card will process, then the **APPROVED** message displays.

EBT (Food Stamp) Transactions

When integrated EBT is utilized, tendering a sale using a Food Stamp Tender key set to Connect To EFT requires entry of the PIN number.

Important! DC Direct Ingenico Tetra devices allowing an EMV EBT card to be swiped was added in the latest DC Direct APP release. Datacap does not plan on adding EMV EBT chip reading support for DC Direct Ingenico Tetra devices. Datacap has been advising partners to use PAX devices for DC Direct since they support additional features like EMV Chip card reading that are not available when using the Ingenico Tetra DC Direct devices.

EBT (Food Stamp) Receipts

Print EBT Balance: On EBT/Food Stamp transactions the balance remaining on the EBT card is only printed on the merchant copy of the EBT receipt as received from the DC Direct device . There is currently no way to print the balance on the customer copy.

To provide the balance to the customer you need to be setup to print two copies of the merchant receipt or perform the “Get EBT Balance” operation outside of a transaction.

The Sam4POS does not control the EBT receipt, We print what is received from the DC Direct device . Furthermore, the EBT balance will not be printed when the Receipt is OFF and receipts are issued “On Demand”.

EBT (Food Stamp) Sale

1. Register a normal transaction. Press **F/S SBTL** to get the total of all food stamp eligible items in the sale.
2. Enter the total of F/S eligible items; Touch the **F/S TEND** key.
3. Select the EBT Sale F/S type:
1-Food Stamp \ 2-Cash Benefit \ 3-Balance Inquiry when prompted.
4. You are prompted to **Swipe/Key Card**; swipe the EBT card on the reader.
5. If prompted to “**ENTER PIN**” At the PIN-Pad, enter the **4-digit PIN**, the processing time is approximately 8-10 seconds.
6. When the card has been processed, the **APPROVED** message displays.

Get EBT (Food Stamp) Balance

Food stamp EBT balance inquiries require the input of a PIN (Personal Identification Number) by the cardholder into a PIN pad device which encrypts the PIN number for secure transmission to the bank’s computer for validation.

EBT (Food Stamp) Refund>Returns

Refunds & Returns to EBT must be performed in the **Void Mode**, not as a Merchandise Return operation. If the station is an SAP-630, turn mode key to **VOID**. If the station is an SAP-6600, you need the **Void Mode** function key. Food stamp EBT returns require the input of a PIN (Personal Identification Number) by the cardholder into a PIN pad device which encrypts the PIN number for secure transmission to the bank’s computer for validation.

1. Register the return/refund operation as described above in the EBT (Food Stamp) Operation.
2. The transaction amount will be returned to the customers EBT card.

Split Tender

Payments may be split between different between EBT cards, different credit cards, cash, or check as necessary.

Drawer Option

OPEN DRAWER ON PARTIAL TENDER

Select this option to open the cash drawer when the first partial tender amount is entered.

Operation

1. Register items into a sale. Enter the amount you wish to tender, then press the appropriate tender key.
Credit, Debit or Gift tender key.
 - The transaction is sent to the EFT device.
2. At the prompt to **Swipe / Insert / Tap / Key**; insert the credit card in the Pin-Pad card reader; processing time is approximately 8-10 seconds.
3. When the transaction has been verified the prompt: **“Instruct Customer To Remove Card”** is displayed.
 - Remove the card from the Pin-Pad card reader.
4. The card will process, then the **APPROVED** message displays.
5. Repeat the process for the next tender. Enter the next tender amount as necessary, then press the appropriate **Cash, Check, Credit, Debit or Gift** tender key.
6. At the prompt to **Swipe / Insert / Tap / Key**; insert the credit card in the Pin-Pad card reader.
 - The processing time is approximately 8-10 seconds.
7. When the transaction has been verified the prompt: **“Instruct Customer To Remove Card”** is displayed.
 - Remove the card from the Pin-Pad card reader.
8. The card will process, then the **APPROVED** message displays.

Cancel EFT

Once the tender has been selected you cannot press Cancel at ECR. You would need to accept the amount on Pin-Pad then you should be able to press RED button at Pin-pad to cancel the operation. (Only if the processor allows.)

1. Register a normal transaction. Press the appropriate **CHARGE** key.
 - The message “WAITING FOR EFT” displays.
2. At the PIN-Pad the ‘SALE Amount’ confirmation message displays:
 - Confirm the sale amount on the Pin-Pad.
3. Press the **RED** button on the PIN-Pad keypad to **CANCEL** the operation.
4. Press **CLEAR** on the ECR; at the “PRESS CASH FOR MANUAL ENTRY” prompt; press **CLEAR** again. After a pause the original transaction is displayed.
5. Press **CANCEL** to cancel the sale or, if a partial tender has already been entered, complete the sale with other tender.

Voids & Refunds Card Present

There are several methods for Voiding and/or making refunds with the Sam4POS. Transaction Void, Merchandise Return, List Paid- Void Sales, EFT Operations. Each method and use is described here.

If you have the credit card that a particular purchase was made with and you need to provide a refund to the card we can use the Void Mode or the Merchandise Return operation to make a refund to the customer. A Void Mode or Return (*MDSE RTRN*) function key must be assigned to the SAP-6600 terminals, on the SAP-630 you can turn the mode key to the VOID position for transaction void operation or assign the Return (MDSE RTRN) function key.

Transaction Void

The VOID MODE function key operation allows the cashier to provide a refund to a customer's credit card regardless of whether the transaction is in the current batch or not. The operation is the same as registering a normal transaction.

1. Touch the **VOID MODE** key.
On the SAP-630/530 terminals you can turn the mode switch to the **VOID** position.
2. Register items then press the **EMV Credit** tender key; The transaction is sent to the EFT device.
Select the card type: Debit \ Credit \ Gift when prompted.
3. You are prompted to **Swipe / Insert / Tap / Key**; insert the credit card in the reader; processing time is approximately 8-10 seconds.
4. When the transaction has been verified the prompt: **"Instruct Customer To Remove Card"** is displayed.
Remove the card from the reader. The card will process, then the **APPROVED** message displays.

REPORTING

Transaction Void operations will update report totals in Sam4POS and print a TRANS VOID TTL but *does not* remove the original transaction from the batch.

Receipt Examples:

Transaction Void

```

2025-01-16      09:49      THU
ORDER#          POS-1_027
-----
PRODUCT          TOTAL
-----
      ** TRANS VOID **
Burger          T1F      $9.95
French Fries    T2       $1.99
-----
TAX TOTAL          $1.00
-----
TOTAL              $12.94
-----
SUBTOTAL          $12.94
CREDIT            $12.94
INVOICE   : 00000027
REFERENCE : AcTwdDg5PQvesGr
AUTH CODE : LaLmKDER
-----
NO. 00000053  REG: POS-1   Madison
    
```

EFT Draft

```

2025-01-16      09:59      THU
ORDER#          POS-1_027
CLERK ID: Patrick

                REFUND

VISA             *****0119
ENTRY METHOD: CHIP
DATE: 01/16/2025  TIME: 09:59:59

INVOICE: 00000027
REFERENCE: AcTwdDg5PQvesGr
AUTH CODE: LaLmKDER

AMOUNT           USD$ 12.94
                =====
TOTAL            USD$ 12.94

                APPROVED - THANK YOU
                I AGREE TO PAY THE ABOVE TOTAL
                AMOUNT ACCORDING TO CARD ISSUER AGREEME
                NT. (MERCHANT AGREEMENT
                IF CREDIT VOUCHER)

X_____
Test Card 01 Datacap

APPLICATION LABEL: Visa Credit
AID: A0000000031010
TVR: 0840008000
IAD: 06010A03A08004
-----
NO. 00000054  REG: POS-1   Patrick
    
```

Financial Report

```

2025-01-16      10:15      THU
(P0S-1)
FINANCIAL REPORT
DATE : 2025-01-16 10:15
AUTHOR : Patrick

DATA RANGE
2025-01-16 ~ 2025-01-16
END OF DAY NUMBER : ALL

OPTIONS
CURRENT DATA
DETAILED DATA
ZERO SKIP
REPORTING BY EMPLOYEE

FILTERS
TERMINAL : [NOT USED]
EMPLOYEE : [ALL]

=====
DESCRIPTION      COUNT      TOTAL
=====

EMPLOYEE [Patrick]
-----
DESTINATION SALES    0      $0.06
NONE                 0      $0.06
-----
GROSS SALES                    $3.29
TRANS VOID                   1     -3.29
-----
PAYMENT FEE                   1      $0.06
DRAWER TOTAL                    $0.06
=====

NO. 00000055  REG: POS-1   Patrick
    
```

Merchandise Return

If a customer returns a purchased product and wishes a refund to their credit card, we can accommodate the merchandise return using the RETURN key. The MDSE RTRN operation allows the cashier to provide a refund to a customer's credit card regardless of whether the transaction is in the current batch or not. The RETURN function key must be assigned to an MLU\FLU or to the Real Keyboard (on SAP-630) on the terminal.

Complete the merchandise return transaction as you would a normal transaction. You must press RETURN prior to entering each item to be returned. Use this function to return merchandise inside a sale or as a separate transaction.

1. Press **RETURN** (MDSE RTRN) and register an item; repeat this operation for each item to be returned.
2. Press the **EMV Credit** tender key; The transaction is sent to the EFT device.
 - Select the card type: Debit \ Credit \ Gift when prompted.
3. You are prompted to **Swipe / Insert / Tap / Key**; insert the credit card in the reader; processing time is approximately 8-10 seconds.
4. When the transaction has been verified the prompt: **“Instruct Customer To Remove Card”** is displayed.
5. Remove the card from the reader. The card will process, then the **APPROVED** message displays.

REPORTING

Merchandise Return operations (MDSE RTRN) will update report totals in Sam4POS and updated the MDSE RETURN TTL but *does not* remove the original transaction from the batch.

Receipt Examples:

Merchandise Return

```

2025-01-16      09:01      THU
ORDER#                POS-1_033
-----
PRODUCT                TOTAL
-----
-1 X    @ 10.95
      == [RETURN] ==
Bacon Cheeseburger    TIF    -10.95
-----
TAX TOTAL                -1.10
-----
TOTAL                    -12.05
-----
SUBTOTAL                -12.05
CREDIT CARD            -12.05
INVOICE   : 00000033
REFERENCE : AcTWdDg5PQvesCr
AUTH CODE : LaLmKDER
-----
NO. 00000033  REG: POS-1  Madison
  
```

EFT Draft

```

2025-01-16      09:02      THU
ORDER#                POS-1_033
CLERK ID: Madison

                        REFUND

DEBIT          *****0051
ENTRY METHOD: CHIP
DATE: 01/16/2025  TIME: 09:02:01

INVOICE: 00000033
REFERENCE: AcTWdDg5PQvesCr
AUTH CODE: LaLmKDER

AMOUNT          USD$ 12.05
                =====
TOTAL           USD$ 12.05

                        APPROVED - THANK YOU

APPLICATION LABEL: US Maestro
AID: A0000000042203
TVR: 8000048000
IAD: 0110A0000322000000000000000000000000F
-----
NO. 00000034  REG: POS-1  Madison
  
```

Financial Report

```

2025-01-16      10:15      THU
(POS-1)
FINANCIAL REPORT
DATE : 2025-01-16 10:15
AUTHOR : Madison

DATA RANGE
2025-01-16 ~ 2025-01-16
END OF DAY NUMBER : ALL

OPTIONS
CURRENT DATA
DETAILED DATA
ZERO SKIP
REPORTING BY EMPLOYEE

FILTERS
TERMINAL : [NOT USED]
EMPLOYEE : [ALL]

=====
DESCRIPTION          COUNT      TOTAL
=====
EMPLOYEE [Madison]
-----
DESTINATION SALES      0        $0.30
NONE                   0        $0.30
-----
NET SALES                2        $0.00
-----
GROSS SALES                        $15.34
CREDIT TAX TOTAL          1       -1.10
TAX 1                     1       -1.10

MOSE RETURN              1      -10.95
TRANS VD                 1       -3.29
-----
MISC TEND SALES          2        $0.00
CREDIT CARD              2        $0.00
PAYMENT FEE              2        $0.30

DRAWER TOTAL                        $0.30
-----
AVERAGE SALES                        $0.00
-----
NO. 00000035  REG: POS-1  Madison
  
```

Voids & Returns Card Not Present

If a transaction still resides in the current batch, we can void the sale (*remove the transaction from the batch*) from the List Paid function key. This operation does not require the credit card to perform the operation.

Void Sales – List Paid Method

When Integrated Credit is utilized, Credit transactions can be voided from the batch in the register mode using the List Paid function key. This operation is used only with MISC TEND credit card transactions when integrated credit is used. The transaction being voided must be in the current batch but you do not need the credit card present for this operation. Refer to page 192 for details.

REPORTING

Using the List Paid function key to Void Sales will update report totals in Sam4POS as well as remove the transaction from the current batch.

List Paid

The List Paid key can only be used outside of a transaction. List Paid allows the operator to view a list of all previously closed transactions for a specified day or date range. Transactions can then be previewed, reprinted or exported to a USB or E-Mail account.

Use the filters to show just the specific transactions you want to view.



START DATE	END DATE	TODAY	EMPLOYEE	TERMINAL	SEARCH	USB	EMAIL
10/26/2023	10/26/2023	TODAY	ALL	ALL			
PAID TYPE							
NOT USED							

List Paid Transactions can be filtered for:

- **Start Date & End Date** – You can select a specific day or date range to view.
- **Today** – Select to view just paid transactions from current day.
- **Employee & Terminal** – Choose all or specific employee(s) and/or terminals.

PAID TYPE – List Paid Transactions can be filtered further by selecting a specific **PAID TYPE**. The default setting is NOT USED.

Available Paid Type filters are: TENDER, NO SALE, CANCEL, VOID MODE, VOID ITEM, RETURN, WASTE, PROMO, RA/PO and PLU INFO.

When the **PAID TYPE = TENDER**, the **TENDER CATEGORY** selections are also available.

Tender Category Selections include: NOT USED, CASH, CHECK, FOOD STAMP TENDER, or MISC.

When the **PAID TYPE = TENDER** and the **TENDER CATEGORY = MISC**, the NO TIP filter is added and additional buttons for VOID SALES, TIP ENTRY, and RETURN# are available.



START DATE	END DATE	TODAY	EMPLOYEE	TERMINAL	SEARCH	USB	EMAIL
10/26/2023	10/26/2023	TODAY	ALL	ALL			
PAID TYPE		TENDER CATEGORY					
TENDER		MISC					
		<input type="checkbox"/> NO TIP					
		VOID SALES					
		TIP ENTRY					
		RETURN#					

- **NO TIP** – This filter is helpful for finding credit transactions that do not have a tip already added.
- **TIP ENTRY** – When integrated credit is utilized, Tips can be entered from the List Paid key for credit transactions by using the **TIP ENTRY** button. See “TIP (Gratuity) Entry” example on page 131 for details.

» **TIP Entry: Tips cannot be Edited/Added to Debit Card transactions after the sale.**

» **TIP Entry is not allowed for GIFT Card transactions. Any Tips must be entered using a PLU prior to finalizing the sale using a Gift Card.**

- **VOID SALES** – Use to Void Credit transactions from the List Paid screen. (*Void Sales button is used only for Integrated Credit EFT Transactions.*) Refer to the “Void Sales” operation on page 192 for details.
- **RETURN#** – When an EMV Sale is processed a token is requested in the EMV Sale and processed as credit. If a customer requests a refund for one item or all items after the batch has already been closed, even if the request is made several days later. With the option **SHOW RETURN#** selected on the function key, the **RETURN#** can be used to facilitate a Return By Record No process to refund the customer the total sale amount or a partial amount of a sale. Refer to the “Return#” operation on page 133 for details.

List Paid Key Definitions

Start Date & End Date – You can select a specific day or date range to view.

Today – Select to view just paid transactions from current day.

Employee & Terminal – Choose all or specific employee(s) and/or terminals.



After setting or editing the filter selections, press the search icon to refresh the view the results.



Pressing the Print icon will print the currently displayed transactions summary list.



When a transaction is selected you can use this icon to export the transaction to USB or to an Email. Exported data is sent in a spreadsheet format (.CSV file). Emailing data requires additional setup, contact your dealer for details.

Paid Type	Tender Category
Not Used	N/A
*Tender	Not Used, Cash, Check, Food Stamp Tender, Misc
No Sale	N/A
Cancel	N/A
Void Mode	N/A
Void Item	N/A
Return	N/A
Waste	N/A
Promo	N/A
RA/PO	N/A
**PLU Info	N/A

* **Tender** – If the Paid Type is set for Tender, Additional **TENDER CATEGORY** selections are available.

- **CASH** –
- **CHECK** –
- **FOOD STAMP TENDER** –
- **MISC** – When the Tender Category is set for MISC, the additional buttons for:
 - **NO TIP** filter selection is added
 - **VOID SALES** (*Void Sales button is used only for EFT Transactions*)
 - **TIP ENTRY** (*Tip Entry button is used only for EFT Transactions*).
 - **RETURN#** – When an EMV Sale is processed (token requested in the EMV Sale and processed as credit). If a customer calls a few days later (*after the batch has been closed*) and requests a refund for one item or all items. A Return By Record No is processed to refund the customer the total amount or partial amount (say for 1 item). The SHOW RETURN# option must be selected on the List Paid function key.

** **PLU Info**: When selected as the Paid Type, you can filter for an individual **PLU** or **PLU Range**.

- **PLU** – Type or scan a **PLU Code** or type **PLU Descriptor** to view paid transactions that contain the specified items.
- **PLU Range** – Enter the range of PLU's: **From PLU Code ~ To PLU Code**.

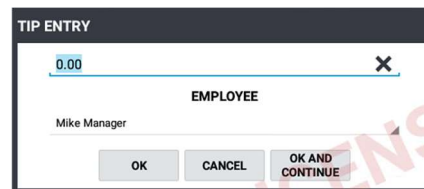
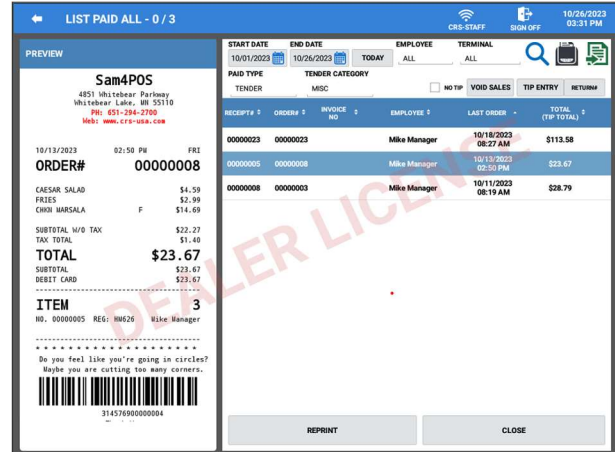
TIP Entry

When Integrated Credit is utilized the DC Direct device can prompt for a Tip. If you elect to not enter a tip at the prompt, Tip's indicated by the customer can be added after the transaction is tendered from the List Paid screen. Tip entry here is *only* used with integrated credit, credit card transactions. The transaction must be in the current batch to enter a TIP on the transaction. You cannot enter tips after the batch is closed.

1. Touch the **LIST PAID** key; the transaction preview screen is displayed.
2. Set the **Start Date & End Date** range or press the **Today** button.
3. Set the **Employee & Terminal** filters as necessary.
4. Set **Paid Type = Tender**
 - **Tender Category = MISC**
5. The **NO TIP** filter and the **TIP ENTRY** and **RETURN#** buttons appear.
 - **NO TIP** – Filters for all MISC transactions that have No Tip applied.
 - **VOID SALES** – Will remove the selected transaction from the batch and update report totals. See page 192 for details.
 - **TIP ENTRY** – Allows for Tip Entry on the selected MISC tender transaction. If Seat # assignment is used you can select each Seat# to apply a Tip to.
 - **RETURN#** - The SHOW RETURN# Option must be selected on the List Paid function key. Refer to page 133 for details.
6. Press the **Search icon**; the transactions matching your settings are displayed.
7. Select the transaction from the list you wish to add a TIP to; then press the **TIP ENTRY** button.
8. The **TIP ENTRY** dialog displays:

Enter the Tip amount indicated by the customer; *Select the appropriate Employee* to assign the TIP To; press **OK** to add the tip to the credit transaction. Press **OK AND CONTINUE** to add additional tip entries, pressing **CANCEL** will exit without adding the tip.

 - If seat #'s are used you can select the specific Seat# to apply a TIP to.
9. Press the **REPRINT** button at the bottom of the transaction list to reprint a receipt for the selected receipt.
10. Press **CLOSE** on the List Paid screen to exit out of the List Paid operation.



Note: After entering a TIP to a Credit Card transaction, the transaction will display in red on the List Paid screen.

ADDING TIP TO CREDIT CARD TRANSACTIONS

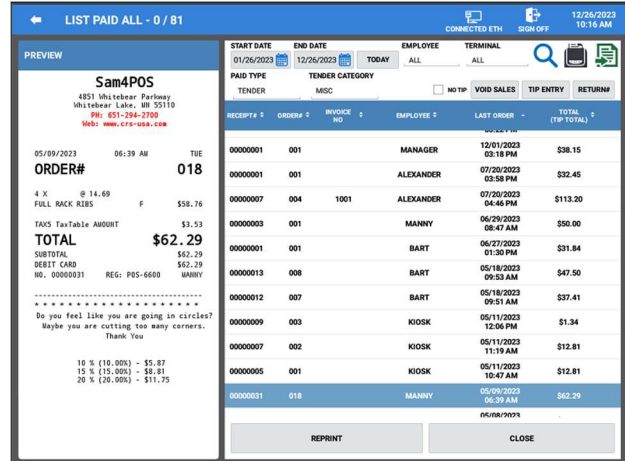
https://www.youtube.com/watch?v=_YkcFjxmoKs&list=PLtF-h-a37jHmbhGgLO3nB76hP-avFSW29&index=87&pp=iAQB

Void Sales

When Integrated Credit is utilized, Credit transactions can be voided from the batch in the register mode using the List Paid function key. This operation is used *only* with credit card transactions when integrated credit is used.

Using the List Paid function key to Void Sales will update report totals as well as remove the transaction from the current batch.

1. Touch the **LIST PAID** key; the transaction preview screen is displayed.
2. Set the **Start Date & End Date** range or press the **Today** button.
3. Set the **Employee & Terminal** filters as necessary.
4. Set **Paid Type = Tender**
 - **Tender Category = MISC**
5. The **NO TIP** filter and the **TIP ENTRY** and **RETURN#** buttons appear.
 - **VOID SALES** – Will remove the selected transaction from the batch and update report totals.
 - **NO TIP** – Filters for all MISC transactions that have No Tip applied.
 - **TIP ENTRY** – Allows for Tip Entry on the selected MISC tender transaction. If Seat # assignment is used you can select each Seat# to apply a Tip to.
 - **RETURN#** - The SHOW RETURN# Option must be selected on the List Paid function key. Refer to page 133 for details.
6. Press the **Search icon**; the transactions matching your settings are displayed.
7. Select the transaction from the list you wish to void; then press the **VOID SALES** button.
8. Press **YES** to void the selected transaction; press **NO** to exit the operation without voiding.
9. Press the **REPRINT** button at the bottom of the transaction list to reprint a receipt for the selected receipt.
10. Press **CLOSE** on the List Paid screen to exit out of the List Paid operation.

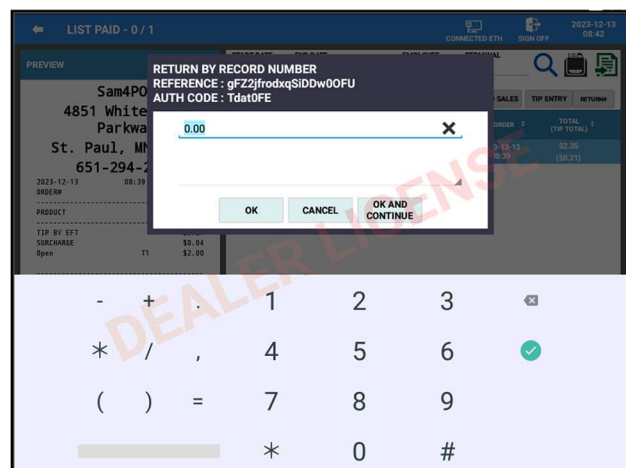
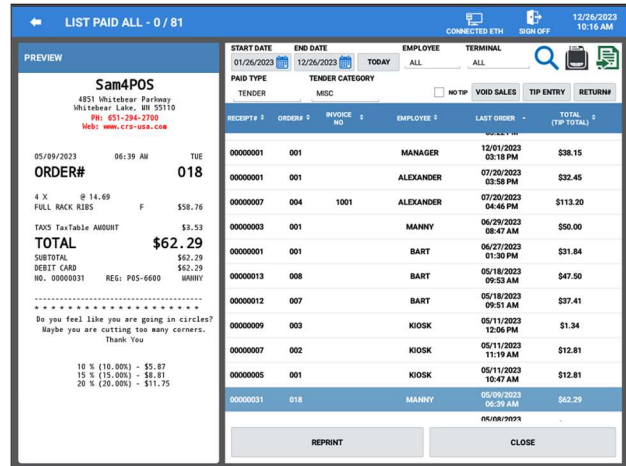


Return#

Used with DC Direct & DC Direct Canada integrated payment terminals only.

When an EMV Sale is processed a token is requested in the EMV Sale and processed as credit. If a customer requests a refund for one item or all items after the batch has already been closed, even if the request is made several days later. With the option **SHOW RETURN#** selected on the function key, the RETURN# can be used to facilitate a Return By Record No process to refund the customer the total sale amount or a partial amount of a sale (customer is returning 1 item from the sale).

1. Touch the **LIST PAID** key; the transaction preview screen is displayed.
2. Set the **Start Date & End Date** range or press the **Today** button.
3. Set the **Employee & Terminal** filters as necessary.
4. Select **Paid Type = Tender**; then choose the **Tender Category = MISC**.
5. The **NO TIP** filter and the **VOID SALES, TIP ENTRY** and **RETURN#** buttons appear.
 - **NO TIP** – Filters for all MISC transactions that have No Tip applied.
 - **VOID SALES** – Will remove the selected transaction from the batch and update report totals. See page 192 for details.
 - **TIP ENTRY** – Allows for Tip Entry on the selected MISC tender transaction. If Seat # assignment is used you can select each Seat# to apply a Tip to.
 - **RETURN#** - The SHOW RETURN# Option must be selected on the List Paid function key. Provide a refund to a credit card transaction.
6. Press the **Search icon**; the transactions matching your settings are displayed.
7. Select the transaction from the list you wish to apply a Return to; then press the **RETURN#** button.
8. The **Return By Record Number** dialog displays. The transaction Reference Number and Authorization Code are displayed.
9. Enter the amount to be returned (up to the total amount of the sale) and press **OK**. Alternatively, you can press the **OK AND CONTINUE** button to apply additional returns as necessary. Pressing **CANCEL** will exit without applying the Return.
10. Press the **REPRINT** button at the bottom of the transaction list to reprint a receipt for the selected receipt.
11. Press **CLOSE** on the List Paid screen to exit out of the List Paid operation.



Gift Card Operations

For Gift Card Sales, you will need a PLU setup for Selling Gift Cards and another PLU setup to ADD Value to a gift card that was previously sold. Each Gift Card PLU must be assigned to a specific PLU Status Group with the option: PLU GIFT CARD ITEM = [ACTIVATE] (*for selling new gift cards*) or PLU GIFT CARD ITEM = [ADD] (*for adding value to previously sold gift cards*).

Complete the gift card sale transaction as you would a normal transaction, enter each gift individually then tender the sale with Cash, Check, or Credit card. The operation is the same if you are activating a new gift card or adding value to an existing card.

When selling new gift cards or adding to a gift card, value is being returned/refunded to the card, this is true whether adding value to an existing gift card or activating a new gift card. When the sale of a gift card is processed, the amount being added to the card will show as a Refund to the card.

You cannot use a gift card to purchase another gift card.

- **Selling gift cards and tender with CREDIT CARD:** The gift card value is loaded prior to processing of the credit card.
- **Selling gift cards and tendering with CASH:** The sale finalizes then gift cards gets loaded.
- **No TIP entry is allowed for GIFT Card transactions:** Tips must be entered using a PLU prior to finalizing the sale using a *Gift Card*.

Selling Gift Cards

1. Register a 'Gift Card Activate' or 'Gift Card Add-Value' transaction.
Ring an amount for each gift card being sold individually (***you cannot use the X/TIME key***):
5000 Gift Activate PLU
2500 Gift Activate PLU
Continue as necessary for any additional gift cards being sold.
2. Tender the transaction, Press **CASH**. The Pin-Pad shows the value for the first gift card:
REFUND
\$50.00 – OK?
3. Press the **GREEN** button to select **YES** on the PIN-Pad keypad. Selecting **NO** (*RED Button*) will cancel the operation without activation or adding value to the gift card.
4. **Swipe** the gift card using the PIN-Pad to load value to the gift card. The PIN-Pad will display: **“PLEASE WAIT”**, then **“DO NOT REMOVE CARD”**, then **“PROCESSING”**.
5. When the processing is complete, the **“APPROVED”** message will display. The receipt prints for the first Gift Card. The Pin-Pad displays the value for the next gift card:
REFUND
\$25.00 – OK?
6. Press the **GREEN** button to select **YES** on the PIN-Pad keypad. Selecting **NO** (*RED Button*) will cancel the operation without activation or adding value to the gift card.
7. **Swipe** the gift card using the PIN-Pad to load value to the gift card. The PIN-Pad will display: **“PLEASE WAIT”**, then **“DO NOT REMOVE CARD”**, then **“PROCESSING”**.
8. When the processing is complete, the **“APPROVED”** message will display. The receipt prints for the second Gift Card.
9. Continue loading additional cards in the same manner as necessary. Press **CASH** to complete the operation. (*Cashier must press CASH Tender key again to finalize.*)

Sample Gift Card Sale Receipts

Gift Card Activate & \or Reload, the gift card balance will only print on the EFT receipt from the DC Direct.

Receipt Sample

```
Sam4POS
4851 Whitebear Parkway
St. Paul, MN 55110
1-800-333-4949

2024-09-20      09:49      FRI
ORDER#          POS-MAIN_044
-----
PRODUCT          TOTAL
-----
GIFT CARD ADD          $10.00
-----
TOTAL          $10.00
-----
SUBTOTAL          $10.00
CASH          $10.00
-----
NO. 0000053 REG: POS-MAIN Madison
```

EFT Gift Receipt

```
2024-09-20      09:49      FRI
ORDER#          POS-MAIN_044
CLERK ID: Patrick

REFUND

GIFT CARD          *****7403
ENTRY METHOD: SWIPED
DATE: 09/20/2024 TIME: 09:13:29

INVOICE: 00000253
REFERENCE: ActWdcb5PQvesGr
AUTH CODE: LaLrKDER

AMOUNT          USD$ 10.00
=====
TOTAL          USD$ 10.00

BALANCE          USD$ 15.00

-----
NO. 0000018 REG: POS-MAIN Madison
```

Add to Gift Card

When a Gift Add is performed we are actually doing a Refund to the Gift Card.

On the pin pad it shows REFUND and the amount.

Manual Gift Card Redeem

Note: Manual Gift Card entries require a separate MISC tender set for “Manual Card Entry”.

If the manual Gift Card entry operation times out during this procedure, you will need to reselect the Manual Gift Card key and follow the prompts to manually enter the gift card data.

1. Register a normal transaction then Tender the sale by pressing the **Manual Gift Card** tender key.
2. At the Pin-Pad, you are prompted to Approve Sale Amount; Press the **GREEN** button on the PIN-Pad to accept the amount.
3. At the Pin-Pad, you are prompted to **Enter the Gift Card Number** and the **Expiration Date**.
 - a. Enter the **Card Number** on the Pin-Pad using the key-pad on the pin-pad display. Press the **GREEN** button on the PIN-Pad.
 - b. Enter the **Expiration Date** for the gift card. Press the **GREEN** button on the PIN-Pad.
4. The card will process, then the **APPROVED** message displays.

Insufficient Gift Card Balance

1. With the Mode Switch in the **REG** position, Register item into a sale.
2. Press the appropriate **Gift Tender** key.
3. At the prompt to **Swipe / Insert / Tap / Key**.
 - **Swipe the gift card** in the Pin-Pad card reader. Processing time is approximately 8-10 seconds.
4. The card will be processed for the remaining card balance, then the **APPROVED** message displays.
 - The **CUSTOMER COPY** of the EFT receipt prints, then the **MERCHANT COPY** prints.
5. If you had inserted a chip card and do not remove the card when approved, the prompt: **“Please Remove Your Card”** will display.
 - The card must be removed to send to the ECR. Failure to remove the card will cause the Pin-Pad to time out.
6. The ECR will indicate **“Transaction Was Not Fully Tendered”**, press **OK** to close the dialog.
7. Tender the remaining sale as desired.

Gift Card Notes:

Please Note: Gift Transactions are processed in Real-Time; The Gift Tender amount is deducted from the account when the approval is received.

Support for partial authorizations for Gift Card tender is a card brand mandate which eases acceptance of major card branded open loop gift cards by allowing their remaining to be depleted without a decline and call to the issuer to find out what the balance is.

All NSF operations are controlled by the processor, not the Sam4POS terminal. Merchants who choose not to support partial authorizations may be charged fees/fines for not doing so.

Because of the above, we document support for partial authorizations as a requirement of our EMV interfaces. However, it is still possible to send a request where partial auth support is not indicated and this would be honored by most processors, with TSYS Summit being the big exception. If you do not indicate support for partials to TSYS you will get an error.

MISC Tender keys have an option: **DO NOT ALLOW PARTIAL TENDER** – When selected, if the customer’s credit\debit card has insufficient funds for the transaction, partial tender on the card will not be authorized. Depending upon the processor, gift card under-tendering may or may not be allowed.

No TIP entry is allowed for GIFT Card transactions.

Tips must be entered using a PLU prior to finalizing the sale using a *Gift Card* .

Get Gift Card Balance

Outside of Sale Procedure

If the customer want to see what the remaining balance is on a Gift Card, we can use the Get Gift Balance in the EFT Operations to perform this operation. Some cards will prompt for a PIN entry (as with Debit & Gift Card). The procedure is as follows:

1. In the **REGISTER Mode**, Outside of a sale, Press the **EFT OPERATION** function key.
2. Select **GET GIFT CARD BALANCE** from the **EFT OPERATION** function key menu or from the **EFT OPERATION** menu in the *Program Mode > Device EFT Operation*.
3. The ECR will display “WORKING” and at the PIN-Pad “**Balance 0.00 OK?**” displays. Press the **GREEN** button on the PIN-Pad keypad to continue.
4. At the prompt, *Insert, Swipe, or Key the Card*; **swipe the Gift Card** on the PIN-Pad.
 - If the prompt **ENTER PIN** displays, Enter the **PIN**; press the **GREEN** button on the PIN-Pad.
5. You can print the response on the terminal display if desired; press **CLOSE** to exit the screen.

Inside of Sale Procedure

When a gift card sale is declined due to an insufficient balance, the customer may request that the operator check the gift card balance and apply the remaining balance to the sale. Using normal procedures, the transaction must be finalized or cancelled to exit and check the gift card balance using the EFT Operation key.

Where check-tracking is available, transactions may be stored and recalled avoiding the inconvenience of cancelling and re-entering the declined transaction.

Transaction Store/Recall Setup Information

Function Keys

The following keys must be placed in an MLU, FLU or upon the keyboard:

- **Store Table**
- **Recall Table**

Function Key Options

- **Recall Table:** Set “DRIVE THRU FEATURE ENABLED?” = Checked.
- **Store Table:** Set “RECALL CHECK LINK” for correct Recall Table key as above.
Set “AUTO CHECK MANAGEMENT?” = Checked.

Operation

1. Store the current transaction, press the **Store Table** key.
2. Press the **Gift Tender** Key; You will be prompted to swipe the card.
3. **Swipe the Gift Card**, the balance will print to the receipt.
4. Recall the transaction, press the **Recall Table** key.
5. Tender the exact amount remaining on the gift card.
6. Use another payment form (i.e. cash, check, charge) as necessary to pay the remaining sale balance.

Store And Forward

Available for DC Direct installations only, Store and Forward (SAF) credit card transactions allow merchants to accept payments without a direct connection to the integrated payment gateway. The SAF settings must be enable in System Option programming and this feature must be enabled by Datacap on the DC Direct device for the merchant before this operation will function.

The DC Direct integrated payment application recognizes these instances automatically and provides a buffer to store transaction data allowing transactions to continue. Refer to the Sam4POS DC Direct supplement for details.

Data Storage: The stored transaction data is not immediately sent to the payment processor but is securely held in the DC Direct device until a later time.

Batch Processing: At a scheduled time or when the DC Direct integrated payment connection is restored, the SAF stored transaction data is compiled into batches and transmitted to the payment processor. Sales that are approved as SAF will print if the Device \ EFT Operation \ DC Direct \ SAF Statistics report is run. These sales will be uploaded when the normal batch is closed.

Authorization and Settlement: The payment processor authorizes the transactions with the card issuing banks and settles the funds into the merchant's account.

SAF is particularly useful during temporary internet connectivity issues or when the merchant needs to continue accepting payments without a direct connection to the integrated payment device and the payment processor.

SAF Statistics: An example of the SAF Statistics can be seen in the Integrated Payment \ EFT Operation \ SAF Statistics on page 340 of this manual.

IMPORTANT! It is important to note that SAF carries increased risks for merchants, such as the potential for charge backs and the inability to receive payment for declined transactions. The merchant assumes all responsibility for these transactions.

Merchants should only use SAF if they are prepared to assume the risks and are allowed to do so by the Card Brand Rules and Regulations.

Risks and Considerations

Increased Risk: Since transactions are processed without immediate authorization, there is a risk of accepting payments from cards that may not have sufficient funds or could be reported as lost or stolen. The merchant assumes responsibility for these transactions.

Transaction Limits: Businesses can set limits on the maximum transaction amount and types of cards accepted which are not applied with SAF.

Potential for Chargebacks: Transactions process using SAF may lead to higher chargeback rates as the merchant may not have immediate confirmation of the transaction's validity. The merchant assumes responsibility for these transactions.

Training Mode

An employee can be created and designated for training purposes. A training mode is available so that you can operate the cash register without updating totals and counters.

Sign-On the designated training employee. The message **** TRAINING MODE **** displays on the header title bar and prints on the receipt (if a receipt printer is attached and programmed). We can also set the Training Option “Use Yellow Title In Training” to more easily identify when a training employee is signed on:



Note: If you are performing training in tracking file operations, the training activity will be added to tracking files. Be sure to designate specific files for training purposes, and/or clear tracking files after training activity.

Training Mode Program Notes

1. Designate an employee file to be used for **TRAINING**. Check the employee option on that employee for **“TRAINING EMPLOYEE”**.
2. Refer to Program Mode \ Options \ Options \ Training Option to select printing, drawer and other related training options.

Modifier Keys

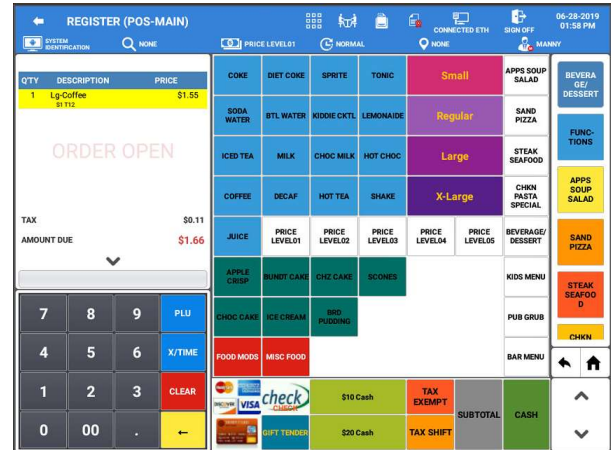
Typically, keys labeled as Small/Medium/Large/etc. are modifier keys. When items are sold in different sizes, touch a modifier (*size key*) before the desired item.

Modifiers can be programmed as:

- **Stay Down** so that registrations will be modified by the same modifier until another modifier is selected,
- **Pop-Up after each item** to register, for example large, medium or small soft drink, or
- **Pop-Up after each transaction** to register the same modification for the item until the transaction is finalized.

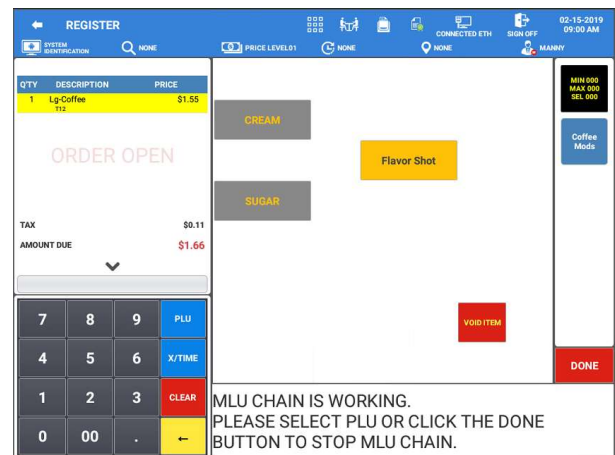
Using Modifiers

- ◆ **LARGE, X-LARGE, MEDIUM** and **SMALL** are modifier keys. When items are sold in different sizes, press a modifier before registering the desired item.
 - For example, touch **LARGE**, and then touch **COFFEE**.



- ◆ When items are sold in different flavors, or with different options, registration of the item may trigger an MLU Chain.
 - In this example, the Large Coffee has the options for: Cream, Sugar and Flavor Shot.
 - Touch the desired option to complete the item registration.
- ◆ Press the **DONE** key to close the selection window.

Note: If multiplication is used, the multiplier number counts toward the MAX & MIN quantity for the MLU in the chain. You cannot enter more items than allowed by the MAX & MIN quantity for the MLU in the chain.



- ◆ The completed item is displayed, and the register is ready for another entry or finalization.



Note: When in an **MLU Chain**, if you need to delete a selection; **Press & Hold** on the item then tap **DELETE** from the sub-menu selections.

Guest Check Tracking

Quick Service Operations

The Sam4POS can be used to add items or receive payments on guest checks in a quick service or table service operation. The quick service/fast food operation uses the Drive-Through feature for guest check tracking. Sam4POS is not meant to maintain open checks for days, weeks, months, etc. It is recommended that all checks are closed on the same day they are opened.

Drive Thru Operations

When drive thru operation is implemented, **Drive Thru Store**, **Drive Thru Recall** keys are assigned on the screen. A **List Drive-Thru** key may also be assigned as required.

- **Drive Thru Store** key uses a Store Table function key with the “auto check management” feature enabled.
 - Link this key to the appropriate “Recall Table” key.
- **Drive Thru Recall** key uses a Recall Table function key with the “Assigned By Register” and the “Drive Thru Feature Enabled” selections checked.
- **List Drive Thru** key can be used to look up a Drive-Thru order out of sequence.

Quick Service Screen Example



Drive Thru Store

1. Enter items.
2. Press the **DRIVE THRU STORE** key.

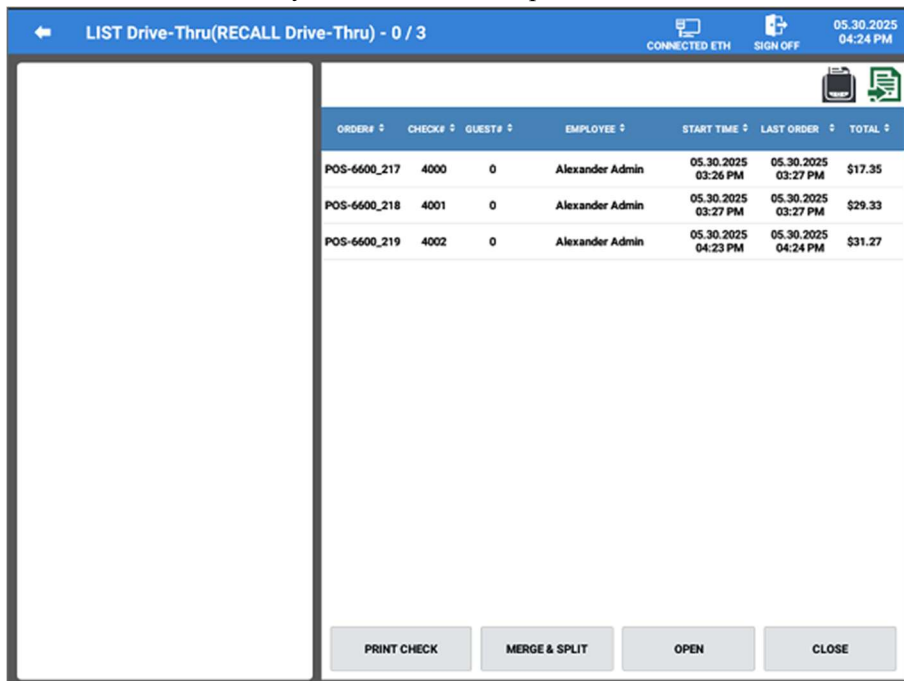
Drive Thru Recall

3. Press the **DRIVE THRU RECALL** key, the oldest transaction is recalled/displayed.
 - Add or void items as necessary.
4. Finalize the transaction with **CASH**, **CHECK** or one of the **MISC TEND** (charge) functions.

List Drive Thru

Alternatively, you can use the **LIST TABLE** key assigned to the **DRIVE THRU RECALL** key to recall a specific sale out of order.

1. Press the **List Drive-Thru** key to view the list of open drive-thru orders.



The screenshot shows a software interface for listing drive-thru orders. The title bar reads "LIST Drive-Thru(RECALL Drive-Thru) - 0 / 3". The interface includes a status bar at the top right with "CONNECTED ETH", "SIGN OFF", and the date/time "05.30.2025 04:24 PM". Below the title bar is a table with columns: ORDER#, CHECK#, GUEST#, EMPLOYEE, START TIME, LAST ORDER, and TOTAL. The table contains three rows of data. At the bottom of the screen are four buttons: PRINT CHECK, MERGE & SPLIT, OPEN, and CLOSE.

ORDER#	CHECK#	GUEST#	EMPLOYEE	START TIME	LAST ORDER	TOTAL
POS-6600_217	4000	0	Alexander Admin	05.30.2025 03:26 PM	05.30.2025 03:27 PM	\$17.35
POS-6600_218	4001	0	Alexander Admin	05.30.2025 03:27 PM	05.30.2025 03:27 PM	\$29.33
POS-6600_219	4002	0	Alexander Admin	05.30.2025 04:23 PM	05.30.2025 04:24 PM	\$31.27

2. Select the desired **Drive-Thru Order** from the list to open.
3. Add or void items as necessary.
4. Finalize the transaction with **CASH**, **CHECK** or one of the **MISC TEND** (charge) functions.

Table Service Operations

The *Sam4POS* provides a soft check order tracking system for storing and recalling orders on the terminal. Multiple tracking files can be created; This allows you to set up different order table tracking files for tracking phone orders, drive-thru tracking for multiple windows, take-out order tracking, table service or whatever your application requires.

Sam4POS is not meant to maintain open checks for days, weeks, months, etc. It is recommended that all checks are closed on the same day they are opened.

The following check tracking options are available:

- Tracking by letting the ECR automatically assign a check number.
- Tracking by manually entering the check number. The number of digits in the check number may be from 0-10 digits long. (0 indicates no predefined digit length for check #'s.)
- Alpha Check Tracking by manually entering customer name.
- Open Checks using MSR (*Mag Stripe Reader*)

Multiple Tracking Files

The Sam4POS allows for as many order tracking files as are necessary to track each order type:

Table Service, Bar Tabs, Phone\Pick-Up Orders, Take-Out orders, etc.

Separate function keys for each order type can be created using the following functions.

- **RECALL TABLE** – Separate Recall Table keys can be created for each order tracking type.
- **STORE TABLE** – Each Store Table key can be linked to a specific Recall Table key.
- **LIST TABLE** – Each List Table key can be linked to a specific Recall Table key.
- **TRANSFER CHECK** – Use to transfer one or all open soft checks form one server to another server.
- **PRINT GUEST CHECK** – Prints the currently displayed\active guest check (order tracking file).

Note: Only one *Transfer Check & Print Guest Check* keys would be necessary even when using multiple order tracking files.

Charge Posting

Sam4POS does not have Charge Posting, there is no interface to a slip printer.

You could use regular check tracking to open checks, make payments, service etc.

You could also use the Customer Database to maintain orders for specific customers.

The main problem being, if checks are not finalized and remain open, the database will not split. Eventually this will cause ECR to slow down as the Sales DB grows.

Guest Check Order Tracking

The Sam4POS ECR uses a Soft Check tracking method for storing orders. It is not necessary to print the check at each posting; you can use the **PRINT CHECK** key to print the check for presentation to the customer. The check will print at the designated receipt printer for the station.

The **PRINT CHECK** key can be programmed to automatically service the check when pressed, this eliminates the need to press the Store Check key after printing the check.

Guest Check Order Tracking Program Notes:

Discuss these options with your authorized Sam4POS dealer or refer to the *Sam4POS Program Reference Manual*.

Set the options for the Recall Table (*Check*) key as desired; Option settings here include:

- Manager Required
- Enforce Seat Number
- Compulsory for all Sales
- (Check #) Assigned by Register
- Opening Employee has Exclusive Access
- Guest Count Entry Required
- Other related options

Set the options for the Store Table (*Check*) key; Option settings here include:

- Manager Required
- Tax Exempt
- Recall Check Link
- Compulsory Alpha Text
- Print Receipt After Store Check
- Print Check# on: R/P, J/P
- Manager Required For Servicing Negative Balance
- Auto Check Management

Additional options associated with guest check tracking can be found in the Program Mode\ Option\ Options\ Guest Check Option programming. Review and set the guest check options as desired.

Reporting

In an IRC System, if a check is registered at one station, recalled and paid at a different station, the report totals will remain at the station that originally registered the transaction.

Typically, the employee that opens the guest check and registered items on to the check would see the PLU Sales Info details on their (*opening employee's*) reports. The employee who recalls and pays off the guest check will see the Drawer & Tender Info details updated on their (*closing employee's*) reports.

Through options programming, we can have the check automatically transfer to the employee the recalls the check. All report totals will be designated to the employee that last recalled and paid the check.

Open Check Reporting

It is best not to keep checks open in the system over several days. SAM4POS is using all Raw data, if checks remain open, note the reporting.

Cashier opens a check on 4/1, adds items then stores the check.

After store check on 4/1, the transaction totals are included in the 4/1 sales because the last update date (STORE) was performed on 4/1.

Cashier reopens the check on 4/2, adds items then stores the check.

After store check on 4/2, the transaction totals are included in the 4/2 sales because the last update date (STORE) was performed on 4/2.

If you print a daily report for 4/1 on 4/2, that total will be different with the printed daily report from 4/1.

Additionally, if that check is finalized on 4/3, all sale amounts are included in the 4/3 sales totals.

Alpha Check Number

Traditionally, check numbers are numeric, either manually entered or assigned by the register depending upon the Recall Table function key programming. Sam4POS has the capability of using an alphanumeric entry for the check number. Alpha check numbers are especially useful for ordering systems where the customer is called by name when the order is ready or for creating Bar Tabs.

Of Guests

Entry is optional and can be controlled by an option on the Recall Table key program or the number of guests may be required on all transactions if set on the Guest # function key program.

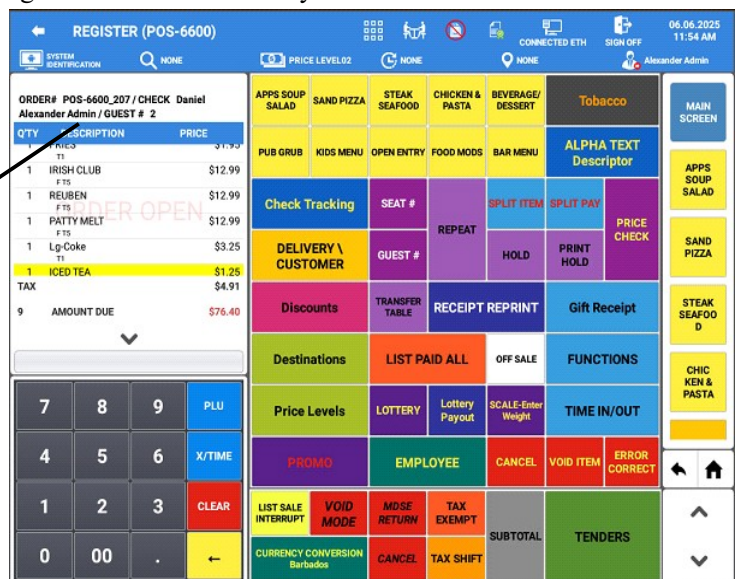
Beginning a Guest Check

1. Depending on how your system is programmed, to begin a check:
 - a. If set to automatically assign a check number, touch the **RECALL TABLE** key, a new check will be opened.
 - b. If it is set to *not* automatically assign a check number, touch the **RECALL TABLE** function key,

 - c. Enter the check number, customer name / or Scan a Barcode; press **OK** to open a new check.
 - d. Alternatively, Touch the **RECALL TABLE** function key, swipe the Mag Card to open the check.
2. If the **Guest #** entry is required, enter the number of guests and press **ENTER** on the Pop-Up dialog.
3. Register the items ordered.
4. If you do not want to print the check; Touch the **STORE Table** function to service\store the order. If you are using kitchen printers, the items will print on the assigned kitchen printer.
5. Press the **Print Check** key if you wish to print the check before storing.

Note: The Print Check key can be programmed to automatically service the check.

The check #, guest count and employee associated with the check are displayed.



Adding to a Check – Method 1

- To add additional items to a stored check, you can either:

RECALL TABLE

Enter the check number and touch the **RECALL Table** function – or –
LIST TABLE

Use the **LIST Table** function to select a check from a list to open:

ORDER#	CHECK#	GUEST#	EMPLOYEE	START TIME	LAST ORDER	TOTAL
078	one	0	MANNY	08-13-2018 08:28 AM	08-28-2018 12:20 PM	\$39.49
079	two	0	MANNY	08-13-2018 08:29 AM	08-13-2018 08:29 AM	\$17.97
080	three	0	SONJAI	08-13-2018 08:29 AM	08-13-2018 08:30 AM	\$32.09
081	four	0	SONJAI	08-13-2018 08:30 AM	08-28-2018 12:20 PM	\$29.00
082	five	0	SONJAI	08-13-2018 08:31 AM	08-30-2018 09:48 AM	\$27.88
212	SplitCheck	0	MANNY	08-28-2018 12:18 PM	08-28-2018 12:18 PM	\$27.79
521	131	2	MANNY	08-29-2018 12:15 PM	08-29-2018 12:23 PM	\$45.65

- Touch a check from the list to select it. The check detail is displayed:

Details for the selected check are displayed in the left column.

QTY	DESCRIPTION	PRICE
1	IRISH CLUB T1	\$18.00
1	1/4 lb BURGER Sandwich Special \$0.00 F T1	\$6.95
1	DIET COKE T1	\$1.00
1	LEMONAIDE T1	\$1.25

TAX	\$1.80
AMOUNT DUE	\$29.00

- Touch **OPEN** to open the selected check.
- Enter the new items ordered.
- Touch the **Store Table** function; the check is stored/serviced or press the Print Check key to print the check before storing.

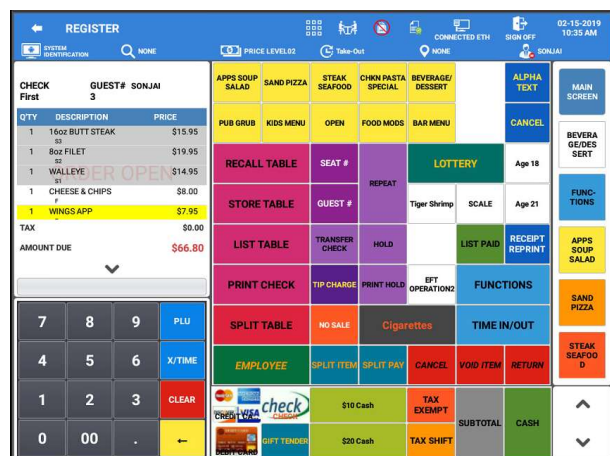
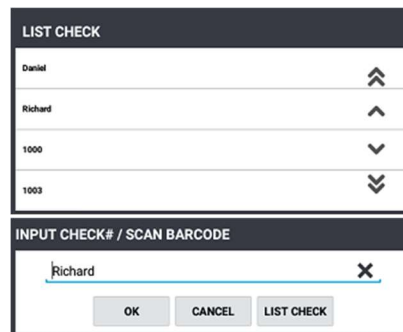
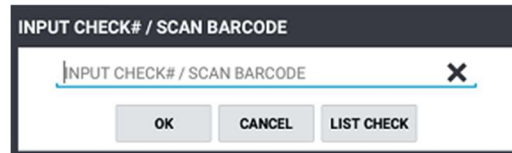
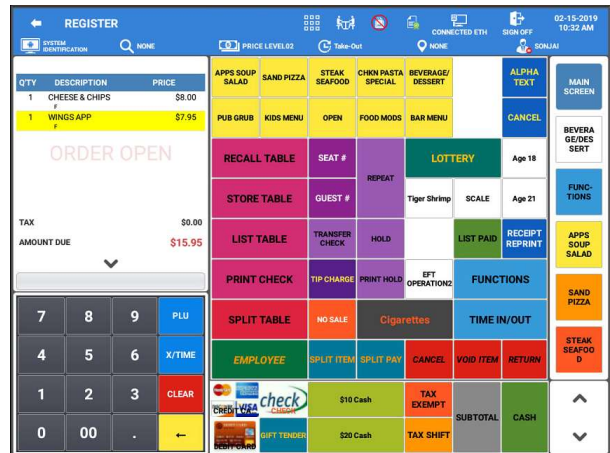
Adding to a Check – Method 2

If a sale is started but not finalized, we can add the items in the sale to an existing check in the system.

1. Register a transaction without opening a table.

2. If check numbers *are not* assigned by the register, Press the **Recall Table** key:
 - a. On the **'Input Check#'** dialog, enter the number of the check, then press **OK**.
3. If check numbers *are* assigned by the register,
 - a. Enter the **number of the check** to be recalled first, then Press the **Recall Table** key. *(If you press Recall w/o entering a check # first, a new check will be opened.)*
4. Alternately, you can press the **"LIST CHECK"** Function Key button; the LIST CHECK dialog is displayed:
 - a. Select the check from the list you want to recall.
 - b. Press **OK** to open the selected guest check.

5. The guest check is opened, and the new items are added to the check:
6. The guest check can then be Stored or tendered as needed.



Seat # Assignment

The seat # system may be employed in a soft check system, its purposes are:

- ◆ To separate orders by seat (or individual patrons) so that orders can be identified by individual seats on kitchen requisitions for food preparation.
- ◆ To facilitate separate payments by seat.

Seat # entry can be enforced, or if optional, seat #'s can be applied to items previously entered. An automatic default Seat# can be set if desired; see General Options programming in the programming manual.

Enforced Seat # Entry


When seat # is enforced, as per setting on the Recall Table function, it is enforced for each main item; Seat # entry is not required for condiments.

Items are displayed as they are entered. The seat number is displayed below each item.

Procedure:

1. Open a check.
2. If you attempt to enter an item without a seat number entry, the message: "NEED SEAT# FIRST" displays.
3. Press **OK** to clear the message.
4. Enter seat # (up to 2 digits).
5. Enter main item and any desired condiments.
6. Enter the seat number for the next item, touch the **SEAT #** key.
7. Enter the next item and its condiments.

The seat number "S1" displays below the item.



QTY	DESCRIPTION	PRICE
1	8oz FILET	\$19.95
	S1 T1	
	ADD MUSHRM	\$0.75
	S1 T1	
1	FULL RACK RIBS	\$16.95
	S2 T1	
1	COFFEE	\$1.00
	S1 T1	
1	SPRITE	\$1.00
	S2 T1	
	TAX	\$2.63
	AMOUNT DUE	\$42.30

Changing the Seat # on a Previously Entered Item

If you need to change the current seat# assignment on an item:

1. Touch the item you wish to change the seat# assignment on.
2. Touch **SEAT #**. The *Enter New Seat #* entry dialog displays.
3. Enter a new seat number (up to 2-digits) and press **ENTER**.



Optional Seat # Entry

When seat # is not compulsory:

1. Touch the item you wish to assign a seat #.
2. Touch **SEAT #**. The *Enter New Seat#* dialog displays.
3. Enter a seat number (up to 2-digits) then press **ENTER**.



Print Check by Seat Number

1. Open a check. Identify items by seat number.
2. Touch **PRINT CHECK**. The print 'Check dialog' will offer the following options:
 - ◆ SINGLE CHECK – ALL SEATS
 - ◆ SEPARATE CHECKS – ALL SEATS
 - ◆ SINGLE CHECK –ONE SEAT (When selected, you will be prompted to select a seat number.)
3. After making your selection, the check will print.

List Table

Use the List Table key to view open tables (*checks*) in the system. You can select a table from the list to open, print the check for a selected table, or merge & split tables. Settings can be made so an employee can see only their own open checks or view all open checks.

1. Touch the **LIST TABLE** key to display open checks.

The screenshot shows the 'LIST TABLE (ALL)' screen. At the top, there are navigation icons and the date '08-30-2018 09:49 AM'. Below the title bar is a table with columns: ORDER#, CHECK#, GUEST#, EMPLOYEE, START TIME, LAST ORDER, and TOTAL. The table contains several rows of data. At the bottom, there are four buttons: PRINT CHECK, MERGE & SPLIT, OPEN, and CLOSE.

ORDER#	CHECK#	GUEST#	EMPLOYEE	START TIME	LAST ORDER	TOTAL
078	one	0	MANNY	08-13-2018 08:28 AM	08-28-2018 12:20 PM	\$39.49
079	two	0	MANNY	08-13-2018 08:29 AM	08-13-2018 08:29 AM	\$17.97
080	three	0	SONJAI	08-13-2018 08:29 AM	08-13-2018 08:30 AM	\$32.09
081	four	0	SONJAI	08-13-2018 08:30 AM	08-28-2018 12:20 PM	\$29.00
082	five	0	SONJAI	08-13-2018 08:31 AM	08-30-2018 09:48 AM	\$27.88
212	SplitCheck	0	MANNY	08-28-2018 12:18 PM	08-28-2018 12:18 PM	\$27.79
521	131	2	MANNY	08-29-2018 12:15 PM	08-29-2018 12:23 PM	\$45.65

2. Touch a check to select it. The selected check is displayed in the left column.
3. The functions available on the LIST TABLE screen are:
 - **PRINT CHECK** – prints a customer copy of the selected check.

Note: This is not the same as pressing the Print Check Function Key.

- **MERGE & SPLIT** - used to combine checks or to split the check into two or more separate checks.
- **OPEN** - to open the check to add items or for payment.

The screenshot shows the 'LIST TABLE (ALL)' screen with a check selected. The left column displays the details for 'CHECK four SONJAI'. The right column shows the same list of checks as the previous screenshot. At the bottom, there are four buttons: PRINT CHECK, MERGE & SPLIT, OPEN, and CLOSE.

QTY	DESCRIPTION	PRICE
1	IRISH CLUB	\$18.00
	TI	
1	1/4 lb BURGER	\$6.95
	FTI	
1	DIET COKE	\$1.00
	TI	
1	LEMONAIDE	\$1.25
	TI	
	TAX	\$1.80
	AMOUNT DUE	\$29.00

- Pressing **CLOSE** will exit back to the Register Mode.
4. If a check is locked you can press and hold on the check in the list, then press **UNLOCK** on the dialog that pops up.
 5. Press anywhere outside the message dialog to clear the message without deleting the check.



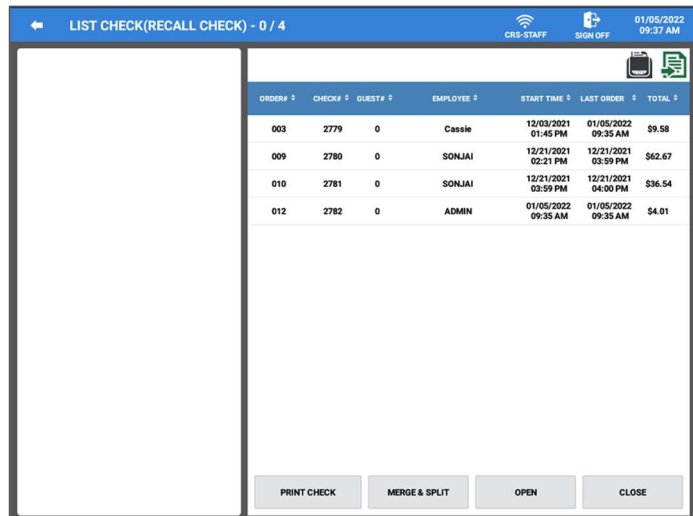
Merge & Split Checks for Payment

The List Table key is used to combine multiple checks together for payment or to split items off from an active check in the system to a new check or to another existing active check in the system.

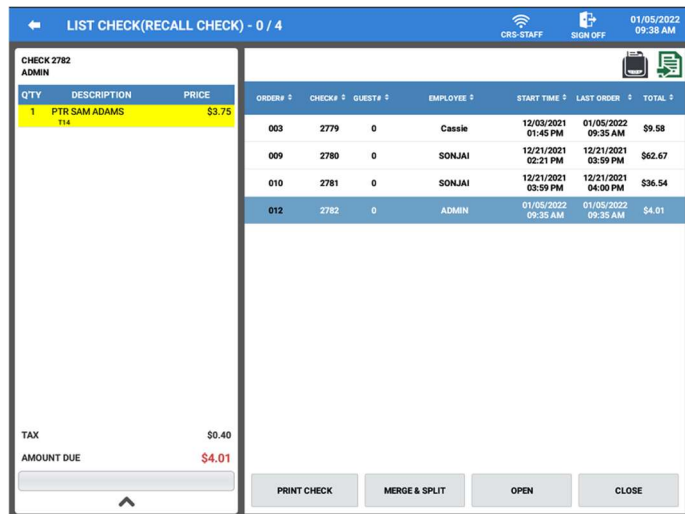
Quick ADD Check

Add Check is accessed by pressing the Merge & Split from the List Table function key or on the Table Map. We will show the List Check operation here. Refer to page 169 for the Table Map Combine\Merge Checks operation.

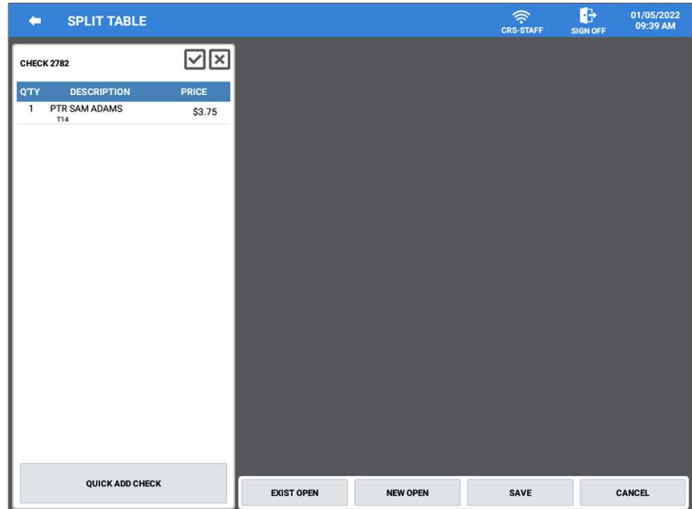
1. From the Register Mode, Press the **LIST CHECK** key to view the open checks in the system.



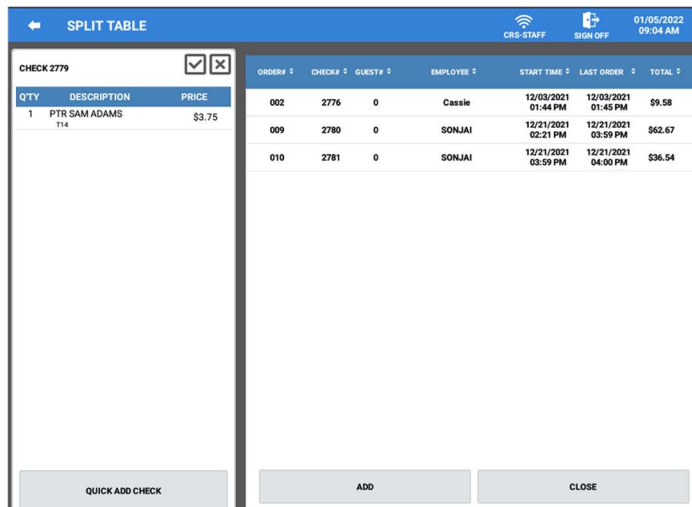
2. Select a check from the list; the check is displayed in the left column.
3. Press the **MERGE & SPLIT** button.



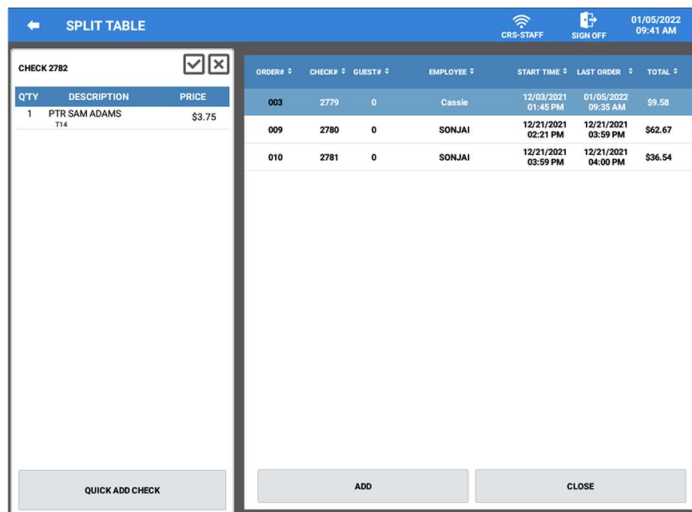
- The Split Table screen is displayed with the selected check and the operation buttons: Quick Add Check, Exist Open, New Open, Save, Cancel



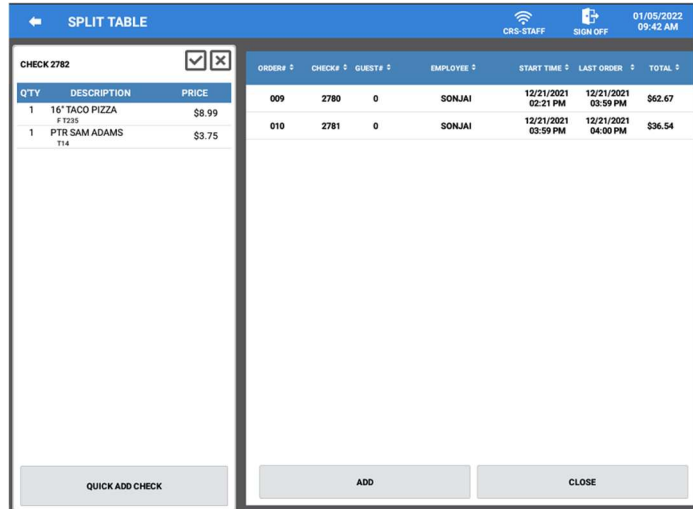
- Press the **QUICK ADD CHECK** button to display the list of open checks



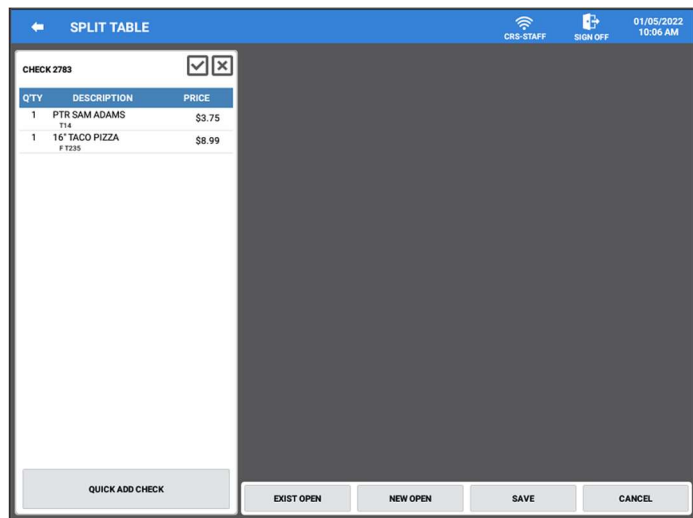
- Select the check from the list on the right (or multiple checks) you want to add to the current check; then press the **ADD** button.



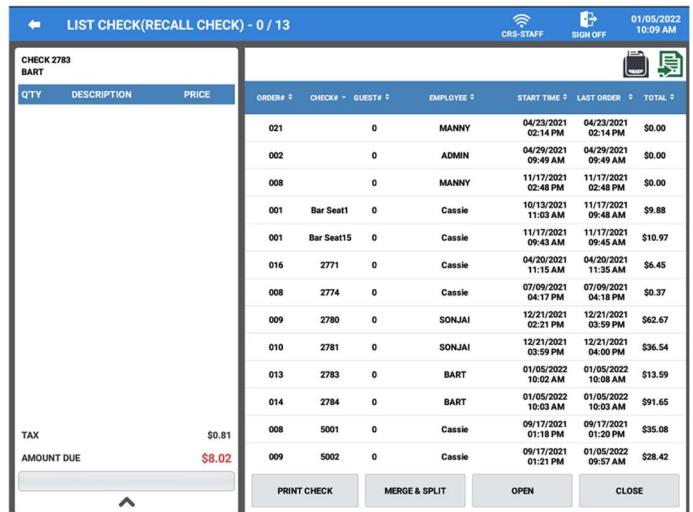
- The selected check is added to the current check.
Select additional checks to add to this check or press **CLOSE** to return to the Split Table screen.



- Press **SAVE** to save the new combined check and return to the List Check screen. The Save key is important as that is what will update the total on the table.



- Press **CLOSE** to return to the main sales screen.

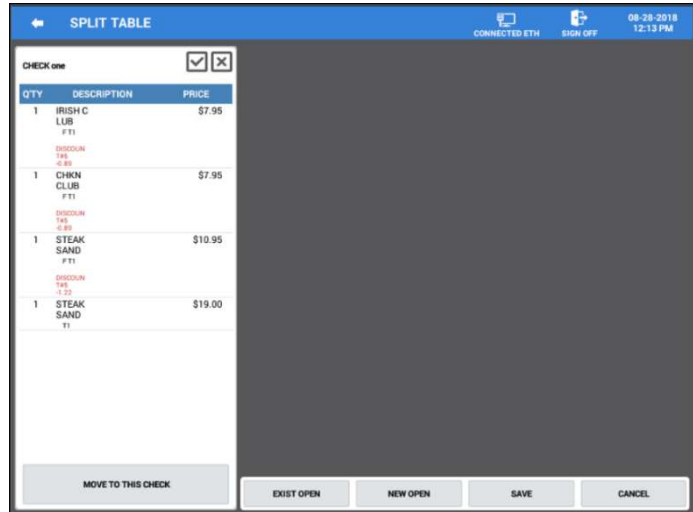


Split Check for Payment

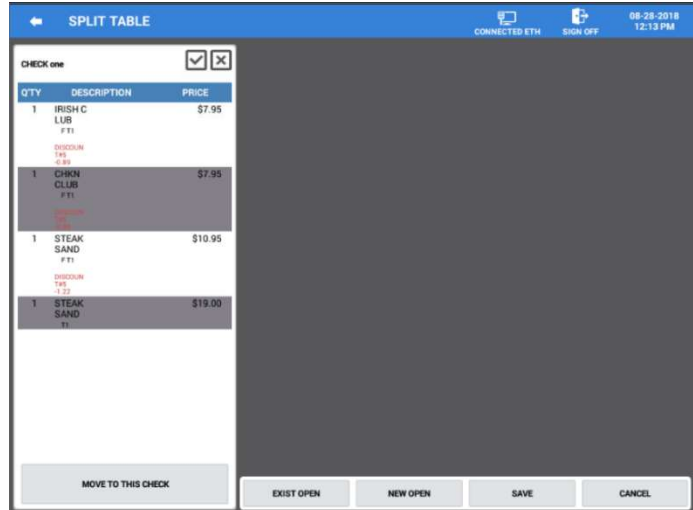
The Split Table function key allows you to select an item or items on a soft check for assignment to another check. The List Check key also allows you to select a check and split items off to a separate check. You can choose to split items off to a new check or to an existing active check in the system.

1. From the **Register Mode**, Recall\Open an existing guest check, then touch the **SPLIT TABLE** function key.

Alternately, you can use the **List Table** button to view and select an open table, then press the **MERGE & SPLIT** button. The **Split Table** dialog is displayed:

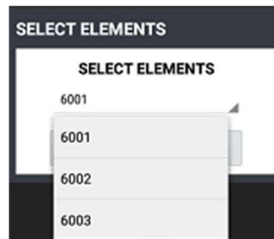
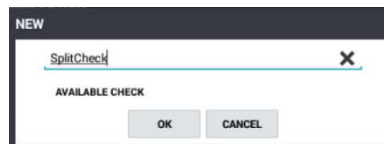


2. Select the items you wish to split off.

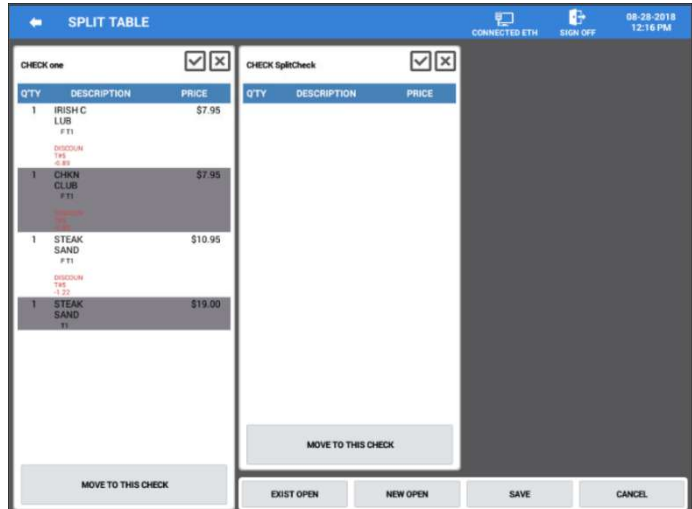


3. Press the **NEW OPEN** button to create a new check for the items.
 - If necessary, enter the number or name for the new check (*up to 10 digits*) and press **OK**.

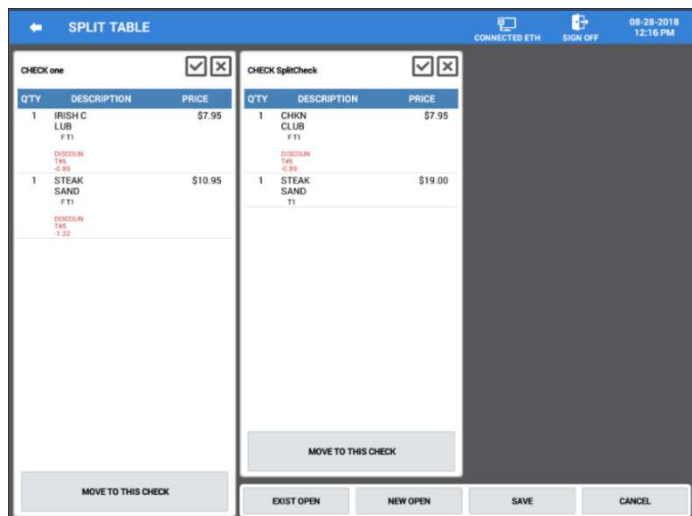
Alternatively, you can select **EXIST OPEN** to merge to an existing check.



4. Select the items you want to move . . .



5. Touch the **MOVE TO THIS CHECK** button on the new check; the selected items will now appear on the new check.



6. Press the **MOVE TO THIS CHECK** button on the selected check to move the selected items.
7. Continue to move items as needed. Note that you can also move items back to the original check if necessary.
8. When you have finished moving all the items, press **SAVE** to save the changes. Pressing **CANCEL** will exit the operation without making any changes.

Repeat Order

You can repeat the last items posted to an active guest check in the system by using the **REPEAT** key. This simplifies the registration of another round of drinks. The Repeat function may require manager authorization.

1. Open a check. Enter Items. Touch the **STORE TABLE** key.
2. Press the appropriate **RECALL TABLE** key to recall the Check or use the **LIST TABLE** key to select and open a check in the system.

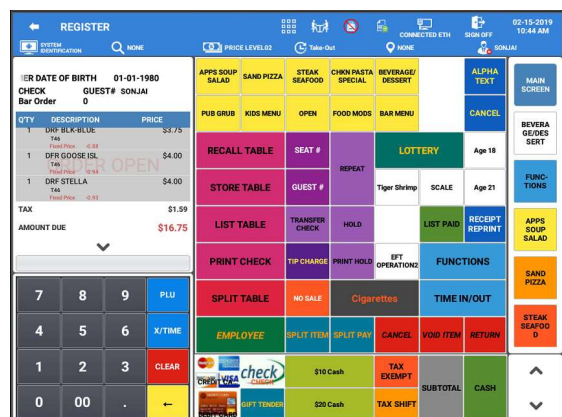
3. Touch **REPEAT**. The items previously posted to the check are displayed.

4. Select the items you wish to REPEAT on the guest check order.

Note: All previously serviced items are highlighted by default. Only leave the items you want to repeat highlighted. Touch the items to deselect/select items as desired.

5. After highlighting just the items you want to repeat, Press the **ADD** button.

6. The selected items are added to the check; Press **STORE TABLE** to store the check again.

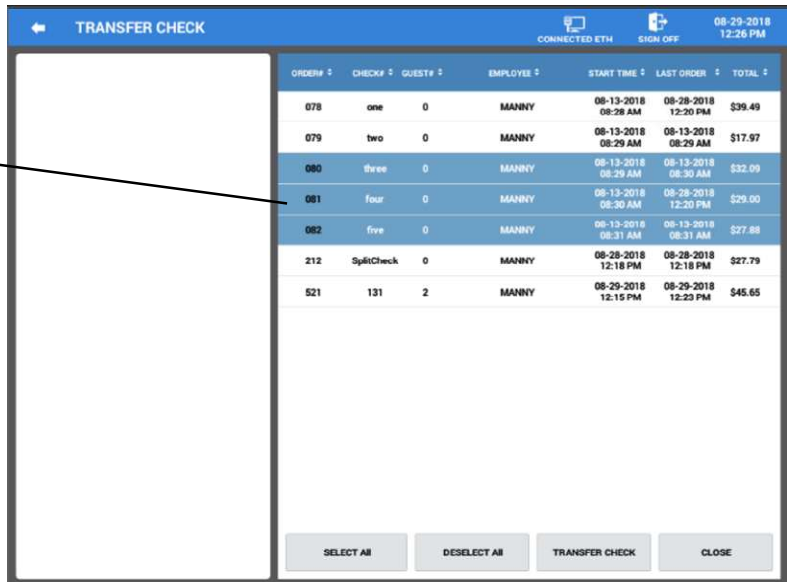


Transfer Table

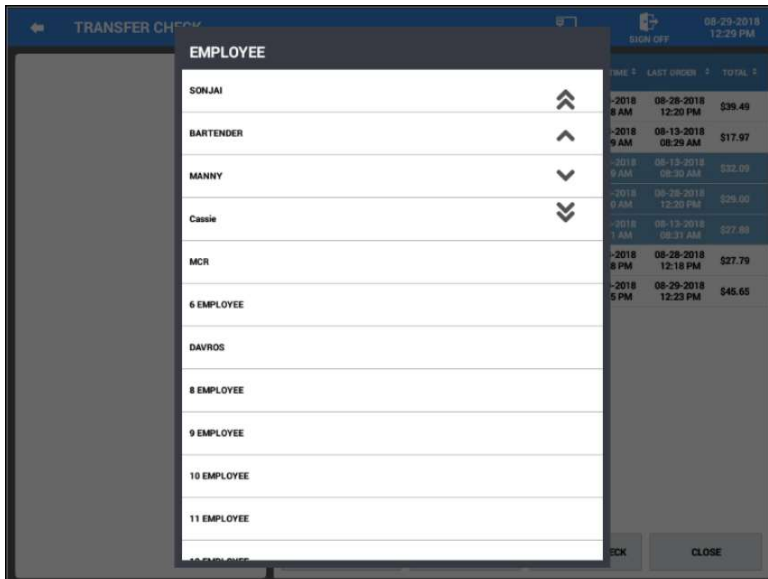
If permitted by authority level programming, an employee is allowed to move a check to a different Employee. This can be done multiple times, if necessary.

1. Sign-On employee and press the **TRANSFER TABLE** key.
2. Select the checks from the list you wish to transfer.
 - a. Press **SELECT ALL** if you want to transfer all of the checks listed.
 - b. Press **DESELECT ALL** if you decide not to transfer all check.

Checks selected for transfer are highlighted



3. Press the **TRANSFER CHECK** button.
4. Choose the employee from the list you wish to transfer the checks to.



Checks **three, four and five** are transferred to Sonjai

ORDER#	CHECK#	GUEST#	EMPLOYEE	START TIME	LAST ORDER	TOTAL
078	one	0	MANNY	08-13-2018 08:28 AM	08-28-2018 12:20 PM	\$39.49
079	two	0	MANNY	08-13-2018 08:29 AM	08-13-2018 08:29 AM	\$17.97
080	three	0	SONJAI	08-13-2018 08:29 AM	08-13-2018 08:30 AM	\$32.09
081	four	0	SONJAI	08-13-2018 08:30 AM	08-28-2018 12:20 PM	\$29.00
082	five	0	SONJAI	08-13-2018 08:31 AM	08-13-2018 08:31 AM	\$27.88
212	SplitCheck	0	MANNY	08-28-2018 12:18 PM	08-28-2018 12:18 PM	\$27.79
521	131	2	MANNY	08-29-2018 12:15 PM	08-29-2018 12:23 PM	\$45.65

SELECT ALL Deselect All TRANSFER CHECK CLOSE

5. The selected checks are transferred to the employee you selected.

Hold/Print Hold

This feature is used in a table service restaurant. It prevents kitchen printer /KVS instructions from being sent immediately after items are registered and stored. For example, an employee registers a customer order consisting of appetizers and main course entrees. Without this feature, both the appetizer and main course items are sent to the kitchen at the same time. With this feature, the employee can "hold" main course items, which prevents them from being sent to the kitchen printer (even though they are programmed to be sent to a printer). Then, later, the employee can recall the check and print the main course items, so they can be prepared and served when the customer is ready to eat them.

A held item is indicated on the display with an 'H' below the item, next to the tax status indicator.

See Program Mode Options \Options \ Guest Check Option to set the following related options:

- ◆ **Warning on held items at finalization** – Display warning to operator that the check has held items when employee attempts to finalize the check, Yes or No.
- ◆ **Automatically select held items on guest check is recall** – (This flag is to facilitate printing of held items.)

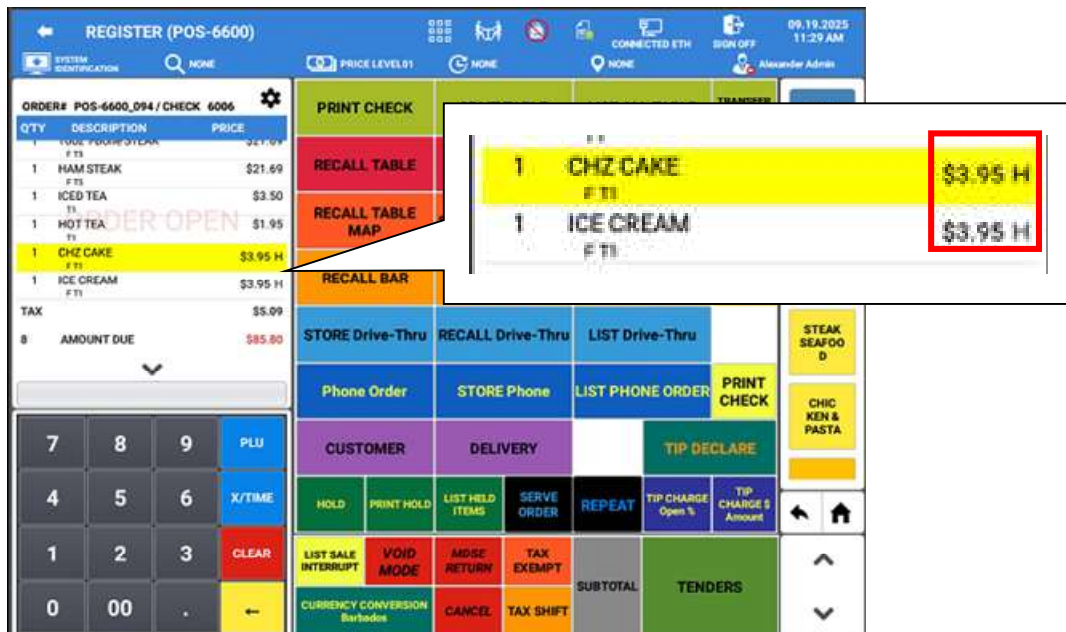
Certain items can be set to automatically hold items by group; see Program Mode \ PLU \ PLU Status Group. (For example, you may wish to automatically hold dessert items when they are first entered.)

Note: Alpha text entries made after a held item will not follow the item when a check is recalled and the item is then released.

Hold an Item

1. Touch the item you wish to hold.
2. Touch the **HOLD** key. When a main item is held, its condiments or instructions are also held.

Note: An 'H' displays next to the price on held items.



3. Store the check by touching the store table key.
4. If the Guest Check Option is programmed to warn the operator if items are held when the check is finalized, the held item message displays. (*Program Mode > Options > Options > Guest Check Option.*)
5. Touch **CLOSE** to store the check.

List Held Items

1. Outside of a sale, press the List Held Items key to view a list of guest checks that have held items.
2. Select the desired check with the held items.

Print All Held Items

(Program Mode → Options → Options → Guest Check Option: Automatically Select Held Items On Guest Check Recall is checked.)

1. Recall an order that has held items. Held Items now have an “S” next to the item price. Add new items to the order as necessary.
2. Touch **PRINT HOLD**. The “Hold” status is removed for all held items; items will be sent to appropriate output when the check is serviced.)

Print an Individual Held Item

(Program Mode → Options → Options → Guest Check Option: Automatically Select Held Items On Guest Check Recall is not checked.)

1. Recall an order that has held items.
2. Touch the item you wish to print.
3. Touch **PRINT HOLD**. (Hold status is removed for selected item; item will be sent to appropriate output when the check is serviced.)

TIP Entry on Guest Check

Tips can be entered to open guest checks in the system using the TIP Charge function key.

Gratuities/Tips received after a sale is tendered with a credit card can be added to the transaction from the register mode using the EFT Operation function key or the List Paid function key. The EFT Operation menu in the Program Mode > Device > EFT Operation > Gratuity Entry may also be used to enter tips. Gratuities (*Tips*) indicated by the customer on the payment draft must be entered at the ECR before the batch is closed.

Refer to the Post-Finalization Procedures: TIP Entry (Gratuity) on page 192 for TIP Entry using the List Paid key. Refer to page 338 for Gratuity Entry from the EFT OPERATION function key menu in the Register Mode or from the EFT OPERATION menu in the Program Mode – Device menu selections.

For tip entry operation using the List Paid or EFT Operation methods. The processor must allow “By Record” operations (*Tokenization*) for Gratuity Entry operation (*EMV Tip Adjustment*).

If desired, a Suggested Gratuity may be programmed to appear on Receipts by adding the Gratuity Line to your receipt and programming the Gratuity amount in Program Mode \ Receipt & Message programming.

Note: These suggested Gratuities printed on the receipt will not appear on the Pin-Pad.

Tips can be added to finalized credit card transaction from the register mode by using the List Paid function key or from the EFT Operation function key. Refer to the Gratuity Entry procedure on page 338 for entering tips from the EFT Operations function key and/or EFT Operations menu in the Device category.

NOTES:

When using the EMV transaction types below, the Gratuity (*Tips*) must be entered using a PLU or other method prior to finalizing the sale:

- **Debit Card transactions**
 - Gratuity (*Tips*) must be entered using a PLU or other method prior to finalizing the sale.
 - Alternately, Gratuity (*Tips*) can be added at the time of payment when the Sam4POS Gratuity Flag option is set to “Prompt For Tip On Pin-Pad”.
- **GIFT Card transactions**
 - Gratuity (*Tips*) must be entered using a PLU or other method prior to finalizing the sale.
- **Contactless Payments**
 - Contactless Payment is supported so long as the Pin-Pad being used supports this feature AND the processor also supports Contactless Payment method.
 - Payment methods such as Google Pay and Apple Pay, as well as some other processor platforms, do not allow EMV TIP Adjustments as well. Check with Datacap for details.

TIP Charge

Use the **TIP CHARGE** function before tendering the transaction to enter Tips to an existing, open guest check in the system.

1. From the Register Mode, **Recall** an open check in the system:
 - a. Enter the check number and touch the **RECALL TABLE** function.
 - b. Alternately, press the **LIST TABLE** function to select a check from the list to open.
2. Enter any new items if necessary, press **SBTL**; Then press the **TIP CHARGE** key. The **OPEN TIP** dialog is displayed.
 - a. Input the **amount** of the TIP received and press **ENTER**. The tip amount will be added to the check. Pressing the **X** in the upper right of the dialog will exit and close the dialog without adding the tip amount to the check.
3. You can Tender or Store the check as required.

Printing a Guest Check

To present the check to the customer for payment you can Recall the check and use the Print Check key to print the guest check.

1. Follow the procedure for Adding to a Check to reopen the desired guest check.
2. With the check open, press the **PRINT CHECK** function key.
3. The check is printed to the receipt printer for the station.

Guest Check Receipt Example

```

SAM4POS
Your Address
City, State Zip Code

04.16.2025      0307 PM      WED
ORDER#      POS-630_103
RECALL BAR      #Richard
                ** Eat-In **
-----
PRODUCT                                TOTAL
-----
CAN FOSTERS      T6      $4.25
  CRV - CAN      T1      $0.05
BTL SAM ADAMS    T6      $4.25
  CRV - BOTTLE   T1      $0.05
-----
IRISH NACHO'S      T1      $11.99 VD
SAMPLER APP      T1      $11.99
3-Piece CHKN Meal      T5F      $15.69
-----
SUBTOTAL W/O TAX      $36.28
TAX1 STATE TAX AMOUNT      $0.96
TAX5 TaxTable Amount      $0.94
INC. 6% VAT TAX VAT AMOUNT      $8.02
INC 6% VAT TAX AMOUNT      $0.48
-----
CREDIT CARD      $39.70
DEBIT CARD      $39.32
CASH      $38.18
-----
ITEM      6
-----
NO. 00000003: POS-630 Alexander Admin
THANK YOU!
TIP
-----

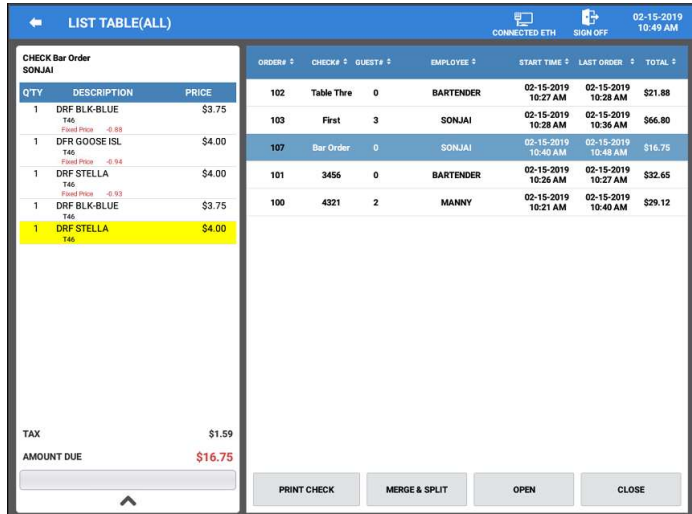
```

Print Option: Print Voided
Item On RP is selected.

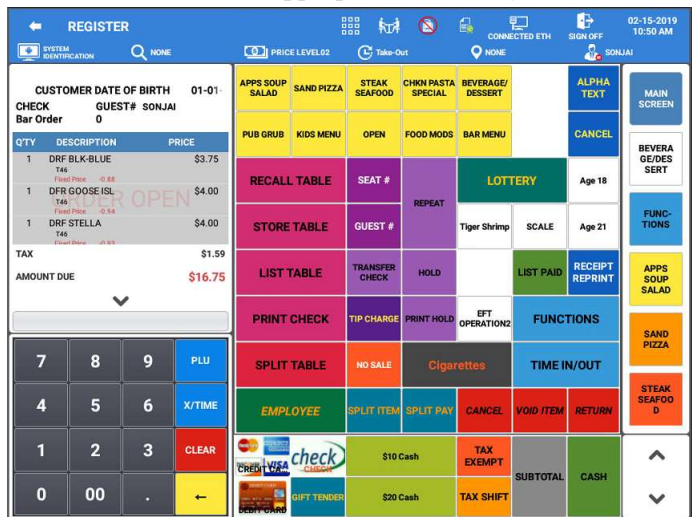
Guest Check Option:
Print Charge And Cash
Total selected.

Paying a Guest Check

1. To pay off an existing check:
 - a. Enter the check number and press **Recall Table**.
 - b. Press the **List Table** function, touch a check from the displayed list of active checks to select it and then touch **OPEN**.



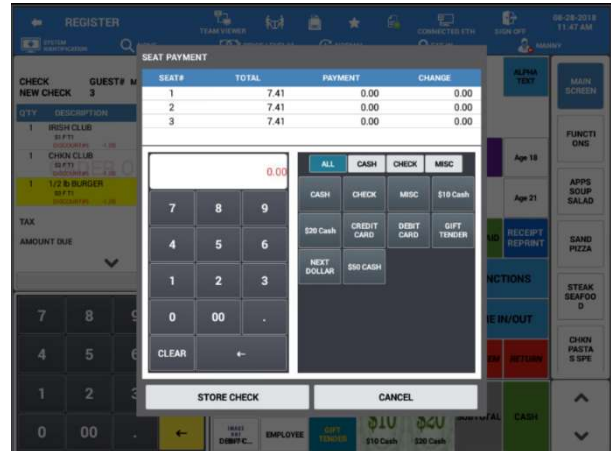
2. Additional items can be registered before the payment is made.
 - a. If necessary, enter a tip amount and touch the **TIP Charge** function key.
3. **Finalize** the check with the appropriate tender key.



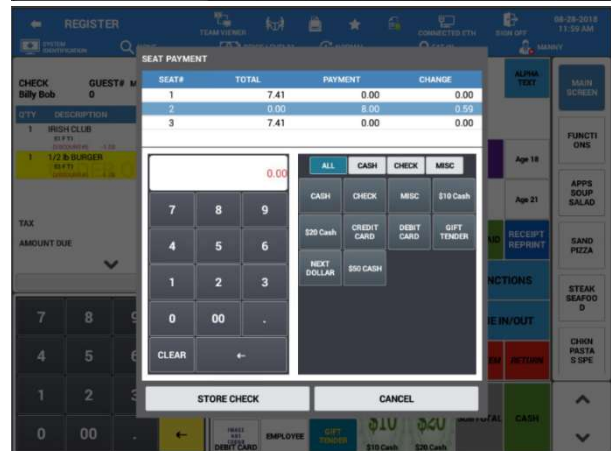
4. The check is finalized; the receipt and check will print, and the display shows the payment information.

Payment by Seat Number

1. Open a check. Identify items by seat number.
2. Touch **SUBTOTAL** and then touch **SEAT #**. Each seat is displayed with the seat total and tax. If there are items without seat assignments, they will be displayed with the identification: "NO SEAT".



3. Touch the seat you wish to pay; the selected seat is highlighted.
4. Enter the appropriate payment amount; press the appropriate tender key, CASH, CHECK or MISC TENDER.
5. The highlighted seat is paid; the seat total is adjusted accordingly.



6. Continue to settle each seat until the check is completely paid, or touch **STORE CHECK** to store the unpaid seats.
7. When the check is opened again, the paid seat no longer appears on the check.

Warning! If the Employee Sign-On method is set for Pop-Up, the employee will be signed off after making the first seat payment. It is not recommended to program Employee Sign-On as Pop-Up when paying by seat #.

Keeping Checks Open

If you keep a check open over several days.

After you store a check on 4/1, that transaction is included in the 4/1 sales.

After store the same check on 4/2, that transaction is included in the 4/2 sales.

If you print the daily report for (4/1) on 4/2, that will be different from the daily report printed on 4/1.

Additionally, if that check is finalized on 4/3, all sale amounts are included in the 4/3 sales totals.

Using Table Map

Table Map Notes

Sam4POS can be setup to use a graphic table map for opening\storing tables in check tracing system. Sam4POS is not meant to maintain open checks (*tables*) for days, weeks, months, etc. It is recommended that all checks (*tables*) are closed on the same day they are opened.

The Sam4POS Table Map (graphical table management) offers the following features:

- ◆ You can design a likeness of the restaurant floor plan placing tables on multiple seating zones – for example, a main floor, bar, counter, patio, or other serving locations.
- ◆ You can place up to 80 tables for each seating zone as necessary (up to 10 Wide and 8 High). Table descriptions can be customized as desired. For Example: Bar, Table, Booth, VIP, etcetera.
- ◆ Adjust the number of tables per Row and Column on the display.

Once the table map is designed, the table map screen can be used in the register mode.

- ◆ The Table Map screen can be selected manually or displayed automatically. If a manual display is used, press the Table Map icon to view the table layout. If an automatic system is employed, the table layout displays immediately after an employee is signed on to operate the register.
- ◆ With the table layout displayed, the operator can touch a table to open or recall the check for the table. Assign the Table to the currently signed-on employee. Merge & Split Tables or Print the check to present to the customer.
- ◆ Operators can move check balances from one table to another.
- ◆ Operators can add check balances from multiple tables to a single table.


Table Map Programming Notes

Refer to the Sam4POS Program Reference Manual for detailed set up instructions.

- ◆ **Program Mode > Options > Options > System Option:**
 - ◆ **“Go Directly To The Graphic Table”** determines whether the Table Map is automatic or manual. Check this option for “Automatic Table Map” operation.
 - When this option is selected the Table Map is loaded automatically in register mode when an employee signs on. Uncheck this option to manually access the Table Map when necessary.
 - ◆ **“Show Table Map Icon”** will display the table map icon on the title bar when in the register mode.
 - A Table Map function key could also be assigned to an MLU \ FLU or Real-Keyboard.
- ◆ When using the Table Map, the table name and number used on the Table Map is used as the guest check number.
 - You can customize the Table name/number as necessary for your application.
- ◆ Set the options on the Recall Table key used for the Table Map as follows:
 - Uncheck the option: “Assigned by Register” Set other Recall Table key options a necessary
 - Associate the appropriate Store Table key to the corresponding Recall Table key
- ◆ Link the corresponding Store Table key to the Recall Table key used for the Table Map.
- ◆ Each station in a system can be assigned to a specific Default Table Map or use the same Default Table Map. **Program Mode > Employee > Station: Default Table Map.**

Table Map Operations

The System Option: Go Directly To The Graphic Table determines if the employee needs to manually launch the Table Map, or if the Table Map automatically displays when an employee signs on.

- If table management is “Manual”:
 - touch the Table Map icon  on the Register Mode title bar.
- If table management is “Automatic”:
 - Sign-On an employee to display the Table Map screen.

Active tables are displayed with a Bold outline.

Each table displays with basic table information:

- Table name/number
- Date/Time table was opened
- Table balance

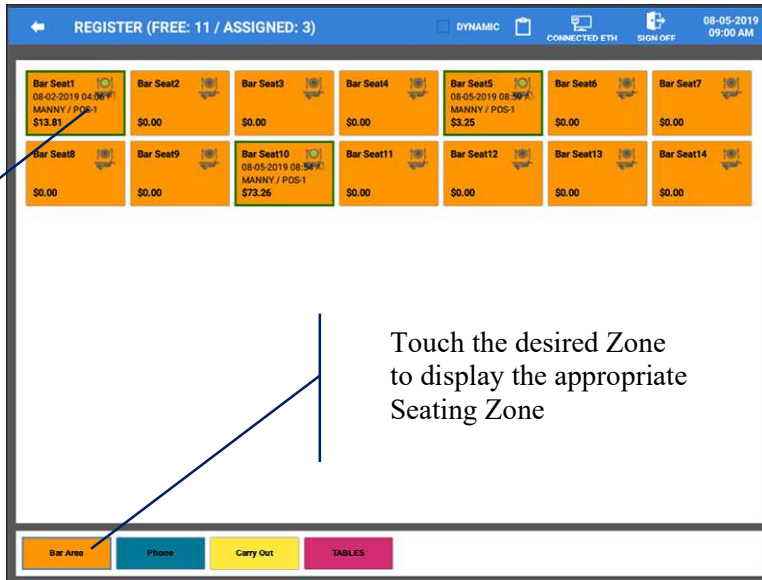






Table Map Icons

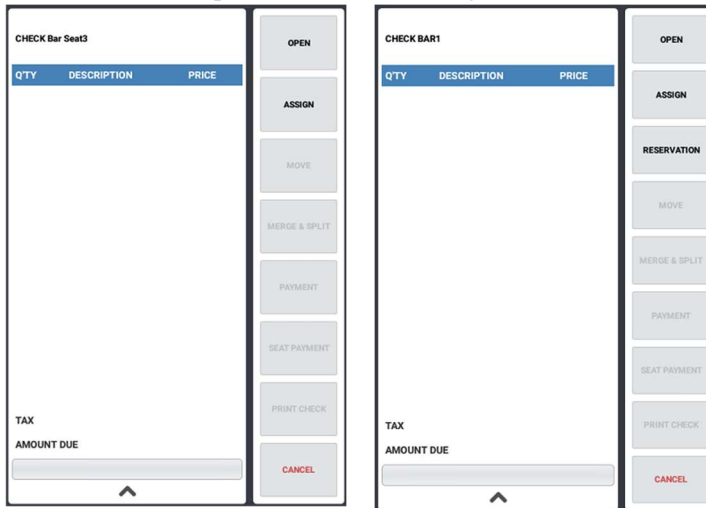
	<ul style="list-style-type: none"> • Pressing the back-arrow icon on the Table Map Title Bar will also exit the table map and return you to the Register Mode without opening the table guest check.
	<ul style="list-style-type: none"> • When the option DYNAMIC is selected in the table map, additional configuration settings are provided for the Table Edit to allow customizing table positions, size and adding a background image.
	<ul style="list-style-type: none"> • Pressing the Clip-Board icon on the Table Map Title Bar will exit the table map screen and return you to the Register Mode without opening the table guest check.

Opening a Table

- If table management is “Manual”:
 - Touch the **Table Map icon**  on the Register Mode title bar or press the **Table Map** function assigned on an MLU, FLU or Real Keyboard.
- If table management is “Automatic”:
 - **Sign-On** an employee to display the Table Map screen.
- With the **Table Map** displayed, select the appropriate **Seating Zone**.
 - Available tables are shown with no amount and no border around the table.



- **Touch a Table** to open the selection dialog shown below:



v2.0.158 and later

v2.0.157 and earlier

- Touch the **OPEN** button to open the check for the selected table.
- The **ASSIGN** button will assign the selected table to the currently signed on employee, then return to the table map screen.
- The **RESERVATION** key is not used. (*Reservation was Removed at v2.0.158.*)
- Pressing **CANCEL** will exit back to the Table Map screen without opening the table.
- Alternately, you can double-tap a table on the table map to open the table guest check.

Entering Table Guest Counts

- If the number of guests entry is required, enter the guest count at the prompt and touch **ENTER**. If the guest count is not required, but you want to enter a guest count, press the **Guest #** key to enter the count.

Assign Seat

- If necessary, enter the number for the seat to be assigned to the item and press the **SEAT #** key, then register the item.
 - A default Seat # can be programmed in Program Mode » Options » Options » General Option: Automatic Seat # Assignment (0 = No default Seat #)
- The Seat # function key can be set for Manager Required and/or for Pop-Up or Stay-Down operation.

Register Items

- Register the items for the table as normal.

Storing the Table

- When the desired items have been added to the table, press the corresponding **Store Table** key to store (service) the Table.
 - Alternately, if the **Table Map** icon or function key is pressed while another table is open, the current table will be stored and the items sent to the kitchen (*if used*).

Recalling a Table

The operation for recalling (reopen) a table is the same as for Opening a Table.

- Alternate methods for recalling an active table are:
 - Use the **List Table** key to view & select an active table from the list.
 - Use the **Recall Table** key to enter the Name\Number for the check and press **OK**.
Note: Table names (Check#) are case sensitive, you must enter the check # exactly as it is stored.
- Active Tables in the system will be shown with a Green Border around the table.



- The Date & Time the order was started is displayed below the table name as well as the Employee who started the order & Station it was opened on.
- Active Tables that are open at a different station will be shown with a Red Border around the table.



- **Note:** When the table is serviced again, it will change back to a green border.

Repeat Order

When a Table has been reopened, touch the REPEAT function key to quickly re-order all items or select items individually for re-ordering. Such as ordering “Another Round” for the table. The repeat function may be set under manager control.

REPEAT Key – When pressed All items are selected (*highlighted*) by default.



Press the **Check Box icon** to deselect All items. You can then select individual items to reorder or press the Check Box icon to reselect All items again.



Press the **ADD** button to add the selected items to the table.



Pressing **CANCEL** will exit the Repeat operation.



The **X icon** has no affect; Press CANCEL to exit the Repeat operation.

REPEAT		
QTY	DESCRIPTION	PRICE
1	Age 21 T1	\$0.00
1	E&J/V.S.O.P/100ML T1	\$11.99
1	CPTN MORGAN T4	\$7.95
1	JAMESON T4	\$7.95

Move Balance to another Table (Combine Tables)

- Open the **Table Map**, Select the active table you wish to move and touch the **MOVE** button, then touch the open table you want to move it to. The order will be moved to the selected open table.
- You can merge tables using this operation as well. Open the **Table Map**, Select the active table you wish to move and touch **MOVE**, then touch a different active table you want to move it to.
- When the **MERGE** confirmation dialog appears, touch **YES** to merge the two tables; the tables will be merged together; pressing NO on the MERGE dialog will abort without merging the two tables.

Merge & Split Tables

When using the Table Map, the Merge & Split button allows you to combine active tables for payment or to select an item or several items from a selected active table and assign the items to another table in the Table Map. You can choose a table in the same zone or you can choose to merge or split the items to a table in a different zone.

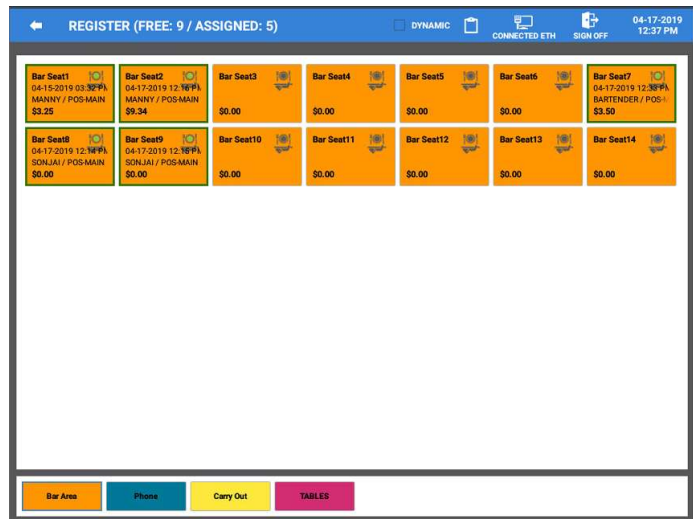
Merge Tables (Combine Checks)

When an active table is selected from the Table Map, the Merge & Split button allows you to merge (combine) the selected table with another table in the Table Map. You can choose a table in the same seating zone or you can choose to merge or split the items to a table in a different seating zone.

Split Table

When an active table is selected from the Table Map, the Merge & Split button allows you to select an item or several items from the selected table and assign the items to another table in the Table Map. You can choose a table in the same zone or you can choose to merge or split the items to a table in a different zone.

1. From the Register screen, Touch the **Table Map** icon to open the Table Map screen.
2. Select the **Seating Zone** where the table resides that you want to Merge or Split items from. For our example we will select a table in the Bar Area.

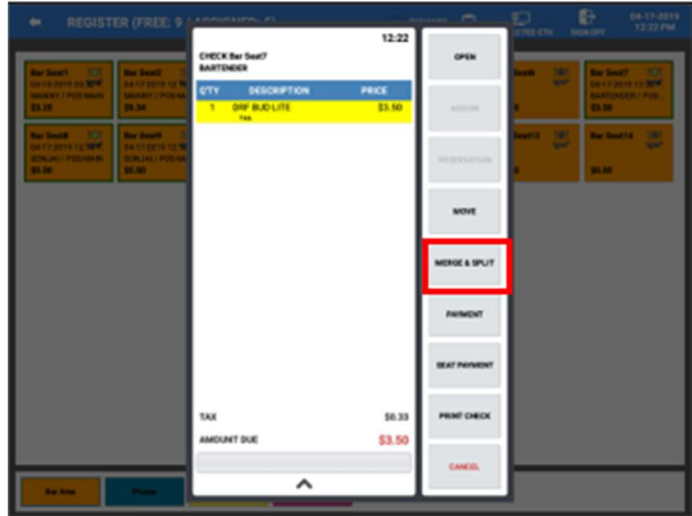


3. Select the **Active Table** you want to Merge or Split items from.

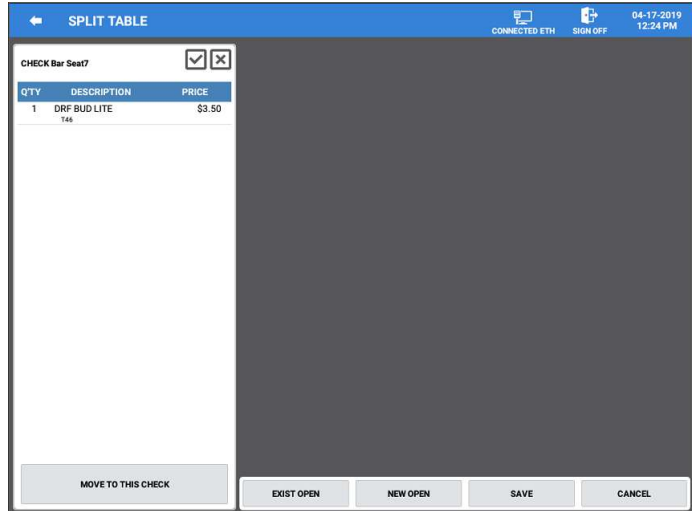
For Example: 'BAR Seat #7'

The 'Table Pop-Up dialog' screen is displayed.

4. Press the **'MERGE & SPLIT'** button.



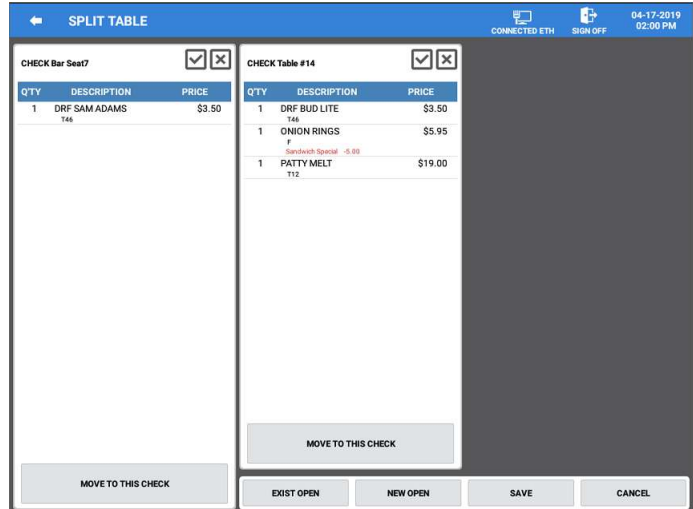
5. The 'SPLIT TABLE' dialog is displayed.
6. Press the **'NEW OPEN'** button to open a new table. Press the **'EXIST OPEN'** button to add items to an existing table.



7. The main Table Map screen is displayed.
8. You can Merge & Split items to any Table on any Seating Zone. Choose the **Seating Zone** and **Table** you want to **Merge** with or **Split** items to.



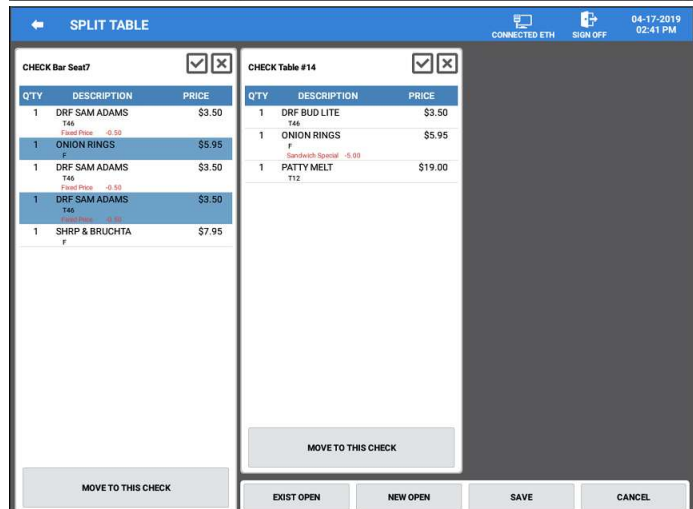
9. In this example, **Table #14** from the ‘TABLES’ Seating Zone was selected.
Note: Multiple tables can be selected if desired.



10. Select all the items from the table that you would like to move to the other selected table.

Press the icon at the top of the check to select all items.

Pressing the icon will delete the table from the screen.



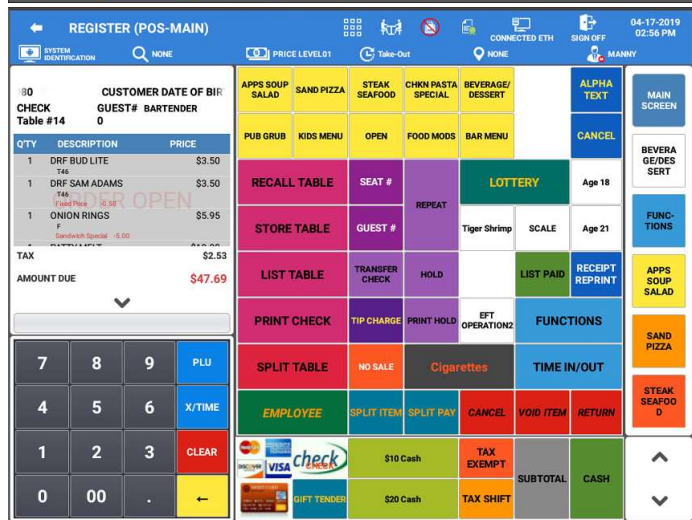
11. Press the ‘**MOVE TO THIS CHECK**’ button on the selected table; the selected items are moved to the selected table:
 12. Press ‘**SAVE**’ when you have finished. The Save key is important as that is what will update the total on the table map.
 13. The selected items are moved to the table selected. Pressing ‘**CANCEL**’ will abort the Merge/Split operation.



14. The **Table #14** now shows the updated balance. BAR Seat #7 is now empty.



15. When **Table #14** is opened in the register mode, the combined check is displayed;



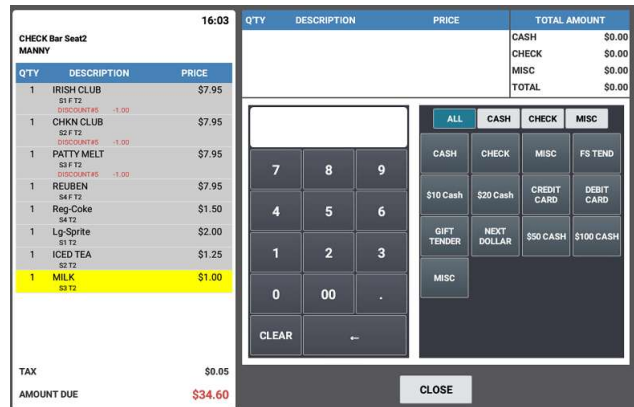
Payment

When a table is selected, you have the option to go directly to a payment window without having to open the table first.

1. From the Register screen, Touch the **Table Map** icon to open the Table Map screen or press the Table Map function located on an MLU, FLU or Real keyboard to open the Table Map screen.
2. Select the **Seating Zone** where the table resides you want to make a payment to.
3. Touch an **Active Table** to view the 'Table Pop-Up' dialog.
4. Touch the **PAYMENT** button:

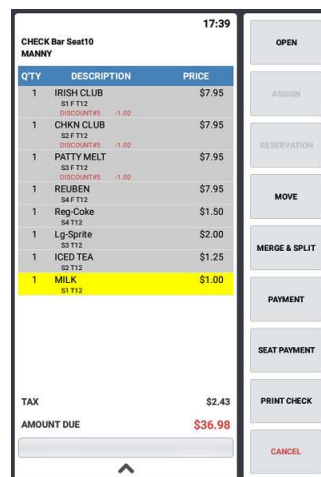


5. The 'Payment' dialog displays.
6. Enter the **Payment Amount** (*as necessary*) and press the appropriate **TENDER** key. Pressing **CLOSE** will exit without applying any payment to the check.

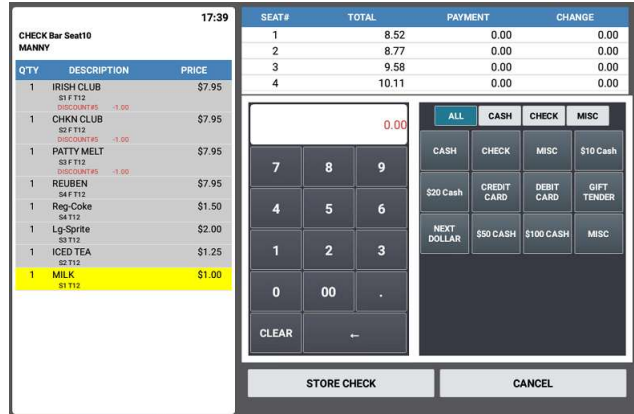


Seat Payment

1. From the Register screen, Touch the **Table Map** icon to open the Table Map screen or press the Table Map function located on an MLU, FLU or Real keyboard to open the Table Map screen.
2. Select the **Seating Zone** where the table resides you want to make a payment to.
3. Touch an **Active Table** to view the 'Table Pop-Up' dialog.
4. Touch the **SEAT PAYMENT** button;



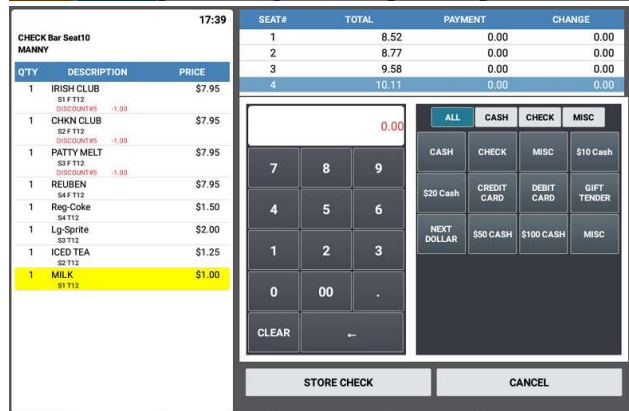
5. The 'Payment' dialog displays.



6. Select the Seat to be paid from the **SEAT#** list in the upper right of the dialog:

7. Enter the payment amount (*if desired*) and press the appropriate **TENDER**.

8. Continue paying seats as necessary or press the **STORE CHECK** button to store the remaining check. Pressing **CANCEL** will exit without making a payment.



9. You are returned to the 'Check dialog' screen.

10. Choose another action on the 'Table Pop-Up' dialog or press **CANCEL** to return to the Table Map screen.

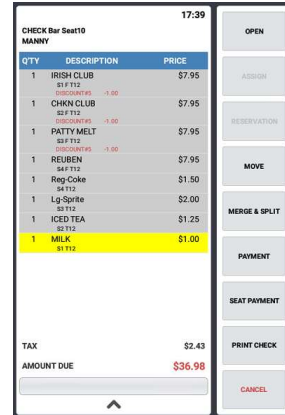


Warning! If the Employee Sign-On method is set for Pop-Up, the employee will be signed off after making the first seat payment. It is not recommended to program Employee Sign-On as Pop-Up when paying by seat #.

Print Check

Will print the guest check for the currently selected table for presentation to the customer.

1. From the Register screen, Touch the **Table Map** icon to open the Table Map screen.
2. Select the **Seating Zone** where the table resides that you want to print.
3. Touch an **Active Table** to open the 'Table Pop-Up' dialog.



4. Touch the **PRINT CHECK** button; If seat numbers are not assigned to any of the items on the check, the guest check will be printed to the receipt printer for the station.
 - a. If items are assigned to seat #'s, the 'Seat Selection' dialog displays:



Single Check – All Seat

Prints the check with all seats on one check.

Separate Check – All Seat

Prints separate checks for each individual seat.

Single Check – One Seat

Opens the 'Enter One Seat' dialog.

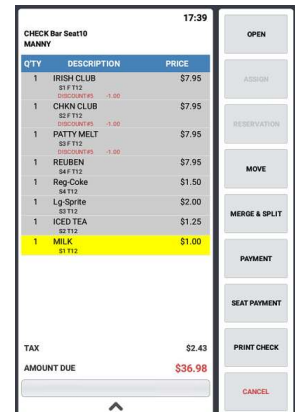
5. Example: when '**Single Seat – One Check**' is selected the selection dialog '**Enter One Seat**' displays. Select the desired **Seat #** from the list to print a check for that individual seat.



Cancel

Pressing CANCEL on the 'Table Pop-Up' dialog will close the dialog and return you to the Table Map screen.

1. From the Register screen, Touch the **Table Map** icon to open the Table Map screen. Select the **Zone** you want to Merge or Split items from. **Touch a Table** to open the check associated with the table. The 'Check dialog' is displayed:
2. Touch the **CANCEL** button to close the 'Check dialog'.
3. You are returned to the **Table Map** screen.




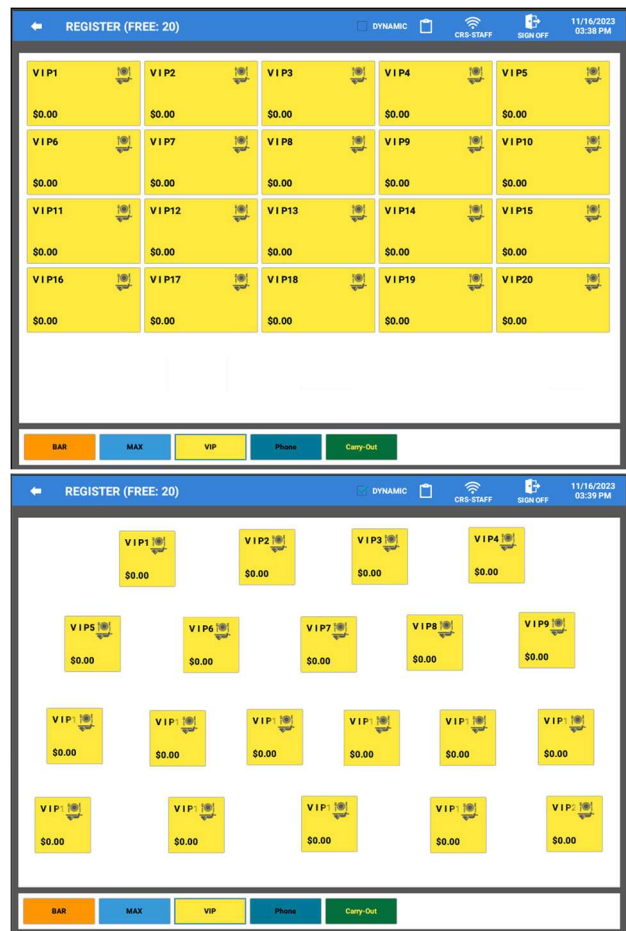
Dynamic Table Map

The table map allows you to create seating zones with tables presented in a grid formation for table service operations. The grid format may not accurately resemble the layout of tables at a restaurant. In these cases we can select the optional Dynamic selection on the Table Map.

Warning! Before you can use this feature in the Register Mode, The Dynamic Table Map layout must be created in the Program Mode > Screen Edit > Table Map. If the Dynamic layout has not been created, when the Dynamic selection is checked, all tables will be moved to the upper left of the Table Map screen and you will not be able to register sales for the tables on the table map.

Using Dynamic Table Map

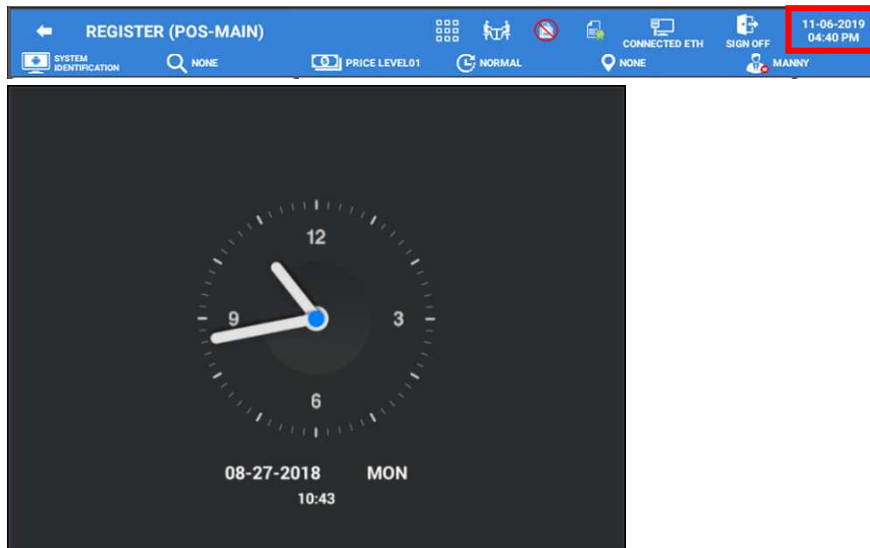
1. From the **Register Mode**, Open the **Table Map** and select a **Table Seating Zone**.
VIP in this example.
2. Press the **DYNAMIC** check box  on the Table Map Title Bar.
3. With the Dynamic selection selected, the tables are displayed as per the layout set in the: Program Mode\ Screen Edit\ Table Map.
4. All table map operation remain the same, only the appearance is affected.



Outside Of Sale Operations

Display Time & Date

The Time and date can be displayed anytime from any screen by pressing the Date & Time on the title bar.



The screen saver can also be set to display the CLOCK. The screen saver will display after the terminal has been idle for a pre-determined amount of time. See: Program Mode > Options > Options > System Option settings. Touch anywhere on the screen to exit the screen saver.

Waste

The WASTE key allows control of inventory by accounting for items that must be removed from stock due to spoilage, breakage, or mistakes. The WASTE key may be under manager control, requiring the manager code entry. The WASTE key is not allowed within a sale.

1. Touch **WASTE**.
2. Register the wasted items.
3. Touch **WASTE** again to finalize.

Received on Account

Received on account operations are used to add to the cash, check or Miscellaneous media amounts to the drawer total, such as entering in beginning cash to the drawer.

Typically, Received on Account operations are performed outside a sale. However, it is possible to perform the operation within a transaction. The Received On Account amount will reduce the current transaction total.

Input Amount

1. Touch the **RECD ACCT** key and select the **INPUT AMOUNT** tab.
2. Using the keypad type in the amount received, then press the media type button to add the amount to the selected media type. You can select to view just the **CASH**, **CHECK** or **MISC** media types as desired or select **ALL** to view & enter all the media types.
3. Press the appropriate media type to enter the amount received (RA). The amount will appear in the transaction detail window. You can enter amounts into more than one media type as necessary:
 - * Enter cash received, touch **CASH**
 - * Enter checks received, touch **CHECK**
 - * Enter Miscellaneous tenders received, touch **MISC**
4. The transaction detail area at the top of the screen keeps a running total of all the Media Types and Amounts received.

QTY	DESCRIPTION	PRICE	TOTAL AMOUNT
1	CASH	\$25.00	\$25.00
1	CHECK	\$50.00	\$50.00
1	CREDIT CARD	\$100.00	\$100.00
			TOTAL
			\$175.00

5. If an incorrect entry is made, you can select the specific entry by pressing the check box preceding the entry and pressing the trash can icon in the upper right corner of the entry screen to delete the entry.
6. You can add a **MEMO** to the **R/A** operation receipt by pressing the **T+ icon** in the upper right corner. When pressed, the **MEMO** dialog appears.

- Type in the desired **MEMO** message you want printed on the R/A receipt, pressing the X at the end of the line will clear the current memo. Press **OK** to add the memo message to the R/A operation receipt. Alternately, you can press the **LIST CHECK** button on the **MEMO** dialog to add the Check # or name to the R/A receipt.
- When the **List Check** button is pressed, a list of all open checks in the system appears. Select the check from the list to add as the Memo to the R/A receipt.

Note: This does NOT update the check total or print on the check.

7. When all media amounts have been entered touch **OK** to finalize. A receipt will print the RA transaction detail depending on the Print Option settings.
 - Pressing **CANCEL** will exit the R/A operation without entering any amounts.

Input Count

The Input Count selection tab allows you to enter CASH received by simply counting the number of a specific quick cash media, such as pennies, nickels, dimes, quarters, \$1 dollar bills, \$5 dollar bills, \$10 dollar bills, etc. The Quick Cash Tender types must be created in the Program Mode\Function Key\Tender Key programming before they will appear on the RA Key, Input Count tab.

1. Touch the **RECD ACCT** key and select the **Input Count** tab.
2. Count the number of the specific **Quick Cash Tender** type; press the appropriate **Quick Cash Tender** button. The terminal will calculate the number entered with the quick cash tender type and enter the appropriate amount.
3. The transaction detail area of the screen keeps a running total of media received.

RA		INPUT AMOUNT		INPUT COUNT	
QTY	DESCRIPTION	PRICE		TOTAL AMOUNT	
<input type="checkbox"/>	11 \$20 Cash	\$220.00	CASH	\$635.00	
<input type="checkbox"/>	2 \$50 CASH	\$100.00	CHECK	\$0.00	
<input type="checkbox"/>	1 \$100 CASH	\$100.00	MISC	\$0.00	
			TOTAL	\$635.00	

Below the table is a numeric keypad with buttons for 7, 8, 9, 4, 5, 6, 1, 2, 3, 0, 00, and a CLEAR button. To the right of the keypad are buttons for \$10 Cash, \$20 Cash, \$50 CASH, \$100 CASH, \$1 CASH, and \$5 CASH. At the bottom are OK and CANCEL buttons.

4. If an incorrect entry is made, you can select the specific entry by pressing the check box preceding the entry and pressing the trash can icon in the upper right corner of the entry screen to delete the entry.
5. You can add a **MEMO** to the R/A receipt by pressing the **T+ icon** in the upper right corner. This can help define what the specific R/A is for. When pressed, the **MEMO** dialog appears.

The MEMO dialog box has a text input field containing "RA" and a close button (X) on the right. Below the input field are three buttons: OK, CANCEL, and LIST CHECK.

6. Type the desired **MEMO** message, Pressing the **X** at the end of the line to clear the current memo. Press **OK** to add the message to the R/A operation receipt.

Alternately, you can press the **LIST CHECK** button on the MEMO dialog to select a check # for the memo message. When the List Check button is pressed, a list of all open checks in the system appears. Select the appropriate check from the list to print as the memo on the R/A receipt.

Note: This does NOT update the check total or print on the check.

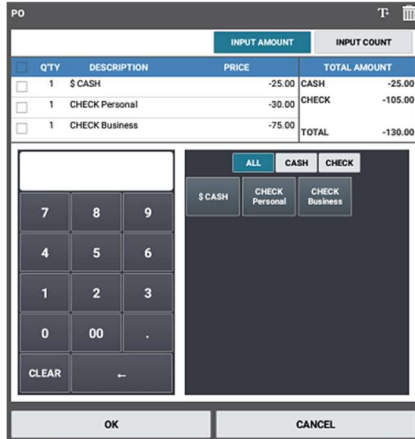
7. When all CASH types have been counted & entered press **OK**. A receipt will print the RA transaction detail depending on the Print Option settings.
 - Pressing CANCEL will exit the R/A operation without entering any amounts.

Paid Out

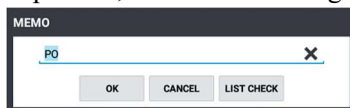
Paid Out operations are performed outside of a sale and are used to remove CASH amounts or CHECKS from the cash drawer, such as Cash Drops or to track checks written out by the employee for goods or services..

Input Amount

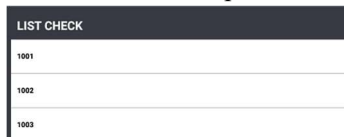
- In the Register Mode, Touch the **PAID OUT** key. and the PO entry screen displays.
 - Depending on the Cash Drawer option setting, the cash drawer may open.



- Using the keypad type in the amount to remove from the drawer then press the media type button to the selected media type. You can select to view just the **CASH**, or **CHECK** media types as desired or select **ALL** to view & enter all the media types.
 - If an incorrect entry is made, you can select the specific entry by selecting the check box preceding the entry and pressing the trash can icon in the upper right corner of the entry screen to delete the entry.
- You can add a MEMO to the P/O operation receipt by pressing the **T+** icon in the upper right corner. When pressed, the **MEMO** dialog appears.



- Type in the desired **MEMO** message you want printed on the P/O receipt, pressing the **X** at the end of the line will clear the current memo. Press **OK** to add the memo message to the P/O receipt. Alternately, you can press the **LIST CHECK** button on the MEMO dialog to select a Check # or name for the memo on the P/O operation receipt. When the List Check button is pressed, a list of all open checks in the system appears. **Note:** This does NOT update the check total or print on the check.



Select the appropriate guest check from the list to add as the memo for the P/O operation receipt.

- When all CASH amounts have been entered touch **OK** to finalize. A receipt will print the P/O transaction detail depending on the Print Option settings.
 - Pressing CANCEL will exit the P/O operation without entering any amounts.

Input Count

The Input Count selection tab allows you to enter CASH amounts by simply counting the number of a specific quick cash media such as pennies, nickels, dimes, quarters, \$1 dollar bills, \$5 dollar bills, \$10 dollar bills, etc. The Quick Cash Tender types must be created in the Program Mode\Function Key\Tender Key programming before they will appear on the PO Key, Input Count tab.

1. In the Register Mode touch the **PAID OUT** key, the cash drawer opens and the PO entry screen displays.
2. Select the **Input Count** tab.
3. Count the number of the specific **Quick Cash Tender** type; press the appropriate **Quick Cash Tender** button. The terminal will calculate the number entered with the quick cash tender type and enter the appropriate amount.
4. The transaction detail area of the screen keeps a running total of media received.

		INPUT AMOUNT	INPUT COUNT		
QTY	DESCRIPTION	PRICE		TOTAL AMOUNT	
<input type="checkbox"/>	20 \$1 CASH	-20.00	CASH	-1027.50	
<input type="checkbox"/>	25 0.05c CASH	-1.25	CHECK	\$0.00	
<input type="checkbox"/>	25 0.25c CASH	-6.25	TOTAL	-1027.50	

Below the table is a numeric keypad (0-9, 00, ., CLEAR) and a grid of tender selection buttons: \$10 CASH, \$20 CASH, \$50 CASH, \$100 CASH, \$5 CASH, 0.05c CASH, 0.10c CASH, 0.25c CASH, and \$1 CASH. At the bottom are OK and CANCEL buttons.

5. If an incorrect entry is made, you can select the specific entry by pressing the check box preceding the entry and pressing the trash can icon in the upper right corner of the entry screen to delete the entry.
6. You can add a MEMO to the operation by pressing the T+ icon in the upper right corner. When pressed, the MEMO dialog appears.

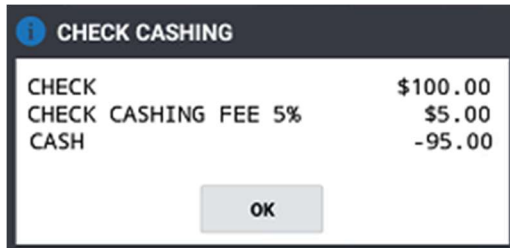
MEMO dialog box with a text input field containing 'PO' and a clear 'X' button. Below the input field are three buttons: OK, CANCEL, and LIST CHECK.

7. Type in the desired **MEMO** message, pressing the **X** at the end of the line to clear the current memo. Press **OK** to add the message to the P/O operation receipt. Alternately, you can press the LIST CHECK button on the MEMO dialog to select a Check # or name for the memo on the P/O receipt. When the List Check button is pressed, a list of all open checks in the system appears. **Note:** This does NOT update the check total or print on the check.
8. When all CASH types have been counted & entered press **OK**. A receipt will print the PO transaction detail depending on the Print Option settings.
 - Pressing CANCEL will exit the P/O operation without entering any amounts.

Check Cashing

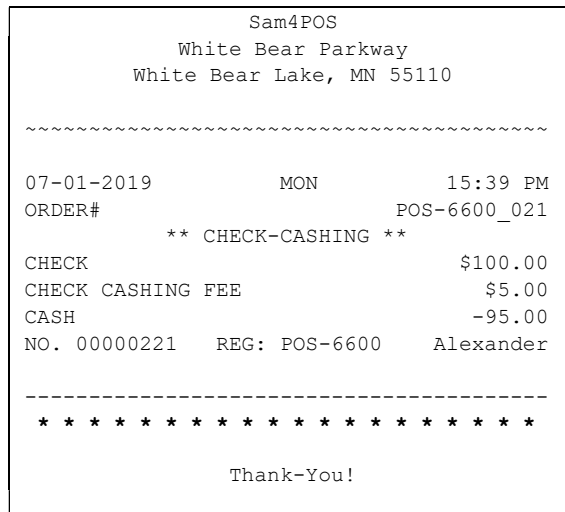
A separate function key is available for check cashing operations. Check Cashing limits may apply and a manager code may be needed to complete the transaction. Depending on the programming of the Check-Cashing key, a Check Cashing Fee may apply.

- ◆ Enter the **Amount of the Check** to be cashed, touch the **CHECK-CASHING** key. The operation is finalized when the Check-Cashing key is pressed. The Operation displays on the ECR screen.



- The Check Amount and any applicable fee are printed on the receipt.
- The remaining amount is finalized to CASH.
- ◆ A Check Cashing total will appear on the Financial Report.
 - This is the total of all checks cashed, minus the Check Cashing Fees.
 - The cash-in-drawer and check-in-drawer totals will be adjusted appropriately.

Sample Check-Cashing Receipt



Post-Finalization Procedures

These operations are performed from the Register Mode but are only allowed after a sale is complete.

Receipt Issue

Additional receipts for the current transaction can be printed after a sale is finalized, or if a receipt is not normally issued, we can print a receipt on request. You must have the Print Option: 'Allow Multiple Receipts' enabled.

If desired, you can also set the Print Option: 'Print Reprint On A Reprinted Receipt'.

- ◆ Register and tender a transaction as normal. If a receipt is requested or if an additional receipt is required, touch the **RECEIPT REPRINT** key to reprint the transaction receipt.

Gift Receipt

When the "Gift Receipt" option on the Receipt Reprint key is checked, when the Receipt Reprint key is pressed, a gift receipt will be printed. You could have two separate keys set up, one for a normal 2nd receipt or receipt on demand, and another for issuing Gift Receipts. The gift receipt will print the items in transaction without the prices and no total line.

Sample Gift Receipt

```
Sam4POS
White Bear Parkway
White Bear Lake, MN 55110

* * * * *
06-03-2019      08:39 PM      MON
ORDER#                753
CUSTOMER DATE OF BIRTH      01-01-1980

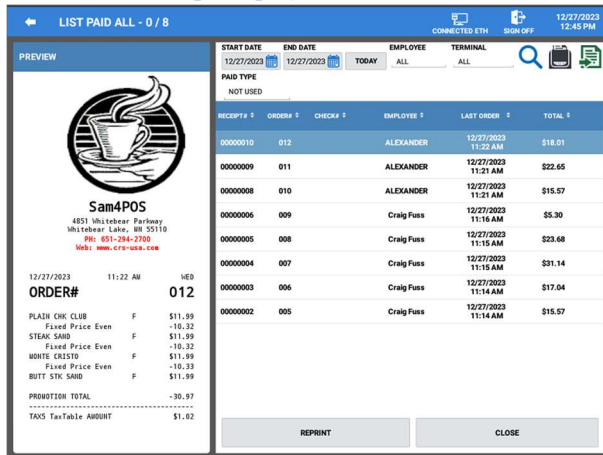
-----
JACK DANIELS GIFT SET
NO. 00002648  REG: POS-MAIN  CASHIER 12

-----
```

List Paid

Press the List Paid function key to view paid transactions in the system.

The selected transaction receipt displays on the left of the screen, the transaction list is on the right.



Use the filters at the top of the transaction list to show just the specific transactions you want to view.



List Paid Transactions can be filtered for:

- **Start Date & End Date** – You can select a specific day or date range to view.
- **Today** – Select to view just paid transactions from current day.
- **Employee & Terminal** – Choose all or specific employee(s) and/or terminals.

List Paid Transactions can be filtered further by the selecting a specific **PAID TYPE**. The default is NOT USED.

Available Paid Type filters are: TENDER, NO SALE, CANCEL, VOID MODE, VOID ITEM, RETURN, WASTE, PROMO, RA/PO, PLU INFO, and DISCOUNT.

When the **PAID TYPE = TENDER**, the **TENDER CATEGORY** selections are also available.

Tender Category Selections include: NOT USED, CASH, CHECK, FOOD STAMP TENDER, or MISC.

When the **PAID TYPE = TENDER** and the **TENDER CATEGORY = MISC**, the **MISC CATEGORY** selections are added with selections for NOT USED, CREDIT, DEBIT and GIFT.


Also, the **NO TIP** filter is added and additional buttons for **VOID SALES**, **TIP ENTRY**, and **RETURN#** are available.





- The **NO TIP** filter is helpful for finding credit transactions that do not have a tip already added.
- When integrated credit is utilized, Tips can be entered from the List Paid key for credit transactions by using the **TIP ENTRY** button. See “TIP Entry (Gratuity)” example on page 192 for details.
 - ⇒ **TIP Entry:** Tips cannot be Edited/Added to Debit Card transactions after the sale.
 - ⇒ **TIP Entry:** Is not allowed for GIFT Card transactions. Any Tips must be entered using a PLU prior to finalizing the sale using a Gift Card.
- **VOID SALES** – Credit transactions may also be Voided from the List Paid screen by using the **VOID SALES** button. *(The Void Sales button is used only for Integrated Credit EFT Transactions.)* Refer to the “Void Sales” operation on page 192 for details.
- **RETURN#** – Is only used with DC Direct integrated payment terminals, must be enabled on the function key.

List Paid Key Definitions

- * **Start Date & End Date** – You can select a specific day or date range to view.
- * **Today** – Select to view just paid transactions from current day.
- * **Employee & Terminal** – Choose all or specific employee(s) and/or terminals.

 After setting or editing the filter selections, press the search icon to refresh the view the results.

 Pressing the Print icon will print the currently displayed transactions summary list.

 When a transaction is selected you can use this icon to export the transaction to USB or to an Email. Exported data is sent in a spreadsheet format (.CSV file). Emailing data requires additional set up, contact your dealer for details.

<u>Paid Type</u>	<u>Tender Category</u>
Not Used	N/A
* Tender	Not Used, Cash, Check, Food Stamp Tender, MISC
No Sale	N/A
Cancel	N/A
Void Mode	N/A
Void Item	N/A
Return	N/A
Waste	N/A
Promo	N/A
RA/PO	N/A
** PLU Info	N/A

* **Tender** – If the Paid Type is set for Tender, Additional **TENDER CATEGORY** selections are available.

- **CASH** –
 - **CHECK** –
 - **FOOD STAMP TENDER** –
 - **MISC** – When the Tender Category is set for MISC:
The **MISC CATEGORY** selections are available.
 - **NOT USED, CREDIT, DEBIT, and GIFT.** This allows you to filter for specific tender types. Additionally:
 - **NO TIP** filter selection is added
- And buttons are added for:
- **VOID SALES** (*Void Sales button is used only for EFT Transactions*)
 - **TIP ENTRY** (*Tip Entry button is used only for EFT Transactions*).
 - **RETURN#** – (*Is only used with DC Direct integrated payment terminals.*) Must be enabled on the function key.

** **PLU Info:** When selected as the Paid Type, you can filter for an individual **PLU** or **PLU Range**.

- **PLU** – Type or scan a **PLU Code** or type **PLU Descriptor** to view paid transactions that contain the specified items.
- **PLU Range** – Enter the range of PLU's: **From PLU Code ~ To PLU Code.**

List Paid Operations

1. Touch the **LIST PAID** key; the transaction preview screen is displayed.
2. Use the filters at the top right of the display to select:
 - A specific Day or date range
 - Employee and Terminal
 - Paid Type selection

3. Touch the **TODAY** button to view paid transactions for the current day.
4. Alternatively, you can select a specific day or date range:
 - Touch the **START DATE** to open the start date calendar view. Select the desired Start Date, Month – Day – Year. Press **OK**.

- Touch the **END DATE** to open the end date calendar view. Select the desired end date, Month – Day – Year. Press **OK**.

8. Press the search icon  to refresh the paid transactions list.

Note: Only the paid transactions in the specified date range will display.

LIST PAID ALL - 0 / 74

12/27/2023 11:40 AM

CONNECTED ETH SIGN OFF

PREVIEW



Sam4POS
4851 Whitebear Parkway
Whitebear Lake, WI 55110
PH: 651-294-2700
Web: www.crs-usa.com

12/27/2023 11:22 AM WED

ORDER# 012

PLAHH CHK CLUB	F	\$11.99
Fixed Price Even		-10.32
STEAK SAND	F	\$11.99
Fixed Price Even		-10.32
MORTE CRISSTO	F	\$11.99
Fixed Price Even		-10.33
BUTT STK SAND	F	\$11.99
PROMOTION TOTAL		-30.97
TAXS TaxTable AMOUNT		\$1.02

START DATE 12/01/2023 END DATE 12/27/2023 TODAY ALL EMPLOYEE ALL TERMINAL ALL

PAID TYPE NOT USED

RECEIPT#	ORDERS	CHECK#	EMPLOYEE	LAST ORDER	TOTAL
00000010	012		ALEXANDER	12/27/2023 11:22 AM	\$18.01
00000009	011		ALEXANDER	12/27/2023 11:21 AM	\$22.65
00000008	010		ALEXANDER	12/27/2023 11:21 AM	\$15.57
00000006	006		MANAGER	12/20/2023 02:37 PM	\$10.00
00000005	005		MANAGER	12/20/2023 02:36 PM	\$0.00
00000004	004		MANAGER	12/20/2023 02:35 PM	\$12.00
00000003	003		MANAGER	12/20/2023 02:28 PM	\$9.67
00000002	002		MANAGER	12/20/2023 02:27 PM	\$11.01
00000001	001		MANAGER	12/20/2023 11:51 AM	\$46.71
00000012	011		MANAGER	12/20/2023 11:04 AM	\$27.00
00000011	009		MANAGER	12/20/2023 10:27 AM	\$20.00
00000009	007		MANAGER	12/20/2023 09:03 AM	\$36.38

REPRINT CLOSE

5. If desired, you can choose to see just the transactions from selected employees. Use the **EMPLOYEE** filter to display the employee list. The Employees with paid transactions are already selected.
- Check the **SELECT ALL** checkbox to display paid transactions for **ALL** employees.
 - Uncheck the **SELECT ALL** checkbox to choose one or more employees whose paid transactions you wish to view.

DESCRIPTION

SELECT ALL REMOVE DELETED EMPLOYEE

<input checked="" type="checkbox"/> ALEXANDER	<input checked="" type="checkbox"/> Assistant Manager	<input checked="" type="checkbox"/> Bartender BART	<input checked="" type="checkbox"/> C R S - M S R	<input checked="" type="checkbox"/> Cassie Cashier	<input checked="" type="checkbox"/> Craig Fuss
<input type="checkbox"/> DAVIOS	<input type="checkbox"/> Digits-10	<input checked="" type="checkbox"/> KIOSK	<input checked="" type="checkbox"/> Lyn Server	<input checked="" type="checkbox"/> MANAGER	<input type="checkbox"/> MCR
<input type="checkbox"/> Richard	<input type="checkbox"/> SONJAI	<input checked="" type="checkbox"/> Training Employee			

SELECTED ITEM COUNT : 10

OK CANCEL DESELECT ALL

6. Some retail stores have a very high employee turn around. You can check the **REMOVE DELETED EMPLOYEE** checkbox to not display employees that have been deleted from the Employee file.
7. When the desired employees have been selected, Press **OK**.


DESCRIPTION

SELECT ALL REMOVE DELETED EMPLOYEE

<input type="checkbox"/> Bartender BART	<input type="checkbox"/> MANAGER	<input checked="" type="checkbox"/> Cassie Cashier	<input type="checkbox"/> KIOSK	<input type="checkbox"/> C R S - M S R	<input type="checkbox"/> Training Employee
<input checked="" type="checkbox"/> ALEXANDER	<input checked="" type="checkbox"/> Craig Fuss	<input type="checkbox"/> Lyn Server	<input type="checkbox"/> Assistant Manager		

SELECTED ITEM COUNT : 3

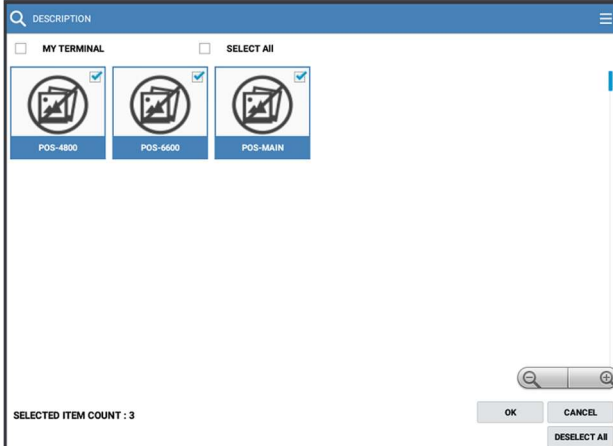
OK CANCEL DESELECT ALL

- Press the Search icon  to load the list of transactions for your specified date range and employee selection.




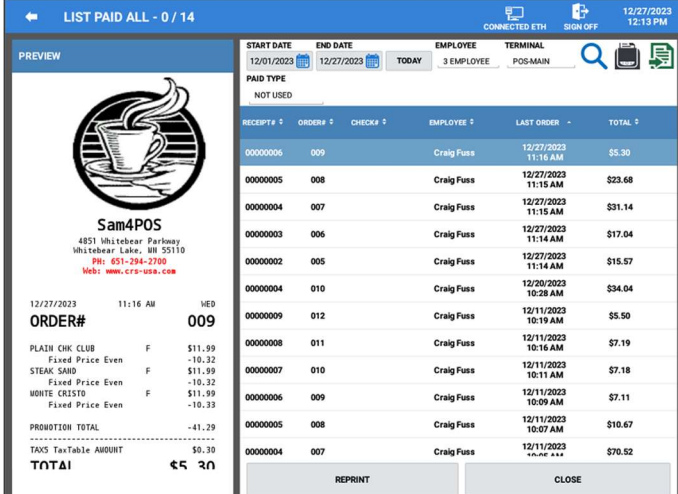
RECEIPTS	ORDERS	CHECKS	EMPLOYEE	LAST ORDER	TOTAL
00000010	012		ALEXANDER	12/27/2023 11:22 AM	\$18.01
00000009	011		ALEXANDER	12/27/2023 11:21 AM	\$22.65
00000008	010		ALEXANDER	12/27/2023 11:21 AM	\$15.57
00000008	006		ALEXANDER	12/19/2023 10:19 AM	\$31.16
00000006	005		ALEXANDER	12/18/2023 09:03 AM	\$19.17
00000006	001		ALEXANDER	12/11/2023 11:39 AM	\$0.00
00000012	001		ALEXANDER	12/08/2023 12:47 PM	\$11.65
00000001	001	1001	Craig Fuss	12/05/2023 04:09 PM	\$46.12
00000016	015		Cassie Cashier	12/04/2023 02:03 AM	\$0.83
00000015	014		ALEXANDER	12/04/2023 11:18 AM	\$38.44
00000014	013		ALEXANDER	12/04/2023 11:16 AM	\$38.44
00000013	012		ALEXANDER	12/04/2023 11:16 AM	\$0.00

- Use the **TERMINAL** filter to select specific stations from the list to view transactions registered only at the specified stations as desired.
 - The **MY TERMINAL** checkbox will select transaction from the station you are currently on.
 - The **SELECT ALL** checkbox will select transactions from ALL stations.




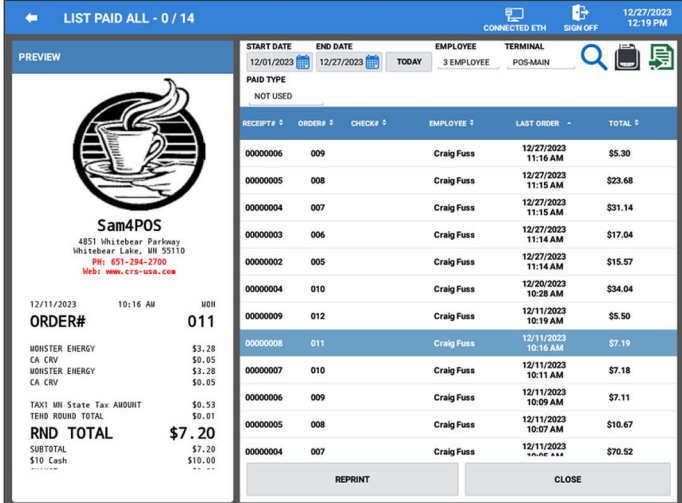
- Press **OK**.

- Touch the Search icon  to load the list of transactions for your specified date range, employee selection and terminal selection.




RECEIPTS	ORDERS	CHECKS	EMPLOYEE	LAST ORDER	TOTAL
00000006	009		Craig Fuss	12/27/2023 11:16 AM	\$5.30
00000005	008		Craig Fuss	12/27/2023 11:15 AM	\$23.68
00000004	007		Craig Fuss	12/27/2023 11:15 AM	\$31.14
00000003	006		Craig Fuss	12/27/2023 11:14 AM	\$17.04
00000002	005		Craig Fuss	12/27/2023 11:14 AM	\$15.57
00000004	010		Craig Fuss	12/20/2023 10:28 AM	\$34.04
00000009	012		Craig Fuss	12/11/2023 10:19 AM	\$5.50
00000008	011		Craig Fuss	12/11/2023 10:16 AM	\$7.19
00000007	010		Craig Fuss	12/11/2023 10:11 AM	\$7.18
00000006	009		Craig Fuss	12/11/2023 10:09 AM	\$7.11
00000005	008		Craig Fuss	12/11/2023 10:07 AM	\$10.67
00000004	007		Craig Fuss	12/11/2023 10:07 AM	\$70.52


12. Select a transaction from the list to preview the receipt.
13. Press the **REPRINT** button to print a copy of the receipt for the transaction.
14. To print a summary of **all** of the paid transactions in the list, press the **Print icon** . See Print List Paid Example on page 190.



15. Press the **Export icon**  if you want to export the list paid transaction summary.
16. **Choose the Export Path** where you want to send the data:



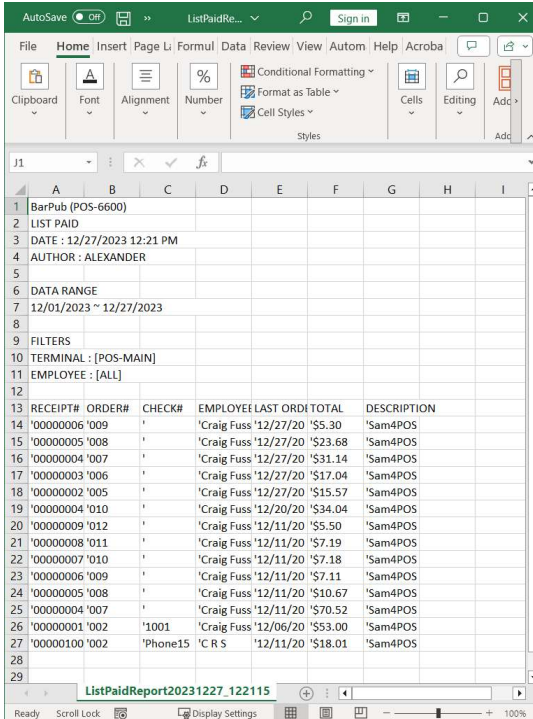
- USB
 - EMAIL
17. The transaction summary will be exported and you will be returned to the List Paid screen. The Export Success notification will display briefly.
 18. The exported file is sent in a Date & Time stamped spreadsheet (.csv) format.

 ListPaidReport20231227_122115.csv

- If the transaction summary was saved to a USB, it will be in the folder:

|Report\StoreName\POS-6600>ListPaid

19. Press **CLOSE** on the List Paid screen to return to the register screen.



Print List Paid Example

```

Sam4POS
10/26/2021          12:36 PM          TUE
BarPub (POS-2)
LIST PAID
DATE : 10/26/2021  12:36
                AUTHOR : MANAGER

DATA RANGE
10/26/2021 ~ 10/26/2021

=====
RECEIPT# 00006013 ORDER#          032
EMPLOYEE                MANNY
10/26/2021 12:11 PM TOTAL        $32.54
-----
RECEIPT# 00006012 ORDER#          031
EMPLOYEE                MANNY
10/26/2021 12:11 PM TOTAL        $47.00
-----
RECEIPT# 00006011 ORDER#          030
EMPLOYEE                ANDREA
10/26/2021 12:11 PM TOTAL        $32.54
-----
RECEIPT# 00006009 ORDER#          029
EMPLOYEE                MANNY
10/26/2021 12:11 PM TOTAL        $19.18
-----
RECEIPT# 00006008 ORDER#          028
EMPLOYEE                ANDREA
10/26/2021 12:11 PM TOTAL        $9.58
-----
RECEIPT# 00006007 ORDER#          027
EMPLOYEE                ANDREA
10/26/2021 12:11 PM TOTAL        $0.83
-----
RECEIPT# 00006006 ORDER#          026
EMPLOYEE                ANDREA
10/26/2021 12:11 PM TOTAL        $32.54
-----
NO. 00006014  REG: POS-2          MANAGER
-----
*****

```

TIP Entry (Gratuity)

Only used with integrated payment, all Tips (*gratuities*) indicated by the customer on the credit card payment draft must be entered at the ECR before the batch is closed. The processor must allow “By Record” operations (*Tokenization*) for Gratuity Entry operations (*EMV Tip Adjustment*).

On the List Paid key, when the Paid Type is set for TENDER and the Tender Category is set for MISC, the NO TIP filter and the TIP ENTRY button appear and the transactions matching your settings are displayed.

- **NO TIP** – Filters for all MISC transactions that have No Tip applied.
- **TIP ENTRY** – Allows for Tip Entry on the selected MISC tender transaction. If Seat # assignment is used you can select each Seat# to apply a Tip to.

Refer to the “Integrated Payment Transactions” chapter “Gratuity (Tip) Entry” on page 131 for this procedure.

Gratuities (Tips) entered here will replace any previous Gratuity (Tip) entered for the same transaction. If the Employee is set up as an ADMIN employee, they can assign Tips to other employees, other Non-Admin employees can only enter their own Tips.

If desired, a Suggested Gratuity may be programmed to appear on sales Receipts by adding the Gratuity Line to the receipt message and programming the Gratuity amount in Program Mode \ Receipt & Message programming.

When using the EMV transaction types below:

- **Debit Card transactions**
 - ⇒ Tips must be entered using a PLU or other method prior to finalizing the sale.
 - ⇒ Alternately, Tips can be added at the time of payment when the Sam4POS Gratuity Flag option is set to “Prompt For Tip On Pin-Pad”.
- **GIFT Card transactions**
 - ⇒ Tips must be entered using a PLU or other method prior to finalizing the sale.
- **Contactless Payments**
 - ⇒ Contactless Payment is supported so long as the Pin-Pad being used supports this feature AND the processor also supports the Contactless Payment method.
 - ⇒ Payment methods such as Google Pay and Apple Pay, as well as some other processor platforms, do not allow for EMV TIP Adjustments.

LIST PAID SCREEN - EXAMPLE

Note: When using integrate payment and the **Paid Type = TENDER** and **Tender Category = MISC**

All transactions will appear with Red Font. After entering a TIP to a Credit Card transaction, that transaction will then be displayed with Black Font and include the TIP amount entered.

RECEIPT #	ORDER #	INVOICE #	EMPLOYEE	LAST ORDER	TOTAL (TIP TOTAL)
00003793	POS-1,193	2234	DON V. (---)	2022-12-20 15:39	\$0.01 (---)
00003749	POS-1,149	2238	NANCY (NANCY)	2022-12-17 18:49	\$50.25 (\$9.75)
00003745	POS-1,145	2235	NANCY (NANCY)	2022-12-17 22:31	\$75.90 (\$15.00)
00003744	POS-1,144	2234	NANCY (NANCY)	2022-12-17 19:12	\$16.89 (\$8.00)
00003743	POS-1,143	2233	NANCY (NANCY)	2022-12-17 19:42	\$12.69 (\$7.31)
00003697	POS-1,197	2199	DON V. (DON V.)	2022-12-17 00:15	\$13.32 (\$10.00)
00003692	POS-1,192	2198	DON V. (---)	2022-12-16 15:02	\$0.01 (---)
00003680	POS-1,180	2192	JANET (JANET)	2022-12-15 20:39	\$18.81 (\$7.00)
00003673	POS-1,173	2187	JANET (---)	2022-12-15 20:37	\$14.43 (---)
00003671	POS-1,171	2185	JANET (JANET)	2022-12-15 20:43	\$10.00 (\$3.00)
00003668	POS-1,168	2182	JANET (JANET)	2022-12-15 18:51	\$11.43 (\$3.00)
00003667	POS-1,167	2181	JANET (---)	2022-12-15 18:51	\$17.36 (\$3.00)

Void Sales

Also available on the List Paid key when the Paid Type is set for Tender and the Tender Category is set for MISC is a VOID SALES button. When Integrated Credit is utilized, Credit transactions can be voided from the batch in the register mode using this operation on the List Paid function key.

Important: This operation is used *only* with credit transactions when integrated credit is used.

1. Touch the **LIST PAID** key; the transaction preview screen is displayed.
2. Select **Paid Type = Tender** and choose **Tender Category = MISC**.

RECEIPT#	ORDER#	INVOICE NO	EMPLOYEE	LAST ORDER	TOTAL (TIP TOTAL)
0000016	017		Bartender BART	12/27/2023 01:19 PM	\$34.20
0000015	016		Lyn Server	12/27/2023 01:18 PM	\$18.00
0000013	015		ALEXANDER	12/27/2023 01:17 PM	\$48.20
0000012	014		MANAGER	12/27/2023 01:16 PM	\$62.30
0000011	013		ALEXANDER	12/27/2023 01:14 PM	\$46.70
0000010	012		ALEXANDER	12/27/2023 11:22 AM	\$18.00
0000004	007		Craig Fuss	12/27/2023 11:15 AM	\$31.15

3. Select the transaction from the list you wish to void; then press the **VOID SALES** button.
4. Press **YES** to void the selected transaction; press **NO** to exit the operation without voiding.

VOID SALES

ARE YOU SURE?

YES NO

Return#

Only Used with DC Direct integrated payment terminals.

When an EMV Sale is processed a token is requested in the EMV Sale and processed as credit. If a customer requests a refund for one item or all items after the batch has already been closed, even if the request is made several days later. With the option **SHOW RETURN#** selected on the function key, the **RETURN#** can be used to facilitate a Return By Record No process to refund the customer the total sale amount or a partial amount of a sale. Refer to the "Return#" operation on page 133 for details.

Customer Delivery

Overview

The Customer \ Delivery feature with Sam4POS maintains a customer data file for assigning a customer to an order for eat-in or pick-up or creating an order for delivery to a customer. The Customer category must be enabled in the program mode before this feature can be utilized, consult with your local dealer for details.

Customer records for the delivery feature are stored in the CUSTOMER category in the Program Mode. The Customer category has two program areas, Customer and Customer Group. Two separate function keys, a Customer key & a Delivery key can be used to initiate a transaction. New customers can be added from this program area or you can add or edit customers from the register mode by pressing the Customer function key.

Programming:

- The **CUSTOMER** program area INFO button has fifteen information entry fields available for each customer. You can enter data into all of the fields or just the entries necessary for your application.
- Pressing the ORDER button will display the Order history for the selected customer.
- You can choose the time period of orders to view by Day, Week, Month, or Year. Press the search icon to load the transaction according to your period selection. Choose an order from the list to view the receipt for transaction.
- **CUSTOMER GROUPS** can be used to assign a Point Rate for different companies or organizations.
Note: (Currently, points cannot be “redeemed”, only the accrual of points is accommodated.)

Function Keys:

- The **CUSTOMER** function key is used to associate the current transaction to a specific customer.
- The **DELIVERY** function key is used to initiate a delivery or pick-up transaction. When touched, the Delivery key opens the customer record screen. Here existing accounts can be opened, new accounts created, or existing accounts deleted.

Operations:

- Press the **Customer** function key anytime, before or during a sale to associate the current order with the selected customer. See “Customer Operations” on page 194 for details.
- Press the **Delivery** function before registering an order to create a delivery order. Delivery Orders are tracked by assigning a tracking file (*Recall Table/Store Table*) to hold the customer delivery orders. The Delivery operation also allows you to accept orders and hold them for preparation and delivery at a later time. Refer to the “Delivery Operations” chapter on page 195 for details.

Customer Delivery Function Keys

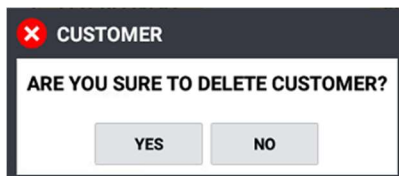
The function keys used with the Customer \ Delivery feature are defined here.

Function Key	Description
Customer	Use the Customer function key to associate an order with a selected Customer. Orders opened using the customer function key cannot be stored. Pressing the Customer key will open the customer records list screen. Here you can add a new customer or select a customer from the list to associate the order with the selected customer.
Delivery	The Delivery function key can be used to initiate a delivery order transaction. Pressing the Delivery key opens the customer list screen. Here existing customer accounts can be accessed, edited or deleted, or new accounts created. An order created using the Delivery key may be stored and/or the delivery order printed.
Store Table	When a delivery order is created using the Delivery function key, the order can be stored by pressing the Store Table key.
Recall Table	Recall Table is used to open a specific delivery order. Press the Recall Table key used for the delivery feature. The Input Check# / Scan Barcode dialog displays. Enter the Check # or Scan the barcode for the check; (<i>you can also press the List Check button on the dialog to select from a list</i>) and press OK to open the delivery check.
List Table	A separate List Table keys can be created for just for customer delivery. The LIST TABLE is used to display a list of all open customer delivery transactions. The total number of checks is displayed on the header.
Print Check	Print Check is used to print out the delivery order. The customer info can be printed on Customer Delivery orders if desired.

Customer Operations

Use the Customer function key to associate an order with a specific customer. Pressing the Customer key will open the customer list screen. Select a customer from the list you wish to associate the current order with. The customer information may be edited as necessary or new customers can be added to the customer list.

- You can register items into an order, then press the **CUSTOMER** key to select or add a customer to associate the order with.
 - Alternatively, you can begin an order by pressing the **CUSTOMER** key first and selecting a customer from the list or add a new customer, then register the items for the sale.
- If the incorrect Customer was selected for the sale, pressing the **CUSTOMER** key again will prompt:



Press **YES** to remove the currently selected Customer from the sale.


Pressing **NO** will cancel the operation without removing the Customer selection.

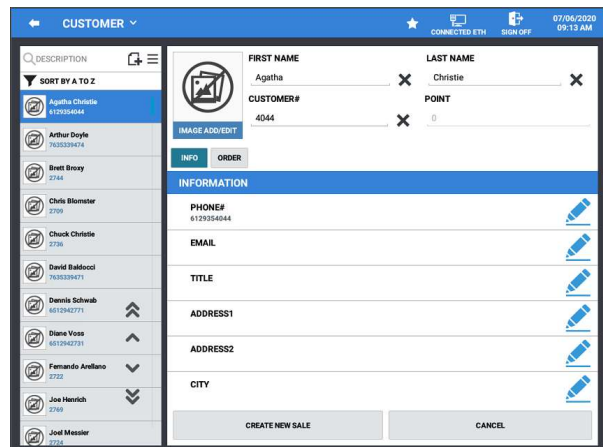
- You can then press the **CUSTOMER** key again to select another Customer to associate with the sale.

Delivery Operations

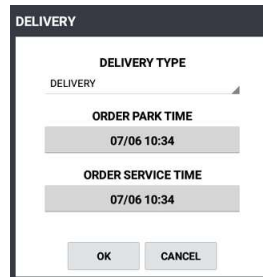
The Delivery function key can be used to initiate a delivery order transaction. The Delivery key must be linked to a specific Recall Table key for proper management of the delivery order. Pressing the Delivery key opens the customer records list screen. Existing accounts can be opened, new accounts created, or existing accounts deleted. An order created using the Delivery key may be stored and/or a check printed.

Entering a Delivery Transaction

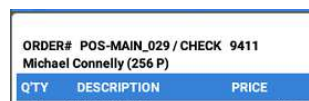
1. Touch the **DELIVERY** key to initiate a delivery order. The customer record screen displays.
2. Select a customer from the list or touch the **Add New Record** icon  to add a new customer to the list.
3. Press the **CREATE NEW SALE** button at the bottom of the screen to begin a new delivery order.



4. The **DELIVERY** dialog displays; Select the parameters for the new order:
 - Delivery Type** – Select Delivery or Pick-Up from the drop down menu.
 - Order Park Time** – Press to select date & time.
 - Order Service Time** – Press to set the date & time to service the order. (*Release the order for preparation.*)
5. Touch **OK** to begin an order. A new delivery order check will open. Pressing **CANCEL** will exit without creating the delivery order.



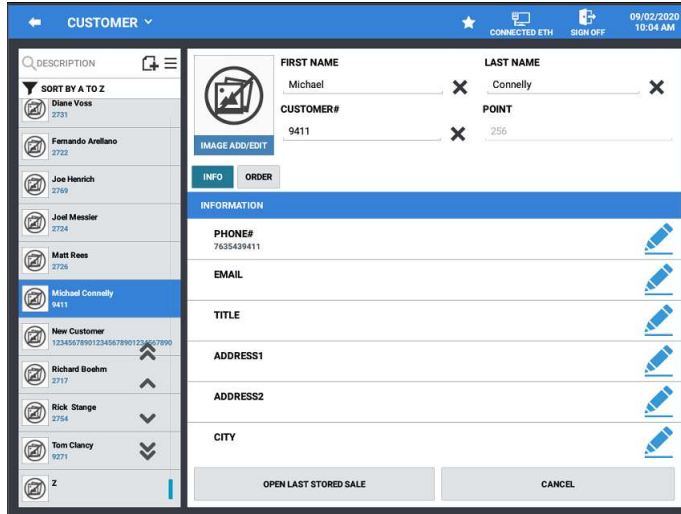
6. At the top of the transaction window; with the Order # ? Check # are displayed as well as the Customer Name.
 - Order #** = as defined in the Program Mode > Options > Options > KP/KV Option programming.
 - Check number** = the Customer # from the customer database.
7. Register the items for the customer then Touch the **STORE** key associated with the Delivery. Requisitions will be directed to the kitchen printer (if used). When complete, Deliver the order. *Alternately, the payment can be applied to the order to finalize the order for delivery.*



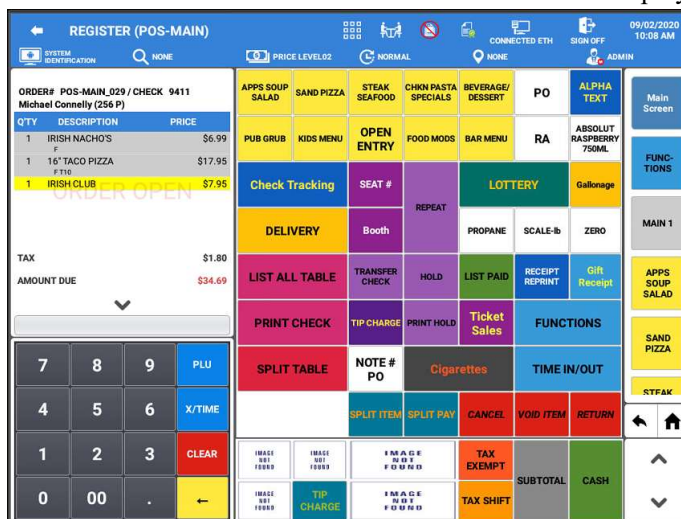
Open Stored Delivery Order

When a Delivery order that has not yet been paid for has been delivered to the customer, you can recall the stored order to apply the payment and finalize the transaction.

1. Touch the **DELIVERY** key to display the customer record screen and select the appropriate customer from the list.



2. After selecting the customer from the list, press the **OPEN LAST STORED SALE** button at the bottom of the screen to display the stored order for the selected customer:
3. The **Last Stored Order** for the selected customer will be displayed:

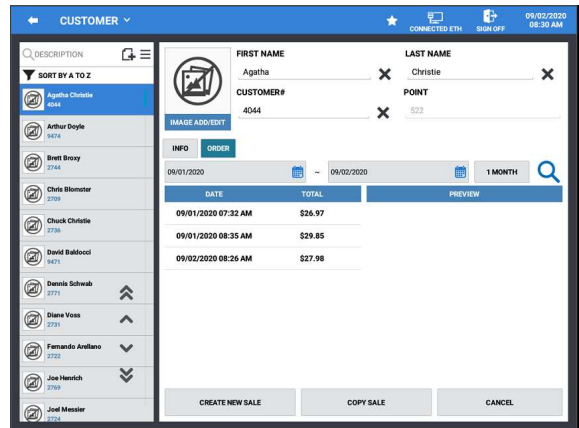


4. Enter the payment received for the order to finalize the transaction.

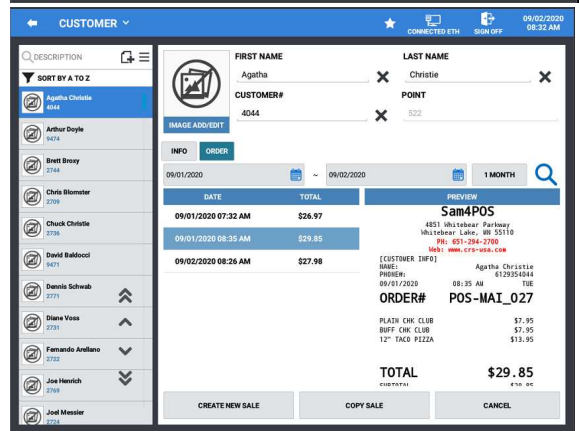
Re-Order Previous Order

At times a delivery customer may want to reorder the same items as their previous order. With the Sam4pos, previous orders can easily be recalled and ordered again in a new sale.

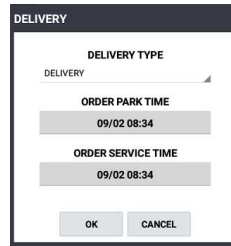
1. Touch the **DELIVERY** key to display the customer record screen and select a customer from the list to begin a new delivery order.
2. After selecting the customer from the list, press the **ORDER** button to display the previous orders list for the selected customer:



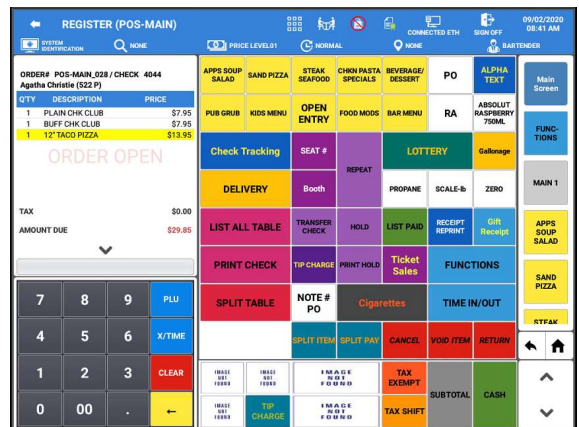
3. Choose the order from the list you want to reorder.
4. Press the **COPY SALE** button at the bottom of the screen; The **DELIVERY** dialog is displayed:



5. Select the parameters for the new order:
 - Delivery Type** – Select Delivery or Pick-Up from the drop down menu.
 - Order Park Time** – Press to select date & time; allows you to accept orders and hold them for preparation and delivery at a later time.
 - Order Service Time** – Press to select date & time; releases parked orders for preparation.



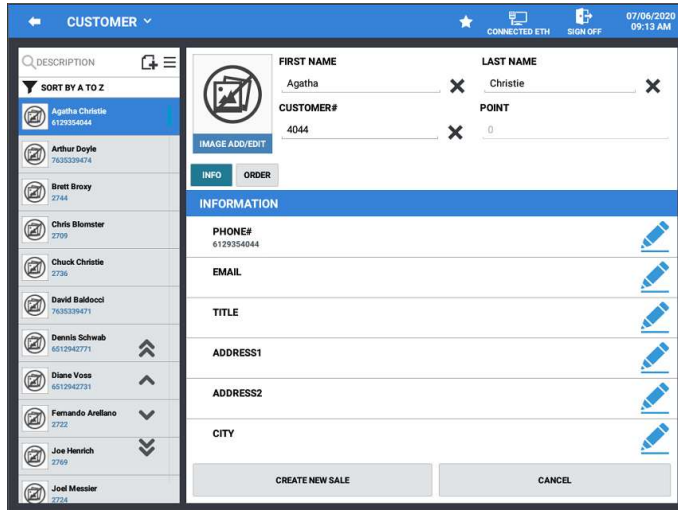
6. Touch **OK** to begin an order. A new delivery order the same as the previous order will open with the customer account number as the check number. Pressing **CANCEL** will exit without creating the delivery order.
7. Items may be added or deleted as necessary, Store the order or tender the order to send to the KP (if used). Delivery when ready.




Park Order for Delivery at a Later Time

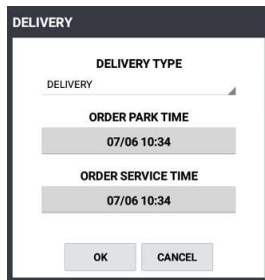
A customer may want to place a delivery order to be picked up or delivered at a later date and/or time. The Sam4POS provides for this using the Order Park Time and the Order Service Time settings when a delivery order is initiated.

1. Touch the **DELIVERY** key to initiate a delivery order. The customer record screen displays:



The screenshot shows the 'CUSTOMER' screen in the Sam4POS application. On the left is a scrollable list of customer names and IDs. The selected customer, Agatha Christie (ID: 6129354044), is highlighted. The right side of the screen displays the customer's details: FIRST NAME (Agatha), LAST NAME (Christie), CUSTOMER# (4044), and POINT (0). Below this is an 'INFORMATION' section with fields for PHONE#, EMAIL, TITLE, ADDRESS1, ADDRESS2, and CITY, each with an edit icon. At the bottom are 'CREATE NEW SALE' and 'CANCEL' buttons. The top of the screen shows a navigation bar with 'CUSTOMER', a star icon, 'CONNECTED ETH', 'SIGN OFF', and the date/time '07/06/2020 09:13 AM'.

2. Select a customer from the list or touch the **Add New Record** icon  to add a new customer to the list. Press the **CREATE NEW SALE** button to begin a new order. The **DELIVERY** dialog displays:



The screenshot shows the 'DELIVERY' dialog box. It has a title bar 'DELIVERY'. Below the title bar is a 'DELIVERY TYPE' dropdown menu with 'DELIVERY' selected. Underneath are two sections: 'ORDER PARK TIME' and 'ORDER SERVICE TIME'. Each section has a date and time field, both showing '07/06 10:34'. At the bottom are 'OK' and 'CANCEL' buttons.

3. Select the parameters for the new order:
 - Delivery Type** – Select Delivery or Pick-Up from the drop down menu.
 - Order Park Time** – Press to select date & time for the pre-order pick-up/delivery order.
 - Order Service Time** – Press to select date & time to releases parked order for preparation.
4. Touch **OK** to initiate the order. Pressing **CANCEL** will exit without creating the delivery order.
5. Enter the requested items; Press the **STORE DELIVERY** key to save the delivery order.
6. Parked orders can be recalled and edited as necessary.
 - a. Press the **DELIVERY** key
 - b. Select the **CUSTOMER** from the list
 - c. Press the **OPEN LAST STORED SALE** button; Add or edit as necessary
 - d. Press the **STORE DELIVERY** when finished.
7. When the set Date & Time for the Order Service Time arrives, the order will be sent to the KP (if used) to begin preparation. Deliver the order when you compete.

End Of Day

End Of Day Screen



End Of Day operations allow employees with the proper authority level to access and generate the End Of Day operation. This operation needs to be generated daily. Generating an EOD report will clear the current data on the terminal. If desired, an EOD function key can be assigned to an MLU, FLU or the real keyboard (*on SAP-630 & SAP-530 terminals*).

Generating the **End Of Day** (EOD) clears the current data on the terminal and updates the report data, this operation must be performed daily. Report totals are not deleted, only the current totals (*since the last EOD*) are cleared. All report totals for the day are still accessible from the Report Mode as explained on page 211 in this manual. The EOD operation can be generated multiple times in a day to accommodate shift reporting, therefore there are no EOD report counters.

Filters and Options are available as well as selections to Print and/or E-mail the reports for all terminals all employees or select specific reports for specified terminals & employees. It is not mandatory to print reports when the processing the EOD since report totals are not deleted, only the current totals are cleared.

If set up to E-Mail Reports, they will be sent to the designated email addresses as defined in the Program Mode \Options\Options\Report Option programming and the EOD will be cleared. No filters or option selections will be available.

Cash Declaration can also be performed from the End Of Day screen. This operates the same as the described in the “Report Mode \ Cash Declaration” example on page 250.

1. From the **Main Menu** selections, press the ‘**END OF DAY**’ icon (*Z-position on the SAP-630 & SAP-530*). The default End Of Day screen displays.

DATE	COUNT	TOTAL	TYPE
------	-------	-------	------

End Of Day Notes

An employee must be signed on to access the END OF DAY mode; Depending on the employee's authority level, the manager password entry may also be required for access to the END OF DAY mode.








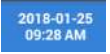


If a terminal is not present in the system when the EOD is generated, the data for that station will not be closed (or posted). When the Network is restored and the next EOD is generated, the system will process reports for all the terminals including any previously unavailable terminals report data.

When using guest checks, if each guest check store/recall and tendering operation are performed at different terminals and the EOD Option "Set Current Terminal" is selected balancing problems will occur. To avoid balancing issues in these circumstances, SAM4POS will automatically disable the "Set Current Terminal" option selection.

Split Database – When EOD is performed, SAM4POS will automatically split the sale data to internal memory if the working database is over the setting in SYSTEM OPTION: SALE DATA SPLIT SIZE (Mb). The default setting is 30 MB. The sale data split is performed to speed up normal transaction entry by making the working Database smaller.

Device Self-Storage Management – When enabled, this feature controls how much data is to be held (saved / stored) on the terminal as determined by the SYSTEM OPTION: SELF-STORAGE MANAGEMENT DATA SIZE LIMIT (MB) setting. A USB Flash Drive must be connected, data over the size limit will be saved to the USB, then deleted from the station.

End Of Day Icons

Icon	Function Description
	Back Arrow – Exits the report mode.
	Report Mode title shows the current mode selection and the Terminal Descriptor. Pressing this title will open the detail report list.
	Up/Down Carrot icons are used to Display/Hide the sub menu selections; End Of Pay and End Of Not Found PLU.
	Cash Declaration – Brings up the Cash Declaration dialog for counting and reporting media amounts in the drawer before a report is taken.
	Favorite icon – Press this icon to add (<i>gold star</i>) or remove (<i>white star</i>) End Of Day on the favorites list.
	<p>Network Connection Method – Ethernet or WiFi: Tap this icon to access the main Android, Wireless & Network settings. The Manager Password is required for access. (<i>Registers do not need to be online for normal operation.</i>)</p> <ul style="list-style-type: none"> If the terminal is not connected to the internet, the connection method may indicate: **DEMO** or **DISCON 1 DAY** this is normal and does not affect software or register operation, even when this number reaches “0”. <p>IRC Error - When IRC is used, if the main terminal is turned off, the IRC Error displays on the satellite terminals.</p>
	Sign Off – Allows you to sign off the current employee and return to the main Sign-On screen.
	Date/Time – Touch this icon to display the clock on the entire screen. Tap the screen again to return to the summary report screen.
	Search icon – Used to search for and load report data for the grid.
	Generate icon – After loading & selecting the EOD reports, press the generate icon to generate the EOD and clear current totals.

EOD Filters/Options

The End Of Day filters and options allow you to choose specific data to be presented when the EOD is generated. Each station in a system can have its own Filters, Options, and Reports selections, changing these selections at one station does not update all stations in an IRC System. The EOD Options & Filters selections will print at the top of the printed reports. It is not mandatory to print reports when processing the EOD since report totals are not deleted, only the current totals are cleared. Report data can still be accessed from the Report Mode.

FILTERS

EOD Filters allow you to generate the EOD for a specified terminal and employee. EOD Filters return to their default setting when you leave the EOD screen. You will need to select the desired filter settings when the EOD is accessed again.

TERMINAL

Choose the MY TERMINAL or SELECT ALL check boxes as desired, you can also select specific terminals.

EMPLOYEE

Choose the SELECT ALL check box or select specific employees for the EOD. The list will display all current employees as well as deleted employees. Deleted employees will appear grayed out in the list of employees. You can check the REMOVE DELETED EMPLOYEE check box to hide these employees in the employee list.

OPTIONS

EOD Options allow you to set how data is presented if selected to print reports when the EOD is generated as well as specific actions to occur when the EOD is generated. The selected options will remain checked each time you access the EOD.

DETAILED LIST

When selected the EOD report data is Listed by individual transactions. This allows you to check or uncheck the EOD Report dates you wish to be printed and/or e-mailed when the EOD report is generated.

Column headers are changed and include: SALE TIME, CLOSING, TERMINAL, EMPLOYEE, SALE AMOUNT, PAID AMOUNT, TYPE. EOD Data can be sorted in ascending or descending order by clicking the column header.



<input checked="" type="checkbox"/>	SALE TIME	CLOSING	TERMINAL	EMPLOYEE	SALE AMOUNT	PAID AMOUNT	TYPE
<input checked="" type="checkbox"/>	2024-04-02 14:44:04	2	POS-MAIN	ALEXANDER	\$32.58	\$34.25	SALE
<input checked="" type="checkbox"/>	2024-04-02 14:45:30	2	POS-630	Craig Fuss	\$38.94	\$41.10	SALE

Detailed List can be sorted by clicking the column header title.

RESET CONSECUTIVE

Check this option to reset the consecutive transaction number that is printed on receipts.

RESET ORDER

Check this option to reset the order number that is printed on the kitchen printout.

FINANCIAL REPORT BY TERMINAL

Used in IRC configurations, prints\emails the financial report data for all terminals and by each individual terminal.

CLEAR EMV FILE

When using the integrated credit feature, this clears the internally stored EMV file that stores the Authorization Response messages that allow the Sam4POS to perform "By Record Number" transactions. Specifically, the Void Transaction by Record Number and Gratuity Entry.

RESET CHECK

Select when you wish to reset the check number when the EOD report is run.

SEND TO TEXT INSERTER ONLY – NO PRINTER OR E-MAIL

Option used to send report data to a Text Inserter. Also see: OPTIONS \ REPORT OPTION \ GENERAL \ EMPLOYEE REPORT FROM REGISTER MODE - ONLY TO TEXT INSERTER

SET CURRENT TERMINAL

Select this option if you want to run the EOD report only for the station you are currently on.

EFT BATCH CLOSE

When this option is selected, the EFT batch will be closed after generating the EOD report.

PRICE LEVEL

Select to present item sales on the PLU Report split out by each price level used by each item.

Print & Email EOD Reports

Selections to Print and/or E-mail the Financial, PLU, Group, Period, Employee, TIP, Promotion, and Product Mix reports for all employees or select specific reports for specified employees.

If reports are selected to E-Mail, they will be sent to the designated email addresses as set up in the Program Mode\Options\Options\Report Option programming and the EOD will be cleared. No filters or option selections will apply.

Note: Multiple days appearing on EOD reports printed or emailed indicates that the EOD is not generated daily, or if there are multiple stations in an IRC, one or more stations did not report at the time a previous EOD was generated.

PRINT REPORTS

Check or uncheck the reports you want to print when the EOD is generated. Report selections will remain selected each time the EOD report screen is accessed.

Print Report Selections are:

Financial, PLU, Group, Period, Employee, TIP, Promotion, and Product Mix

When reports are selected in the Print Reports, selected reports will be printed and will send to the EJ Report.

If no reports are selected in the Print Reports, no reports will be printed and nothing will send to the EJ Report.

EJ is saving receipts, so with nothing selected to print, the EJ is not saving anything.

E-MAIL REPORTS

Check or uncheck the reports you wish to be emailed when the EOD is generated. Report selections will remain selected each time the EOD report screen is accessed.


E-Mail Report Selections are:

Financial, PLU, Group, Period, Employee, TIP, Promotion, and Product Mix.

Note: E-Mail settings must be set up in the Program Mode > Options > Options > Report Option for this feature. The Report Options: Send Email On End Of Day must be selected and the merchants Gmail Account & Password information, and the Email Addresses For Export must be entered before the E-MAIL REPORTS selections will appear on the EOD screen.

Emailed reports are in the same format as printed on a receipt printer. When a new PC/Device logs into Gmail for the first time the account will likely get a security alert. The account owner will need to mark the activity as safe, then the device will be able to connect.

Generating EOD

1. From the **Main Menu** selections, press the **'END OF DAY'** icon (*Z-position on the SAP-630 & SAP-530*), The default End Of Day screen displays.
2. Select the **Filters** and **Options** as desired for the report; Check or Uncheck reports you want to be **Printed** and/or **E-Mailed** when the EOD report is generated. (To E-Mail reports, the email settings must be set up in the Program Mode > Options > Options > Report Option.)
3. Press the  **Search** icon to load the available End Of Day report list.

END OF DAY 08.01.2025 11:11 AM

TOTAL 8 **NET SALES** 8
\$2937.05 **\$2937.05**

GENERATE

FILTERS
TERMINAL ALL **EMPLOYEE** ALL

OPTIONS
 DETAILED LIST RESET CONSECUTIVE # RESET ORDER # FINANCIAL REPORT BY TERMINAL CLEAR EMV FILE RESET CHECK #
 SEND TO TEXT INSERTER ONLY - NO PRINTER or E-MAIL SET CURRENT TERMINAL EFT BATCH CLOSE PRICE LEVEL

PRINT REPORTS
 FINANCIAL REPORT PLU REPORT GROUP REPORT PERIOD REPORT EMPLOYEE REPORT TIP REPORT PROMOTION REPORT
 PRODUCT MIX REPORT

E-MAIL REPORTS
 FINANCIAL REPORT PLU REPORT GROUP REPORT PERIOD REPORT EMPLOYEE REPORT TIP REPORT PROMOTION REPORT
 PRODUCT MIX REPORT

DATE	COUNT	TOTAL	TYPE
2025-08-01	8	\$2937.05	SALE

4. The report summary at the top of the screen shows the TOTAL SALES Count & Amount, NET SALES Count & Amount, RA/PO Count & Amount at the top of the screen. The report detail header breaks down the EOD data by DATE, COUNT, TOTAL, and TYPE for the day.
 - EOD report data can also be sorted in ascending or descending order by tapping on the desired column heading.
 - Check the select all box on the header row (by default, all reports are selected) or uncheck the select all box to allow selecting individual EOD reports to generate.
5. Press the **EOD icon** in the Generate area to clear the current totals and issue your selected reports. Reports will be printed and emailed as selected.

Additional EOD Notes:

- When using guest checks, if each guest check store/recall and tendering operation are performed at different terminals and the EOD Option "Set Current Terminal" is selected balancing problems will occur. To avoid balancing issues in these circumstances, SAM4POS will automatically disable the "Set Current Terminal" option selection.
- In an IRC System, depending on the Sync Type setting at the POS-Main:
 - Real-Time Synchronization** – All sale/transaction data and program data is synchronized with all stations in the system as the sales/transactions or program changes are performed (*Real-Time*). The more stations there are in a system, the busier the entire system will be. Refer to the chapter "Regarding Sync Type Settings" on page 209 for details.
 - Synchronize Before Report Operation** – When report data (*EOD, Report Mode Summary or Detail report or Calendar report*) is loaded at the satellite station, only the sales data for that station will be seen. When reports are performed (*EOD, Report Mode Summary or Detail Report or Calendar Report*) on the POS-Main terminal, All sale/transaction data is synchronized between all stations in the system. Refer to the chapter "Regarding Sync Type Settings" on page 209 for details.
- If a terminal is not present in the system when the EOD is generated, the data for that station will not be closed (or posted). When the Network is restored and the next EOD is generated, the system will process reports for all the terminals including any previously unavailable terminals report data.
- The EOD can also be generated from the register mode if the signed on employee has the appropriate authority level. An EOD function key may also be assigned to an MLU \ FLU or real keyboard to allow processing the EOD report from the register mode.

Sale Data Split

When the EOD is generated, SAM4POS will automatically split the sale data to internal memory if the working database is over the setting in SYSTEM OPTION: SALE DATA SPLIT SIZE (Mb), the default setting is 30 MB. The sale data split is performed to speed up normal transaction entry by making the working Database smaller.

At the station that generates the EOD you may see the notifications: **Saving Please Wait** then **Sale Data Split Please Wait**



During the Sale Data Split operation, all other stations in an IRC System will display the notification message: **Database Split Please Wait**



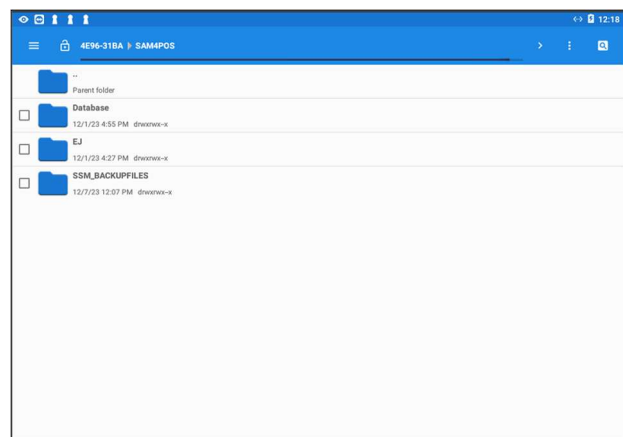
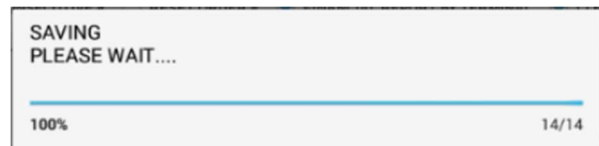
Press **OK** to clear the notification when the Sales Data Split operation completes at the terminal that initiated the Database Split.

Self-Storage Management

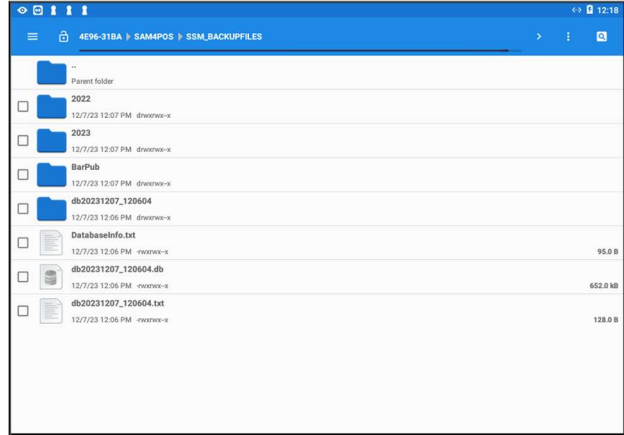
When the System Option: Device Self-Storage Management is enabled, and the total storage on the terminal is over the setting in the System Option: Self-Storage Management Data Size (MB), when the EOD is generated and the Database Split has finished, the Self-Storage Management process will initiate automatically.

- Data is backed up to the USB
 - USB Flash Drive must be connected prior to generating the EOD.
- Self-Storage Management files are deleted.
 - If no USB drive is present: SSM still deletes that data from the terminal.
- When storage management is complete, the files are relocated to the USB:

USB:\SAM4POS\SSM_BACKUPFILES



- Inside the SSM_BACKUPFILES directory you will see the EJ Files, Backup DB, Split Sales DB, and Log Files.



If you do not have a USB Flash Drive installed on the terminal, the Self-Storage Management dialog “Failed To Backup Self-Storage Management Please Insert USB” will display.

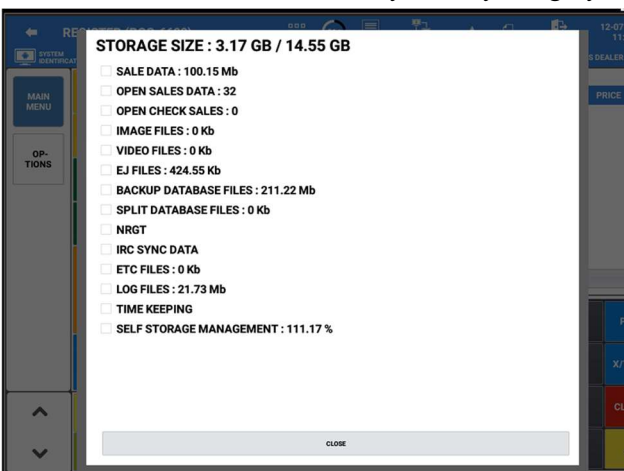


- **YES** : Will not show this message again.
- **NO** : The message will display again at the next Sign-On.

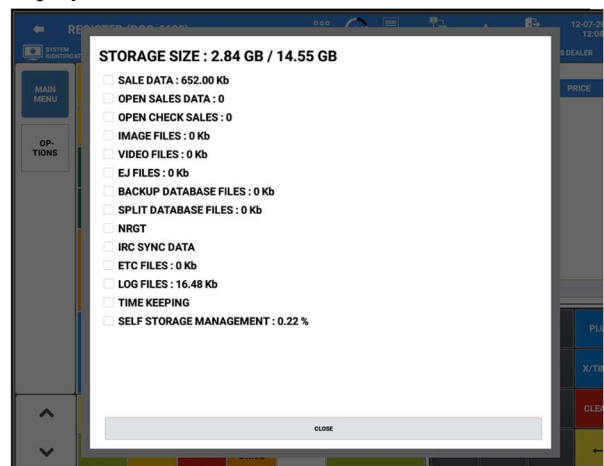
Checking Storage Size

The current Storage Size can be checked from the register mode.

1. From the register mode title bar, press the Utility Information icon.
2. The Storage Usage icon displays the current percentage of Memory Storage currently used.
3. If the percentage of total memory storage used is higher than the System Option: Storage Threshold % value, the Memory Storage percentage value will appear Red.
4. Tap the Memory Storage icon to show the total Memory Storage Size: Used Memory / Total Memory.
 - The breakdown of memory used by category is also displayed.



Register Mode: Memory Storage **Before** EOD



Register Mode: Memory Storage **After** EOD

End Of Day Sub Menu Reports

The End Of Day \checkmark sub menu provides additional report selections for End Of Pay and End Of Not Found PLU.

1. Touch the **END OF DAY** \checkmark title to access the sub menu report selections.

DATE	COUNT	TOTAL	TYPE
2025-08-01	8	\$2937.05	SALE

2. Choose the desired report from the sub menu selections.

END OF PAY

The End of Pay report must be generated at the end of the pay period when the time keeping feature is being used.

END OF NOT FOUND PLU

The End of Not Found PLU report is used to clear the data generated when PLU items are added to the database from the register mode using the Not Found PLU feature.

End Of Pay

The End of Pay report must be generated at the end of the pay period when the time keeping feature is used. This displays the Total Time, Total Labor cost, and Total Overtime for employees broken down by Date. You can generate a report for a selected date/employee.

- Every day, the manager/owner should run the Time In Out Report & verify all the time keeping data is correct.
 - Any edits for time keeping should be performed.
- On the last day of the pay period, after running the Time In/Out Report & verifying/editing the employee times, generate the End Of Day . . . Run the End Of Pay to clear the Time Keeping data. All time clock edits must be performed before generating the End Of Pay report.
 - Not performing the End Of Pay will result in the Time Keeping totals never to be posted.

Note: After generating the End Of Pay report, you will no longer be able to edit the time keeping data for the Dates/Employees selected on the End Of Pay report. Overtime calculations will begin anew when the End Of Pay report is generated.

1. Select the **DATE** and **EMPLOYEES** you wish to clear (or select all).

END OF PAY				
TOTAL TIME	TOTAL LABOR	TOTAL OVERTIME	GENERATE	
07:10	\$100.62	00:00		
DATE	TIME	COST	OVERTIME	
<input checked="" type="checkbox"/> 02-19-2018 - 02-25-2018	07:10	\$100.62	00:00	
<input checked="" type="checkbox"/> Cassie	01:25	\$16.85	00:00	
<input checked="" type="checkbox"/> SONJAI	01:57	\$19.49	00:00	
<input checked="" type="checkbox"/> MANNY	01:51	\$36.99	00:00	
<input checked="" type="checkbox"/> BARTENDER	01:57	\$27.29	00:00	
<input type="checkbox"/> 03-12-2018 - 03-18-2018	143:52	\$1920.90	66:46	
<input type="checkbox"/> SONJAI	106:46	\$1401.50	66:46	
<input type="checkbox"/> BARTENDER	37:06	\$519.40	00:00	
<input type="checkbox"/> 06-11-2018 - 06-17-2018	2312:10	\$49982.92	2152:10	
<input type="checkbox"/> MER	76:52	\$184.22	36:52	
<input type="checkbox"/> SONJAI	745:05	\$10076.25	705:05	
<input type="checkbox"/> MANNY	745:06	\$21953.00	705:06	
<input type="checkbox"/> BARTENDER	745:07	\$15367.45	705:07	
<input type="checkbox"/> 07-02-2018 - 07-08-2018	36:45	\$551.40	00:00	
<input type="checkbox"/> SONJAI	13:32	\$156.77	00:00	
<input type="checkbox"/> MANNY	11:36	\$222.00	00:00	

2. To clear the Time Keeping data, select the date and employees you wish to clear and press the 'End Of Day icon' in the **GENERATE** area. The selected Time In/Out Report will print at the receipt printer.
3. Pressing the 'Show icon' in the **GENERATE** area will reload the **REPORT MODE – TIME IN OUT REPORT** screen. You would press this to edit time keeping prior to clearing End Of Pay.

REPORT MODE - TIME IN OUT REPORT				
DATES TODAY LAST END OF DAY CUSTOM PERIOD 1 DAY 1 WEEK 2 WEEK 1 MONTH 3 MONTH 6 MONTH 1 YEAR		GENERATE 		
START DATE	END DATE			
08.01.2025	08.01.2025			
FILTERS EMPLOYEE: ALL JOB CODE: ALL CLOSED: ALL TYPE: ALL				
NEW EDIT DELETE SHOW				

4. Press the back-arrow icon on the title bar to return to the Report Mode screen.

End Of Pay Notes

- When using the Time Keeping feature, The proper procedure for issuing Time Keeping reports is –

At the End of Each Day –

- ⇒ Run the **TIME IN OUT Report**
- ⇒ Perform **Time Clock Edits** as necessary
- ⇒ Generate the **END OF DAY**

At the End of Pay Period –

- ⇒ Run the **TIME IN OUT Report**
- ⇒ Perform **Time Clock Edits** as necessary
- ⇒ Generate the **END OF DAY**
- ⇒ Generate the **END OF PAY**

Time Clock Edit Notes:

- Time clock edits must be performed **before** the **End Of Day Report** is generated. Edited records will display in red to easily see which times have been changed. If the End Of Day report has been generated you will not be able to edit the employee times. The data will appear “Grayed Out”.
- When the **Time Keeping Option: Clock IN/OUT Employee At EOD** is selected, employees are automatically clocked In/Out when the EOD report is generated. When selected and the EOD report is generated, the notification: **“Clock In/Out Employee At EOD? Are You Sure?”** displays.
 - When you Press **Yes**; clocked-in employees are Clocked out, the EOD is generated, then employees are clocked back in. Afterward, the employee Time Stamp from prior to the EOD is grayed out and you are not able to edit those times. **Error Message #221 ALREADY CLOSED** will display if time edit is attempted. However, you will still be able to select time entries and delete the entries.
 - When you Press **No**; the EOD is not generated. You can go to the Time Keeping report to edit employee times if necessary.
- At the end of the pay period, when the End Of Pay is generated, if the employee data is not cleared, it is likely that an employee is still clocked in. Clock out all employees, then perform the End Of Pay procedures again.
- Another useful report is the **Labor Report**. Labor Report data is gathered from the Time Keeping report to calculate labor cost. This information is separated by the Job Code and may also be separated by Employee & Job Code. See the Labor Report on page 275 for details.


End Of Not Found PLU

The End of Not Found PLU report is used to clear the data generated when PLU items are added to the database from the register mode using the Not Found PLU feature. Select individual PLU's from the list you wish to clear or select all PLU's.

1. From the main **Program Mode** menu, press the 'END OF DAY' icon; press 'END OF DAY ∨' on the title bar to access the sub menu.
2. Select 'END OF NOT FOUND PLU' from the sub menu selections; the 'End Of Day Not Found PLU' report displays the PLU added by: DESCRIPTOR, PLU CODE, GROUP, EMPLOYEE, TIME.

DESCRIPTION #	PLU CODE	GROUP #	EMPLOYEE #	TIME #
PLU10164	10164	[BEVERAGE]	MANNY	2018-08-30 13:37
PLU20162	20162	[BEVERAGE]	MANNY	2018-08-30 13:38
PLU3016230162	3016230162	[BEVERAGE]	MANNY	2018-08-30 13:39
PLU40162	40162	[BEVERAGE]	MANNY	2018-08-30 13:39

Note: We can sort the displayed data by selecting the column headers on the End Of Not Found PLU to make selecting individual PLU's or groups of PLU's easier.

3. The report shows the Total Not Found PLU Count (all items entered using the not found PLU feature). Filters allow you to view only certain specified information. Filter by:
 - GROUP** – Choose a specific group to see just the items added to that group.
 - EMPLOYEE** – Select an employee to see items added by that employee.
 - FROM PLU / TO PLU** – Enter a PLU range to see the just those PLU's.
4. Press the 'End Of day' icon  in the 'Generate' area to issue the report; this operation will clear the selected reports.

End Of Day Function Key

The End Of Day function key is available to allow generating the EOD from the register mode as per the settings on the EOD screen and can be set as Manager Required. Depending on the EOD function key setting, reports can be generated for all stations or you can select the option: Allow Only Current Terminal.

Create an End Of Day function key in: **Program Mode** → **Function Key** → **Function Key**.

Assign the EOD key to an MLU, FLU or Real Keyboard (SAP-630/SAP-530).

Program Mode → **Screen Edit: MLU Edit, FLU Edit, or Real Keyboard**.

Pressing the EOD key will open the EOD Screen, generate the EOD and return to the register mode.

Regarding Sync Type Setting

The Sync Type setting is only available in IRC configurations on the POS-Main terminal in the Program Mode > Network & Revenue > Terminal & Network. This setting determines how the synchronization of sales data and report data is managed by the station in an IRC system. (*Program Data is always synchronized in Real-Time.*) Sync Type can be set for 'Real-Time Synchronize' or for 'Synchronize Before Report Operation'.

The Sync Data function key can be used anytime to synchronize the transaction data. This function only works when using the "Synchronize Before Report Operation" for the Sync Data setting.

Sync Type:

Real Time Synchronize

Synchronizes the result of every sale \ transaction \ report data to all terminals in real time.

Note: The greater the number of stations there are in an IRC system, the busier the system will be.

Synchronize Before Report Operation

All sale transaction data is synchronized before reports are performed on the POS-Main terminal. Only programming data changes are synchronized Real-Time Sync for all stations.

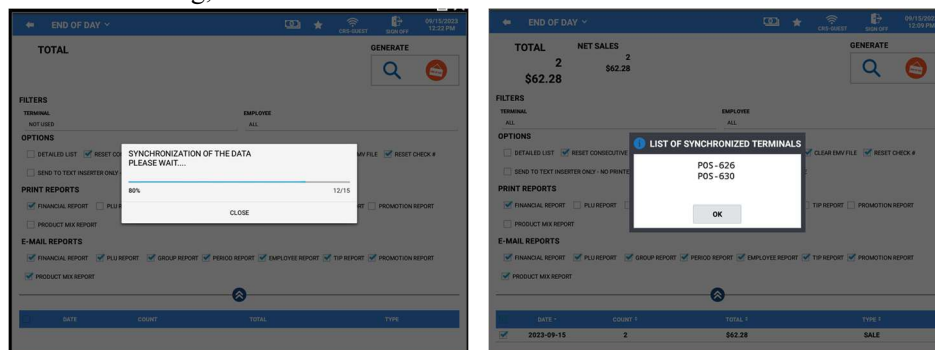
- ⇒ Sale & transaction data is saved to each individual stations database only.
- ⇒ Guest Check operations will be available only at the station they are registered on.
- ⇒ Sale & transaction data is synchronized to all stations only when a report is generated (*EOD, Report Mode Summary or Detailed Report, Calendar Report*) at the POS-Main terminal.

At the Satellite station, when the report data (*EOD, Report Mode Summary or Detail Report or Calendar Report*) is loaded, only the sales data for that station will be seen.

Only when the report data (*EOD, Report Mode Summary or Detail Report or Calendar Report*) is searched for & loaded at the POS-Main, will the Sale\Transaction report data be Synchronized between all stations in the system.

EOD Example:

When the **Synchronization Of The Data** is completed, the **List Of Synchronized Terminals** displays. Press **OK** to close the notification dialog; then Generate the EOD.



Sync Type Recommendation

Real Time Sync:

- ⇒ Multiple terminals in system and/or using floating clerk (Clerk Interrupt) system.

Synchronize Before Report Operation:

- ⇒ Multiple terminals in system and **not using** check tracking system.
- ⇒ Multiple terminals and using check tracking system but **not using** a floating clerk (Clerk Interrupt) system.
- ⇒ Multiple terminals at very busy sites.

Report Mode

Report Mode Screen



Touch the REPORT Mode icon on the main menu screen to view the report mode screen. (*X-position on the SAP-630 & SAP-530.*) The terminal descriptor is displayed with the Report Mode header.

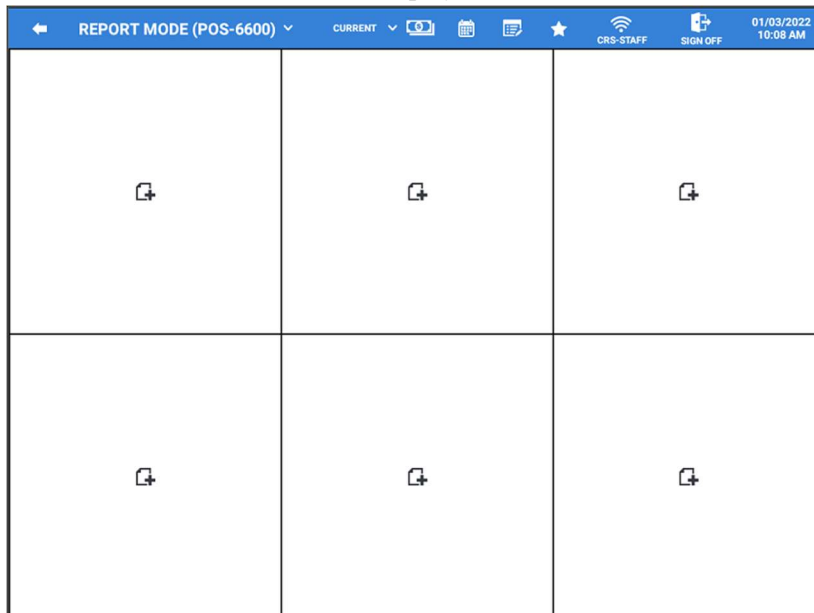
With the Report Mode selected the default screen displays a grid of six quick view summary reports for managers to quickly see selected report information. Specific data can be chosen to display on the summary report grid. Refer to the “Summary Reports” on page 213 for details.

Detailed reports are available by touching ‘REPORT MODE ∨’ on the title bar. From the sub menu report section you can view, print, or export the selected report as a CSV or PDF file. Refer to the Detailed Reports section on page 216 for information about the detailed reports.

Cash Declaration operations are provided in the Report Mode and a Calendar Report for viewing sales data.




















Please Note: Reports are not cleared from the report mode; report data will remain in the terminal until they are deleted using the Storage Management. (Refer to Storage Management in the Appendix for details.) The current daily totals are cleared by generating the ‘End Of Day’ operation; see the End Of Day chapter on page 199 for details.

1. From the **MAIN MENU** screen, press the ‘**REPORT MODE**’ icon (*X-Position on the SAP-630 & SAP-530*); the default **REPORT MODE** screen is displayed.



Note: An employee must be signed on to access the report mode; a password entry may be required to access the report mode.


Report Mode Icons

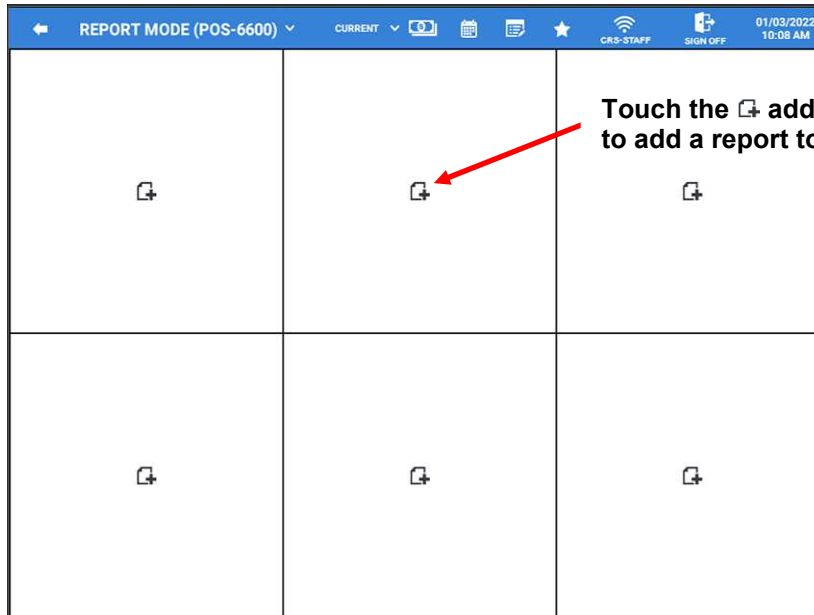
Icon	Function Description
	Back Arrow – Exits the report mode.
	Report Mode title – Shows the current mode selection and the Terminal Descriptor. Pressing this title will open the detail report list.
	Up/Down Carrot icons – Are used to Display/Hide the detailed reports selection sub menu; press this icon to access all other reports.
	Current/Today selection – CURRENT (<i>before the EOD is performed</i>) & TODAY (<i>shows all info for the day, including info after an EOD is performed</i>). If the user changes the option, the graphs will be refreshed. The selection that the user chooses will be saved when user exits the screen.
	Cash Declaration – For counting and reporting media amounts in the drawer before a report is taken.
	Calendar View – Allows monthly report totals to be viewed and printed on a monthly calendar format. Monthly Sales data is displayed, broken down for each day and week of the month.
	Edit icon – Used to show and hide the Edit/Delete/Refresh icons  on the Quick-View Report grids.
	Favorite icon – Press this icon to add (<i>gold star</i>) or remove (<i>white star</i>) the report mode on the favorites list.
	Network Connection Method – Ethernet or WiFi: Tap this icon to access the main Android, Wireless & Network settings. The Manager Password is required for access. (<i>Registers do not need to be online for normal operation.</i>) <ul style="list-style-type: none"> If the terminal is not connected to the internet, the connection method may indicate: **DEMO** or **DISCON 1 DAY** this is normal and does not affect software or register operation, even when this number reaches “0”. IRC Error - When IRC is used, if the main terminal is turned off, the IRC Error displays on the satellite terminals.
	Sign Off – Allows you to sign off the current employee and return to the Main Sign-On screen.
	Date/Time – Touch this icon to display the clock on the entire screen. Tap the screen again to return to the Report Mode Summary Report screen.
	Search icon – Used to search for and load report data for the grid.
	Add record icon – Use to add a report to an empty cell in the Report Mode Quick-View.
	Edit icon – When added to the grid, pressing this icon brings up the Report Summary list to change the report that displays in the selected cell.
	Trash Can/Delete icon – When added to the grid, pressing this icon will remove the current report selection from the selected grid.
	Refresh icon – Use to refresh the data for the currently selected report in the grid.
	Print icon – Use to print the selected report.
	Export icon – Use to export the selected report to CSV or to PDF.

Summary Reports

When the Report Mode is selected, the default screen displays a grid of six quick view summary reports for managers to quickly see selected report information. Specific data can be chosen to display on the summary report grid. The Quick View Summary Reports allow you to view selected report information without having to first run and print the report. Report information displayed in the summary reports cannot be printed.

Adding Reports to the Quick View







- ◆ To add or edit the summary reports that are shown on the report mode quick view display, touch the  add record icon in any one of the six grids to select from the list of available reports.




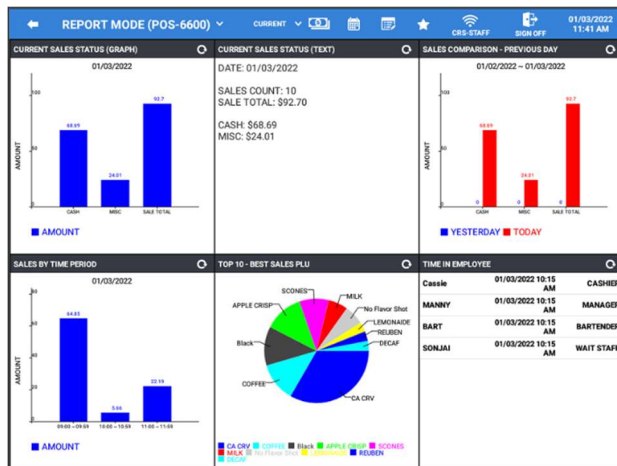
- ◆ The available quick view Summary Report Items include:
 - **Current Sales Status (Graph)**
 - **List Check**
 - **Top 10 – Best Sales PLU**
 - **Top 10 – Best Sales Group**
 - **Top 10 – Best Employee**
 - **Sales Comparison – Previous Day**
 - **Sales By Time Period**
 - **Time In Employee**
 - **Time In/Out Employee**
 - **Current Sales Status (Text)**
 - **TIP Report By Employee**

Note: Reports that have already been assigned to a cell will no longer appear in the list.

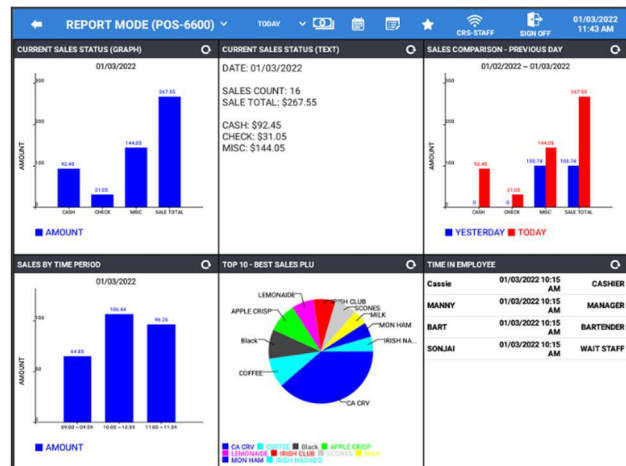
- ◆ Select the report from the list that you want to appear in the selected cell on the quick view screen.
- ◆ When you have added your report selections, they will appear on the quick view screen.

REPORT MODE ▾		
 SHOW CURRENT SALES STATUS (GRAPH)	 SHOW CURRENT SALES STATUS (TEXT)	 SHOW SALES COMPARISON - PREVIOUS DAY
 SHOW TOP 10 - BEST SALES PLU	 SHOW TOP 10 - BEST EMPLOYEE	 SHOW TIME IN/OUT EMPLOYEE

- ◆ If the report doesn't display, touch the  icon to see the report data. Select **CURRENT** to view report data before EOD is performed or select **TODAY** to view **all** report data for the day, including info after an EOD performed. If the Current/Today option is changed, the graphs will be refreshed to display the selected data. The last selection chosen will be saved when exiting the Report Mode screen.



Current

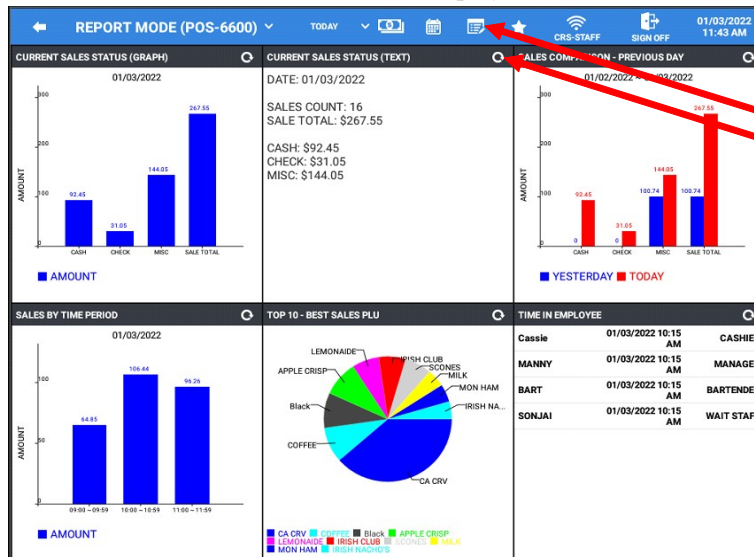


Today



Edit the Summary Reports

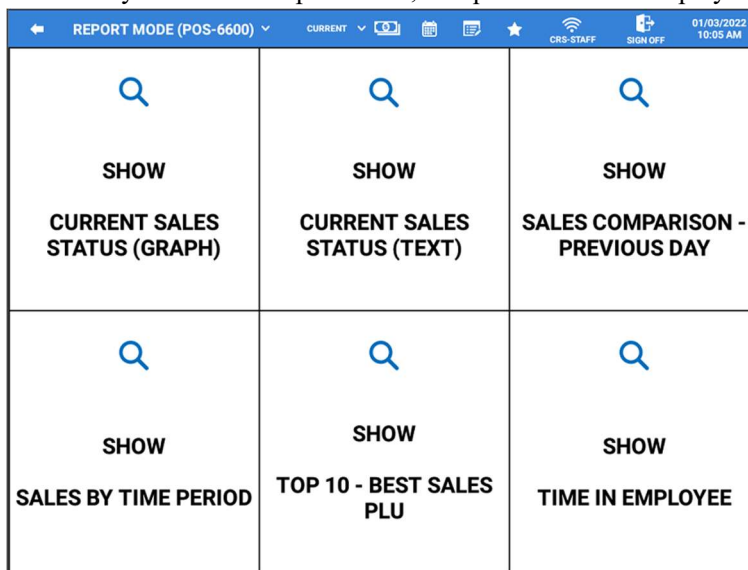
If desired, the current reports in the report mode quick reports can be changed to display different reports or removed from the quick report view.




- ◆ Touch the **Edit icon**  on the title bar to display or hide the edit icons for each report in the grid.



The “Edit” icon on the header bar displays or hides the edit icons for each report in the grid.

- Press the **Favorites icon**  if you want to add the reports to your Favorites list selections.
- To exit the report mode, press the **Return**  button.
- ◆ The next time you enter the report mode, the quick view will display as shown here:



- ◆ To see the quick view reports again simply press the **Search**  icon in the cell to view the report data.
 - You can change the reports displayed here by pressing the **Edit icon**  and selecting a different report from the list of available Summary Report Items.
 - Touch the **Delete icon**  to no longer display any report in the current cell.

Detailed Reports

In addition to the summary reports, detailed reports are available by selecting the report mode sub menu. Select a report from the list to view the report data. When the report is generated for the selected report you can view or print the report data. We can also export the report data as a CSV or PDF file to a USB or EMAIL.

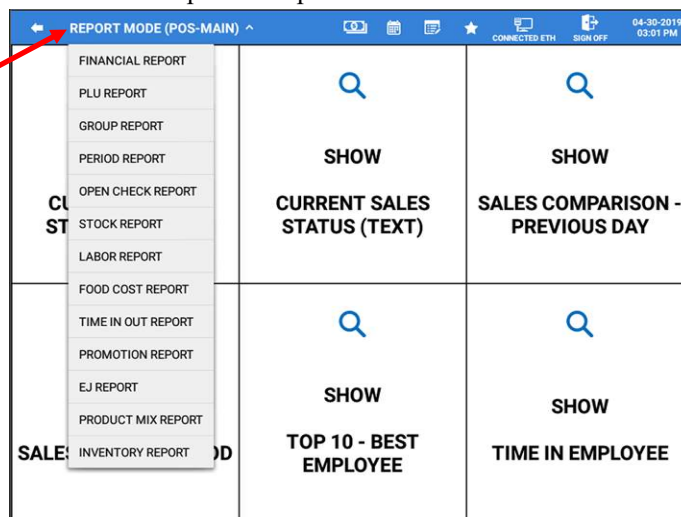
Please Note: Reports are not cleared when generated from the report mode, report data will remain in the terminal until they are deleted using the Storage Management operation.

Caution: Not clearing out old sales history will eventually fill up the available memory and cause the terminal to slow down and/or create Data Sync issues.

The current daily totals are cleared by generating the 'End Of Day' operation, this operation should be performed daily. Refer to the End Of Day chapter on page 199 for details.

1. Touch 'REPORT MODE ∨' to view the sub menu dropdown for access to all other reports. Select the specific report you wish to view from the list to open the report.

Touch REPORT MODE ∨ to open the detailed reports sub menu selections.



2. After making a report selection, you will be able to view the selected report. Select the Date or date range, choose detail Options for the report, and Filter reports for desired information.

Note: The Date selection, Options and Filters will vary depending on the report selected.

Report Dates \ Options \ Filters

The detailed reports provide report data that can be selected by specific date selections. Options and filters are provided to define data that is presented on the selected report. The dates, options and filters will vary depending on the specific report selected. The various possible selections are explained below.

Dates

You can choose **DATES** to view reports for Today, Last End of Day, or set a Custom period; you can also choose from 1 Day, 1 Week, 2 Week, 1 Month, 3 Month, 6 Month or 1 Year reports. Simply make your selection and press the refresh icon to change the current view to your new selections.

Note: The Dates selection will revert to the default setting when you exit the report screen.

TODAY

This selection will display the report data for the current day.

LAST END OF DAY

This report selection displays report data for the Last End of Day report that was generated.

CUSTOM PERIOD

This selection allows you to select a specified report period; Select the Start Date and End Date for the Custom Period report.

1 DAY

This selection allows you to select a specific day to review report data; Select the day by entering the Start Date (*the End Date will automatically be entered*).

1 WEEK \ 2 WEEK

This selection allows you to select a specific week or two week period to review report data; Select the desired week by entering the Start Date; The start date can be any day of the desired week (*the End Date will automatically be entered*).

1 MONTH

This selection allows you to select a specific Month to review report data; Select the desired Month by entering the Start Date; Select the Month and Year for the report. The day selection has no effect, the day will always be the 1st of the selected month, (*the End Date will automatically be entered*).

3 MONTH

This selection allows you to select a specified 3-Month (*quarterly*) range to review report data; Select the desired 3-Month range by entering the Start Date; Select the Month and Year for the report. The day selection has no effect, the day will always be the 1st of the selected 3-month range; (*the End Date will automatically be entered*).

6 MONTH

This selection allows you to select a specified 6-Month (*bi-annual*) range to review report data; Select the desired 6-Month range by entering the Start Date; Select the Month and Year for the report. The day selection has no effect, the day will always be the 1st of the selected 6-month range; (*the End Date will automatically be entered*).

1 YEAR

This selection allows you to select a specific Year to review report data; Select the desired Year by entering the Start Date; Select the desired Month and Year for the report. The day selection has no effect, the day will always be the 1st of the selected month; (*the End Date will automatically be entered*).

START DATE and END DATE

Use the calendar provided to select the start date & end date.

END OF DAY NUMBER

You have the option to select a specific End of Day Number if more than 1 EOD has been performed, such as after each shift.

TERMINAL

You can select to view report data from My Terminal, Select ALL or select individual terminals. The default terminal selection setting is Not Used. This indicates there is no filter selected which is the same as choosing Select ALL, the report will collect data from all stations in the system.

OPTIONS

The Report Mode Option selections allow you to further define the report to display specific data.

Important! Options selections will limit the report to display just the data specified by the selected option. If no data exists for the selected option, no data will load when you generate the report.

The report option selections available will vary depending on the specific detail report type selected. When an option is selected, the option will remain checked when you exit the report mode and each time you access the same report in the report mode.

The Report Option selections will remain as selected when you exit the report screen. The same option selections will be applied to all detailed report selections where applicable.

The option definitions shown below define the option selections found on the various detail report selections. Refer to the Available Detailed Reports chapter to see the specific options & filters available for each individual report.

OPTIONS DEFINITIONS

TRAINING DATA

Select if you wish to see just the report data for items sold while in training. If no Training sales were registered, no data will load when the report is generated.

CURRENT DATA

Current Data only includes data that has not been posted (*before the EOD is preformed*). When selected, the report will display only the current data on the report (*report data since the last EOD was generated*). Previous dates cannot be selected when the Current Data box is checked. You must uncheck the 'Current Data' selection to run historical reports.

DETAILED DATA

Expands the data displayed on reports to include separate tax breakdown and media totals.

ZERO SKIP

When selected, any report totals with a 0 count/amount will not be displayed.

DRAWER TOTAL

When selected **only** the drawer totals for each tender type is displayed.

TIP TOTAL

When selected **only** the TIP TOTAL information is displayed. If no TIP entries have been made, no data will display when the report is generated.

REPORTING BY EMPLOYEE \ SIGNED ON EMPLOYEE \ CLOCKED IN EMPLOYEE

Select one of these settings if desired to show reports by each employee, only the currently signed on employee, or only clocked in employees.

REPORTING BY TERMINAL

Used in IRC configurations, when selected, the report displays/prints/emails the selected report for ALL Terminals and for Each Individual Terminal in the system.

PLU ZERO SALES

Displays a list of PLU's with no sales activity.

WASTE, PROMO

When checked **only** items that have been used with the Waste & Promo function keys are displayed. If no Promo or Waste operations were performed, no data will load when the report is generated.

PRICE LEVEL

Select to display item sales on the PLU Report split out by each price level used by each item.

NOT FOUND PLU

Select to display a list of items added using the Not Found PLU feature.

PLU PROFIT

Select to display the PLU Profit Ratio for each item sold.

FILTERS

The Report Mode Filter selections provide further flexibility by allowing you to filter the report to show all employees or choose a specific employee to view just their individual totals.

Report Filters return to their default setting when you leave the Report Mode screen. You will need to select the desired filter settings when the Report Mode is accessed again and a report is selected.

Report Filters will return to their default setting when you leave the Report Mode screen. You will need to select the desired filter settings when the Report Mode is accessed again and a report is selected.

Refer to the Available Detailed Reports chapter to see the specific filters & options available for each individual report.

FILTERS DEFINITIONS

GROUP #1, #2, #3

Default setting = NOT USED – All Groups report data will display. Select specific Groups assigned on the PLU group assignment #1, #2, #3. This filter only appears on the following report types: PLU, Stock, and Food Cost Reports.

GROUP

Default setting = NOT USED – All Groups report data will display.

Select a specific Group or Groups from the list to view report data for just the selected group(s) or check the select all check box to see data from ALL Groups. This filter appears on the report types: Group and Period Reports.

EMPLOYEES

Default setting = ALL – Report data for all employees will display on the report.

Choose the SELECT ALL check box or select specific employees for the report. Deleted employees appear grayed out in the list of employees. You can choose the REMOVE DELETED EMPLOYEE check box to hide these employees in the employee list. This filter appears on the following report types: Financial, PLU, Group, Period, Open Check, Labor, Food Cost, Time In-Out, Promotion, and Product Mix Reports.

FROM PLU \ TO PLU

Default setting = BLANK (*no selection*) – Report Data will include all PLU's. You can also choose to select a specific PLU or PLU range for the report if desired. This filter appears on the following report types: PLU, Group, Period, Stock, and Food Cost Reports.







TOP

Default setting = ALL – Report Data will include all PLU's. Choose to display the Top 5, 10, 20, 30, 50, 100 or ALL PLU's, Groups, Open Checks, depending on the report type selected. This Filter appears on the following report types: PLU, Group, Period, Open Check, Labro, and Food Cost Reports.


Report View \ Print \ Export

GENERATE

This section provides:

- ◆ **REFRESH** button  to refresh the report data after changing date selections, options or filters.
- ◆ **ZOOM** button  to view just the report data.
- ◆ **REPORT VIEW** button  that allows you to view the report and/or print to the receipt printer.
- ◆ **EXPORT** button  allows you to export the selected report as either a CSV or PDF file. Exported reports are formatted to fit 8.5 x 11 paper. Exported reports can be saved to a USB or to your EMAIL. You can select from a list of email addresses to send reports to, or have the reports sent automatically to all email addresses as defined in report option programming.
 - ⇒ Reports saved to the USB in: Report > Store Name > Terminal Description > Report Type.
 - ⇒ The Reports are shown in List Data format and Graph Data format were applicable.
- ◆ **SHOW MORE & SHOW LESS**   buttons to expand the report data to show more or less data, this will hide/show the Dates, Options, Filters and Generate selections to view just the report data.

REPORT DETAIL LIST DATA


LIST  Report data by default is displayed in a LIST format. Report data can be sorted in ascending or descending order by tapping on the desired column heading.

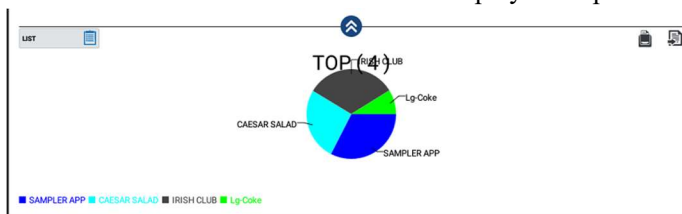
Report Data can be sorted by tapping the column header.



DESCRIPTION	PLU CODE	GROUP	PROMO	WA
TOTAL				0
GUM 50	14	[GUM 50]		0
MISC TAX 33	27	[MISC TAX 33]		0
COFFEE LARGE	3001	[COFFEE]		0
COFFEE SMALL	3018	[COFFEE]		0
CAPPUCINO LRG	3025	[COFFEE]		0

REPORT DETAIL GRAPH DATA

GRAPH  Graph View: Report data by default is shown in a 'LIST' format. Some reports can be displayed in a GRAPH format. Press the GRAPH icon to display the report data as a 'Pie Graph'.



Available Detailed Reports

Financial
Stock
EJ

PLU
Labor
Product Mix

Group
Food Cost
Inventory

Period
Time In Out

Open Check
Promotion

Financial Report

DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE & END DATE

END OF DAY NUMBER & TERMINAL SELECTION

OPTIONS

Training Data, Current Data, Detailed Data, Zero Skip, Drawer Total, Tip Total
Reporting By Employee, Signed On Employee, Clocked In Employee, Reporting By Terminal
NOTE: Option selections limit the report to display just the specified option selection data.

FILTERS

Employee - SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

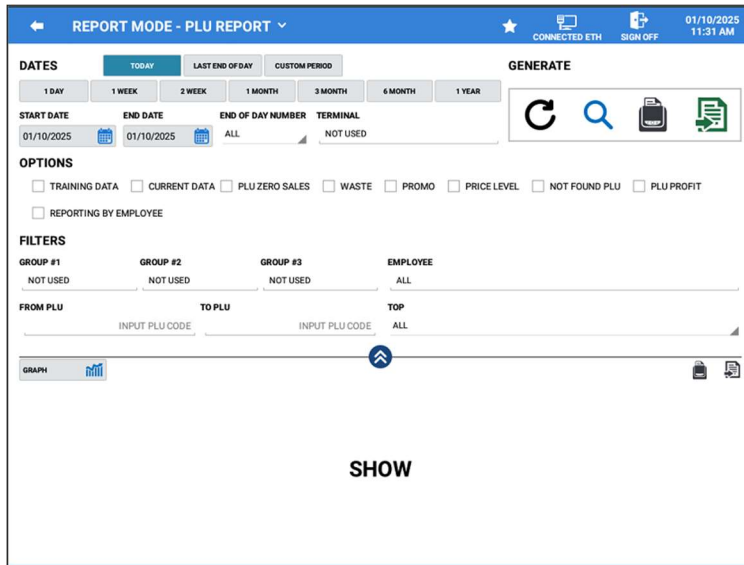
GENERATE

Refresh, Zoom, Report View, Export

REPORT DATA

Line: Description – Count – Total

PLU Report



DATES

Date selections include: Today, Last End of Day, Custom Period
 1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE AND END DATE

END OF DAY NUMBER AND TERMINAL SELECTION

Not Used (*indicates there is no filter selected*), My Terminal, select Specific Terminal(s) or Select All

OPTIONS

Training Data, Current Data, PLU Zero Sales, Waste, Promo, Price Level, Not Found PLU, PLU Profit
 Reporting By Employee

NOTE: Option selections limit the report to display just the specified option selection data.

FILTERS

Group #1, #2, #3 – Select specific Groups assigned on PLU group assignment #1, #2, #3

Employee – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

From PLU \ To PLU – Select a PLU or PLU range for the report if desired

TOP – Choose to display the Top 5, 10, 20, 30, 50, 100 or ALL PLU's

GENERATE

Refresh, Zoom, Report View, Export

REPORT DATA

List: Item Description – PLU Code – Group – Promo – Waste – Usage – Count – Total – Amount Ratio

The columns can be sorted alphabetically: A to Z or Z to A; Highest to Lowest or Lowest to Highest.

Graph: PLU Item Description

PLU Profit Report

With the PLU Profit option selected on the PLU Report, the PLU Description, Code, Total Sales, Total Cost and the Profit and the Profit Ratio are printed on the PLU Profit Report. You will need to add the PLU Cost to items in PLU programming. Only items with the COST entered on the PLU will appear on this report.

The screenshot shows the 'REPORT MODE - PLU REPORT' interface. At the top, there are navigation icons and status indicators like 'CONNECTED ETH' and 'SIGN OFF'. Below this is the 'DATES' section with buttons for 'TODAY', 'LAST END OF DAY', and 'CUSTOM PERIOD'. A row of time filters includes '1 DAY', '1 WEEK', '2 WEEK', '1 MONTH' (selected), '3 MONTH', '6 MONTH', and '1 YEAR'. The 'START DATE' is 01.01.2026 and the 'END DATE' is 01.31.2026. There are also fields for 'END OF DAY NUMBER' (set to 'ALL') and 'TERMINAL' (set to 'NOT USED'). A 'GENERATE' button is present with icons for refresh, search, print, and export. The 'OPTIONS' section has checkboxes for 'CURRENT DATA' (unchecked) and 'PLU PROFIT' (checked). The 'FILTERS' section includes 'GROUP' (set to 'NOT USED') and 'EMPLOYEE' (set to 'ALL'). Below this are fields for 'FROM PLU' and 'TO PLU' with 'INPUT PLU CODE' labels. A table at the bottom displays the report data with columns for Description, PLU Code, Total Sales, Total Cost, Profit, and Profit Ratio.

DESCRIPTION	PLU CODE	TOTAL SALES	TOTAL COST	PROFIT	PROFIT RATIO
TOTAL (73)		\$422.97	\$136.00	\$286.97	67.85 %
PLASTIC CUPS (1)	98391002075	\$0.00	\$0.00	\$0.00	0.00 %
POTATO STICKS (2)	41200096875	\$21.90	\$4.00	\$17.90	81.74 %
CRV - BOTTLE (2)	1121080	\$0.00	\$0.00	\$0.00	0.00 %
ICEHOUSE/24FL (2)	348801	\$9.00	\$8.00	\$1.00	11.11 %
Lg Sprite (1)	30163	\$3.25	\$2.00	\$1.25	38.46 %
Lg Diet Coke (1)	30162	\$3.25	\$2.00	\$1.25	38.46 %
Lg Coke (1)	30161	\$3.25	\$2.00	\$1.25	38.46 %
MEMO (1)	3333	\$0.00	\$0.00	\$0.00	0.00 %

DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE AND END DATE

END OF DAY NUMBER AND TERMINAL SELECTION

Not Used (*indicates there is no filter selected*), My Terminal, select Specific Terminal(s) or Select All

OPTIONS

The only options are: Current Data and PLU Profit

FILTERS

Group – Select specific Groups assigned

Employee – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

From PLU \ To PLU – Select a PLU or PLU range for the report if desired

Additionally, the PLU Report data can be displayed as a LIST report or in a GRAPH format.

GENERATE

Refresh, Zoom, Report View, Export

REPORT DATA

List: Item Description – PLU Code – Total Sales – Total Cost – Profit – Profit Ratio

PLU Report Export

When exporting a PLU Report to PDF/CSV, there are differences depending on the setting of the Report Option: EXPORT SIMPLE PLU REPORT TO CSV/PDF as follows. Not to be confused with the Simple PLU.csv Backup.

- 1) When the Report Option: EXPORT SIMPLE PLU REPORT TO CSV/PDF *is not checked*:

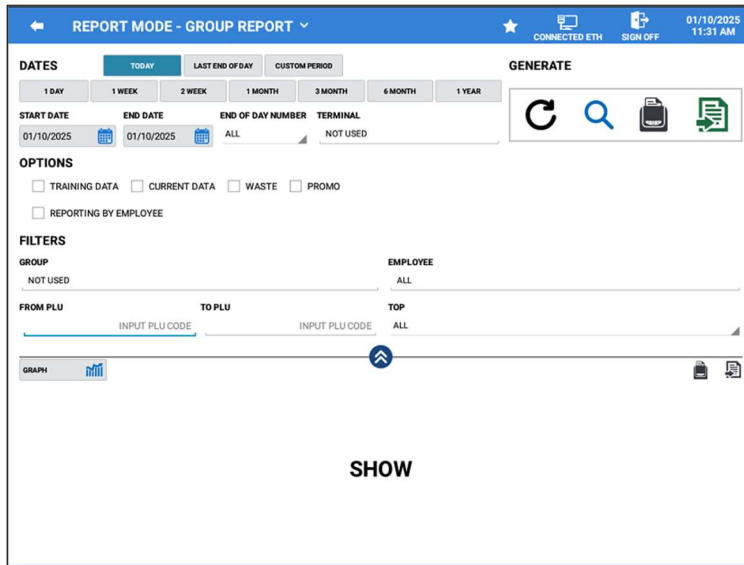
DESCRIPTION	PLU CODE	GROUP	PROMO	WASTE	USAGE	COUNT	TOTAL	AMOUNT RATIO
TOTAL			0	0	40	40	\$2314.80	100.00%
MISC SALES Taxable	10	[MISC]	0	0	3	3	\$332.10	14.35%
OPEN GROCERY TAXABLE	37	[Food]	0	0	4	4	\$83.00	3.59%
OPEN GROCERY	77	[Food]	0	0	3	3	\$99.00	4.28%
LEMON CHICKEN	123	[DINNERS]	0	0	1	1	\$21.69	0.94%
CREAT A PASTA	126	[DINNERS]	0	0	1	1	\$21.69	0.94%
MISC NEGATIVE	157	[Food]	0	0	3	3	-3.63	-0.16%
MISC MDSE	197	[Food]	0	0	3	3	\$594.00	25.66%
MISC SERVICES	237	[Food]	0	0	6	6	\$940.83	40.64%
KDS MAC & CHZ	241	[SANDWICHES]	0	0	1	1	\$5.99	0.26%
KDS GR CHZ	242	[SANDWICHES]	0	0	1	1	\$5.99	0.26%
KDS NUGGETS	243	[SANDWICHES]	0	0	1	1	\$5.99	0.26%
KDS PB&J	244	[SANDWICHES]	0	0	1	1	\$5.99	0.26%
KDS CORN DOG	246	[SANDWICHES]	0	0	1	1	\$5.99	0.26%
KDS MINI BURG	247	[SANDWICHES]	0	0	1	1	\$5.99	0.26%
KDS NOODLES	248	[SANDWICHES]	0	0	1	1	\$5.99	0.26%
KIDS RIB TIPS	249	[SANDWICHES]	0	0	1	1	\$5.99	0.26%
Open Item (VAT Taxable)	282	[SPECIALS]	0	0	3	3	\$148.50	6.42%
Open Tax-Table	292	[SPECIALS]	0	0	3	3	\$29.70	1.28%
LINGUINI	881	[N-C MODS]	0	0	1	1	\$0.00	0%
ANGEL HAIR	883	[N-C MODS]	0	0	1	1	\$0.00	0%

- 2) The Report Option: EXPORT SIMPLE PLU REPORT TO CSV/PDF *is checked*, used for Door Dash for example (*food delivery company*):

DESCRIPTION	PLU CODE	COUNT	TOTAL
TOTAL		40	\$2314.80
MISC SALES Taxable	10	3	\$332.10
OPEN GROCERY TAXABLE	37	4	\$83.00
OPEN GROCERY	77	3	\$99.00
LEMON CHICKEN	123	1	\$21.69
CREAT A PASTA	126	1	\$21.69
MISC NEGATIVE	157	3	-3.63
MISC MDSE	197	3	\$594.00
MISC SERVICES	237	6	\$940.83
KDS MAC & CHZ	241	1	\$5.99
KDS GR CHZ	242	1	\$5.99
KDS NUGGETS	243	1	\$5.99
KDS PB&J	244	1	\$5.99
KDS CORN DOG	246	1	\$5.99
KDS MINI BURG	247	1	\$5.99
KDS NOODLES	248	1	\$5.99
KIDS RIB TIPS	249	1	\$5.99
Open Item (VAT Taxable)	282	3	\$148.50
Open Tax-Table	292	3	\$29.70
LINGUINI	881	1	\$0.00
ANGEL HAIR	883	1	\$0.00

Same also when exporting the PLU Report as a csv file.

Group Report



DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE AND END DATE

END OF DAY NUMBER AND TERMINAL SELECTION

Not Used (*indicates there is no filter selected*), My Terminal, select Specific Terminal(s) or Select All

OPTIONS

Training Data, Current Data, Waste, Promo
Reporting By Employee

NOTE: Option selections limit the report to display just the specified option selection data.

FILTERS

Group – Select a specific Group or Groups to view

Employee – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

From PLU \ To PLU – Select a PLU or PLU range for the report if desired

TOP – Choose to display the Top 5, 10, 20, 30, 50, 100 or ALL PLU's

Additionally, the Group report data can be displayed as a LIST report or in a GRAPH format.

GENERATE

Refresh, Zoom, Report View, Export

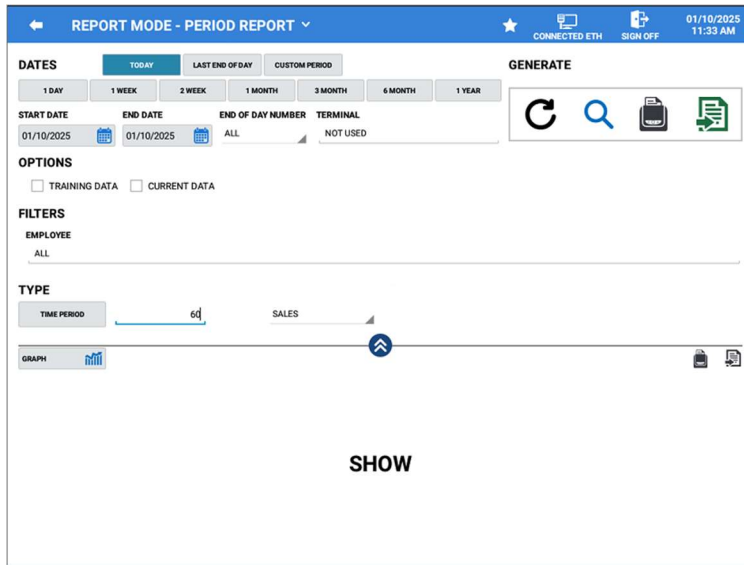
REPORT DATA

List: Group Description – Promo – Waste – Usage – Count – Total – Amount Ratio

The columns can be sorted alphabetically: A to Z or Z to A; Highest to Lowest or Lowest to Highest.

Graph: Group Item Description

Period Report



DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE AND END DATE

END OF DAY NUMBER AND TERMINAL SELECTION

Not Used (*indicates there is no filter selected*), My Terminal, select Specific Terminal(s) or Select All

OPTIONS

Training Data, Current Data

NOTE: Option selections limit the report to display just the specified option selection data.

FILTERS

Employee – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

TYPE

Press the Time Period/ Date Period button to toggle between selections:

TIME PERIOD – Enter the desired time period as number of days, *i.e.* 30, 60, 100, etc.

Choose the data type: Sales, Group, Destination or Track.

DATE PERIOD – Select the desired date period: Day, Week, Month, DOW

DOW = Day Of Week – Select from: SUN, MON, TUES, WED, THU, FRI, SAT

Then choose the TYPE of data selection for the report: SALES \ GROUP \ DESTINATION \ TRACK

When TRACK is selected, you can choose ALL tracks or specify which track(s) to include in the report.

Additionally, the Period report data can be displayed as a LIST report or in a GRAPH format.

GENERATE

Refresh, Zoom, Report View, Export

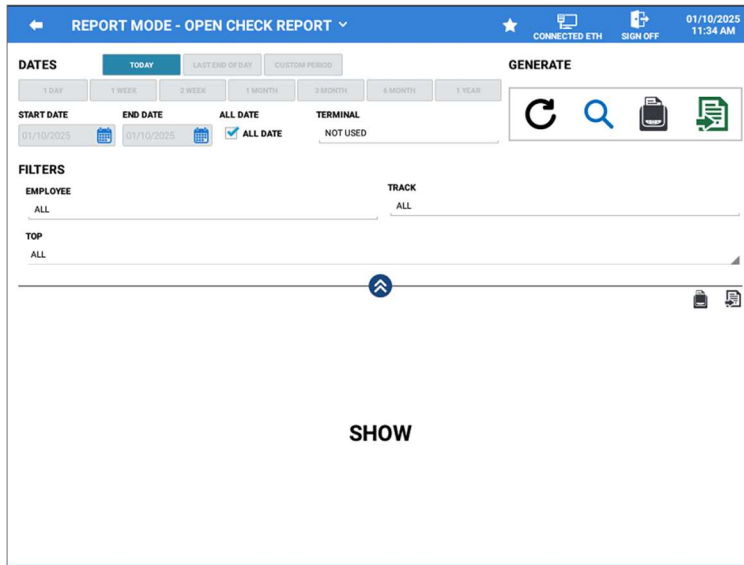
REPORT DATA

List: Description – Count – Total – Amount Ratio

The columns can be sorted alphabetically: A to Z or Z to A; Highest to Lowest or Lowest to Highest.

Graph: Total Amount by Time Period

Open Check Report



DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE & END DATE

ALL DATE

When selected, Only the TODAY date selection is available, all other date selections are grayed out.

TERMINAL SELECTION

Not Used (*indicates there is no filter selected*), My Terminal, select Specific Terminal(s) or Select All

FILTERS

EMPLOYEE – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

TRACK – Select ALL or select specific Tracks from the list for the report *i.e. Drive-Thru*

TOP – Choose to display the Top 5, 10, 20, 30, 50, 100 or ALL PLU's

GENERATE

Refresh, Zoom, Report View, Export

REPORT DATA

List: Track – Check# - Guest# - Employee – Start Time – Last Owner – Total

Stock Report

REPORT MODE - STOCK REPORT

CONNECTED ETH SIGN OFF 01/10/2025 11:34 AM

DATES

TODAY LAST END OF DAY CUSTOM PERIOD

1 DAY 1 WEEK 2 WEEK 1 MONTH 3 MONTH 6 MONTH 1 YEAR

START DATE 01/10/2025 END DATE 01/10/2025

GENERATE

BELOW THE MINIMUM STOCK VALUE

FILTERS

GROUP #1 NOT USED GROUP #2 NOT USED GROUP #3 NOT USED

FROM PLU TO PLU

INPUT PLU CODE INPUT PLU CODE

SHOW

DATES

Only the TODAY selection is available, all other date selections are grayed out.

OPTIONS

Below The Minimum Stock Value – When selected, the generated report will display only info for PLU's that are below the minimum stock level as set on the PLU.

FILTERS

Group #1, Group #2, Group #3 – Select specific Groups assigned on PLU group assignment #1, #2, #3
From PLU \ To PLU – Select a PLU or PLU range for the report if desired

GENERATE

Refresh, Zoom, Report View, Export

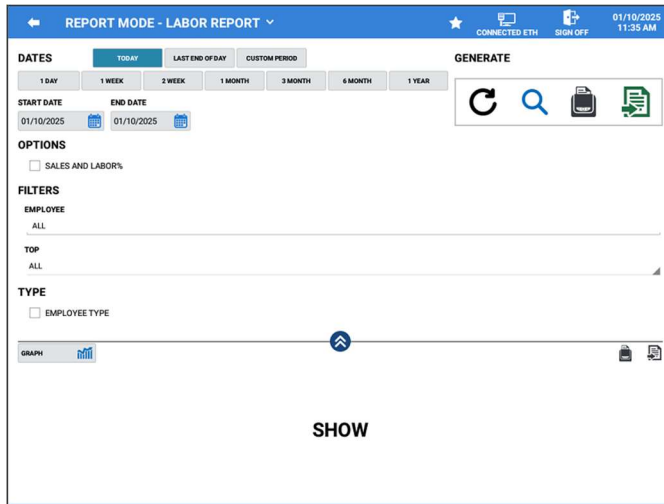
REPORT DATA

Item Description – PLU Code – Cost – Group – Stock – Price 1 – Price 2

The columns can be sorted alphabetically: A to Z or Z to A; Highest to Lowest or Lowest to Highest.

Labor Report

Labor report data is gathered from the Time Keeping report to calculate labor cost. This information is separated by Job Code and may also be separated by Employee & Job Code.



Labor Report Options & Filters

DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE AND END DATE – Use the calendars to define the custom period date range.

OPTIONS

SALES AND LABOR % – The Sales & Labor % Report is a combination of data from the *Period Report* and the *Time In Out Report*. When the Sales And Labor% option is selected the TYPE selection is changed as show below.

FILTERS

EMPLOYEE – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

TOP – Choose to display the Top 5, 10, 20, 30, 50, 100 or ALL PLU's

TYPE

When the option: **Sales And Labor%** is not selected the TYPE selection is:

EMPLOYEE TYPE – When not checked the report displays the data per: Job Code, Time and Cost.

When checked, the report data is broken down by Employee per: Job Code, Time & Cost.

The report data can be displayed in a **List** format or in a **Graph** format.

When the option: **Sales And Labor%** is selected the **TYPE** selection is changed into two selections:

TIME PERIOD – Enter the desired time period in minutes (two digit entry) *i.e. 15, 30, 60, etc.*

Then choose the data type selection: NONE or EMPLOYEE TYPE

DATE PERIOD – Choose: Day, Week or Month.

Then choose the data type selection: NONE or EMPLOYEE TYPE

EMPLOYEE TYPE – Check to include each Employee and Job Code data on the report for the selected period or uncheck to just show the Job Code data on the report for the selected period.

The report data can be displayed in a **List** format or in a **Graph** format.

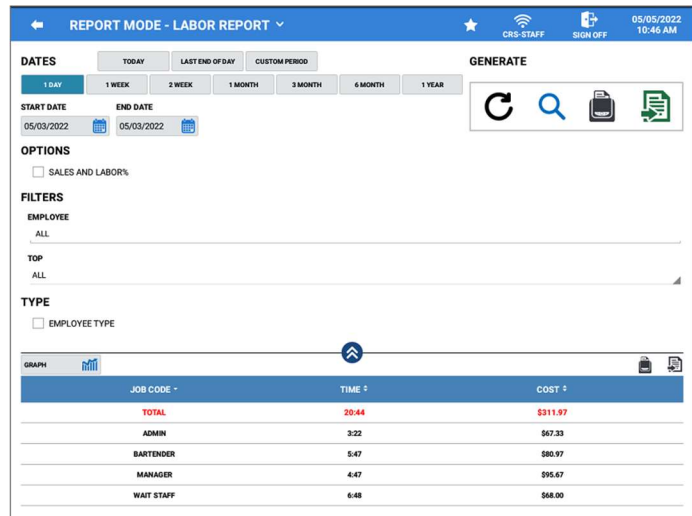
GENERATE

Refresh, Zoom, Report View\Print, Export To CSV or PDF and choose the Export PATH: USB or EMAIL.

Labor Report Example

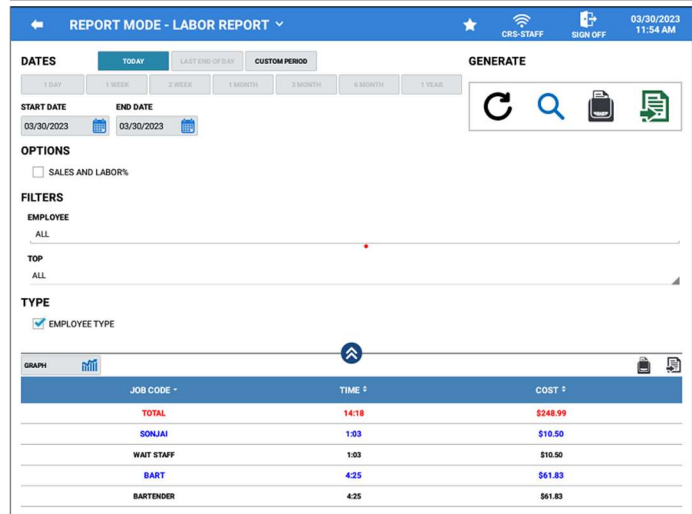
Labor Report shown with **TYPE** selection for **EMPLOYEE TYPE** NOT selected.
The data is conveyed per Employee:

- Job Code
- Time
- Cost

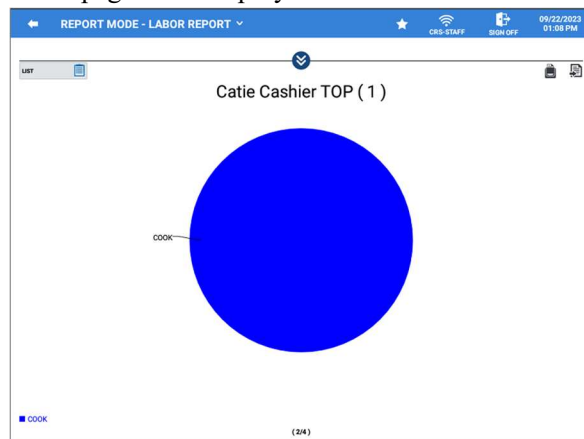
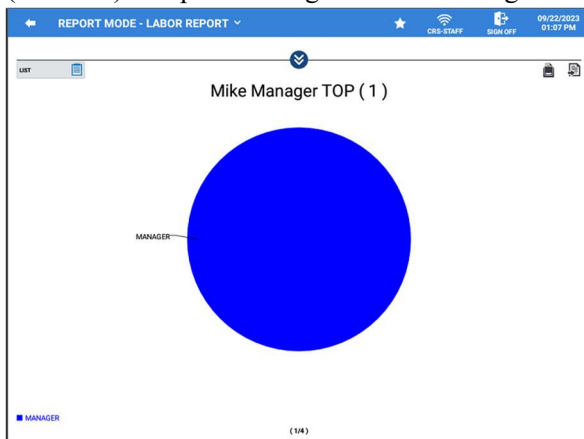


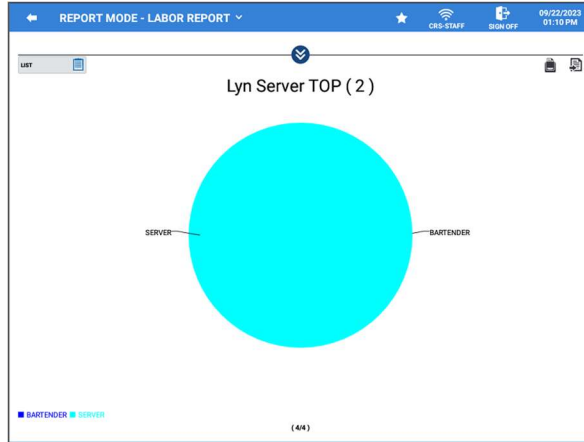
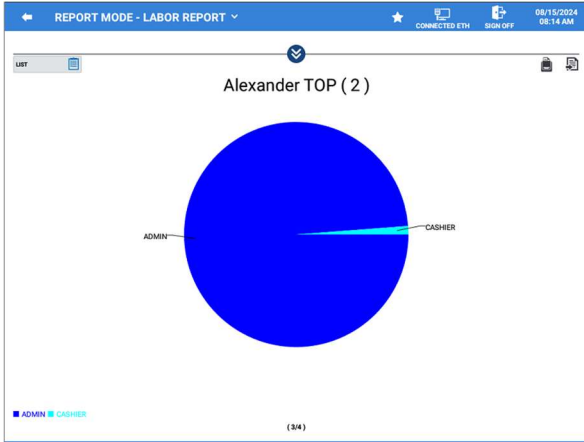
Labor Report with the **TYPE** selection for **EMPLOYEE TYPE** selected.
The data is conveyed per each Employee by Job Code:

- Job Code
 - Employee
 - Job Code
- Time
- Cost



The examples below show the Labor Report as a **Graph** and the **TYPE** setting for **EMPLOYEE TYPE** is selected (Checked). Swipe left or right to scroll through to view each page: The Employee Name and Job Code are shown.





Printed Labor Report Sample

TYPE = NONE

```

Sam4POS
05/03/2022      03:35 PM      TUE
BarPub (POS-MAIN)
Labor Report (ALL)
DATE : 05/03/2022 11:31 AM
AUTHOR : ANDREW

DATA RANGE
05/03/2022 ~ 05/03/2022

FILTERS
EMPLOYEE : [ALL]

TYPE
TIME PERIOD : 60
EMPLOYEE TYPE : NO

=====
JOB CODE                TIME - COST
=====
TOTAL                   54:12 - $847.43
ADMIN                   11:44 - $234.66
BARTENDER               14:09 - $198.10
MANAGER                 13:09 - $263.00
WAIT STAFF              15:10 - $151.67

NO. 00000002      REG: POS-MAIN      ADMIN
-----
*****

```

TYPE = EMPLOYEE TYPE

```

Sam4POS
05/03/2022      11:31 AM      TUE
BarPub (POS-MAIN)
Labor Report (ALL)
DATE : 05/03/2022 11:31 AM
AUTHOR : ANDREW

DATA RANGE
05/03/2022 ~ 05/03/2022

FILTERS
EMPLOYEE : [ALL]

TYPE
TIME PERIOD : 60
EMPLOYEE TYPE : YES

=====
JOB CODE                TIME - COST
=====
TOTAL                   54:16 - $848.51
SONJAI                  15:11 - $151.83
WAIT STAFF              15:11 - $151.83
BART                    14:10 - $198.34
BARTENDER               14:10 - $198.34
MANNY                   13:10 - $263.34
MANAGER                 13:10 - $263.34
ANDREW                  11:45 - $235.00
ADMIN                   11:45 - $235.00

NO. 00000004      REG: POS-MAIN      ADMIN
-----
*****

```

Sales & Labor% Report

The Labor Report has an option selection for **Sales And Labor%**. When selected a more detailed report showing sales vs. hours worked is displayed. The Sales and Labor % Report uses data from both the Period Report and the Time In Out Report. When selected, additional Type selections are available.

When the Sales And Labor% option is selected the TYPE selection on the Labor Report is changed to:

FILTERS

EMPLOYEE – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

TOP – You can choose ALL employees or choose the Top 5, 10, 20, 30, 50, 100 employees.

TYPE

With the Sales And Labor % option selected, the Type selection toggles between Time Period and Date Period.

TIME PERIOD – Enter the desired time period in minutes (two digit entry) *i.e. 15, 30, 60, etc.*

Then choose the data type selection: NONE or EMPLOYEE TYPE

DATE PERIOD – Choose: Day, Week or Month.

Then choose the data type selection: NONE or EMPLOYEE TYPE

EMPLOYEE TYPE – Check to include each Employee and Job Code data on the report for the selected period or uncheck to just show the Job Code data on the report for the selected period.

The report data can be displayed in a **List** format or in a **Graph** format.

You must generate the EOD reports every day and generate the End Of Pay at the end of the pay period to get meaningful data on Sales and Labor% Report.

List Format

TYPE: Time Period = 60

Employee Type NOT selected (**NONE**):

Data is shown per time period setting (hourly).

DESCRIPTION	CUST	NET SALES	AVG/CUST	HRS LBR	LABOR COST	%/NET SALES	LABORS/CUST	SALES/MAN/HR
TOTAL	12	\$400.08	\$33.34	20.44	\$311.97	77.98%	\$25.99	\$19.29
08:00 - 08:59	0	\$0.00	\$0.00	00:34	\$5.67	0%	\$0.00	\$0.00
09:00 - 09:59	0	\$0.00	\$0.00	01:34	\$17.93	0%	\$0.00	\$0.00
10:00 - 10:59	0	\$0.00	\$0.00	02:34	\$35.33	0%	\$0.00	\$0.00
11:00 - 11:59	10	\$278.62	\$27.86	02:36	\$38.13	13.69%	\$3.81	\$107.16

List Format

TYPE: Time Period = 60

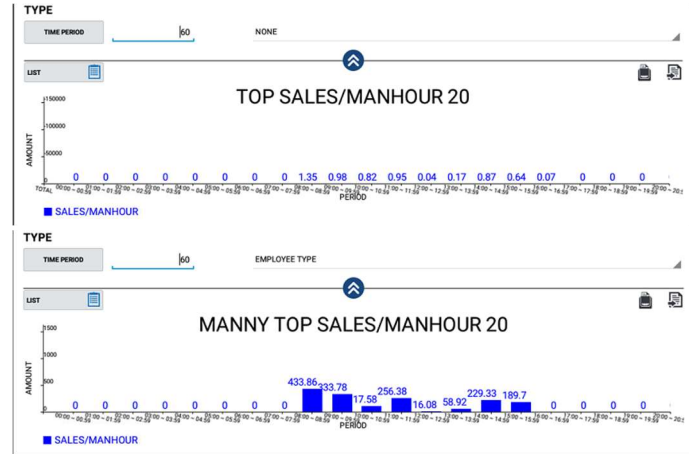
With **EMPLOYEE TYPE** selected:

Data is shown for each Employee \ per Time Period setting (hourly).

DESCRIPTION	CUST	NET SALES	AVG/CUST	HRS LBR	LABOR COST	%/NET SALES	LABORS/CUST	SALES/MAN/HR
TOTAL	12	\$400.08	\$33.34	20.44	\$311.97	77.98%	\$25.99	\$19.29
MANNY	4	\$169.81	\$42.45	04.47	\$95.67	56.34%	\$23.91	\$35.50
10:00 - 10:59	0	\$0.00	\$0.00	00:34	\$11.33	0%	\$0.00	\$0.00
11:00 - 11:59	4	\$169.81	\$42.45	00:52	\$17.33	10.21%	\$4.33	\$195.93
12:00 - 12:59	0	\$0.00	\$0.00	00:49	\$16.33	0%	\$0.00	\$0.00
13:00 - 13:59	0	\$0.00	\$0.00	01:00	\$20.00	0%	\$0.00	\$0.00
14:00 - 14:59	0	\$0.00	\$0.00	01:00	\$20.00	0%	\$0.00	\$0.00
15:00 - 15:59	0	\$0.00	\$0.00	00:32	\$10.67	0%	\$0.00	\$0.00
BART	3	\$53.17	\$17.72	05.47	\$80.97	152.29%	\$26.99	\$9.19
09:00 - 09:59	0	\$0.00	\$0.00	00:34	\$7.93	0%	\$0.00	\$0.00
10:00 - 10:59	0	\$0.00	\$0.00	01:00	\$14.00	0%	\$0.00	\$0.00
11:00 - 11:59	3	\$53.17	\$17.72	00:52	\$12.13	22.81%	\$4.04	\$61.34
12:00 - 12:59	0	\$0.00	\$0.00	00:49	\$11.43	0%	\$0.00	\$0.00
13:00 - 13:59	0	\$0.00	\$0.00	01:00	\$14.00	0%	\$0.00	\$0.00
14:00 - 14:59	0	\$0.00	\$0.00	01:00	\$14.00	0%	\$0.00	\$0.00
15:00 - 15:59	0	\$0.00	\$0.00	00:32	\$7.47	0%	\$0.00	\$0.00
SONJAI	3	\$55.64	\$18.54	06.68	\$68.00	122.21%	\$22.66	\$8.18
08:00 - 08:59	0	\$0.00	\$0.00	00:34	\$5.67	0%	\$0.00	\$0.00
09:00 - 09:59	0	\$0.00	\$0.00	01:00	\$10.00	0%	\$0.00	\$0.00

Graph Format

TYPE: Time Period = 60
EMPLOYEE TYPE NOT selected (NONE):
 Data is shown per time period setting (hourly).



Graph Format

TYPE: Time Period = 60
 With **EMPLOYEE TYPE** selected:
 Data is shown for each Employee \ per Time Period setting (hourly).

Sales And Labor% Report Definitions:

There are eight items per every time unit in the Sales and Labor % Report:

DESCRIPTION	CUST	NET SALES	AVG/CUST	HRS LBR	LABOR COST	%/NET SALES	LABORS\$/CUST	SALES/MANHOURL
-------------	------	-----------	----------	---------	------------	-------------	---------------	----------------

DESCRIPTION = Name (If Employee Type selected) Time/Date Period.

CUST: and **NET SALES:** Values are obtained from the Period Report where the **AVG/CUST:** is division of these two values.

- **CUST:** is the number of customers served per time period.
- **NET SALES:** is the Net Sale total for the time period.
- **AVG/CUST:** is the Net Sales total divided by the number of customers ($NET\ SALES \div CUST$).

HRS LBR: and **LABOR COST:** Are calculated from Time Keeping Report and Pay Rate Program.

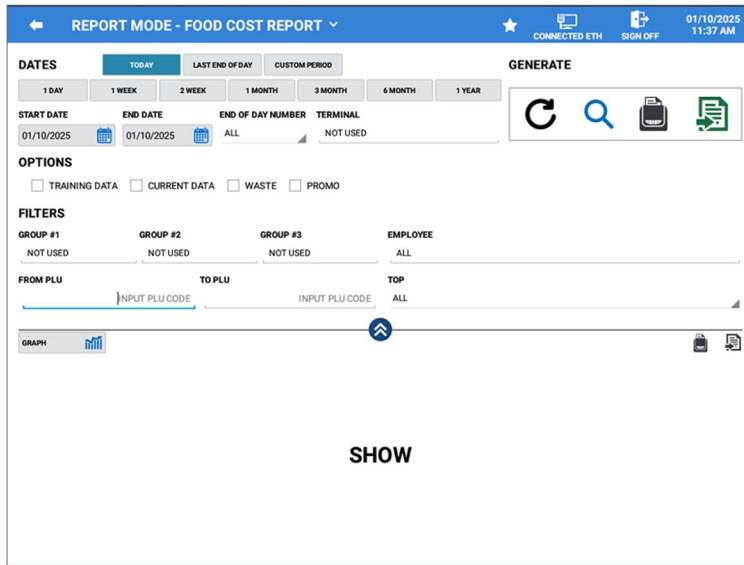
- **HRS LBR:** Is the sum of working hours for all employees who worked in this time period.
- **LABOR COST:** Is the sum of the product of working hours and pay rate for every employee ($HRS\ LBR * PAY\ RATE$).

%/NET SALES: Is a ratio of Net Sales to Labor Cost ($LABOR\ COST \div NET\ SALES * 100$).

LABORS\$/CUST: This value is the labor cost per each customer which can be calculated dividing the LABOR COST by the number of customers ($LABOR\ COST \div CUST$).

SALES/MANHOURL: Is the Division of the Net Sales total by the sum of working hours for all employees during this time period ($NET\ SALES \div HRS\ LBR$).

Food Cost Report



DATES

Date selections include: Today, Last End of Day, Custom Period
 1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE AND END DATE

END OF DAY NUMBER AND TERMINAL SELECTION

Not Used (*indicates there is no filter selected*), My Terminal, select Specific Terminal(s) or Select All

OPTIONS

Training Data, Current Data, Waste, Promo

NOTE: Option selections limit the report to display just the specified option selection data.

FILTERS

Group #1, Group #2, Group #3 – Select specific Groups assigned on PLU group assignment #1, #2, #3

Employee – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

From PLU \ To PLU – Select a PLU or PLU range for the report if desired

TOP – Choose to display the Top 5, 10, 20, 30, 50, 100 or ALL PLU's

Additionally, the Food Cost Report data can be displayed as a List report or in a Graph format.

GENERATE

Refresh, Zoom, Report View, Export

REPORT DATA

List: Recipe – Total Food Cost – Total Sales Count – Net Sale Total – Total Food Cost %

The columns can be sorted alphabetically: A to Z or Z to A; Highest to Lowest or Lowest to Highest.

Graph: Amount by Net Sales & Total Food Cost

Time In Out Report

The Time In/Out Report shows the time worked for each employee broken down by job code, the total regular time, overtime and labor cost for each employee. The total regular time, overtime and labor cost for all employees combined is shown at the end of the report.

When using the Time Keeping feature, The proper procedure for issuing Time Keeping Report is:

At the End of the Day

- Run the **TIME IN OUT** Report
- Perform any necessary **Time Clock Edits**
- Generate the **END OF DAY**

At the End of the Pay Period

- Run the **TIME IN OUT** Report
- Perform any necessary **Time Clock Edits**
- Generate the **END OF DAY**
- Generate the **END OF PAY**

REPORT MODE - TIME IN OUT REPORT

CONNECTED ETH SIGN OFF 01/10/2025 11:38 AM

DATES TODAY LAST END OF DAY CUSTOM PERIOD

1 DAY 1 WEEK 2 WEEK 1 MONTH 3 MONTH 6 MONTH 1 YEAR

START DATE 01/10/2025 END DATE 01/10/2025

GENERATE

FILTERS

EMPLOYEE ALL JOB CODE ALL CLOSED ALL TYPE ALL

NEW EDIT DELETE

SHOW

Time In Out Report Settings

DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

START DATE & END DATE

FILTERS

EMPLOYEE – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

JOB CODE – Select All or specific job code from the list

CLOSED – choose ALL, Not Closed, or Closed

TYPE – ALL, In, Out, Break Time

EDITING BUTTONS

Buttons for editing time entries are also provided.



REPORT DATA

Name – Job Code – Start Time – End Time – Type



The report data can be sorted alphabetically A-Z or Z-A or from Highest to Lowest or Lowest to Highest. You can also sort each column heading in ascending or descending order by tapping on the desired column header.

Report Function Key

The Time In/Out report can also be run from the register mode by programming a REPORT function key to run the Time In/Out Report. The report will print to the receipt printer for the station. The report data printed on the report will use the default Time In/Out Report settings and filters.

1. Create a **REPORT** Function key in the *Program Mode* → *Function Key* → *Function Key* program.
2. Select the **Time In Out Report** from the report selections and any other reports you wish to generate on the REPORT function key.
3. Set the **Filters** as desired:
 - **Employee:** Choose ALL Employees, Signed On Employee or Individual Employee.
 - **Terminal:** Choose ALL Terminal, (MY TERMINAL), or other Specified Terminal.
 - **Dates:** Select 1 Day, 1 Week, 1 Month, 3 Month, 6 Month or 1 Year.
4. Assign the **REPORT** function key to an MLU or FLU.
5. When the **REPORT** key is pressed, the Time In Out Report will be printed.

Note: More than one Report key can be created to run different reports with different report selections and filters.

Time Clock Editing

If an employee forgets to clock in or out or a time entry requires adjustment, authorized personnel can use the time clock edit buttons on the Time In/Out Report to add a new time entry for an employee, correct incorrect clock entries or delete time entries.

Use the buttons above the time entries to perform the desired operation. The available selections include:



- **New** – Use to enter a new time entry for the selected employee.
- **Edit** – Use to edit the current time entry for the selected employee.
- **Delete** – Use this selection to delete the selected time entry for the selected employee.

Important! All time clock edits must be performed **before the End Of Day Report** is generated. This is critical to remember especially if you perform an EOD report at the end of each Shift!

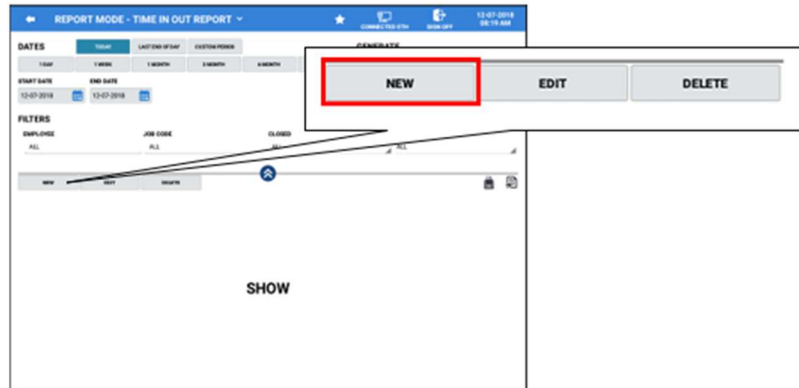
Time Clock Edit Notes:

- Time clock edits must be performed **before the End Of Day Report** is generated. This is critical to remember especially if you perform an EOD report at the end of each Shift! Edited records will display in red to easily see which times have been changed. If the End Of Day report has been generated you will not be able to edit the employee times. The data will appear “Grayed Out”.
- When the **Time Keeping Option: Clock IN/OUT Employee At EOD** is selected employees are automatically clocked In/Out when the EOD report is generated. When selected and the EOD report is generated, the notification: **“Clock In/Out Employee At EOD? Are You Sure?”** displays.
 - * When you Press **Yes**; clocked-in employees are Clocked out, the EOD is generated, and then employees are clocked back in. Afterward, the employee Time Stamp from prior to the EOD is grayed out and you are not able to edit those times. **Error Message #221 ALREADY CLOSED** will display if time edit is attempted. However, you will still be able to select time entries and delete the entries.
 - * When you Press **No**; the EOD is not generated. You can go to the Time Keeping Report to edit employee times if necessary.

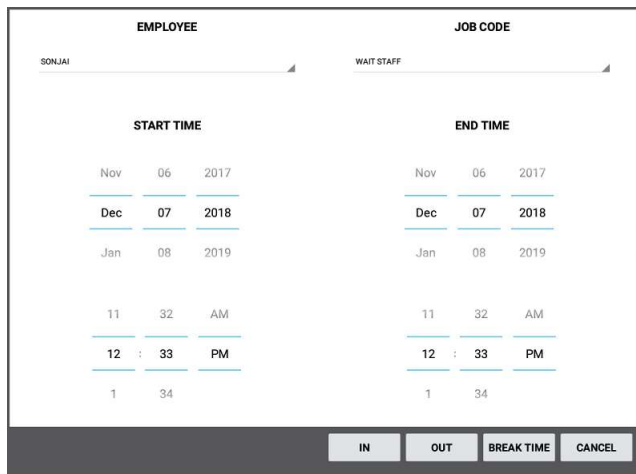
New Time Entry

If an employee forgets to clock in on a certain day we can manually enter the employees time for the current pay period.

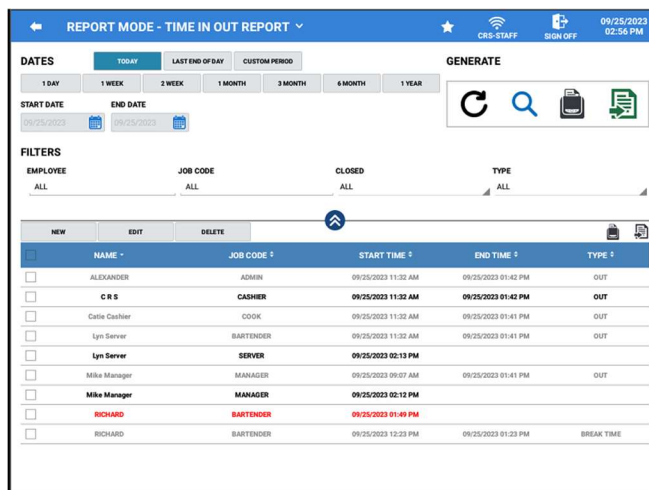
1. From the **Report Mode**, select the **Time In Out Report** from the detailed reports menu.
2. Press the **NEW** button to add a new time entry for an employee.



3. The time entry dialog displays. Select the **Entry Type**:
IN – This will enter the NEW time entry Job Code and Start Time for this employee.
OUT – This selection will enter the Job Code, Start Time & End Time for the selected employee.
BREAK TIME – This selection enters the Job Code, Start Time & End Time for the employee.
CANCEL – Will exit without entering any data.
4. Use the drop-down lists to select the **EMPLOYEE**, **JOB CODE**, **START TIME** and **END TIME**.



5. The **NEW** time entry is added and will display in red on the Time In Out Report:



Edit Time Entry

Employees with the proper authority level can edit the employee's Job Code, Start Time and End Time including the clock Out or Break Time selection as necessary.

Important! All time clock edits must be performed **before the End Of Day Report** is generated. This is critical to remember especially if you perform and EOD report at the end of each Shift!

1. From the **Report Mode**, select the **Time In Out Report** from the detailed reports menu; Select the **DATES** as necessary; choose the desired **FILTERS**, then press the **Refresh** icon in the Generate section or press **SHOW** to display the current employee time entries. The Time In/Out Report selections appear as per your Dates selection and Filter selections:

The screenshot shows the 'REPORT MODE - TIME IN OUT REPORT' interface. At the top, there are navigation options and a 'GENERATE' section with 'NEW', 'EDIT', and 'DELETE' buttons. The 'EDIT' button is highlighted with a red box. Below the buttons, there are filters for 'EMPLOYEE' and 'JOB CODE'. A table displays the following data:

NAME	JOB CODE	START TIME	END TIME	TYPE
BARTENDER	BARTENDER	12-07-2018 02:17 PM	12-07-2018 12:08 PM	BREAK TIME
BARTENDER	BARTENDER	12-07-2018 12:09 PM		
Richard	DISHWASHER	12-07-2018 06:11 AM	12-07-2018 01:11 PM	OUT
SONJAI	CASHIER	12-07-2018 12:07 PM		

2. Press the **EDIT** Button; The Time In-Out Edit dialog displays:

The screenshot shows the 'REPORT MODE - TIME IN OUT REPORT' interface with the 'EDIT' dialog displayed. The dialog has 'SAVE' and 'CANCEL' buttons at the top. Below the buttons is a table with the following data:

NAME	JOB CODE	START TIME	END TIME	TYPE
BARTENDER	BARTENDER	12-07-2018 02:17 PM	12-07-2018 12:08 PM	BREAK TIME
BARTENDER	BARTENDER	12-07-2018 12:09 PM		
DAVROS	BARTENDER	12-07-2018 10:58 AM		
SONJAI	CASHIER	12-07-2018 12:07 PM		

3. We can edit the Job Code, Start Time End Time or Type; Touch the time entry field for the employee time you wish to edit. To Edit Clock In entry, touch the **START TIME** or the **END TIME (MM-DD-YYYY HH:MM)** entry field. The time edit dialog displays:

START TIME - (ORIGINAL : 09-12-2019 12:32 PM)

Aug 11 2018
 Sep 12 2019
 Oct 13 2020

11 31 AM
 12 : 32 PM
 1 33

OK CANCEL

END TIME - (ORIGINAL : null)

Nov 06 2017
 Dec 07 2018
 Jan 08 2019

1 39 AM
 2 : 40 PM
 3 41

DELETE OUT BREAK TIME CANCEL

4. **Start Time Edit:** You can edit the Month – Day – or Year as well as the Hours – Minutes and AM/PM entry. Touch **OK** to save. *(Note that the original start time entry is shown in the title bar.)*
5. **End Time Edit:** You can also edit time entry type for the time entry:
 - a. **DELETE** – to delete the current end time entry.
 - b. **OUT** – if the new entry is the time out at end of their shift.
 - c. **BREAK TIME** - if the time entry is for clocking out for their break.
 - d. **CANCEL** – to cancel any changes without saving.

REPORT MODE - TIME IN OUT REPORT

CONNECTED ETH SIGN OFF 12-07-2018 02:43 PM

SAVE CANCEL

NAME	JOB CODE	START TIME	END TIME	TYPE
BARTENDER	BARTENDER	12-07-2018 02:17 PM	12-07-2018 12:08 PM	BREAK TIME
BARTENDER	BARTENDER	12-07-2018 12:09 PM		
DAVROS	BARTENDER	12-07-2018 10:58 AM	12-07-2018 02:42 PM	OUT
SONJAI	CASHIER	12-07-2018 12:07 PM		

6. Press **SAVE** to apply the new entry; pressing **CANCEL** will exit without applying any changes.
7. The edited time entry will appear in red and will print to the receipt printer (if set in system options) and the new time is applied to the Employee.

REPORT MODE - TIME IN OUT REPORT

CONNECTED ETH SIGN OFF 12-07-2018 02:47 PM

DATES: TODAY LAST END OF DAY CUSTOM PERIOD
 1 DAY 1 WEEK 1 MONTH 3 MONTH 6 MONTH 1 YEAR

START DATE: 12-07-2018 END DATE: 12-07-2018

GENERATE

FILTERS: EMPLOYEE: ALL JOB CODE: ALL CLOSED: ALL TYPE: ALL

NEW EDIT DELETE

NAME	JOB CODE	START TIME	END TIME	TYPE
BARTENDER	BARTENDER	12-07-2018 02:17 PM	12-07-2018 12:08 PM	BREAK TIME
BARTENDER	BARTENDER	12-07-2018 12:09 PM		
DAVROS	BARTENDER	12-07-2018 10:58 AM	12-07-2018 02:42 PM	OUT
SONJAI	CASHIER	12-07-2018 12:07 PM		

Delete Time Clock Entry

Erroneous time entries can be deleted from the Time In/Out report by authorized personnel as necessary. Deleting time entries is allowed even after the End Of Day is generated but must be performed before the End Of Pay is generated.

Caution: Use caution when performing this operation, deleted entries cannot be recovered.

1. From the **Report Mode**, select the **Time In Out Report** from the detailed reports menu, then press **SHOW** to display the current employee time entries:

The screenshot shows the 'REPORT MODE - TIME IN OUT REPORT' interface. At the top, there are navigation options like 'DATE', '1 DAY', '1 WEEK', '1 MONTH', '3 MONTH', and '6 MONTH'. Below that, there are 'START DATE' and 'END DATE' fields. The 'FILTERS' section includes 'EMPLOYEE', 'JOB CODE', and 'CLOSED'. A 'GENERATE' button is at the top right, with a red box around the 'DELETE' option. A red arrow points from this button to the 'DELETE' column header in the table below.

	NAME	JOB CODE	START TIME	END TIME	TYPE
<input type="checkbox"/>	BARTENDER	BARTENDER	12-07-2018 02:17 PM	12-07-2018 12:08 PM	BREAK TIME
<input type="checkbox"/>	BARTENDER	BARTENDER	12-07-2018 12:09 PM	12-07-2018 08:17 PM	OUT
<input type="checkbox"/>	Cassie	CASHIER	12-04-2018 06:45 AM	12-07-2018 02:54 PM	OUT
<input type="checkbox"/>	Cassie	CASHIER	12-07-2018 06:05 AM	12-07-2018 01:18 PM	OUT
<input type="checkbox"/>	Cassie	CASHIER	12-05-2018 06:53 AM	12-05-2018 02:53 PM	OUT
<input type="checkbox"/>	DAVROS	BARTENDER	12-05-2018 02:54 PM	12-05-2018 10:54 PM	OUT
<input type="checkbox"/>	DAVROS	BARTENDER	12-07-2018 10:58 AM	12-07-2018 02:42 PM	OUT
<input type="checkbox"/>	Richard	DISHWASHER	12-07-2018 06:11 AM	12-07-2018 01:11 PM	OUT
<input checked="" type="checkbox"/>	SONJAI	CASHIER	12-07-2018 12:07 PM		
<input type="checkbox"/>	SONJAI	WAIT STAFF	12-05-2018 06:52 AM	12-05-2018 02:52 PM	OUT

2. Select the time entry record you wish to remove; Press the **DELETE** Button. The selected record is removed:

The screenshot shows the 'REPORT MODE - TIME IN OUT REPORT' interface after a record has been deleted. The 'DELETE' button in the top right 'GENERATE' section is highlighted with a red box. A red arrow points from this button to the 'DELETE' column header in the table below.

	NAME	JOB CODE	START TIME	END TIME	TYPE
<input type="checkbox"/>	BARTENDER	BARTENDER	12-07-2018 02:17 PM	12-07-2018 12:08 PM	BREAK TIME
<input type="checkbox"/>	BARTENDER	BARTENDER	12-07-2018 12:09 PM	12-07-2018 08:17 PM	OUT
<input type="checkbox"/>	Cassie	CASHIER	12-07-2018 06:05 AM	12-07-2018 01:18 PM	OUT
<input type="checkbox"/>	Cassie	CASHIER	12-04-2018 06:45 AM	12-07-2018 02:54 PM	OUT
<input type="checkbox"/>	Cassie	CASHIER	12-05-2018 06:53 AM	12-05-2018 02:53 PM	OUT
<input type="checkbox"/>	DAVROS	BARTENDER	12-05-2018 02:54 PM	12-05-2018 10:54 PM	OUT
<input type="checkbox"/>	DAVROS	BARTENDER	12-07-2018 10:58 AM	12-07-2018 02:42 PM	OUT
<input type="checkbox"/>	Richard	DISHWASHER	12-07-2018 06:11 AM	12-07-2018 01:11 PM	OUT
<input type="checkbox"/>	SONJAI	WAIT STAFF	12-05-2018 06:52 AM	12-05-2018 02:52 PM	OUT

Time Clock Edit Notes:

- You must perform all time clock edits *before* the **End Of Day Report** is generated. This is critical to remember especially if you perform an EOD report at the end of each Shift! Edited records will display in red to easily identify which time entries have been changed. If the End Of Day report has been generated you will not be able to edit the employee times. The data will appear “Grayed Out”.
- When the **Time Keeping Option: Clock IN/OUT Employee At EOD** is selected employees are automatically clocked In/Out when the EOD report is generated. When selected and the EOD report is generated, the notification: “**Clock In/Out Employee At EOD? Are You Sure?**” displays.
 - * When you Press **Yes**; clocked-in employees are Clocked out, the EOD is generated, and then employees are clocked back in. Afterward, the employee Time Stamp from prior to the EOD is grayed out and you are not able to edit those times. **Error Message #221 ALREADY CLOSED** will display if time edit is attempted. However, you will still be able to select and **DELETE** time entries.
 - * When you Press **No**; the EOD is not generated. You can go to the Time Keeping Report to edit employee times if necessary.

Sample Time In/Out Report Before EOD

Before the EOD is generated, employee Time In/Out data is displayed in normal font and is accessible for editing.

NEW	EDIT	DELETE					
	NAME	JOB CODE	START TIME	END TIME	TYPE		
<input type="checkbox"/>	Lyn Server	WAIT STAFF	09/01/2023 09:40 AM	09/20/2023 08:49 AM	OUT		
<input type="checkbox"/>	Lyn Server	WAIT STAFF	09/20/2023 09:27 AM	09/21/2023 10:09 AM	OUT		
<input type="checkbox"/>	Mike Manager	MANAGER	09/20/2023 09:26 AM	09/21/2023 10:10 AM	OUT		

Sample Time In/Out Report After EOD

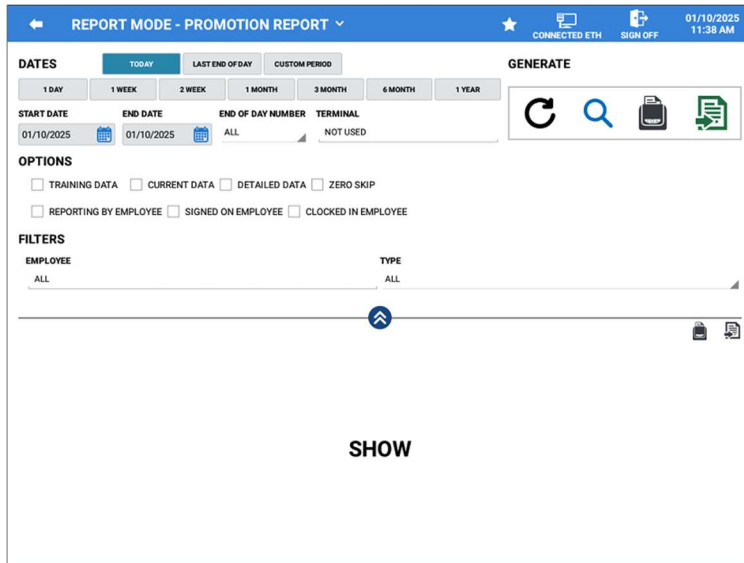
After the EOD is generated, employee Time In/Out data is greyed out, not accessible for editing data.

NEW	EDIT	DELETE					
	NAME	JOB CODE	START TIME	END TIME	TYPE		
<input type="checkbox"/>	Lyn Server	WAIT STAFF	09/01/2023 09:40 AM	09/20/2023 08:49 AM	OUT		
<input type="checkbox"/>	Lyn Server	WAIT STAFF	09/20/2023 09:27 AM	09/21/2023 10:09 AM	OUT		
<input type="checkbox"/>	Mike Manager	MANAGER	09/20/2023 09:26 AM	09/21/2023 10:10 AM	OUT		

Time Clock Edit Receipt Example

```
TIME CLOCK - EDIT
< BEFORE EDITING >
Cassie Cashier
JOB NAME  TYPE    DATE  IN   DATE  OUT
COOK
          09.24 09:07 AM - ---:--
          TIPS : $0.00
          ALEXANDER
JOB NAME  TYPE    DATE  IN   DATE  OUT
MANAGER
          09.24 09:14 AM - ---:--
          TIPS : $0.00
          Lyn Server
JOB NAME  TYPE    DATE  IN   DATE  OUT
BARTENDER
          09.24 09:07 AM - ---:--
          TIPS : $33.00
< AFTER EDITING >
Catie Cashier
JOB NAME  TYPE    DATE  IN   DATE  OUT
COOK
          * 09.24 09:07 AM - 09.24 10:19 PM
          TIPS : $0.00
          ALEXANDER
JOB NAME  TYPE    DATE  IN   DATE  OUT
MANAGER
          * 09.24 09:07 AM - 09.24 10:19 PM
          TIPS : $0.00
          Lyn Server
JOB NAME  TYPE    DATE  IN   DATE  OUT
BARTENDER
          * 09.24 09:07 AM - 09.24 10:19 PM
          TIPS : $33.00
```

Promotion Report



DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE & END DATE

END OF DAY NUMBER

ALL is the only selection.

TERMINAL SELECTION

Not Used (*indicates there is no filter selected*), My Terminal, select Specific Terminal(s) or Select All

OPTIONS

Training Data, Current Data, Detailed Data, Zero Skip
Reporting By Employee, Signed On Employee, Clocked In Employee

FILTERS

EMPLOYEES – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.

TYPE – All, Mix and Match, Multi buy, Combo Discount, Sweet Deal

GENERATE

Refresh, Zoom, Report View, Export

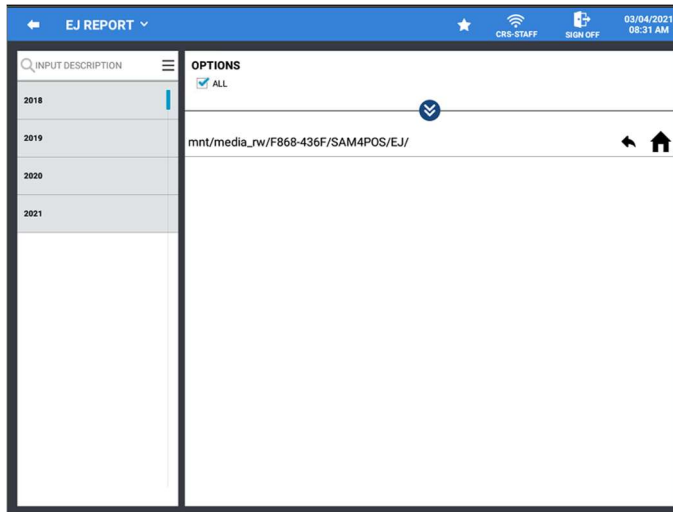
REPORT DATA

Description – Count – Total

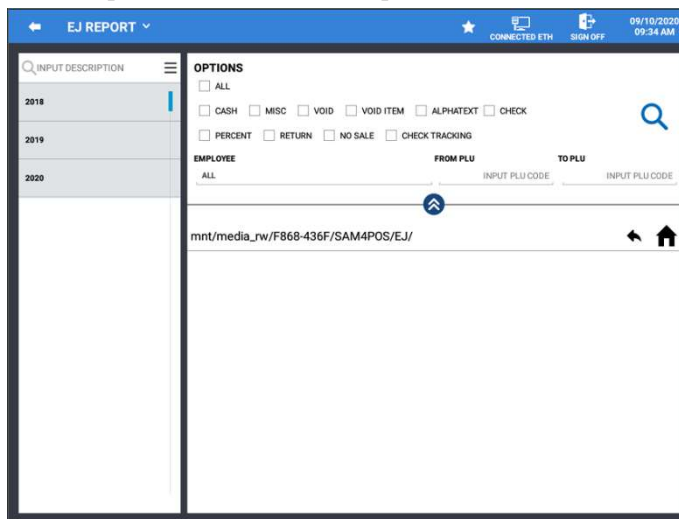
EJ Report

To utilize the EJ Report it must first be enabled in the Program Mode\ Options\ Options\ Report Options. The EJ Report is a useful tool for searching, reviewing and reprinting previously closed transactions and operations. The EJ Report can be set to save data to a USB drive or to internal storage. Refer to the Report Option settings in the Sam4pos Programming Manual for all EJ option selections and definitions.

1. From the **Report Mode**, select the **EJ Report** from the **Detailed Reports** menu.



2. You have **Options** selections on the EJ Report to view specific transaction types. Unchecking the **ALL** selection in the Options area to view the option selections.

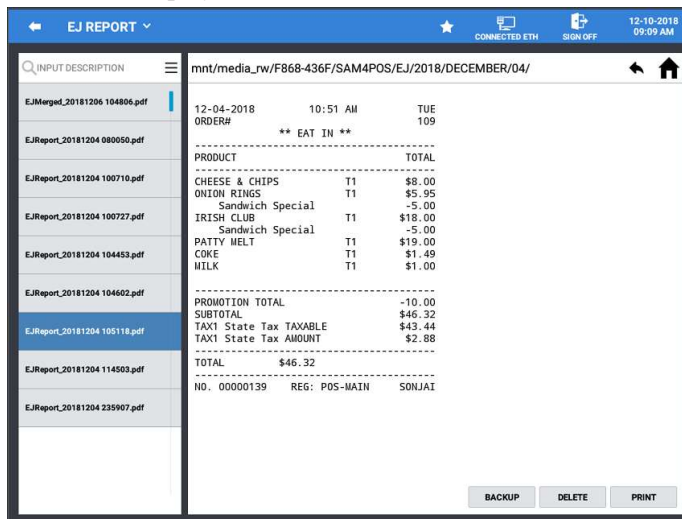


3. Choose the Options for the transaction data you wish to filter for:
 - ◆ **All** – Displays ALL EJ data.
 - ◆ **Select individual Options** – Cash, MISC, Void, Void Item, Alpha Text, Check, Percent, Return, No Sale, Check Tracking
 - ◆ **Employee** – SELECT ALL or select specific employees. REMOVE DELETED EMPLOYEE will hide these employees in the employee list.
 - ◆ **From PLU ~ To PLU Range** – Select a specific PLU range for the report.



4. EJ Reports are sorted by *Year / Month / Date / Transaction*. Simply press the desired selection to expand.




5. The transactions that correspond to your filter selections will be listed; When a transaction is selected, the transaction detail is displayed:



6. With the selected transaction displayed: you can **Backup**, **Delete**, or **Print** the transaction.
- ◆ **Backup** – Backs up the transaction to the memory device
 - ◆ **Delete** – Will delete the selected transaction (*Controlled by Employee Authority Level.*)
 - ◆ **Print** – Prints the transaction to the receipt printer
7. The EJ Report file path is displayed at the top of the display; the navigation icons can be used to:

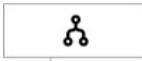
-  go back one level on the memory device
-  go to the root of the memory device

EJ Report - EDIT MODE

The Edit Mode  can be used to Print, Merge, Save and Delete EJ Report data.



Print the selected record



Merge allows you to select some transactions in the EJ Report and MERGE them or choose some or all transactions and print or email together.

Original individual EJ Report data for each day remains and a separate report file for the merged data *EJMerged_yyyymmdd hhmms.pdf* is created. This file will contain all the merged EJ transactions.



Delete the selected records



Export the selected records:

- ◆ Choose Export File: To CSV or To PDF
- ◆ Choose Export Path: USB or FTP

Note: On terminals that have an SD port, the SD port is viewed as a USB port. If an SD card is inserted and the EJ path is set for USB, the EJ files will be written to the SD.



Close the Edit Mode

EJ Report - Send Range To Email

1. Press the **Menu**  icon and select **EJ REPORT SEND RANGE TO EMAIL**



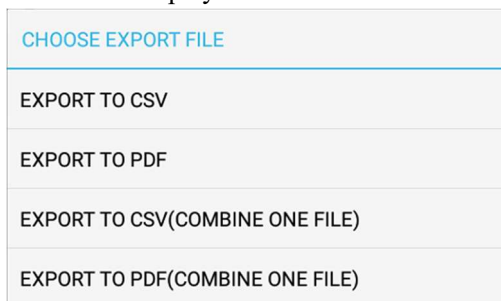
EJ REPORT SEND RANGE TO EMAIL

START DATE
04-17-2020

END DATE
04-17-2020

OK CANCEL

2. Enter the **START DATE** and **END DATE** for the range of EJ Reports you want to email.
 - You can tap the date and use the Calendar to select the Month \ Day(s) \ Year for the Range.
3. Press **OK** to proceed; Pressing **CANCEL** will Exit the operation. The **CHOOSE EXPORT FILE** format selection menu displays:



CHOOSE EXPORT FILE

EXPORT TO CSV

EXPORT TO PDF

EXPORT TO CSV(COMBINE ONE FILE)

EXPORT TO PDF(COMBINE ONE FILE)

Export To CSV – Files are sent as they appear in the date range as separate files.

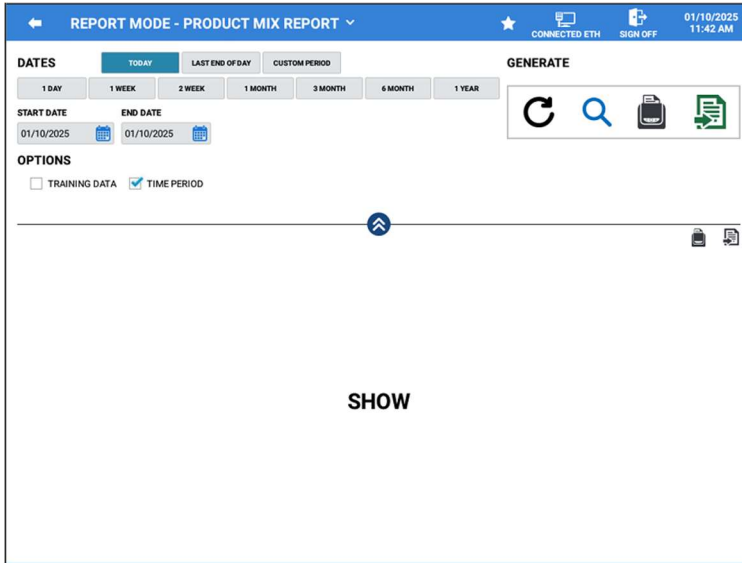
Export To PDF – Files are sent as they appear in the date range as separate files.

Export To CSV (Combine One File) – Files are sent as they appear in the date range as one combined file.

Export To PDF (Combine One File) – Files are sent as they appear in the date range as one combined file.

4. The EJ will upload to the email addresses as set up in the Options \ Option \ Report Option settings.

Product Mix Report



DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR

Additional selections in the Dates area are:

START DATE & END DATE

OPTIONS

Training Data – Select to display only totals from Training employee.

Time Period – When time period is not selected (*unchecked*), only the summary of the Product Mix Report will print. When time period is selected (*checked*) the data is broken down into hourly time periods.

GENERATE

Refresh, Zoom, Report View, Export

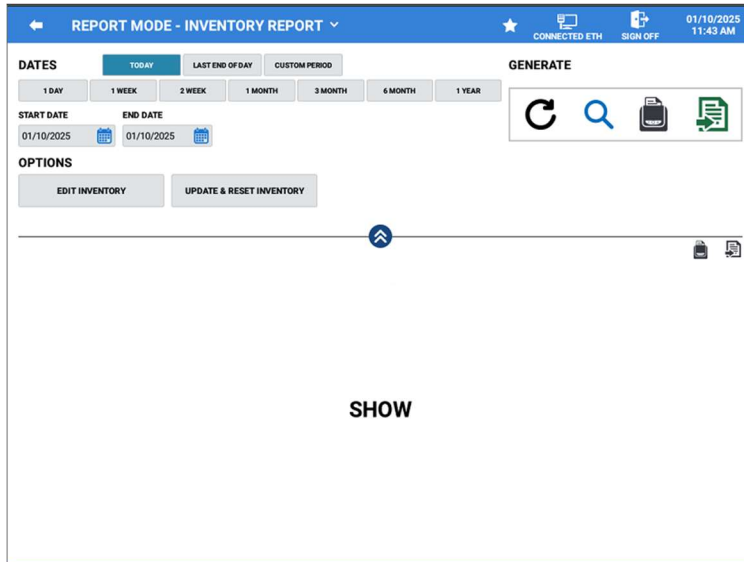
REPORT DATA

Description – Count – Total

The columns can be sorted alphabetically: A to Z or Z to A; Highest to Lowest or Lowest to Highest.

Inventory

This report is only used when Ingredient & Recipes are set up for items.



DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR
START DATE & END DATE

OPTIONS

Edit Inventory – Brings you to the Ingredient programming screen.
Update & Reset Inventory – Pressing this button will Update & Reset the inventory data.

GENERATE

Refresh, Zoom, Report View, Export

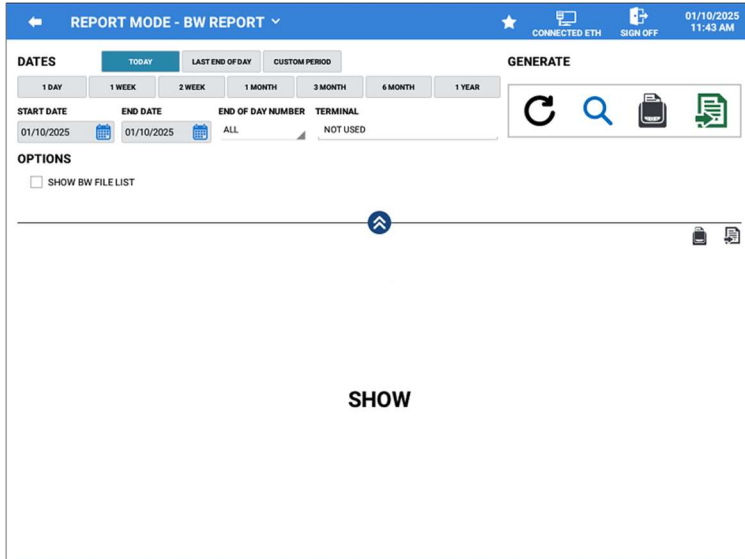
REPORT DATA

Description – Theoretical Usage – Actual Usage – Ending Inventory – Value Of Inventory – Variance –
Variance Cost – Efficiency % – Food Cost %

The data can be sorted alphabetically: A to Z or Z to A; Highest to Lowest or Lowest to Highest.

BW Report

Only available with the BandyWorks firmware – refer to the BandyWorks supplement for details.



DATES

Date selections include: Today, Last End of Day, Custom Period
1 DAY, 1 WEEK, 2 WEEK, 1 MONTH, 3 MONTH, 6 MONTH, 1 YEAR
START DATE & END DATE

OPTIONS

Show BW File List = unchecked:

DESCRIPTION	COUNT
BW ITEMS COUNT	183

Show BW File List = checked:


DESCRIPTION
<input type="checkbox"/> /mnt/sdcard/SAM4POS/BandyWorks/52587_4444_TroyTest()CRSBarPub20260203105522.csv
<input type="checkbox"/> /mnt/sdcard/SAM4POS/BandyWorks/52587_4444_TroyTest()CRSBarPub20260203133041.csv
<input type="checkbox"/> /mnt/sdcard/SAM4POS/BandyWorks/52587_4444_TroyTest()CRSBarPub20260203133237.csv
<input type="checkbox"/> /mnt/sdcard/SAM4POS/BandyWorks/52587_4444_TroyTest()CRSBarPub20260204143635.csv

GENERATE

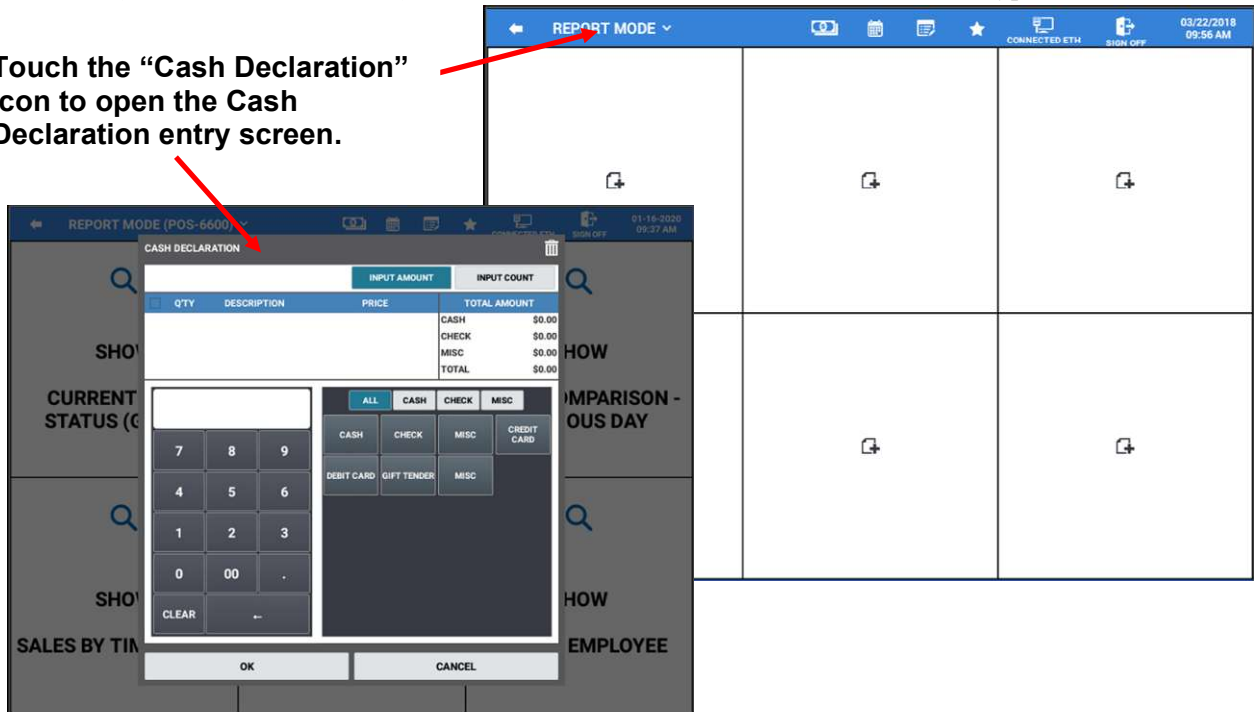
Refresh, Zoom, Report View, Export

Cash Declaration

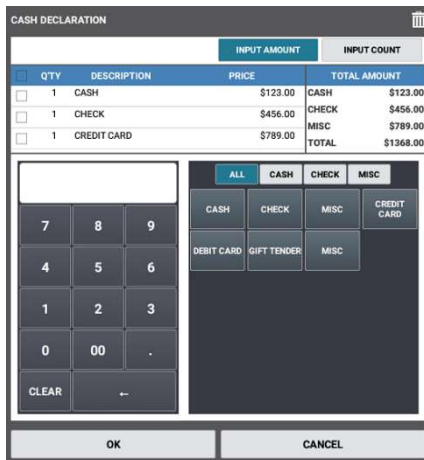
Cash declaration is the process of counting and reporting media amounts in the drawer before a report is taken. The purpose of this feature is to insure accurate reporting; the difference will print to the receipt printer. Cash declaration can be set as compulsory before issuing an EOD report or Time Keeping Report, in the Report Options/EOD Options. Employee's must have the authority to perform cash declarations. If desired, the cash drawer can be triggered to open when the cash declaration is performed by setting the option in the Drawer Options.

- ◆ From the Report Mode, touch the Cash Declaration icon  on the title bar to enter each media total amount (Cash, Check, and MISC.) in the cash drawer. Use ALL to view all the media types.

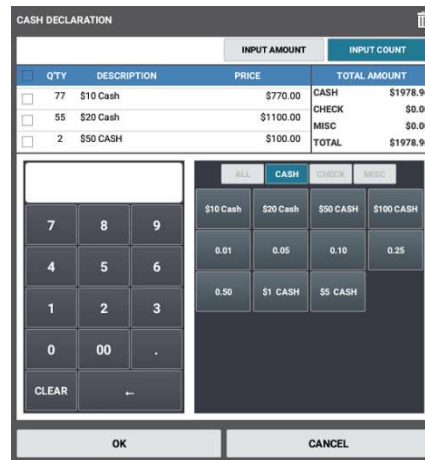
Touch the "Cash Declaration" icon to open the Cash Declaration entry screen.



- ◆ There are two methods available for inputting your totals: **Input Amount** & **Input Count**.



Input Amount



Input Count

Input Amount

The input amount method allows you simply count selected media type and enter that total amount.

1. You can select to count just the **CASH**, **CHECK** or **MISC** totals as desired or select **ALL** to view & enter all the media types.
2. Type in the amount for the media, then press the media type button to add the amount to the selected media type.
3. If an incorrect entry is entered, you can select the amount by clicking the check box preceding the amount and press the trash can icon in the upper right corner to delete the amount.
4. When you have entered all the appropriate media type amounts, press **OK**.


Input Count

The Input Count method allows you to simply count the number of a specific quick cash media; pennies, quarters, dollars, ten dollars, etc. These Quick Cash Tender types must be created in the Program Mode\Function Key\Tender Key programming before they will appear on the Cash Declaration\Input Count tab.

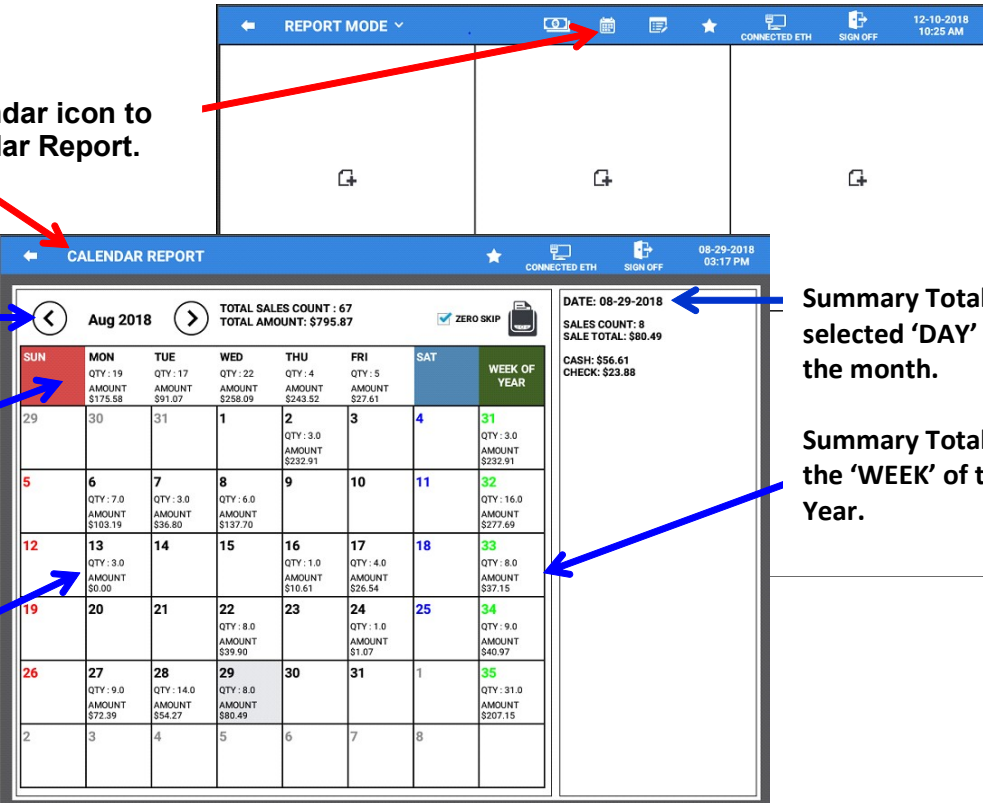
1. Count the number of the specific Quick Cash Tender type; press the appropriate Quick Cash Tender button. The terminal will calculate the number entered with the quick cash tender type and enter the appropriate amount.
2. If an incorrect entry is entered, you can select the amount by clicking the check box preceding the amount and press the trash can icon in the upper right corner to delete the amount.
3. When all cash has been entered, press **OK**.

Calendar Report View

Current monthly totals can be viewed and printed on a monthly calendar format by pressing the calendar view icon on the Report Mode title bar. Monthly Sales data is displayed for each day and week of the month by selecting the calendar report in the report mode.

- ◆ The Calendar icon  allows you to view sales data accumulated for the selected month.




Touch the Calendar icon to open the Calendar Report.



The screenshot shows the 'CALENDAR REPORT' screen for August 2018. At the top, it displays 'REPORT MODE' and a navigation bar with icons for back, calendar, print, star, and sign off. The main area is a calendar grid for August 2018. To the right of the grid, there are summary statistics for the selected date (08-29-2018) and the week of the year (31). Annotations with arrows point to various parts of the screen:

- Monthly Totals:** Points to the navigation arrows and the month/year 'Aug 2018'.
- Totals by 'Day' of week:** Points to the 'SUN' column header.
- Daily totals appear for each date of the month:** Points to a cell in the calendar grid (e.g., 13).
- Summary Total for selected 'DAY' of the month:** Points to the 'DATE: 08-29-2018' section.
- Summary Totals for the 'WEEK' of the Year:** Points to the 'WEEK OF YEAR' column.

SUN	MON	TUE	WED	THU	FRI	SAT	WEEK OF YEAR
29	30	31	1	2	3	4	31
5	6	7	8	9	10	11	32
12	13	14	15	16	17	18	33
19	20	21	22	23	24	25	34
26	27	28	29	30	31	1	35
2	3	4	5	6	7	8	

- ◆ Monthly totals are displayed at the top of the calendar while daily totals are displayed for each day in the month. Use the   arrows to navigate to the desired month.
 - ◇ Sales totals by the week 'Day' is displayed for SUN through SAT.
 - ◇ Daily totals for each day are reported on the calendar grid.
 - ◇ Weekly totals for each week of the year show at the right of the week.
 - ◇ Totals at the right show the totals for a selected day of the month.
 - ◇ Daily totals for each day of the month may be printed by pressing the  print icon. This prints the total for each Date 1st, 8th, 15th, etc. Check ZERO SKIP to skip days with no sales totals.

Report Function Key

REPORT function keys are available to allow generating individual reports or generating several reports all at one time from the register mode. More than one report key can be created to run different reports with different filters and report selections. Create a Report Function key: **Program Mode** → **Function Key** → **Function Key** program.

- ⇒ Select the reports you wish to generate on the REPORT function key.
- ⇒ Set the Filters for the desired: Employee, Terminal, and Dates selections.

Report Samples

Overview

Reports generated in the Sam4POS may be printed to the programmed receipt printer for the station or exported as a .CSV file or .PDF file. The exported report can be sent to a USB memory drive or to an email address. The email feature must be set up in the Report Option programming before using the Email Reports feature.

The Options and Filters selections described in the Detailed Reports chapter affect the data printed on reports. Your reports may differ from the examples shown here depending on the settings at your station. The Options and Filters selections used when the report was generated will appear on the report header.

Report Notes:

The last line on all printed reports shows the report counter number, the Terminal Descriptor of the station the report was generated on and the Employee that generated the report.

The report counter number advances each time a report is generated. There is only one report counter for all reports, whether the report is generated from the Report Mode or from the EOD.

If desired, the receipt Logo Image can be printed on reports. Refer to the *Program Mode > Options > Options > Report Option* programming for all option settings.

Printed Reports

Financial Report

Refer to the Balancing Formulas on page 278 for balancing this report.

```
04/27/2021      10:00 AM      TUE
BarPub (POS-MAIN)
FINANCIAL REPORT
DATE : 04/27/2021 10:00 AM
AUTHOR : MANAGER

DATE RANGE
04/27/2021 ~ 04/27/2021
END OF DAY NUMBER : ALL

OPTIONS
CURRENT DATA
DETAILED DATA
ZERO SKIP

FILTERS
TERMINAL : [NOT USED]
EMPLOYEE : [ALL]

[ALL TERMINAL]

=====
DESCRIPTION                COUNT      TOTAL
=====
(+) PLU TOTAL                9      $75.31
PRICE LEVEL01                6      $50.31
PRICE LEVEL02                3      $25.00
(-) PLU TOTAL                0       $0.00
ADJST TOTAL (A)              9      $50.31
-----
NON-TAX                      $0.00
TAX1 State Tax SALES        $24.95
TAX2 Liquor Tax (VAT) SALES $4.69
TAX3 TaxTable SALES        $21.67

TAX TOTAL (T)                $3.02
TAX1 State Tax              $1.54
TAX2 Liquor tax (VAT)      $0.18
TAX3 Tax Table              $1.30
EXEMPT TAX SALES TOTAL     $0.00
-----
DESTINATION SALES           3      $50.67
EAT IN                       3      %50.67
-----
DISCOUNT TOTAL (D')        2 -3.50 (-2.50)
10% SALE DISC                1       -2.50
$1.00 OFF ITEM               1       -1.00

NET SALES (A) + (T) - (D')   3      $75.83
```

Continued ...

Report header shows the details about the report and parameters that were set when the report was generated.

If multiple price levels are used, and the Detailed Data option is selected, the register will report (+) and (-) totals for each of the levels.

TAX amount totals as reported from each individual transaction.

When an item discount is set to NET the item total, the Discount Total (D') shows the total for all discounts (the first number) and the total amount for item NET discounts.

... Continued from previous page

GROSS SALES		\$75.83
CREDIT TAX TOTAL	0	\$0.00
MDSE RETURN	0	\$0.00
PREVIOUS VOID	0	\$0.00
TRANS VOID	0	\$0.00
CANCEL	0	\$0.00

RA TOTAL	1	\$200.00
RA-Beginning Cash	1	\$200.00
PO TOTAL	1	\$100.00
PO-2	1	\$100.00

CASH OUT TOTAL	0	\$0.00
CASH SALES	1	\$14.90
\$20 CASH	1	\$14.90
CHECK SALES	1	\$11.78
CHECK	1	\$11.78
HASH TOTAL	0	\$0.00
AUDACTION	0	\$0.00
NO SALE	0	\$0.00

CASH-IN-DRAWER		\$204.90
CASH SALES		\$204.90
CHECK CASHING		-285.00
CHECK-IN-DRAWER	5	\$321.80
FD/S-IN-DRAWER	0	\$0.00
MISC TEND SALES	-1	-46.01
AM EX	-1	-30.00
VISA	0	-16.01
CONVERSION TOTAL		20.00
DRAWER TOTAL		\$150.67

PROMO	0	\$0.00
WASTE	0	\$0.00
GUESTS	0	\$0.00
CHECKS PAID	0	\$0.00
OPEN CHECK	0	\$0.00
INTERRUPT BALANCE	0	\$0.00
TIP TOTAL	0	\$0.00
ESTIMATED TIPS	0	\$0.00
DECLARATION TOTAL	0	\$0.00
DECLARATION OVER/SHORT	0	\$0.00
COUPON SALES	1	-1.00
TRAINING TOTAL	3	\$800.61
ROUND TOTAL	1	\$0.02
PROMOTION TOTAL	0	\$0.00
MIX AND MATCH	3	-4.97
LOYALTY DISCOUNT TOTAL	0	\$0.00
AVERAGE SALES		\$16.94
AVERAGE GUEST	0	\$0.00

NRGT		\$1410215.08
NO. 00000648	REG: POS-MAIN	MANAGER

* * * * *		

Note: **Audaction** is the total of all sales finalized with a negative balance.

ROUND TOTAL is the total of all positive and negative RND Total's from rounded CASH transactions.

NRGT is the Non-Resettable Grand Total amount. This total continues to increase with the combined ADJST TOTAL from all current and previously generated reports. NRGT may or may not include Tax totals and/or Discount totals depending on the report option settings. Beginning at v2.0.163 if you select the report option: Reporting By Terminal, the NRGT will print for each Individual Station and a combined NRGT total for All Terminals.

PLU Report

The PLU report includes the PLU descriptor and the PLU Code (number in the parenthesis).

The Report Option: EXPORT SIMPLE PLU REPORT TO CSV/PDF *is not checked*:

```
04/27/2021      11:46 AM      TUE
BarPub (POS-MAIN)
PLU REPORT (ALL)
DATE : 04/27/2021 11:46 AM
AUTHOR : MANAGER

DATE RANGE
04/27/2021 ~ 04/27/2021
END OF DAY NUMBER : ALL

OPTIONS
CURRENT DATA

FILTERS
TERMINAL : [NOT USED]
EMPLOYEE : [ALL]
GROUP : [NOT USED]
GROUP #2 : [NOT USED]
GROUP #3 : [NOT USED]
PLU : ALL

=====
DESCRIPTION          COUNT    TOTAL    RATIO
(CODE)
=====
WINGS APP (#9)             1     $5.00   11.91%

PATTY MELT (#47)          1     $7.99   15.88%

16oz T-Bone
STEAK (#87)              1     $6.99   13.3%

BTL MILLER HIGH          1     $4.69    9.32%
LIFE (#1058)

WINCHESTER                5    $24.95   49.59%
LITTLE CIGARS (#1376000098)

=====
TOTAL                      9    %50.31  100.00%

NO. 00000649      REG: POS-MAIN      MANAGER

-----
* * * * *
-----
```

Group Report

```
04/27/2021      11:46 AM      TUE
BarPub (POS-MAIN)
GROUP REPORT (ALL)
DATE : 04/27/2021 11:46 AM
AUTHOR : MANAGER

DATE RANGE
04/27/2021 ~ 04/27/2021
END OF DAY NUMBER : ALL

OPTIONS
CURRENT DATA

FILTERS
TERMINAL : [NOT USED]
EMPLOYEE : [ALL]
PLU : ALL

=====
DESCRIPTION      COUNT      TOTAL      RATIO
=====
STARTERS          1         $5.99     11.32%
SANDWICHES       1          %7.99     15.88%
DINNERS          1          $6.99     13.89%
CIGARS           5         $24.95     49.59%
BEER             1          $4.69      9.32%

=====
TOTAL            8         $50.31    100.00%

NO. 00000650      REG: POS-MAIN      MANAGER

-----
* * * * *
```

Period Report

The report shown here is just one specific report with the Time Period set at 60 and Type = Sales. With different TYPE selections the reports will appear different. Refer to the Period Report definitions on page 226 in the Detailed Reports chapter for other filter and Type settings.

```
04/27/2021      01:52 PM      TUE
BarPub (POS-MAIN)
PERIOD REPORT (ALL)
DATE : 04/27/2021 01:52 PM
AUTHOR : MANAGER

DATE RANGE
04/27/2021 ~ 04/27/2021
END OF DAY NUMBER : ALL

FILTERS
TERMINAL : [NOT USED]
EMPLOYEE : [ALL]

TYPE
TIME PERIOD : 60
SALES

=====
DESCRIPTION      COUNT      TOTAL      RATIO
=====
09:00 ~ 09:59      1      $5.99      11.32%
10:00 ~ 10:59      1      %7.99      15.88%
11:00 ~ 11:59      1      $6.99      13.89%
13:00 ~ 13:59      5      $24.95      49.59%
TOTAL              8      $115.11     100.00%

NO. 00000651      REG: POS-MAIN      MANAGER

-----
* * * * *
```

Open Check Report

If check tracking is utilized and there are open checks in the system, we can print out the Open Check Report to view a summary of the open checks.

```
04/27/2021      11:52 AM      TUE
BarPub (POS-MAIN)
OPEN CHECK REPORT (ALL)
DATE : 04/27/2021 11:52 AM
AUTHOR : MANAGER

DATE RANGE
04/27/2021 ~ 04/27/2021
END OF DAY NUMBER : ALL

FILTERS
TERMINAL : [NOT USED]
EMPLOYEE : [ALL]
TRACK :[RECALL CHECK, Phone Order, Take-Out Or
der, RECALL TABLE MAP, Drive-Thru Recall, RECA
LL Delivery, RECALL BAR]

=====
TRACK /CHECK# / GUEST#      TOTAL
EMPLOYEE      START TIME / END TIME
=====
RECALL CHECK / 1014 / 0      $9.53
MANNY      12:27 / 12:47

RECALL Delivery / 2771 / 0      $6.45
CASSIE      11:15 / 11:35

TOTAL      $15.98

NO. 00000652      REG: POS-MAIN      MANAGER

-----
* * * * *

```

Stock Report

Only the TODAY selection is available when generating this report, all other date selections are grayed out.

```
04/27/2021      01:53 PM      TUE
BarPub (POS-MAIN)
STOCK REPORT (ALL)
DATE : 04/27/2021 01:53 PM
AUTHOR : MANAGER

DATE RANGE

FILTERS
GROUP : [NOT USED]
GROUP #2 : [NOT USED]
GROUP #3 : [NOT USED]
PLU : 13760000098 ~ 13760000906

=====
DESCRIPTION                                GROUP
STOCK / COST                                PRICE 1 / PRICE 2
=====
WINCHESTER LITTLE CIGARS(13760000906)
                                           [Cigars]
55 / 1.17                                4.99 / 4.49

WINCHESTER LITTLE CIGARS(13760000098)
                                           [Cigars]
49 / 1.27                                4.99 / 4.49

TOTAL (#)
104 / 126.58                                518.96 / 466.96

NO. 00000653      REG: POS-MAIN      MANAGER

-----
* * * * *
```

The TOTAL (#) value = each of the individual items STOCK quantity multiplied by the COST then added together.

As in the report above: $55 + 49 = 104$ and $(55 * 1.17) + (49 * 1.27) = 126.58$ so the TOTAL (#) is **104 / 126.58**

The PRICE 1 / PRICE 2 values show each of the individual items STOCK quantity multiplied by the Price 1 & Price 2 value, then added together for the combined total **518.96 / 466.96**

Labor Report

This report is used with the Time Keeping feature. With the Employee Type selected on the Labor Report, the employees job code is printed below the employee as shown here.

Employee Type not selected

```

04/28/2021      09:52 AM      WED
BARPUB (POS-MAIN)
LABOR REPORT (ALL)
DATE : 04/28/2021 09:52 AM
AUTHOR : MANAGER
DATE RANGE
04/28/2021 ~ 04/28/2021
END OF DAY NUMBER : ALL
FILTERS
EMPLOYEE : [ALL]

TYPE
DATE PERIOD : DAY
EMPLOYEE TYPE : YES

=====
JOB CODE                TIME - COST
=====
TOTAL                   12:42 - $141.23

CASHIER                 1:42 - $20.23

MANAGER                 2:18 - $32.20

BARTENDER               2:18 - $32.20

COOK                    7:24 - $88.80

NO. 00000695  REG: POS-MAIN  MANAGER
-----
* * * * *

```

Employee Type selected

```

04/28/2021      09:52 AM      WED
BARPUB (POS-MAIN)
LABOR REPORT (ALL)
DATE : 04/28/2021 09:52 AM
AUTHOR : MANAGER
DATE RANGE
04/28/2021 ~ 04/28/2021
END OF DAY NUMBER : ALL

FILTERS
EMPLOYEE : [ALL]

TYPE
DATE PERIOD : DAY
EMPLOYEE TYPE : YES

=====
JOB CODE                TIME - COST
=====
TOTAL                   12:42 - $141.23

CASSIE                  1:42 - $20.23
CASHIER                 1:42 - $20.23

MANNY                   2:18 - $32.20
MANAGER                 2:18 - $32.20

BART                    2:18 - $32.20
BARTENDER               2:18 - $32.20

COLLIN                  7:24 - $88.80
COOK                    7:24 - $88.80

NO. 00000695  REG: POS-MAIN  MANAGER
-----
* * * * *

```

Sales And Labor % Report

Notes: The Sales and Labor % Report uses data from both the Period Report and the Time In Out Report.

You must generate the EOD report every day to get meaningful data on Sales and Labor % Report.

See report option settings to Exclude Tax In Net Sale On Labor Report when Sales & Labor % is selected.

... Continued from previous column

05.03.2022	TUE	01:31 PM
BarPub (POS-MAIN)		
Labor Report (ALL)		
DATE : 05/03/2022 11:31 AM		
AUTHOR : Bartender BART		
DATA RANGE		
05/03/2022 ~ 05/03/2022		
OPTIONS		
SALES AND LABOR%		
FILTERS		
EMPLOYEE : ALL		
TYPE		
TIME PERIOD : 60		
NONE		
=====		
TIME PERIOD / ITEM		
=====		
TOTAL		
CUST:	12	NET SALES: \$400.08
		AVG/CUST: \$33.34
HRS LBR: 07:18		LABOR COST: \$311.97
		%NET SALES: 77.98%
LABORS\$/CUST:		\$25.99
SALES/MANHOURL		\$19.29

08:00~08:59		
CUST:	0	NET SALES: \$0.00
		AVG/CUST: \$0.00
HRS LBR: 06:15		LABOR COST: \$5.67
		%NET SALES: 0%
LABORS\$/CUST:		\$0.00
SALES/MANHOURL		\$0.00
09:00~09:59		
CUST:	0	NET SALES: \$0.00
		AVG/CUST: \$0.00
HRS LBR: 06:15		LABOR COST: \$17.93
		%NET SALES: 0%
LABORS\$/CUST:		\$0.00
SALES/MANHOURL		\$0.00

10:00~10:59		
CUST:	0	NET SALES: \$0.00
		AVG/CUST: \$0.00
HRS LBR: 06:15		LABOR COST: \$35.33
		%NET SALES: 0%
LABORS\$/CUST:		\$0.00
SALES/MANHOURL		\$0.00
11:00~11:59		
CUST:	10	NET SALES: \$278.62
		AVG/CUST: \$27.86
HRS LBR: 06:15		LABOR COST: \$38.13
		%NET SALES: 13.69%
LABORS\$/CUST:		\$3.81
SALES/MANHOURL		\$107.16
12:00~12:59		
CUST:	0	NET SALES: \$0.00
		AVG/CUST: \$0.00
HRS LBR: 06:15		LABOR COST: \$52.42
		%NET SALES: 0%
LABORS\$/CUST:		\$0.00
SALES/MANHOURL		\$0.00
13:00~13:59		
CUST:	2	NET SALES: 121.46
		AVG/CUST: \$60.73
HRS LBR: 06:15		LABOR COST: \$64.00
		%NET SALES: 52.69%
LABORS\$/CUST:		\$32.00
SALES/MANHOURL		\$30.36
NO. 00000018 REG: POS-MAIN ADMIN		

Continued in next column ...

Sales & Labor % Report Definitions

Notes: The Sales and Labor % Report uses data from both the Period Report and the Time In Out Report.

You must generate the EOD report every day to get meaningful data on Sales and Labor % Report.

The Time Period can be defined as DAY or set for a specified number on MINUTES. The report sample shows the Sales And Labor% Report set for 60 Minute (*hourly*) intervals. There are eight items per every time unit in the Sales and Labor % Report:

CUST: and **NET SALES:** Values are obtained from the Period Report where the **AVG/CUST:** is division of these two values.

- **CUST:** is the number of customers served per time period.
- **NET SALES:** is the Net Sale total for the time period.
- **AVG/CUST:** is the Net Sales total divided by the number of customers ($\text{NET SALE} \div \text{CUST}$).

HRS LBR: and **LABOR COST:** Are calculated from Time Keeping Report and Pay Rate Program.

- **HRS LBR:** Is the sum of working hours for all employees who had worked in this time period.
- **LABOR COST:** Is the sum of the product of working hours and pay rate for every employee.

%/NET SALES: Is a ratio of Net Sales to Labor Cost ($\text{LABOR COST} \div \text{NET SALES} \times 100$).

LABORS/CUST: This value is labor cost per each customer which can be calculated dividing the LABOR COST by the number of customers ($\text{LABOR COST} \div \text{CUST}$).

SALES/MANHOURL: Divide Net Sales by the sum of working hours ($\text{NET SALES} \div \text{HRS LBR}$).

Food Cost Report

This report is used with the Ingredient & Recipe feature only. Refer to the separate Inventory & Product Mix supplement for details.

```
04/27/2021      11:52 AM      TUE
BarPub (POS-MAIN)
FOOD COST REPORT (5)
DATE : 04/27/2021 11:52 AM
AUTHOR : MANAGER

DATE RANGE
04/27/2021 ~ 04/27/2021
END OF DAY NUMBER : ALL

FILTERS
TERMINAL : [NOT USED]
EMPLOYEE : [ALL]
GROUP : [NOT USED]
GROUP #2 : [NOT USED]
GROUP #3 : [NOT USED]
PLU : ALL

=====
RECIPE              COUNT / NET SALE TOTAL
TOTAL FOOD COST      TOTAL FOOD COST %
=====
TOTAL                6 / $41.64
$31.59                75.86%

1/2 Pound Burger    3 / $20.97
$17.34                83.89%

1/2 Pound Burger    3 / $20.97
$14.25                67.95%

NO. 00000690      REG: POS-MAIN      MANAGER

-----
* * * * *

```

Time In Out Report

Only used with the Time Keeping feature. The Time In/Out Report shows the time worked for each employee broken down by job code, the total regular time, overtime and labor cost for each employee. The total regular time, overtime and labor cost for all employees combined is shown at the end of the report.

Note: The asterisk (*) on the Cassie Cashier time entry indicates the time has been edited.

... Continued from previous column

```

04.27.2021      TUE      20:59 PM

BarPub (POS-MAIN)
TIME IN OUT REPORT
DATE : 04.27.2021 03:18 PM
AUTHOR : Manny Manager

DATE RANGE
04.27.2021 ~ 04.27.2021

FILTERS
EMPLOYEE : [ALL]
JOB CODE : [ALL]
CLOSED : ALL
TYPE : ALL

=====
NAME              SSN              TIPS
=====
Cassie Cashier   987-65-4321     $5.55

JOB NAME    TYPE    DATE    IN    DATE    OUT
CASHIER          OUT
* 04.27 11:26 AM - 04.27 10:49 PM
CASHIER      11:23 REG          0:00 OT
TOTAL REG    11:23 HR          $135.46 CST
TOTAL OT     0:00 HR           $0.00 CST
TOTAL LBR   11:23 HR          $135.46 CST

Alexander Admin  456-89-1234     $20.00
=====
JOB NAME    TYPE    DATE    IN    DATE    OUT
BARTENDER          OUT
04.27 11:49 AM - 04.27 10:53 PM
BARTENDER    11:04 REG          0:00 OT
TOTAL REG    11:04 HR          $154.93 CST
TOTAL OT     0:00 HR           $0.00 CST
TOTAL LBR   11:04 HR          $154.03 CST
    
```

```

Lyn Server      123-45-6789     $0.00
-----
JOB NAME    TYPE    DATE    IN    DATE    OUT
MANAGER          OUT
04.27 12:33 PM - 04.27 09:10 PM
MANAGER      8:37 REG          0:00 OT
TOTAL REG    8:37 HR          $172.33 CST
TOTAL OT     0:00 HR           $0.00 CST
TOTAL LBR   8:37 HR          $172.33 CST
-----
CASHIER
REG          11:23 HR          $135.46 CST
OT           0:00 HR           $0.00 CST
TOTAL LBR   11:23 HR          $135.46 CST

MANAGER
REG          8:37 HR          $172.33 CST
OT           0:00 HR           $0.00 CST
TOTAL LBR   8:37 HR          $172.33 CST

BARTENDER
REG          11:04 HR          $154.93 CST
OT           0:00 HR           $0.00 CST
TOTAL LBR   11:04 HR          $154.03 CST

TOTAL
TOTAL REG    31:04 HR          $462.72 CST
TOTAL OT     0:00 HR           $0.00 CST
TOTAL LBR   31.04 HR          $462.72 CST
TOTAL TIPS    $0.00    TIP%      $0.00

NO. 00000670 REG: POS-MAIN    Manny MANAGER

-----
* * * * *
    
```

Continued in next column ...

Promotion Report

When items are assigned in the Promotion programming, the Promotion Report shows the type of promotion, and the specific discount applied with the count and total. A Promotion TTL also prints on the Financial Report.

```
04/27/2021      01:52 PM      TUE
BarPub (POS-MAIN)
PROMOTION REPORT
DATE : 04/27/2021 01:52 PM
AUTHOR : MANAGER

DATE RANGE
02/01/2021 ~ 04/30/2021
END OF DAY NUMBER : ALL

OPTIONS
DETAILED DATA
ZERO SKIP

FILTERS
TERMINAL : [NOT USED]
EMPLOYEE : [ALL]
TYPE : ALL

=====
DESCRIPTION              COUNT      TOTAL
=====
MIX AND MATCH              7      $20.50
Beer Bucket                 1      $8.14
% Discount                  1      $8.96
$ Discount                   5      $3.40
MULTI BUY                   1      $1.00
Irish Club Special          1      $1.00
COMBO DISCOUNT             1      $4.50
Sandwich Discount           1      $4.50

NO. 00000672      REG: POS-MAIN      MANAGER

-----
* * * * *
```

EJ Report

The EJ Report save data by Year\ Month\ Day\ Operation.

Example of a previously registered transaction from the EJ.

```

04/22/2021      01:52 PM      THU
      ORDER#      020
      ** EAT IN **
16" PIZZA      T5F      $16.95
16" TACO PIZZA      T5F      $17.95

TAX5 SalesTax Taxable      $34.90
Tax5 SalesTax AMOUNT      2.09
      TOTAL      $36.99
SUBTOTAL      $36.99
CHECK      $36.99
-----
      ITEM      2
NO. 00000651      REG: POS-MAIN      MANAGER
-----
* * * * *
      THANK YOU!

Suggested Gratuity (15.00%) - $5.23
    
```

Product Mix Report

This report is only used when PLU's are assigned to a Product Mix Group. Refer to the separate Inventory & Product Mix Supplement for details.

```

04/28/2021      09:52 AM      WED
BarPub (POS-MAIN)
PRODUCT MIX REPORT
DATE : 04/28/2021 09:52 AM
AUTHOR : MANAGER

DATE RANGE
04/22/2021 ~ 04/28/2021
END OF DAY NUMBER : ALL

=====
DESCRIPTION      COUNT      TOTAL
=====
Cups Large (1 LCup)      2      $0.04
-----
Cup X-Large (1 XCup)      1      $0.04
-----
Chicken Wings (1 WING)      32      $23.96
-----
Chicken Meals (1 PCS)      26      $84.16

NO. 00000672      REG: POS-MAIN      MANAGER
-----
* * * * *
    
```

Inventory Report

This report is used with the Ingredient & Recipe feature only. Refer to the separate Inventory & Product Mix supplement for details.

... Continued from previous column

04/28/2021	12:41 PM	WED
BARPUB (POS-MAIN)		
INVENTORY REPORT		
DATE : 04/28/2021 12:41 PM		
AUTHOR : MANAGER		
DATE RANGE		
04/28/2021 ~ 04/28/2021		
=====		
INVENTORY		BUN

BEGINNING INVENTORY	196.000	
RECEIPTS	0.000	
TRANSFER INS	0.000	
TRANSFER OUTS	0.000	
RAW WASTE	0.000	
THEORETICAL USAGE	6.000	
ACTUAL INVENTORY	0.000	
ACTUAL USAGE	196.000	
ENDING INVENTORY	190.000	
VALUE OF INVENTORY	33.580	
VARIANCE	-190.000	
VARIANCE COST	-34.580	
EFFICIENCY %	3266.67%	
FOOD COST	35.672	
FOOD COST %	85.67%	
=====		
INVENTORY		BURGER PATTI

BEGINNING INVENTORY	496.000	
RECEIPTS	0.000	
TRANSFER INS	0.000	
TRANSFER OUTS	0.000	
RAW WASTE	0.000	
THEORETICAL USAGE	6.000	
ACTUAL INVENTORY	0.000	
ACTUAL USAGE	496.000	
ENDING INVENTORY	490.000	
VALUE OF INVENTORY	245.000	
VARIANCE	-490.000	
VARIANCE COST	-245.000	
EFFICIENCY %	8266.67%	
FOOD COST	248.000	
FOOD COST %	595.58%	

=====	
INVENTORY	ONION

BEGINNING INVENTORY	21.450
RECEIPTS	0.000
TRANSFER INS	0.000
TRANSFER OUTS	0.000
RAW WASTE	0.000
THEORETICAL USAGE	6.000
ACTUAL INVENTORY	0.000
ACTUAL USAGE	21.450
ENDING INVENTORY	15.450
VALUE OF INVENTORY	0.386
VARIANCE	-15.450
VARIANCE COST	-0.386
EFFICIENCY %	357.50%
FOOD COST	0.536
FOOD COST %	1.29%
=====	
INVENTORY	PICKLE SLICE

BEGINNING INVENTORY	110.999
RECEIPTS	0.000
TRANSFER INS	0.000
TRANSFER OUTS	0.000
RAW WASTE	0.000
THEORETICAL USAGE	6.000
ACTUAL INVENTORY	0.000
ACTUAL USAGE	110.999
ENDING INVENTORY	104.999
VALUE OF INVENTORY	0.525
VARIANCE	-104.999
VARIANCE COST	-0.525
EFFICIENCY %	1849.98%
FOOD COST	0.555
FOOD COST %	1.33%
=====	
PLU RECIPE SALES	\$41.64
FOOD COST	281.213
FOOD COST %	675.34%
VALUE OF INVENTORY	274.991
VARIANCE COST	-274.991
NO. 00000689	REG: POS-MAIN ADAM

* * * * *	

Continued in next column ...

Exported CSV Reports

Exported PLU Reports sent to a USB are in the USB-E:\Report\StoreName\TerminalDescription\PLUReport.
The report samples shown below show the report as it would appear exported to a CSV file.

Financial Report

Refer to the Balancing Formulas on page 278 for balancing this report.

```

FINANCIAL REPORT
DATE : 2017-10-04 14:39
AUTHOR : MANAGER

DATA RANGE
2017-09-27 ~ 2017-10-04
END OF DAY NUMBER : ALL

OPTIONS
CURRENT DATA
DETAILED DATA

FILTERS
TERMINAL : [NOT SELECTED]
EMPLOYEE : [ALL]

DESCRIPTION                COUNT    TOTAL
'(+)' PLU TOTAL             '30     '$327.83
'PRICE LEVEL01             '30     '$327.83
'(-)' PLU TOTAL             '0      '$0.00
'ADJUST TOTAL (A)          '30     '$327.83
'NON-TAX                    '       '$0.00
'TAX SALES TOTAL           '       '$327.83
'TAX1 SALES                 '       '$327.83
'TAX TOTAL (B)             '       '$21.88
'TAX1                       '       '$21.88
'EXEMPT TAX SALES TOTAL    '       '$0.00
'DESTINATION SALES         '12     '$331.15
'NONE                       '12     '$331.15
'DISCOUNT TOTAL            '1      '-2.00
'%2                         '1      '-2.00
'NET SALES (A) + (B)       '12     '$349.71
'GROSS SALES                '       '$349.71
'CREDIT TAX TOTAL          '0      '$0.00
'MDSE RETURN                '0      '$0.00
'PREVIOUS VOID             '0      '$0.00
'TRANS VOID                 '0      '$0.00
'CANCEL                      '1      '$6.95
'RA TOTAL                   '1      '$75.00
'RA                         '1      '$75.00
'PO TOTAL                   '0      '$0.00
'CASH SALES                 '10     '$306.70
'CASH                       '10     '$306.70
'CHECK SALES                '1      '$24.45
'CHECK                      '1      '$24.45
'HASH TOTAL                 '0      '$0.00
'AUDACTION                  '0      '$0.00
'NO SALE                    '0      '$0.00
'CASH-IN-DRAWER             '       '$281.70
'CHECK-IN-DRAWER           '       '$124.45
'FD/S-IN-DRAWER            '       '$0.00
'MISC TEND SALES           '3      '$177.03
'CONVERSION TOTAL          '       '$0.00
'DRAWER TOTAL               '       '$406.15
  
```

PROMO	`1	-11.99
'TRAINING TOTAL	'1	'\$800.61
'WASTE	'1	'\$3.25
'GUESTS	'10	'
'CHECKS PAID	'1	'\$75.56
'OPEN CHECK	'1	'\$12.81
'INTERRUPT BALANCE	'0	'\$0.00
'TIP TOTAL	'0	'\$0.00
'DECLARATION TOTAL	'	'\$0.00
'DECLARATION OVER/SHORT	'	'\$0.00
'COUPON SALES	'1	'-2.00
'ROUND TOTAL	'2	'\$0.04
'PROMOTION TOTAL	'0	'\$0.00
'AVERAGE SALES	'	'\$199.99
'AVERAGE GUEST	'0	'
NRGT	`	'\$899148.89

PLU Report

The Report Option: EXPORT SIMPLE PLU REPORT TO CSV/PDF *is not checked:*

BarPub (POS-6600)
 PLU REPORT (ALL)
 DATE : 01.13.2026 09:20 AM
 AUTHOR : Alexander Admin

DATA RANGE
 01.06.2026 ~ 01.06.2026

END OF DAY NUMBER : ALL

FILTERS

TERMINAL : [NOT USED]
 EMPLOYEE : [ALL]
 GROUP : [NOT USED]
 GROUP #2 : [NOT USED]
 GROUP #3 : [NOT USED]
 PLU : ALL

DESCRIPTION	PLU CODE	GROUP #1	GROUP #2	GROUP #3	PROMO	WASTE	USAGE	COUNT	TOTAL	AMOUNT RATIO
'TOTAL	'	'	'	'	'0	'0	'40	'40	'\$2314.80	'100.00%
'MISC SALES Taxable	'10	'MISC	'NONE	'NONE	'0	'0	'3	'3	'\$332.10	'14.35%
'OPEN GROCERY TAXABLE	'37	'Food	'NONE	'NONE	'0	'0	'4	'4	'\$83.00	'3.59%
'OPEN GROCERY	'77	'Food	'NONE	'NONE	'0	'0	'3	'3	'\$99.00	'4.28%
'LEMON CHICKEN	'123	'DINNERS	'NONE	'NONE	'0	'0	'1	'1	'\$21.69	'0.94%
'CREAT A PASTA	'126	'DINNERS	'NONE	'NONE	'0	'0	'1	'1	'\$21.69	'0.94%
'MISC NEGATIVE	'157	'Food	'NONE	'NONE	'0	'0	'3	'3	'-3.63	'-0.16%
'MISC MDSE	'197	'Food	'NONE	'NONE	'0	'0	'3	'3	'\$594.00	'25.66%
'MISC SERVICES	'237	'Food	'NONE	'NONE	'0	'0	'6	'6	'\$940.83	'40.64%
'KDS MAC & CHZ	'241	'SANDWICHES	'NONE	'NONE	'0	'0	'1	'1	'\$5.99	'0.26%
'KDS GR CHZ	'242	'SANDWICHES	'NONE	'NONE	'0	'0	'1	'1	'\$5.99	'0.26%
'KDS NUGGETS	'243	'SANDWICHES	'NONE	'NONE	'0	'0	'1	'1	'\$5.99	'0.26%
'KDS PB&J	'244	'SANDWICHES	'NONE	'NONE	'0	'0	'1	'1	'\$5.99	'0.26%
'KDS CORN DOG	'246	'SANDWICHES	'NONE	'NONE	'0	'0	'1	'1	'\$5.99	'0.26%
'KDS MINI BURG	'247	'SANDWICHES	'NONE	'NONE	'0	'0	'1	'1	'\$5.99	'0.26%
'KDS NOODLES	'248	'SANDWICHES	'NONE	'NONE	'0	'0	'1	'1	'\$5.99	'0.26%
'KIDS RIB TIPS	'249	'SANDWICHES	'NONE	'NONE	'0	'0	'1	'1	'\$5.99	'0.26%
'Open Item (VAT Taxable)	'282	'SPECIALS	'NONE	'NONE	'0	'0	'3	'3	'\$148.50	'6.42%
'Open Tax-Table	'292	'SPECIALS	'NONE	'NONE	'0	'0	'3	'3	'\$29.70	'1.28%
'LINGUINI	'881	'N-C MODS	'NONE	'NONE	'0	'0	'1	'1	'\$0.00	'0%
'ANGEL HAIR	'883	'N-C MODS	'NONE	'NONE	'0	'0	'1	'1	'\$0.00	'0%

PLU Report

Report Option: EXPORT SIMPLE PLU REPORT TO CSV/PDF *is checked* for Door Dash:

BarPub (POS-6600)
PLU REPORT (ALL)
DATE : 01.13.2026 09:23 AM
AUTHOR : Alexander Admin

DATA RANGE
01.06.2026 ~ 01.06.2026

END OF DAY NUMBER : ALL

FILTERS

TERMINAL : [NOT USED]
EMPLOYEE : [ALL]
GROUP : [NOT USED]
GROUP #2 : [NOT USED]
GROUP #3 : [NOT USED]
PLU : ALL

DESCRIPTION	PLU CODE	COUNT	TOTAL
'TOTAL	'	'40	'\$2314.80
'MISC SALES Taxable	'10	'3	'\$332.10
'OPEN GROCERY TAXABLE	'37	'4	'\$83.00
'OPEN GROCERY	'77	'3	'\$99.00
'LEMON CHICKEN	'123	'1	'\$21.69
'CREATE A PASTA	'126	'1	'\$21.69
'MISC NEGATIVE	'157	'3	'-3.63
'MISC MDSE	'197	'3	'\$594.00
'MISC SERVICES	'237	'6	'\$940.83
'KDS MAC & CHZ	'241	'1	'\$5.99
'KDS GR CHZ	'242	'1	'\$5.99
'KDS NUGGETS	'243	'1	'\$5.99
'KDS PB&J	'244	'1	'\$5.99
'KDS CORN DOG	'246	'1	'\$5.99
'KDS MINI BURG	'247	'1	'\$5.99
'KDS NOODLES	'248	'1	'\$5.99
'KIDS RIB TIPS	'249	'1	'\$5.99
'Open Item (VAT Taxable)	'282	'3	'\$148.50
'Open Tax-Table	'292	'3	'\$29.70
'LINGUINI	'881	'1	'\$0.00
'ANGEL HAIR	'883	'1	'\$0.00

Group Report

GROUP REPORT (ALL)
DATE : 2017-10-04 14:31
AUTHOR : MANAGER

DATA RANGE
2017-09-27 ~ 2017-10-04
END OF DAY NUMBER : ALL

OPTIONS
CURRENT DATA

FILTERS
TERMINAL : [NOT SELECTED]
GROUP : NOT SELECTED
EMPLOYEE : [ALL]
PLU : ALL

DESCRIPTION	PROMO	WASTE	USAGE	COUNT	TOTAL	AMOUNT RATIO
'TOTAL	'1	'1	'30	'32	'\$ 327.83	'100.00 %
'BEER	'1	'1	'7	'9	'\$ 44.00	'13.42 %
'BEVERAGE	'0	'0	'1	'1	'\$ 1.00	'0.31 %
'DINNERS	'0	'0	'6	'6	'\$ 100.70	'30.72 %
'GROUP14	'0	'0	'12	'12	'\$ 138.28	'42.18 %
'SANDWICHES	'0	'0	'1	'1	'\$ 19.95	'6.09 %
'SPECIALS	'0	'0	'1	'1	'\$ 9.95	'3.04 %
'STARTERS	'0	'0	'2	'2	'\$ 13.95	'4.26 %

Period Report

PERIOD REPORT (ALL)
DATE : 2017-10-04 14:31
AUTHOR : MANAGER

DATA RANGE
2017-09-27 ~ 2017-10-04
END OF DAY NUMBER : ALL

OPTIONS
CURRENT DATA

FILTERS
TERMINAL : [NOT SELECTED]
GROUP : NOT SELECTED
EMPLOYEE : [ALL]
PLU : ALL

TYPE
TIME PERIOD : 60
SALES

DESCRIPTION	PROMO	WASTE	USAGE	COUNT	TOTAL	AMOUNT RATIO
'TOTAL	'1	'1	'30	'32	'\$ 327.83	'100.00 %
'08:00 ~ 08:59	'0	'0	'16	'16	'\$ 179.09	'54.63 %
'09:00 ~ 09:59	'0	'0	'10	'10	'\$ 101.04	'30.82 %
'12:00 ~ 12:59	'0	'0	'2	'2	'\$ 31.95	'9.75 %
'13:00 ~ 13:59	'1	'1	'0	'2	'\$ 0.00	'0 %
'14:00 ~ 14:59	'0	'0	'2	'2	'\$ 15.75	'4.8 %

Open Check Report

OPEN CHECK REPORT (ALL)
DATE : 2017-10-04 14:32
AUTHOR : MANAGER

DATA RANGE
ALL DATE

FILTERS
TERMINAL : [NOT SELECTED]
EMPLOYEE : [ALL]
TRACK : ALL

TRACK	CHECK#	GUEST#	EMPLOYEE	START TIME	LAST ORDER	TOTAL
'TOTAL	'	'	'	'	'\$ 21.35	
'RECALL	'0	'BARTENDER	'14:43	'14:45	'\$ 12.81	
'RECALL	'0	'BARTENDER	'14:51	'14:53	'\$ 8.54	

Stock Report

STOCK REPORT
DATE : 09-11-2018 08:27 AM
AUTHOR : MANNY

DATA RANGE

FILTERS
GROUP #1 : [NOT USED]
GROUP #2 : [NOT USED]
GROUP #3 : [NOT USED]
PLU : ALL

DESCRIPTION	PLU CODE	COST	GROUP	STOCK	MINIMUM STOCK	EXTENDED COST
'TOTAL	'	'0.00	'	'761	'	'0.00
'GIFT ADD-Value	'505	'0.00	'[GIFT SOLD]	'100	'5	'0.00
'GIFT SOLD	'5	'0.00	'[GIFT SOLD]	'100	'5	'0.00
'Marlboro Carton	'1111100302	'0.00	'[TOBACCO]	'100	'5	'0.00
'Marlboro Light 100's Carton	'1111100304	'0.00	'[TOBACCO]	'100	'5	'0.00
'Marlboro Light Carton	'1111100303	'0.00	'[TOBACCO]	'99	'5	'0.00
'Marlboro Menthol Carton	'1111100401	'0.00	'[TOBACCO]	'100	'5	'0.00
'Marlboro Pack	'84160812	'0.00	'[TOBACCO]	'162	'5	'0.00

Labor Report

LABOR REPORT (ALL)
DATE : 2017-10-04 14:32
AUTHOR : MANAGER

DATA RANGE
2017-09-27 ~ 2017-10-04

FILTERS
EMPLOYEE : [ALL]

TYPE
TIME PERIOD : 60

JOB CODE	TIME	COST
'TOTAL	'228:00	'\$ 1402.78
'BARTENDER	'76:00	'\$ 412.58
'JOB#9	'76:00	'\$ 577.62
'WAIT STAFF	'76:00	'\$ 412.58

Food Cost Report

Only used when Ingredients & Recipes are used.

FOOD COST REPORT (ALL)
DATE : 02-20-2019 08:39 AM
AUTHOR : MANNY

DATA RANGE
09-01-2018 ~ 02-28-2019
END OF DAY NUMBER : ALL

FILTERS
TERMINAL : [NOT USED]
GROUP #1 : [NOT USED]
GROUP #2 : [NOT USED]
GROUP #3 : [NOT USED]
EMPLOYEE : [ALL]
PLU : ALL

RECIPE	TOTAL FOOD COST	TOTAL SALES COUNT	NET SALE TOTAL	TOTAL FOOD COST %
'TOTAL	'\$34.76	'19	'\$144.26	'24.1%
'null	'\$2.81	'3	'\$23.85	'11.78%
'null	'\$2.44	'1	'\$6.95	'35.11%
'Recipe 5	'\$1.41	'1	'\$18.00	'7.83%

Time In Out Report

TIME IN OUT REPORT
DATE : 2017-10-04 15:41
AUTHOR : MANAGER

DATA RANGE
2017-09-27 ~ 2017-10-04

FILTERS
EMPLOYEE : [ALL]

EMPLOYEE NUMBER	NAME	JOB CODE	START TIME	END TIME	TYPE	MODIFIED
'BARTENDER	'BARTENDER	'2017-10-02 09:30:47	'2017-10-02 15:38:00	'OUT	'MODIFIED	
'BARTENDER	'BARTENDER	'2017-10-03 15:34:24	'2017-10-03 15:40:00	'OUT	'MODIFIED	
'BARTENDER	'BARTENDER	'2017-10-04 15:40:53	'	'	'	
'MANAGER	'JOB#9	'2017-10-02 09:30:53	'2017-10-02 15:38:00	'OUT	'MODIFIED	
'MANAGER	'JOB#9	'2017-10-03 15:34:34	'2017-10-03 15:40:00	'OUT	'MODIFIED	
'MANAGER	'JOB#9	'2017-10-04 15:41:00	'	'	'	
'SERVER	'WAIT STAFF	'2017-10-02 09:30:40	'2017-10-02 15:39:00	'OUT	'MODIFIED	
'SERVER	'WAIT STAFF	'2017-10-03 15:34:41	'2017-10-03 15:40:00	'OUT	'MODIFIED	
'SERVER	'WAIT STAFF	'2017-10-04 15:40:48	'	'	'	

Promotion Report

PROMOTION REPORT
DATE : 2017-10-04 15:35
AUTHOR : MANAGER

DATA RANGE
2017-10-04 ~ 2017-10-04
END OF DAY NUMBER : ALL

OPTIONS
CURRENT DATA
DETAILED DATA

FILTERS
TERMINAL : [NOT SELECTED]
EMPLOYEE : [ALL]

DESCRIPTION	COUNT	TOTAL
'MIX AND MATCH	'1	'\$10.00
'DISCOUNT#5	'1	'\$10.00
'MULTI BUY	'0	'\$0.00
'COMBO DISCOUNT	'0	'\$0.00
'SWEET DEAL	'0	'\$0.00

Product Mix Report

BarPub (POS-MAIN)
 PRODUCT MIX REPORT
 DATE : 12/06/2024 11:34 AM
 AUTHOR : C R S SUPPORT

DATA RANGE
 12/01/2024 ~ 12/31/2024

DESCRIPTION	COUNT	TOTAL
'Chicken Wings (1 WING Pieces)(WING Pieces)	'11	'\$132.01
'13:00-13:59()	'12	'\$140.00
'07:00-07:59()	'-1	'-7.99
'Burger Patties (1 Burger Patty)(Burger Patty)	'-1	'-7.99
'07:00-07:59()	'-1	'-7.99

Inventory Report

BarPub (POS-MAIN)
 INVENTORY REPORT
 DATE : 12/06/2024 11:34 AM
 AUTHOR : C R S SUPPORT

DATA RANGE
 12/01/2024 ~ 12/31/2024

INVENTORY	BEGINNING INVENTORY	RECEIPTS	TRANSFERS INS	TRANSFERS OUTS	RAW WASTE	THEORETICAL USAGE	ACTUAL INVENTORY	ACTUAL USAGE	ENDING INVENTORY	VALUE OF INVENTORY	VARIANCE	VARIANCE COST	EFFICIENCY %	FOOD COST	FOOD COST %
			12345	12345.	1234		12345.6	24483	-		244			-	###
BUN	196	12	.68	68	5.68	-1	8	.4	-12136.7	-2208.88	6	4455.789	####	.97	###
BURGER PATTY	496	100	0	0	0	-1	0	1496	1497	748.5	7	-748.5	####	748	##
Maraschino Cherry Mayonnaise	-14	0	0	0	0	-1	0	-14	-13	-2.925	13	2.925	1400.00%	-3.15	2%
	-4	0	0	0	0	-1	0	-4	-3	-0.3	3	0.3	400.00%	-0.4	5.01%
Onion	21.45	45	0	0	0	-1	0	66.45	67.45	5.801	5	-5.801	####	5.71	71.5%
Pickle Slice	110.999	0	0	0	0	-1	0	110.999	111.999	0.56	999	-0.56	####	0.55	6.95%

Report Balancing Formulas

+/-	NET SALES	\$ Amount
=	PLU Sales Total (ADJST TOTAL)	\$
+	Tax 1 Amount	\$
+	Tax 2 Amount	\$
+	Tax 3 Amount	\$
+	Tax 4 Amount	\$
+	Tax 5 Amount	\$
+	Tax 6 Amount	\$
+	Item Coupon Total (when NET = N)	\$
+	Item Percentage Discount (when NET = N)	\$
+	Sale Coupon Amounts	\$
+	Sale Percentage Discounts	\$
+	Sale Surcharge Amounts	\$
=	Net Sales	\$

+/-	GROSS SALES	\$ Amount
=	Net Sales	\$
+	Negative PLU Total	\$
+	Item Coupon Total (when NET = Y)	\$
+	Item Percentage Discount (when NET = Y)	\$
+	Sale Coupon Amounts	\$
+	Sale Percentage Discounts	\$
+	Credit Tax 1	\$
+	Credit Tax 2	\$
+	Credit Tax 3	\$
+	Credit Tax 4	\$
+	Credit Tax 5	\$
+	Credit Tax 6	\$
+	Merchandise Return	\$
+	VOID Position Total	\$
+	Mix & Match Total	\$
=	Gross Sales	\$

Favorite List



The Favorite List allows you to quickly access specific program areas or reports that you may use frequently. Adding selections to the favorite list is an easy way to go to a specific screen you visit frequently, such as a certain program mode, or a specific report.

Add Screen to Favorite List



If a screen has a white star in the upper-right corner the screen can be listed as a favorite. Tap the star to add the current screen to the favorite list.



When a screen is added to the favorite list the star is colored amber. Tap the favorite icon again to remove the current screen from the favorite list.

View Favorite List

1. From the main category selection screen, touch the  **FAVORITE** icon to display your **FAVORITE LIST**, or **Press & Hold** the favorite icon on the title bar on any screen (*except for the register mode screen*) to display the Favorite List.



Favorite List Example

2. Selections in the Favorite List are displayed alphabetically. Choose from the available selection on the Favorite List to go directly to the desired selection.

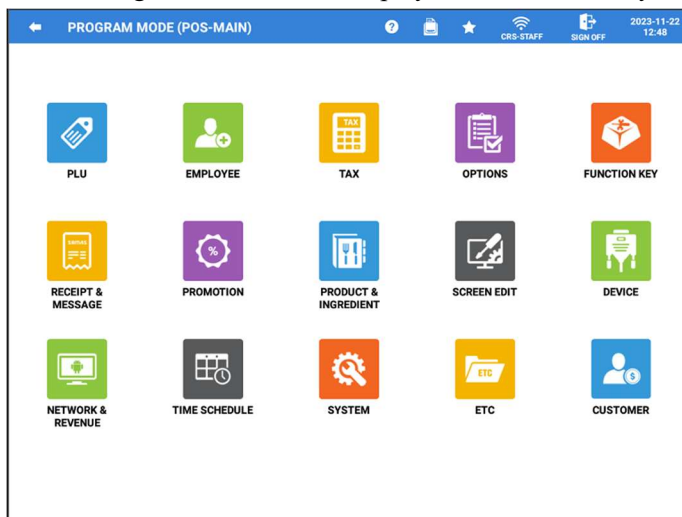
Program Maintenance

Program Mode

All database programming and maintenance is performed in the Program Mode. The Program Mode is separated into categories to make finding and programming specific areas easier. This document discusses programming maintenance for editing Tax Rates, PLU's Employee File, and Customer file. Consult with your local dealer for information on all other program categories. Touch any of the categories shown to enter the programming options for that category.

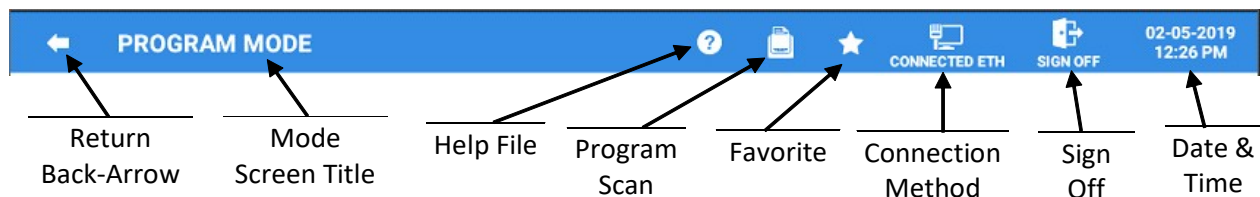
It is a good practice to back up the program data from the ECR before performing any program maintenance, then backup the program data again after all the program editing is completed and has been tested for proper operation.

1. From the main menu screen, press the '**PROGRAM MODE**' icon. (*P-Position on the SAP-630/SAP-530*). The default Program Mode screen displays: Your screen may or may not show all program categories.



2. The Program Mode **Title Bar** provides access to the **Help File** and **Program Scans**.
3. Below the Title bar the individual **Program Categories** are shown.

Program Mode Title Bar



HELP File



A Help File is available in the program mode which provides a list of common programming topics. When you select a topic from the list you will be linked to the YouTube video showing how to use the topic.

Note: The terminal must be connected to an active internet connection to utilize this feature.

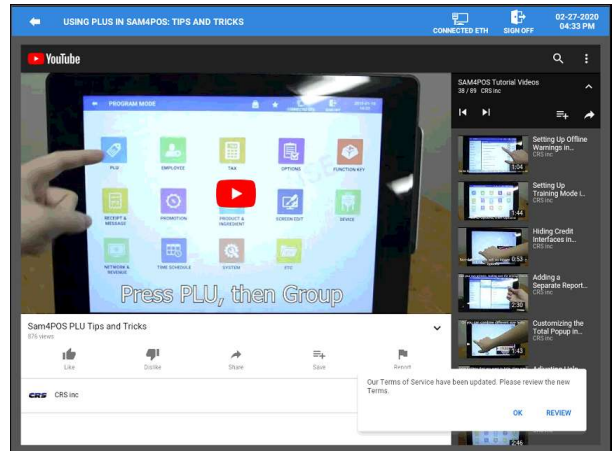
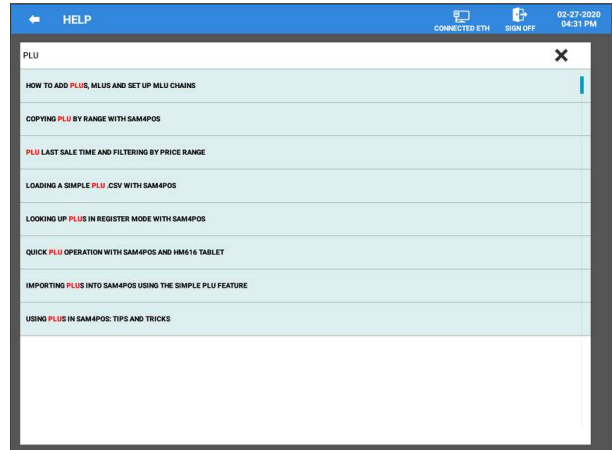
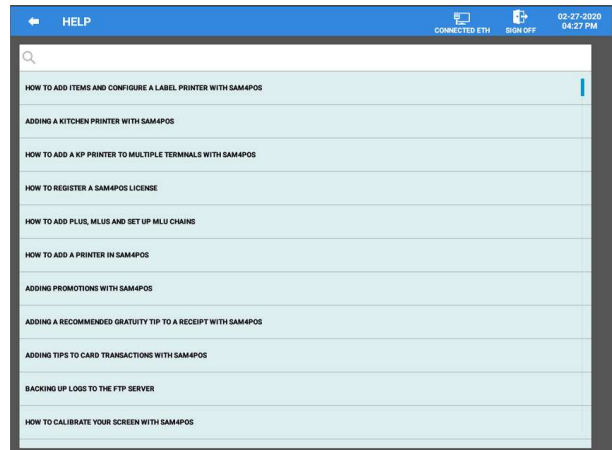
1. From the main **PROGRAM MODE** menu screen, touch the **Help File** icon  located on the title bar. The HELP file screen is displayed:

- Scroll through the list to select a topic to view a YouTube Video for the selected topic.

(The terminal must be connected to an active internet connection to use this feature.)

Alternately, you can type in a topic in the search bar at the top of the list to see just the topics pertaining to your search criteria. For example: typing PLU in the search bar will show the result below:


2. When a topic is selected, the YouTube video for the desired topic can be viewed:
3. You can also use the controls on the display to navigate to the next or previous video.
4. Press the **Back Arrow** on the title bar to return to the HELP File.

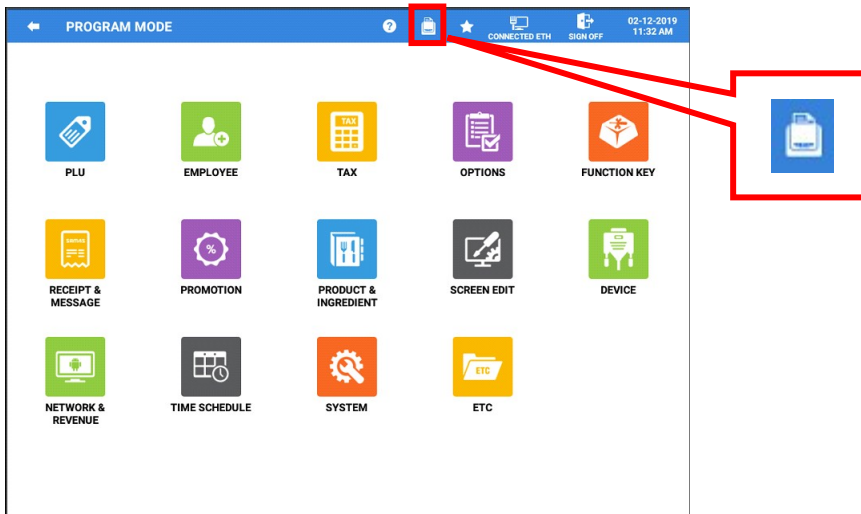


Program Scans

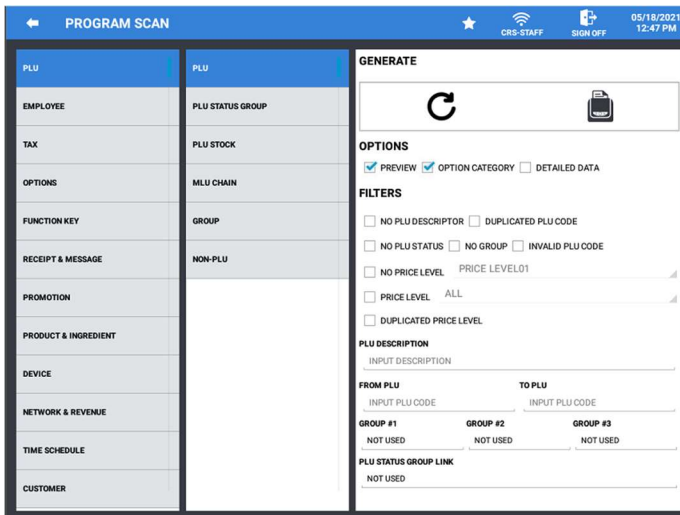




The Program Scans allow you to view and print the current program mode settings for all program areas. The scan will be printed to the assigned receipt printer for the terminal. Each of the various program scan categories have options and filters specific to the selected category.

1. From the main **PROGRAM MODE** menu screen, touch the **PROGRAM SCAN** icon  located on the title bar.



2. The main **PROGRAM SCAN** selection menu is displayed:



3. Select the **PROGRAM AREA** you wish to Scan, Select the **OPTIONS/FILTERS** for the selected scan, Press the  Print icon to **PREVIEW** your selection.
 - a. Press the **PRINT** button to print the scan,
 - b. Press the **EXPORT** button to export as a CSV or PDF document to a USB or EMAIL address,
 - c. Press **CLOSE** to close the selection and return to the Program Scan screen.
4. Press the  Refresh icon to reset to the options/filters to the default settings.

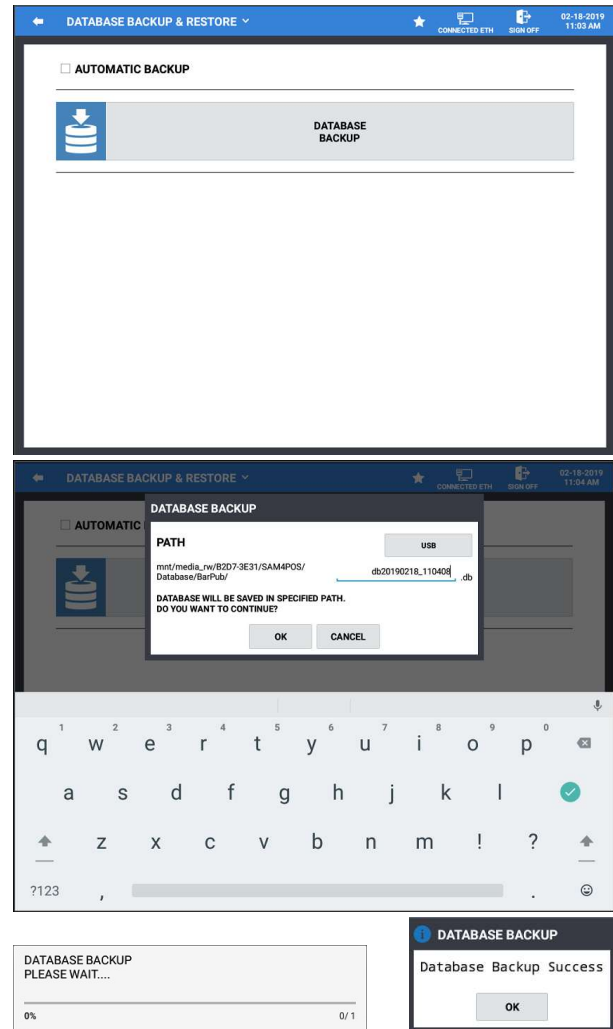
Backup Program

It is a good practice to back up the program data from the ECR before performing any program maintenance, then backup the program again after all the program editing is completed and has been tested for proper operation.

The database menu, in the program mode system menu selections, provides access to the database backup operations for the current program files.

Database Backup

1. From the **PROGRAM MODE**, touch **SYSTEM**, then select **DATABASE**. The Database Backup & Restore screen displays.
2. Press the **DATABASE BACKUP** to open the DATABASE BACKUP dialog.
3. Select the **PATH** (*device you wish to back up to*)
Selections are: USB or Internal SD Card.
 - It is best to save the Database Backup to a **USB** flash drive.
4. Press **OK** to back up the current database.
5. The progress dialog displays during the process; When the backup has completed, the confirmation, **'Database Backup Success'** displays briefly.
6. Press **OK**.



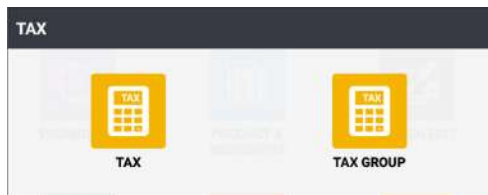
TAX Programming

The SAM4POS provides tax calculations for up to ten different tax rates to accommodate State, County, Municipal and Local taxes.

Tax Groups are used to assign taxes to specific PLU's. The Tax Groups are assigned to items through the PLU Status Group programming. A tax Group can have a single tax assigned or multiple taxes can be assigned to the Tax Group to accommodate city, county, state, and federal taxes that may apply.

Tax 10 also has provisions for the Canadian Goods and Services tax (GST). If GST is to be taxable, you have the option to tax the GST by other applicable tax rates (tax on tax). Refer to Tax Programming on page 285 for an explanation of the different tax types.

1. From the main **PROGRAM MODE** menu select **TAX**, the Tax category selection menu displays:



2. Select the **TAX** category you wish to edit:
 - **Tax**
 - **Tax Group**

Note:

- Program the TAX Rates in the TAX category before assigning taxes to the TAX GROUP.

Editing TAX

There are three tax calculation options for each of the ten possible taxes. TAX 10 has the additional GST selection.

- **ADD ON** – Most sales taxes can be programmed by entering an *add-on* tax percentage rate. The appropriate tax is applied as per the total of taxable items within a sale.
- **VAT** – Value Added Tax. Essentially, this is a type of consumption tax that is applied to the purchase of certain goods & services. The tax is included in the cost of the item; you can use value added tax (*VAT*) to calculate the tax share of each sale.
- **TAX TABLE** – If a tax entered as an add-on tax percentage does not exactly follow the tax chart for your area, you can enter the tax using the *tax table* programming to match tax collection exactly to the break points of your state or county provided tax table. (Tax table programming allows up to 75 breakpoints.)
- **GST** – Goods & Services Tax (available on TAX10 only). The goods and services tax (GST) is a type of value-added tax (VAT) levied on certain goods and services sold for domestic consumption. The GST is paid by consumers, but it is remitted to the government by the businesses selling the goods and services.

As sales are registered, any applicable taxes for each individual transaction are reported to the financial report.

1. From the **Program Mode** menu, touch **TAX** to view the TAX program category selections and select **TAX**.

The screenshot shows a mobile application interface for editing tax settings. On the left, there is a vertical list of tax categories: TAX1 State Tax, TAX2 County Tax, TAX3 Transit Tax, TAX4 Liquor Tax (VAT), TAX5 Tax Table, TAX6 VAT, TAX7 (highlighted in blue), TAX8, TAX9, and TAX10. On the right, the details for the selected 'TAX7' category are shown. The 'DESCRIPTION' field contains 'TAX7' with a clear 'X' icon. Below it, the 'TAX NUM #' field contains '7'. A 'GENERAL' section is visible, followed by a 'SPECIFICATION' section with 'ADDCON' and a green checkmark icon. The 'RATE' field contains '0.000' with a blue pencil icon. At the top of the screen, there is a status bar with 'TAX', a star icon, 'CONNECTED ETH', 'SIGN OFF', and the date/time '11-19-2019 10:33 AM'.

2. Enter a **DESCRIPTION** (*up to 30 characters*) for each of the 10 tax rates if desired. This will be the descriptors printed on receipts and reports. You can use the **X** at the end of the description field to clear the current descriptor.
3. The **TAX NUM #** field displays the current tax 1-10 that is selected.

VAT TAX Programming Notes

When *VAT* tax is selected (*Value-Added Tax*), the tax is included as part of the item price. Refer to **VAT** options in the Program Mode\Options\Options\Tax Option programming for additional *VAT TAX* options.

General

SPECIFICATION

Press the dropdown to select the tax type: **VAT**.

RATE

Enter the rate to three decimal places: *i.e. 6.875% tax would be entered as 6875*.

Press **OK** to go back to the main **TAX** programming screen.

Add On Tax Programming

When *ADDON* tax is selected, the tax is calculated then added-on to the sale.

General

SPECIFICATION

Press the dropdown to select the tax type: **ADDON**.

RATE

Enter the tax **RATE** to three decimal places: *i.e. 8.75% tax would be entered as 8750*.

Press **OK** to go back to the main **TAX** programming screen.

Tax Table Programming

In some cases, a tax that is entered as a percentage does not follow exactly the tax charts that apply in your area (even if the tax chart is based on a percentage). In these cases, we recommend using the tax table programming method. This method will match tax collection exactly to the break points of your tax table.

Option

GENERAL

SPECIFICATION

Select **TAX TABLE** from the drop-down selection menu.

RATE

You can enter the rate if desired, this has no effect on the tax table values entered.

TAX TABLE OPTION

MAXIMUM NON-TAXABLE AMOUNT

Enter the highest amount where no tax is charged. For this example, the entry is 0.10.

FIRST TAX AMOUNT CHARGED

Enter the first tax amount that is charged. For this example, the entry is 0.01.

OF NON-REPEAT BREAKS

Enter the number of Non-repeat breaks (1-99). For this example, the entry is 5.

OF REPEAT BREAKS

Enter the number of repeat breaks (1-99). For this example, the entry is 3.

Break Point

The break point tab is where the tax table break points are entered. The Sam4POS uses the high side of the breakpoint range. Up to 99 Non-Repeat Breaks and 99 Repeat Breaks may be entered. Refer to the tax chart from your state department of revenue for the tax appropriate tax breaks for the tax rate you are entering. Use the buttons at the bottom of the display to enter your values.

- For each Break Point, Enter the high Amount in the range.
- For example: if the break point is .22 - .38, enter .38 for the break point.

Use the buttons at the bottom of the display to enter your values.



1. To enter the breaks for the tax table – press the **New** button; enter the first break point (high-side break point) for the specified number of Non-Repeat and Repeat Breaks from the tax table chart.
2. Enter the first **Non-Repeat** break point value and press **OK And Continue**.
3. Continue entering all the **Non-Repeat** and **Repeat Break** points in the same manner. After the last Repeat Break is entered, press **OK**.
4. If an incorrect break point value was entered, you can go back to that value & check the box to select the break point and press the **EDIT** button to change the value.
5. You can also go back to a break point value & check the box to select the break point(s) then press the **DELETE** button to remove extra break points from the table.

Sample - 6% Tax Table

Before programming, obtain a copy of the tax table you wish to program. You will need the printed tax table if you wish to determine the break point entries yourself.

Examine the tax table to determine the pattern of break point differences and when the break points begin to repeat. Mark the beginning break points that do not fit a repeating pattern as “Non-Repeat Breaks”. Mark the break points that are repeating in a pattern as “Repeat Breaks”. Count the number of repeat and non-repeat breaks.

<u>Tax Charged</u>	<u>Sale Amount Range</u>	<u>Break Points</u>
\$0.00	\$0.00 - \$0.10	- Non-Repeat Breaks
\$0.01	\$0.11 - \$0.21	
\$0.02	\$0.22 - \$0.38	
\$0.03	\$0.39 - \$0.56	
\$0.04	\$0.57 - \$0.73	
\$0.05	\$0.74 - \$0.91	- Repeat Breaks
\$0.06	\$0.92 - \$1.08	
\$0.07	\$1.09 - \$1.24	
\$0.08	\$1.25 - \$1.41	
\$0.09	\$1.42 - \$1.58	
\$0.10	\$1.59 - \$1.74	
\$0.11	\$1.75 - \$1.91	
\$0.12	\$1.92 - \$2.08	
\$0.13	\$2.09 - \$2.24	
\$0.14	\$2.25 - \$2.41	

GST Tax

Tax 10 has provisions for a Goods and Services Tax (GST). The goods and services tax (GST) is a type of value-added tax (VAT) levied on certain goods and services sold for domestic consumption. The GST is paid by consumers, but it is remitted to the government by the businesses selling the goods and services.

If GST is to be taxable, you have the option to tax the GST by other applicable tax rates (tax on tax).

General

SPECIFICATION

Press the dropdown to select the tax type: *VAT*, *ADDON*, or *TAX TABLE*.

RATE

Enter the **GST tax RATE** to three decimal places: *i.e. 6.875% tax would be entered as 6875*; Refer to the tax program notes for each tax type for details about the rate setting.

GST(Tax10) Is Taxable By Rate

Check the box for the appropriate tax rate to indicate if the GST is taxable by that rate.

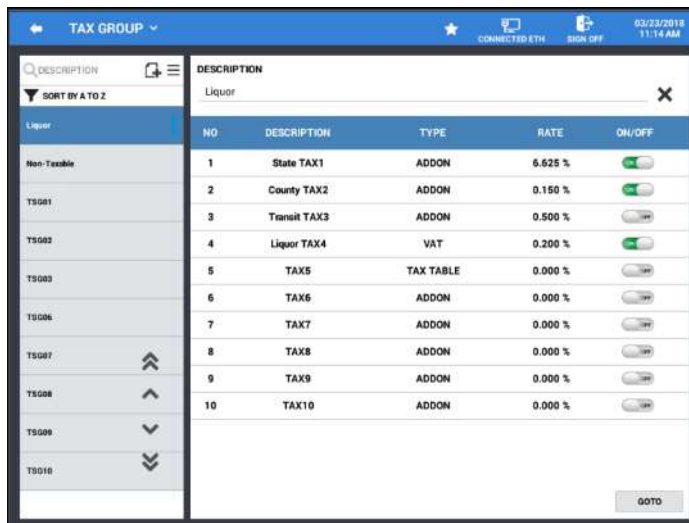
This heading & selections are only available on TAX 10.

TAX GROUP

Tax Groups are used to assign tax rates to taxable PLU's. A tax group can be assigned a single tax rate, multiple tax rates or no tax rates (*for non-tax items*) depending on the application needs. As many tax groups as are necessary can be created using the 10 tax rates.

Individual Tax Groups are assigned in the PLU Status Group programming and the PLU Status Groups are then assigned to individual PLU's to apply the appropriate tax for the item.

1. From the main **Program Mode** menu, touch **TAX** to view the TAX program selections then touch **TAX GROUP**.



The screenshot shows the 'TAX GROUP' screen with a search bar and a list of tax groups. The table below represents the data shown in the screenshot.

NO	DESCRIPTION	TYPE	RATE	ON/OFF
1	State TAX1	ADDON	6.625 %	<input checked="" type="checkbox"/>
2	County TAX2	ADDON	0.150 %	<input checked="" type="checkbox"/>
3	Transit TAX3	ADDON	0.500 %	<input type="checkbox"/>
4	Liquor TAX4	VAT	0.200 %	<input checked="" type="checkbox"/>
5	TAX5	TAX TABLE	0.000 %	<input type="checkbox"/>
6	TAX6	ADDON	0.000 %	<input type="checkbox"/>
7	TAX7	ADDON	0.000 %	<input type="checkbox"/>
8	TAX8	ADDON	0.000 %	<input type="checkbox"/>
9	TAX9	ADDON	0.000 %	<input type="checkbox"/>
10	TAX10	ADDON	0.000 %	<input type="checkbox"/>

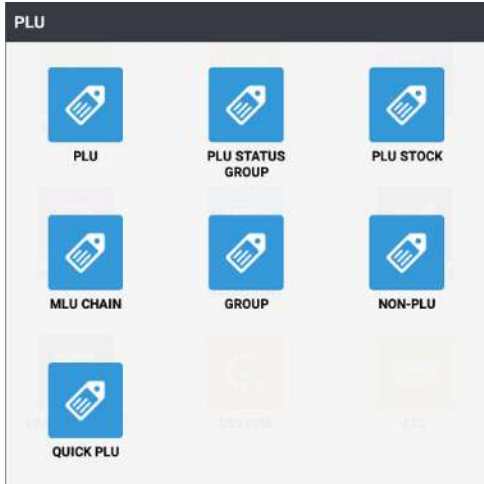
2. Select a Tax Group to edit or create new Tax Groups as needed.
3. Turn **ON/OFF** the tax rates as needed for each Tax Group by pressing the On/Off button.
4. Pressing the **GOTO** button at the bottom right of the display brings you to the Tax Programming screen.

PLU Maintenance – Program Mode

This is where new items are added to the database and existing items can be maintained or deleted. Each PLU is assigned a descriptor, Price, Cost, PLU code and a few unique options. Each new PLU can be assigned a unique code number up to a maximum of 18-digits in length.

Shelf or product labels can be printed from the PLU Programming screen by pressing the Print button, Specific set up is required to utilize this feature.

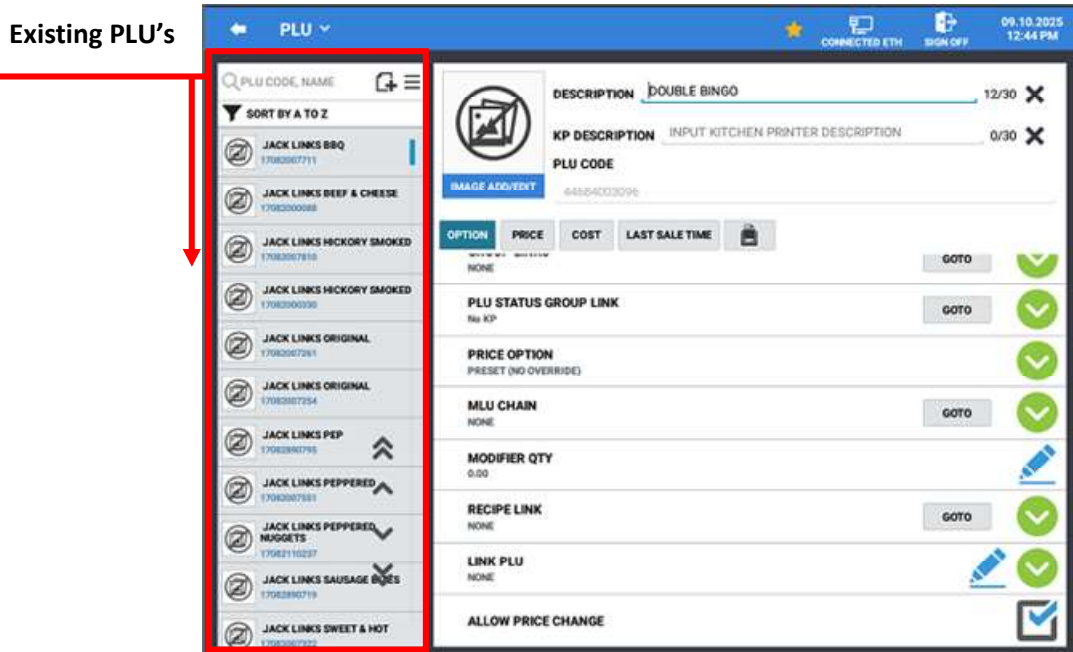
1. From the **PROGRAM MODE** menu, touch **PLU** to view the PLU category selection window.







2. Touch the PLU program category you wish to edit:
 - **PLU**
 - **PLU Status Group**
 - **PLU Stock**
 - **MLU Chain**
 - **Group**
 - **Non-PLU**
 - **Quick PLU**

PLU Programming

1. From the **PROGRAM MODE** main menu, touch **PLU** to view the PLU program selection window, touch **PLU** to view the PLU programming options. Here you can add, edit or delete items (PLU's) as necessary.



2. All existing PLU's are listed. You can edit an existing PLU by scrolling through the PLU list to the specific item you wish to edit.
3. The double Up/Down Arrows   go to the Beginning/End of the list respectively; the single Up/Down Arrows   scroll Up/Down one page at a time.
4. Select a PLU from the list to edit the options, price or cost for the item.

PLU Option Definitions

DESCRIPTION

This is the name of the saleable item, which will appear on receipts and reports. Descriptions can be up to 30-characters, the total number of characters used/allowed is shown at the end of the line. Pressing the **X** at the end of the description line will clear the current description.

KP DESCRIPTION

If desired, enter an alternate KP Description to be used at the KP/KVS. If no alternate KP Descriptor is entered, the PLU Descriptor will be used.

PLU CODE

The PLU code can be up to 18 numeric digits. PLU's may be added by typing in a code or by scanning an item.

IMAGE ADD/EDIT

You can display a thumbnail image of the PLU item. See "Loading Images For Item" in the Appendix for details.

Option

STOCK

The PLU must be linked to a PLU Status Group with the option Stock Item checked.

STOCK

The current stock level is displayed. Press the pencil icon to open the STOCK entry dialog. Enter the stock quantity, then press the appropriate button to: **ADD** to, **SUBTRACT** from, or **OVERRIDE** the current stock quantity for the item. Pressing CANCEL will exit without editing the current stock quantity.

MINIMUM STOCK

You can enter minimum stock quantity for PLU's with *stock item* status as necessary. Press the pencil icon to open the MINIMUM STOCK entry dialog. Enter the desire minimum stock quantity, then press the appropriate button to: **ADD** to, **SUBTRACT** from, or **OVERRIDE** the current minimum stock quantity for the item. Pressing CANCEL will exit without editing the current minimum stock quantity.

GENERAL

GROUP LINK 1, 2, 3

This field is used to provide the first, second, and third Group category for sales analysis. *i.e.* Cigarettes, Cigarette Packs, Marlboro and so on. The **GOTO** button allows you to go to the programming options for that group.

PLU STATUS GROUP LINK

Assign the appropriate PLU Status Group link for common system flags for this item.

The **GOTO** button allows you to go to the programming options for that PLU status group.

PRICE OPTION

Set the PLU as: **Preset (No Override)**, **Preset (Allow Override)** or as an **Open** price entry PLU.

MLU CHAIN

This is where you can assign MLU Chains "condiment chains" that will follow the PLU. You can also assign an individual MLU to an item by pressing the LOAD MLU button when the MLU Chain list is displayed.

MODIFIER QTY

This works in conjunction with the Stock Link PLU flag when the General Option setting 'Use Stock Link Program' is set for 'Stock Link PLU'. The quantity can be entered to 2 decimal places. Press the pencil icon to open the MODIFIER QTY dialog. Enter the appropriate MODIFIER QTY. Press **OK** to enter the quantity, pressing CANCEL will exit without entering the QTY.

For example: when items such as cases of soda or beer are separated into 12-packs, 6-packs or singles, this setting determines the quantity of units to be deducted from the main Stock PLU item. The field consists of two decimal places, for example: 50 would result in 0.50 being reduced from the stock of the item program within the Link PLU# field, 100 will reduce the QTY by one.

RECIPE LINK

This links to the ingredient inventory so that when the product is sold, the quantities of each ingredient associated with the recipe for the item are subtracted from stock for the assigned recipe and the appropriate sub recipes.

STOCK LINK PLU \ KP DESCRIPTOR PLU \ LINK PLU

This operation depends on the General Option setting 'Use Stock Link PLU On PLU Program'.

STOCK LINK PLU – When the General Option 'Use Stock Link Program On PLU' is set for Stock Link PLU. PLU's can be set to reduce stock levels set on another PLU. Set the number for the PLU where stock is affected (by activity of this PLU) here. (Used with Modifier QTY above.)

This capability is used where multiple PLU's affect a single inventory item. For example: cup counts for beverage items or when items are counted without regard to brand, such as cigarette packs.

KP DESCRIPTOR PLU - When the General Option 'Use Stock Link Program On PLU' is set for KP Descriptor PLU instead of its own descriptor. This allows for a secondary PLU descriptor to print on the KP. (For example, this can be used to print Spanish in the kitchen.)

LINK PLU - When the General Option 'Use Stock Link Program On PLU' is set for LINK PLU Set the number for the PLU you want to register with the current PLU. (For Example: Link a CRV PLU Link for bottles or cans.)

ALLOW PRICE CHANGE

If selected, the PLU price can be changed from the REGISTER mode using the [PLU INFO] or [PRICE CHECK] function keys.

Price

If the PLU is set as a Preset PLU, the entry here is the price for the item. If the PLU is set as OPEN, the entry here is the HALO (*High Amount Lock Out*) for the item (*maximum allowable entry*).

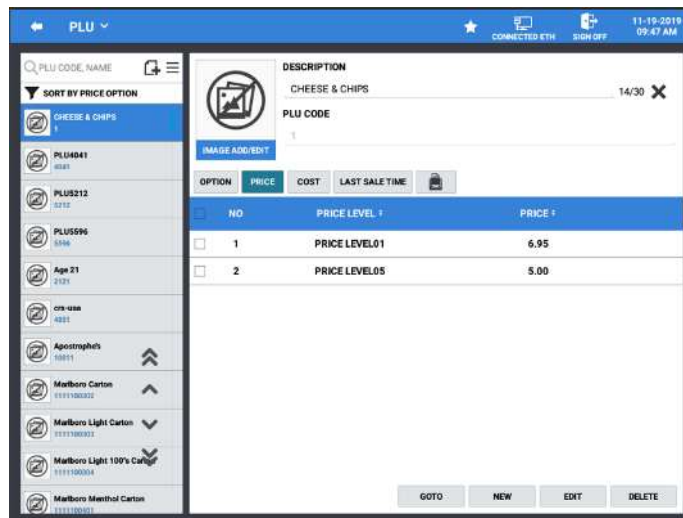
PRICE LEVEL (1 – X)

Entered here are the assigned price level(s) for each product. The Price/HALO can be up to 8-digits (999999.99).

Price Level Function keys for various pricing must be created before thou can assign different price levels here.

As many Price Levels as are needed for your application can be added, such as for Normal Price, Event Pricing, etc.

Note: Additional Price Level function keys must be created in 'Function Key' programming before they can be assigned to PLU's.



GOTO, NEW, EDIT, DELETE



GOTO – Press GOTO to the function key programming, to allow editing the Price Level programming.

NEW – Press to **add a NEW Price Level** to the PLU (*price level key must first be created in function key programming before you can assign here*)

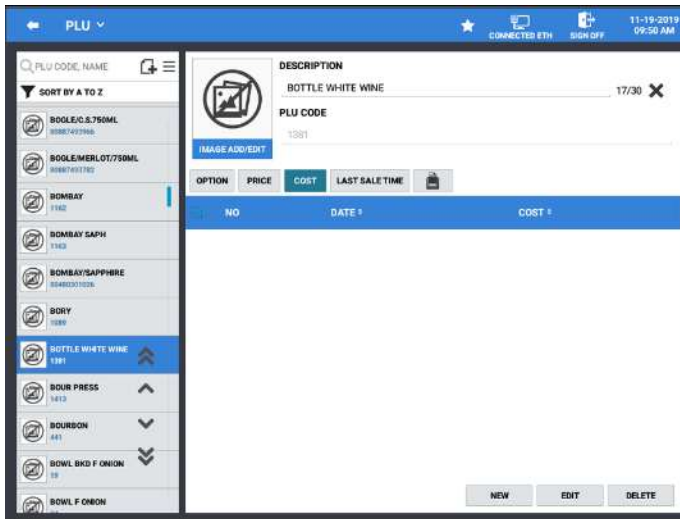
EDIT – Press to edit the selected Price and Price Level assignment.

DELETE – Press to delete the selected price.

Cost

The COST tab in PLU programming allows you to enter the merchant cost for the item.

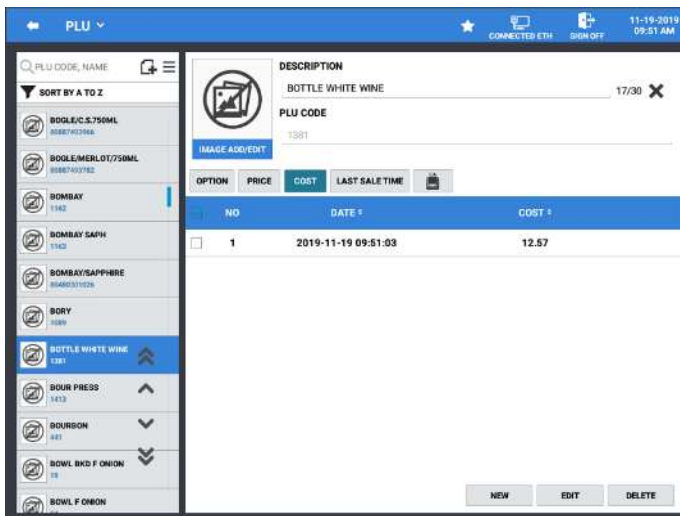
1. From the **PLU** programming screen, select the PLU you want to add the cost to, press the **COST** tab.



2. Select the '**NEW**' button at the bottom right of the display. The cost entry dialog displays.



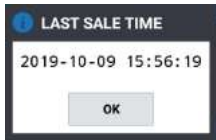
3. Enter the merchant cost (*up to 8-digits*) for the item and press **OK**. The cost is entered for the item. Pressing **CANCEL** will exit without entering in the cost.




4. If the cost was entered incorrectly, you can edit the cost amount. Select the PLU you wish to edit the cost for and press the **EDIT** button at the lower right of the screen.
 - a. Enter the correct cost for the PLU and press **OK**. You are returned to the main PLU screen.
5. You can also delete the cost entry for the selected item. Select the PLU you wish to remove the cost for and press the **DELETE** button at the lower right of the screen. The cost entry will be removed.

Last Sale Time

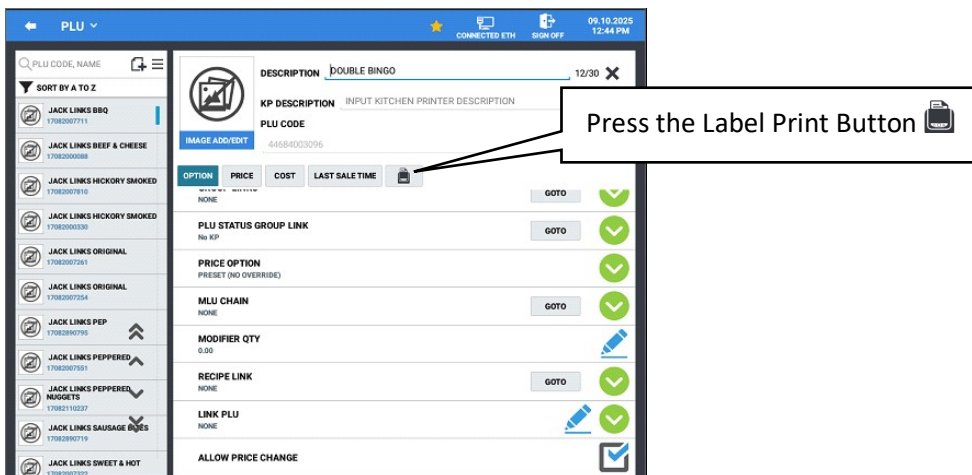
Beginning in v1.1.46 and later, we can view the date and time a particular PLU was sold. This can be helpful when determining if an item should be removed or deleted. The time is represented in YYYY-MM-DD HH:MM:SS format. If the selected item has no sales history it will indicate 'NONE'.



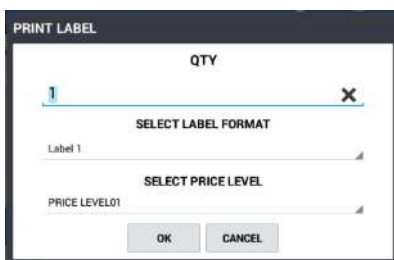
Print Label

Labels can be printed from the PLU screen by pressing the  Print Label icon. Specific set up is required for this feature.

1. On the PLU programming screen, select the item you wish to print a label for then press the **Label Print** icon.




2. On the **Print Label** dialog displays:

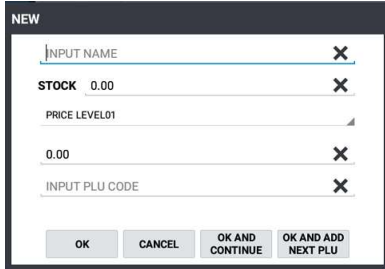


- a. Select the **QTY**, number of labels for each selected item you want to print.
 - b. Select the **LABEL FORMAT** as defined in the Label Print set up.
 - c. Select the **PRICE LEVEL**, this will be the price that prints on the label.
3. Press **OK** on the Print Label dialog to print the labels and close the dialog. Pressing **CANCEL** will exit the dialog without printing the labels.

Adding New PLU's

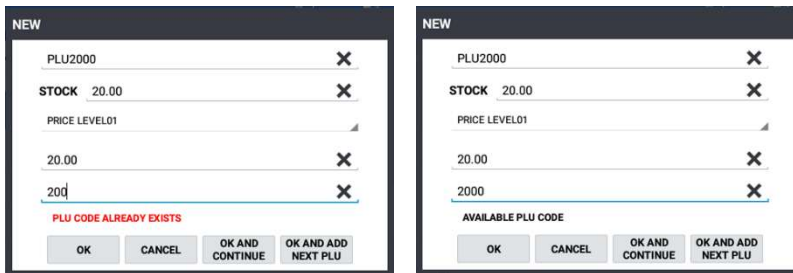
New items (PLU's) can easily be added to the database. New PLU's can have up to a 30-character name/descriptor and up to an 18-digit PLU code.

1. Press the add record icon  to add new PLU's to the database. The "NEW" item entry dialog displays:



2. Type in the:
 - PLU descriptor in the "INPUT NAME" field,
 - Enter the **STOCK** quantity if you are tracking stock in this item,
 - Select the **PRICE LEVEL** and Enter the item **PRICE** (for all price levels)
 - Type in the item PLU CODE or scan the new item in the "INPUT PLU CODE" field.

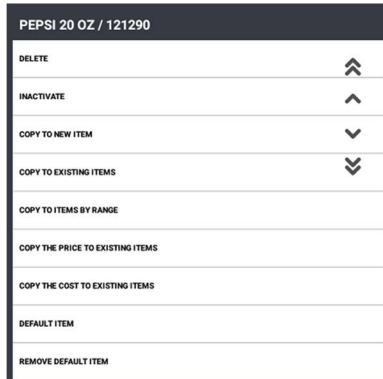
If the item code entered is already being used in the PLU database, you will receive the warning: "PLU Code Already Exists" enter in a new code number or press cancel.



3. Press **OK** to go on to the PLU option programming.
 - Press **OK AND CONTINUE** to add the item and continue adding more PLU's.
 - Press **OK AND ADD NEXT PLU** to add the current item and automatically select the next consecutive PLU# available for the next PLU.
 - Press **CANCEL** to cancel the new PLU entry.

PLU Sub Menu

PLU's can easily be maintained in the Sam4POS ECR Application, simply select the item and make the appropriate changes. If you select an item and press and hold on the item, a sub menu list of operations is displayed. This sub menu operation list includes:



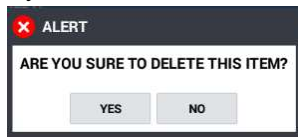
- Delete
- Inactivate / Activate
- Copy To New Item
- Copy To Existing Items
- Copy To Items By Range
- Copy The Price To Existing Items
- Copy The Cost To Existing Items
- Default Item
- Remove Default Item

Note: PLU can also be added and maintained from the Quick PLU screen, see page 305 for details.

Delete PLU

Individual items can be deleted as desired from the PLU Maintenance menu. To delete multiple PLU's all at one time use the Edit/Sort ≡ method; refer to page 301 for details.

1. **Press and hold** on the item you wish to delete and select '**DELETE**'. The confirmation alert message displays:



2. Press **YES** to delete the selected item; select **NO** to exit without deleting.

Inactivate / Activate PLU

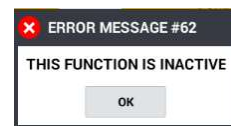
1. **Press and hold** on the item you wish to make inactive, then select '**INACTIVATE**' from the PLU maintenance list. Inactivated PLU's will be grayed out in the PLU list:



2. Inactive PLU's will appear grayed out in the register mode. *(Could be set to Hide or appear Normal.)*



3. If an Inactivated PLU is selected in the register mode, the following error will display:



4. You will need to '**Activate**' the PLU to resume allowing sales for the item.

Copy PLU

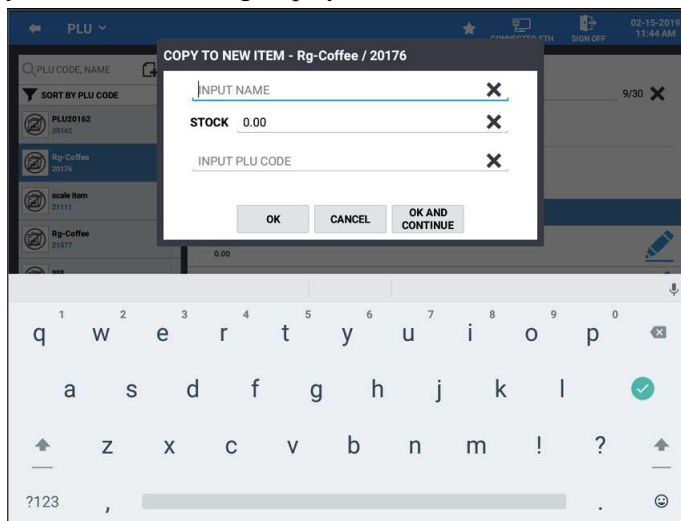
The SAM4POS makes creating multiple items that share the same settings very simple with the Copy PLU feature. You can copy a selected PLU to a new item or copy the selected PLU to existing items. You can also choose to copy the just the price of the selected item to existing items in the database.

1. From the **PLU** programming screen, select the item you wish to copy.
2. **Press and Hold** the item to open the PLU Sub Menu selection list.
3. Select the appropriate Copy operation from the menu to proceed.

Copy To New Item

Copies the selected PLU to new items individually.

1. From the **PLU** programming screen, select the item you wish to copy.
2. **Press and Hold** the item to open the PLU Sub Menu selection list. Select **COPY TO NEW ITEM**. The Copy To New Item dialog displays.

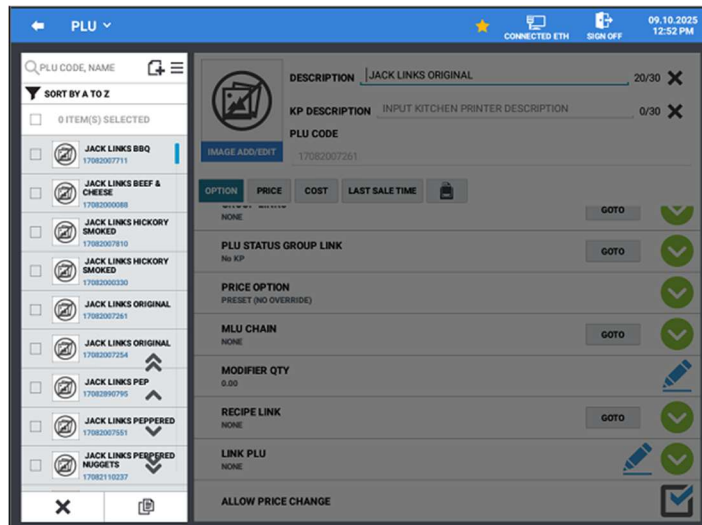







3. **INPUT NAME** → **STOCK** → **Input PLU CODE** for the new item.
4. Press **OK** to add the new item; Press **OK AND CONTINUE** to add the item and continue adding more PLU's; Press **OK AND ADD NEXT PLU #** to add the next available PLU #; Press **CANCEL** to cancel the new PLU entry.

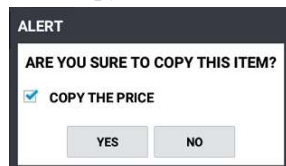
Copy To Existing Items

Allows you to copy the settings or changes of the selected item to another PLU or multiple PLU's already in the PLU database. The descriptor does not change, only the options/settings are updated.

1. From the **PLU** programming screen, select the PLU item you wish to copy.
2. **Press and Hold** on the item to open the PLU sub-menu selection dialog. Select **COPY TO EXISTING ITEMS**.
3. Check the items from the PLU list you wish to copy the selected PLU to.



4. The double Up/Down Arrows   go to the Beginning/End of the list respectively; the single Up/Down Arrows   scroll Up/Down one page at a time. The X will exit the procedure.
5. Press the copy – icon  the confirmation dialog displays:



6. Check or uncheck the '**COPY THE PRICE**' selection as desired.
7. Press **YES** to proceed with the copy procedure; all options, prices, will be copied to the selected items. The **COST** information is not copied. Press **NO** to exit the copy and return to the main PLU screen.

Copy To Items by Range

This feature allows you to copy a single PLU to a range of sequential PLU's. This makes creating multiple PLU's easier than adding them one at a time.

1. **Press and Hold** the item you wish to copy to open the PLU Dialog Menu selections.
2. Select **Copy to Items by Range**, the Copy to Items by Range dialog displays:

OPTIONS	PRICE
<input checked="" type="checkbox"/> SELECT ALL	<input checked="" type="checkbox"/> SELECT ALL
<input checked="" type="checkbox"/> STOCK	<input checked="" type="checkbox"/> PRICE LEVEL01
<input checked="" type="checkbox"/> MINIMUM STOCK	
<input checked="" type="checkbox"/> GROUP LINK1	
<input checked="" type="checkbox"/> GROUP LINK2	
<input checked="" type="checkbox"/> GROUP LINK3	
<input checked="" type="checkbox"/> PLU STATUS GROUP LINK	

3. The PLU Descriptor/PLU Code displays at the top of the sub menu.
4. Using the keypad provided, enter the desired range of PLU's you want to create:
 - Enter the first PLU# in the range in the **FROM PLU** field; Press icon, pressing the **X** will clear the current entry.
 - Enter the last PLU# in the range in the **TO PLU** field; Press icon, pressing the **X** will clear the current entry.
 - Enter the integer for the **BETWEEN PLU**. For example: enter 1 to copy to every single PLU in the range, enter 5 to create PLU's every 5th number 5, 10, 15, etc.
5. If you want to copy the PLU descriptor to the selected range, check the **DESCRIPTION** box.
6. Select the individual **OPTIONS** you wish to copy to the selected PLU range (*you can scroll up/down the list of options*) or check **SELECT ALL**.
7. Press **OK** when you have completed your selections, the new PLU items will be created; pressing **CANCEL** will exit without creating the new PLU's.


Copy The Price To Existing Items

Copy The Cost To Existing Items

'Copy The Price To Existing Items' is similar to the 'Copy to Existing Items' operation on page 298 except that only the price levels are copied to the items selected.

'Copy The Cost To Existing Items' is similar to the 'Copy to Existing Items' operation on page 298 except that only the PLU Cost is copied to the items selected.

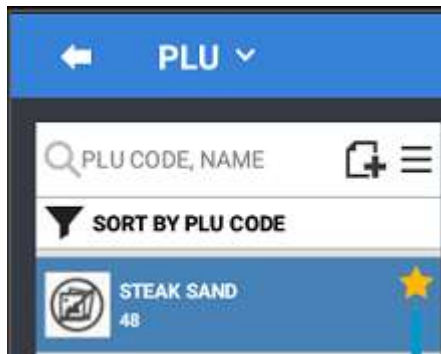
Default Item

You can choose any item in the PLU file to be used as the default item. The settings on the Default Item will be copied to all new PLU's that are added using the add new record  icon. *(The default item applies to items added using the Not Found PLU feature as well.)* You can remove the default item status or change it to another PLU to suite your needs.

1. From the **PLU** programming screen, **Press and Hold** the PLU you wish to set as the Default Item.
2. Select **DEFAULT ITEM** from the PLU sub menu.



3. The default item setting is indicated by the gold star:



Remove Default Item

4. **Press and Hold** the Default Item PLU; Select **REMOVE DEFAULT ITEM** from the PLU sub menu.







Menu Icon ☰

If you have a large PLU file, you can use the Edit/Sort feature to maintain the PLU database more easily. This feature allows you to access the Edit Mode, Sort PLU's alphabetically or numerically, Search for PLU's by PLU Status Group, Group assignment, from PLU Code, or search for PLU's with no sales activity. We can also Delete ALL PLU's in the database from this area.

1. Touch the **Menu icon** ☰ on the PLU programming screen to display the sub-menu selections:
Edit Mode, Sort, Filter, Load PLU, and Load All PLU's
2. Select the operation from the menu that you want to perform.

EDIT MODE

Selecting the Edit Mode from the menu selections allows you to select multiple PLU's at the same time or select all PLU's in the PLU file to edit the settings as necessary, delete , make inactive  or print a barcode . Press the exit icon  to close the edit mode.

SORT

Select SORT from the available selections, Options to sort PLU's:

- A TO Z or Z TO A
- PLU CODE
- PLU Status Group
- Group #1, Group #2, Group #3
- Recipe
- MLU Chain
- Price Option
- Modifier QTY
- Stock Link PLU#
- Allow Price Change
- Stock
- Minimum Stock

FILTER

Select Filter from the available selections, choose from:

- **PLU Status Group** – select the PLU status group to view PLU's assigned to that status group.
- **Group** – select the group to view just the PLU's assigned to that group.
- **From PLU Code** – Enter a PLU code to view just the PLU's from that code number entered and higher.
- **No Sale PLU's** – This selection will display all PLU's with no sales activity.
- **PLU By Price Range** – Allows filtering the PLU by price range and price level. Enter the **Lowest Price**, **Highest Price** and select the **Price Level**.
- **PLU By Stock Range** – We can filter PLU's by PLU Stock Range quantity. Enter the **Lowest Stock QTY** and the **Highest Stock QTY**, then press **OK**.
- **Range No Sale PLU** – We can filter for No Sale PLU's by a Date Range. Enter the **Start Date** and the **End Date**, then press **OK**.

LOAD MLU

Brings up the MLU screen. Select from the MLU's to view items assigned to your selection. You will be brought to the PLU programming screen for the selected PLU.

LOAD ALL PLU'S

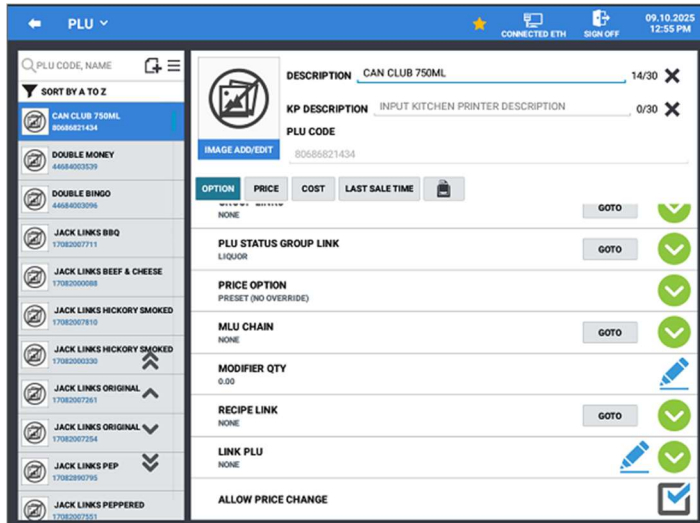
By default, only the first 1000 PLU's will load when entering the PLU programming menu. Press the Load All PLU'S to load the entire PLU file.


Printing Labels from PLU

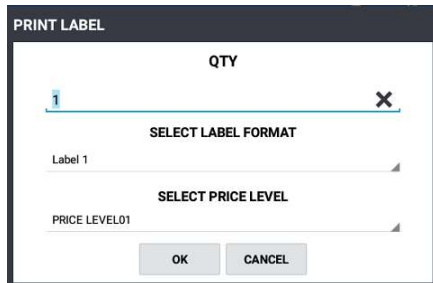
Labels can be printed from the PLU programming area or from the Edit Mode. We can choose to print a single label or multiple labels for one or more PLU items. To use this feature, you must have a label printer connected to the terminal, defined in devices and mapped to the station.

Additional programming is required to utilize this feature, consult with your local dealer for details.

1. Select **PLU** from the **PROGRAM MODE > PLU** menu selections. The PLU programming screen displays:



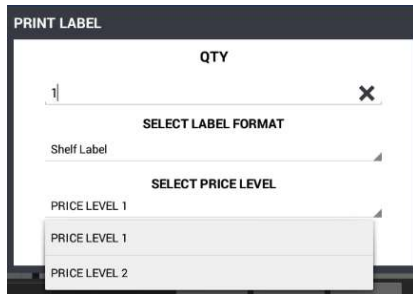
2. Select the **PLU** from the list you wish to print a label for; then press the Print icon ; the **PRINT LABEL** dialog displays:



3. Select the **QTY**, number of labels for each selected item you want to print.
4. Select the **LABEL FORMAT** (as defined in the Label Print set up).



5. Select the **PRICE LEVEL**, this will be the price that prints on the label.



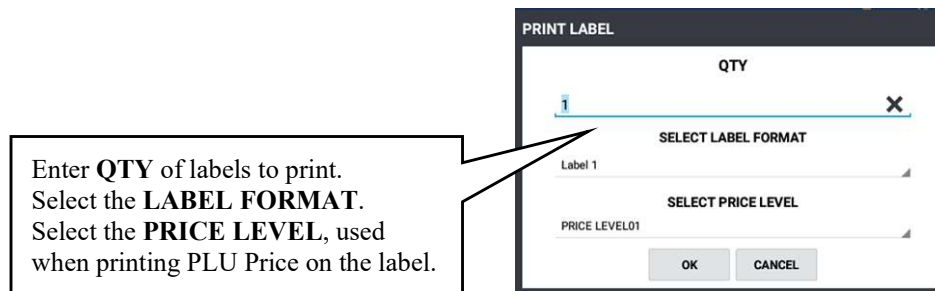
6. Press **OK** on the Print Label dialog to print the labels and close the dialog.

Alternately, you can select the menu icon and select Edit Mode:

1. Select the **EDIT MODE** from the menu icon, then select the one or more PLU's from the list.



2. Press the printer button The **'PRINT LABEL'** dialog displays:



3. Press **OK** on the Print Label dialog to print the labels and close the dialog.

PLU STOCK

PLU stock is a simple inventory system where each whole unit PLU activity subtracts a value of "1" from the stock counter. (Note that if multiplication or decimal multiplication is used when the PLU is registered, the resulting quantity of activity will subtract from the stock counter. Stock is maintained increments to the second decimal position, *i.e.* "X.XX".)

Use the *PLU Stock* feature when you are selling items exactly as they are stocked. For example, if cartons of milk are only sold individually, they could be inventoried with this system. Alternatively, if prepared food, such as meats or salad is sold by weight, such as in a delicatessen, the actual weight sold in each transaction is subtracted from the *PLU stock* level.

Current and Minimum PLU stock levels are entered for each *PLU STOCK* item. To assist in reordering, the PLU minimum stock report lists each item with an inventory level below the minimum stock level. When the level of a stock item falls below the minimum inventory level set here, the item will appear on the PLU MINIMUM STOCK report. When multiple registers are installed, the stock count is checked by IRC at each stock item registration.

1. From the **PROGRAM MODE** touch **PLU** to view the PLU program selection window, then touch **PLU STOCK** to view the PLU stock items and quantities.
2. Select the item or multiple items you wish to edit. (All selected items stock value will be updated with the value entered.)
3. You can view ALL PLU's stock quantities, or you can select a specific group of PLU's to view.

NO	PLU DESCRIPTION	CODE	STOCK	MINIMUM
1	GIFT SOLD	5	0.00	0.00
2	GIFT ADD-Value	505	0.00	0.00
3	Marlboro Carton	1111100302	0.00	0.00
4	Marlboro Light Carton	1111100303	0.00	0.00
5	Marlboro Light 100's Carton	1111100304	0.00	0.00
6	Marlboro Menthol Carton	1111100401	0.00	0.00
7	Marlboro Pack	84160812	88.00	10.00

4. The column headers can also be sorted to make it easier to locate specific items.
5. Select either the **STOCK** or the **MINIMUM** stock selection, then touch **'EDIT'**.
6. The appropriate entry window displays:
7. Enter the new quantity then touch:
 - **ADD** - to add to the current quantity.
 - **SUBTRACT** - to remove from the current quantity.
 - **OVERRIDE** - to enter a new quantity.
 - **CANCEL** - if you wish to exit without making any changes.
8. Press the Back Arrow \leftarrow icon to exit the PLU Stock. The prompt **'Do You Want To Print The Stock Edit'** displays.
 - Press YES to print the Stock Edit data to the receipt printer.
 - Press No to exit the PLU Stock without printing to stock edit detail.

NO	PLU DESCRIPTION	CODE	STOCK	MINIMUM
----	-----------------	------	-------	---------

EDIT STOCK

0.00

SELECTED 7 ITEM(S)

ADD SUBTRACT OVERRIDE CANCEL

EDIT MINIMUM STOCK

0.00

SELECTED 7 ITEM(S)

ADD SUBTRACT OVERRIDE CANCEL

EDIT STOCK

DO YOU WANT PRINT THE STOCK EDIT?

YES NO

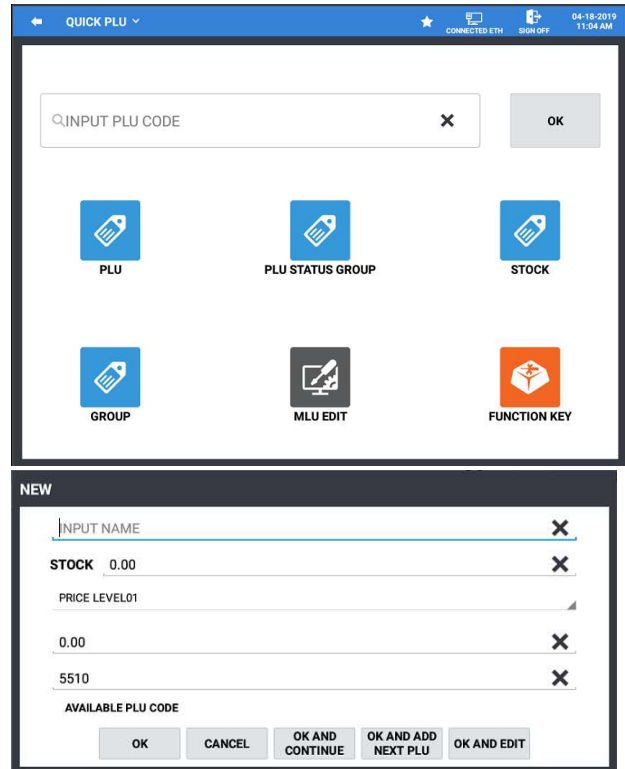
Quick PLU

The Quick PLU menu provides another means to quickly access the programming for a specific PLU or add new PLU's to the database. Six quick access program areas are provided, PLU, PLU Status Group, Stock, Group, MLU Edit, and Function Key. Select one of these categories to go directly to the programming maintenance screen for that category.

We can also enter the PLU code for a specific item to go to the programming for that specific PLU or add new PLU's to the database.

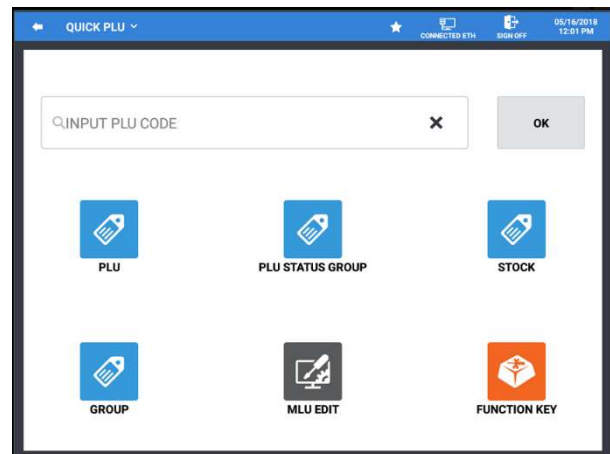
Quick PLU – Add New PLU

1. From the **PROGRAM MODE** main menu screen select **PLU** then select **Quick PLU**. The main Quick PLU selection screen is displayed:
 - PLU
 - PLU STATUS GROUP
 - STOCK
 - GROUP
 - MLU EDIT
 - FUNCTION KEY
2. In the '**Input PLU Code**' field, Type in the number for the new PLU or scan the new item; press **OK**.
3. The **NEW PLU** dialog appears
 - **Input Name** – Type a name for the new PLU.
 - **Stock** – Enter the stock quantity if the item is a stock item.
 - **Price Level \ Price** – Select the Price level and enter the price for the level.
 - **OK** – Adds the new PLU to the database and returns to the main Quick PLU screen.
 - * **CANCEL** – Exits the new PLU entry dialog without adding the item.
 - * **OK AND CONTINUE** – Adds the new item then returns to the NEW PLU entry dialog to allow entry of another new PLU.
 - * **OK AND NEXT PLU** – Adds the new PLU and returns to the NEW PLU entry dialog with the next available PLU number already selected.
 - * **OK AND EDIT** – Adds the new PLU to the database, then loads the PLU programming screen for further editing of the new PLU.



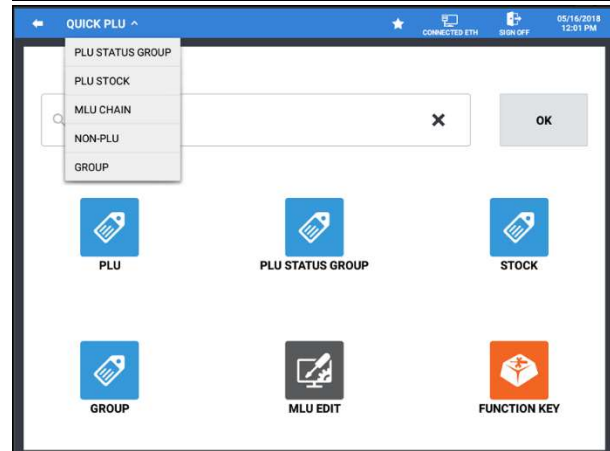
Quick PLU - Edit Existing PLU

1. From the **PROGRAM MODE** main menu screen select **PLU** then select **Quick PLU**. The main Quick PLU selection screen is displayed:



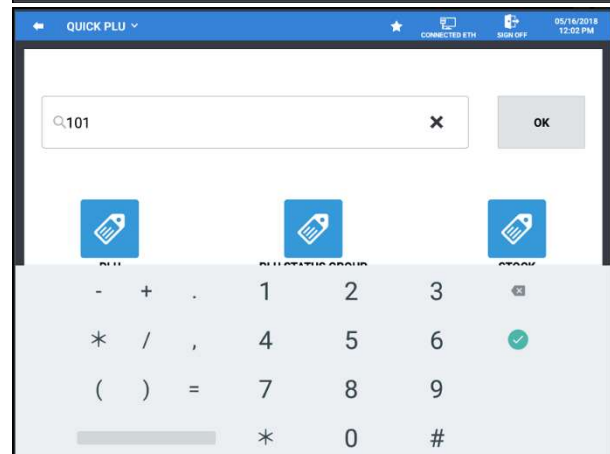
2. Select a category from the available selections to go to the programming screen for that category. Alternately, you can press the **Quick PLU** sub menu to select a category as shown:

- PLU Status Group
- PLU Stock
- MLU Chain
- Non-PLU
- Group



3. If you want to access the programming for a specific PLU, you can do so by typing in the desired **PLU#** or scan the specific item to go to the programming for that PLU.

4. Type in the **PLU CODE** then press the **Done icon**




5. The PLU code is shown in the window as in the example:

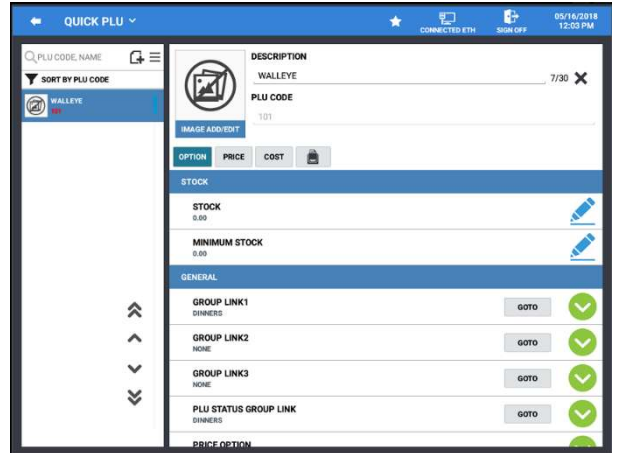
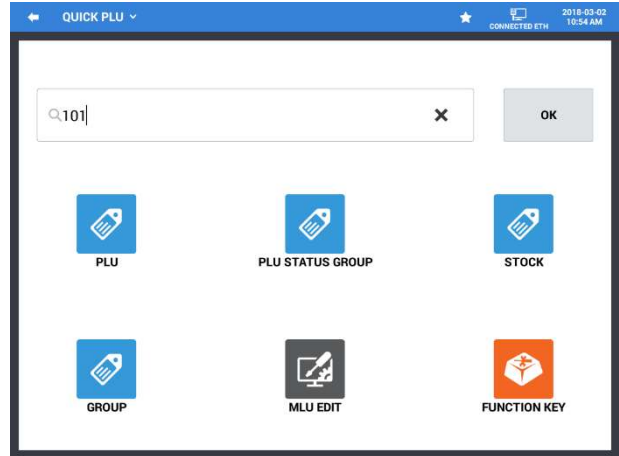
6. Press the **OK** button.

Alternately, you scan the Item Barcode and press **OK** to go directly to that PLU.

7. The programming for the PLU is shown; edit as necessary.

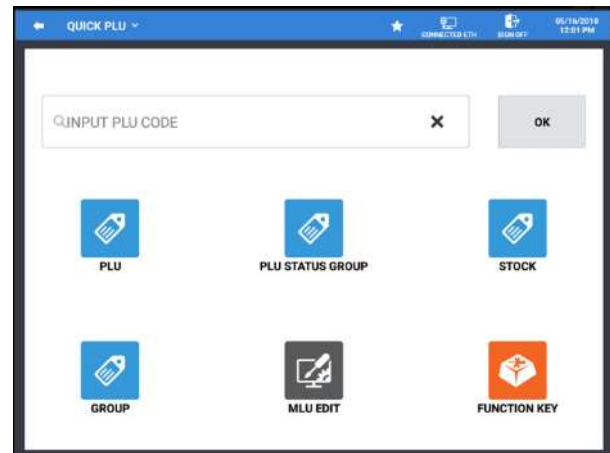
- OPTION
- PRICE
- COST
- PRINT LABEL

8. When you have finished editing the PLU, press the **back arrow**  icon on the headed bar to return to the main Quick PLU category selection screen.



Quick PLU – Stock Edit

1. From the **PROGRAM MODE** main menu screen select **PLU** then select **Quick PLU**.
2. Select **STOCK** from the **QUICK PLU** menu selections.



3. The **PLU STOCK** screen is displayed.
 - PLU Status Groups are listed in the left column.
 - PLU's are displayed on the right.

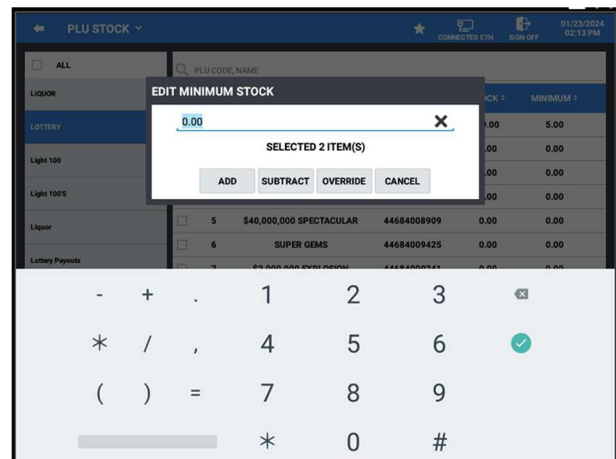
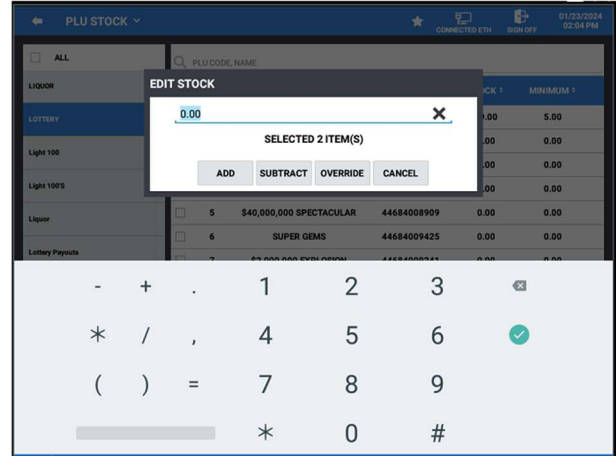
NO	PLU DESCRIPTION	CODE	STOCK	MINIMUM	
<input type="checkbox"/>	1	GIFT CARD SOLD	5	0.00	5.00
<input type="checkbox"/>	2	MARLBORO MEDIUM	6	-3.00	0.00
<input type="checkbox"/>	3	ZERO	25	-1.00	0.00
<input type="checkbox"/>	4	Cigarette Pack Price	30	125.00	5.00
<input type="checkbox"/>	5	Ticket Occupancy	300	0.00	5.00
<input type="checkbox"/>	6	OPEN BEER	397	-1.00	0.00
<input type="checkbox"/>	7	OPEN WINE	399	-8.33	0.00
<input type="checkbox"/>	8	DRF BLK-BLUE	961	0.00	0.00
<input type="checkbox"/>	9	DRF 1/2&1/2	962	0.00	0.00
<input type="checkbox"/>	10	DRF BLK-TAN	963	0.00	0.00
<input type="checkbox"/>	11	DRF BLUE MOON	964	0.00	0.00
<input type="checkbox"/>	12	DRF BUD LITE	965	0.00	0.00
<input type="checkbox"/>	13	DRF CIDER	966	0.00	0.00

4. **Uncheck ALL** at the top of the PLU Status Group list to view just the Stock Items related to the selected PLU Status Group.
5. Select an item or several items from the PLU list to edit.
6. Use the selection at the bottom right of the screen to choose **STOCK** or **MINIMUM**.

STOCK
 MINIMUM

NO	PLU DESCRIPTION	CODE	STOCK	MINIMUM	
<input type="checkbox"/>	1	LOTTERY	9990	99.00	5.00
<input type="checkbox"/>	2	MILLION DOLLAR DOUBLER	44684009760	0.00	0.00
<input type="checkbox"/>	3	TREASURE TREE	44684009692	0.00	0.00
<input type="checkbox"/>	4	SUPER 7	44684009449	0.00	0.00
<input type="checkbox"/>	5	\$40,000,000 SPECTACULAR	44684008909	0.00	0.00
<input type="checkbox"/>	6	SUPER GEMS	44684009425	0.00	0.00
<input type="checkbox"/>	7	\$2,000,000 EXPLOSION	44684009241	0.00	0.00
<input type="checkbox"/>	8	BIG MONEY BINGO	44684009791	0.00	0.00
<input type="checkbox"/>	9	FAST \$500s	44684009722	0.00	0.00
<input type="checkbox"/>	10	RED HOT WILD TIME	44684009159	0.00	0.00
<input type="checkbox"/>	11	CASHWORD PURPLE	44684009272	0.00	0.00
<input type="checkbox"/>	12	WILD NUMBER BINGO	44684009609	0.00	0.00
<input type="checkbox"/>	13	GOT LUCK?	44684009647	0.00	0.00

7. With **STOCK** selected Press the **EDIT** button. The **EDIT STOCK** dialog is displayed.
8. Enter the appropriate **STOCK** quantity value for the desired operation:
 - **ADD** – Adds the quantity to the current Stock quantity.
 - **SUBTRACT** - Removes the quantity from the current quantity.
 - **OVERRIDE** – Replaces the current quantity with the newly entered quantity.
 - **CANCEL** - Will exit without making any changes to the current quantity.
9. With **MINIMUM** selected Press the **EDIT** button. The **EDIT MINIMUM STOCK** dialog is displayed.
10. Enter the appropriate **MINIMUM STOCK** value for the selected item(s):
 - **ADD** – Adds the value to the current Minimum Stock value.
 - **SUBTRACT** - Reduces the current Minimum Stock value by the amount entered.
 - **OVERRIDE** – Replaces the current Minimum Stock value with the newly entered quantity.
 - **CANCEL** - Will exit without making any changes to the current value.
11. Press the Back Arrow ⇐ icon to exit the PLU Stock. The prompt ‘**Do You Want To Print The Stock Edit**’ displays.
 - Press YES to print the Stock Edit data to the receipt printer.
 - Press No to exit the PLU Stock without printing the edited stock detail.



PLU Maintenance – Register Mode

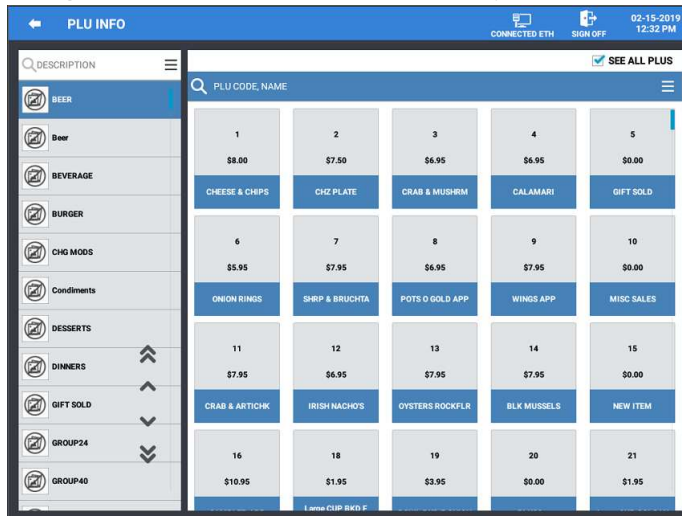
For convenience, changing descriptors & prices on existing items or adding new items to the database can be performed from the register mode using the PLU Info key.

PLU Info Key

The PLU description and prices can be maintained from the register mode using the PLU Info key. To utilize this feature, the employee signed must have the authority to edit PLU's from the PLU Info key. The PLU/Item being edited will also need the PLU option 'Allow Price Change' checked (enabled).

PLU Price Change

1. In the **Register Mode**, Press the **PLU INFO** key, the PLU info dialog displays:



2. Group selections are shown in the grid on the left of the screen, PLU's are displayed on the right grid. The default setting has 'See All PLU's' checked.
 - We can uncheck the "See All PLU's" selection, then select a group from the left column to view just the items assigned to that group.
 - Search the PLU list and select the PLU (*or Scan the item*). The Edit PLU dialog displays.

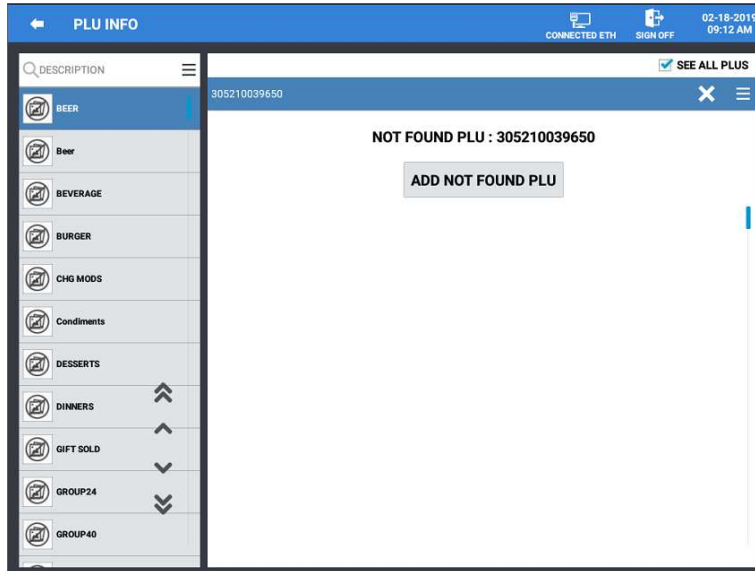


3. Edit the **PLU Description** and/or **Price** (*for all price levels*) as necessary.
 - **REGISTER** – Applies your edits, goes to the Register Mode and adds the edited item to the current transaction.
 - **OK** – Applies your edits, then returns to the PLU INFO screen. Edit additional items as needed.
 - **CANCEL** – Exits the Edit PLU dialog without applying any changes and returns to the PLU Info screen.
 - **OK & RETURN TO REG** – Applies your edits, then returns to the register mode but does not register the item in a sale.

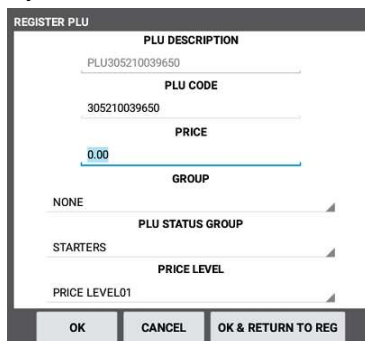
Adding PLU's

Items not currently in the PLU file can be added using the PLU Info key.

1. From the **Register Mode**, press the **PLU INFO** key to display the PLU Info dialog.
2. Scan the item, if the item is not currently in the PLU file, the **ADD NOT FOUND PLU** dialog displays:



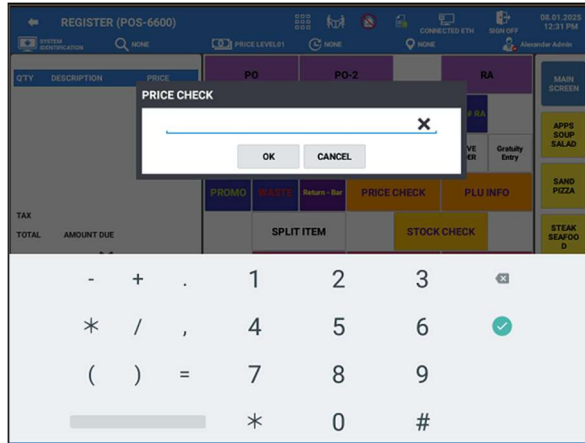
3. Press the **ADD NOT FOUND PLU** button to add the item to the PLU file. The Register PLU dialog displays:

A screenshot of the 'REGISTER PLU' dialog. It has a title bar 'REGISTER PLU' and a 'PLU DESCRIPTION' section with a text field containing 'PLU305210039650'. Below are fields for 'PLU CODE' (305210039650), 'PRICE' (0.00), 'GROUP' (NONE), 'PLU STATUS GROUP' (STARTERS), and 'PRICE LEVEL' (PRICE LEVEL01). At the bottom are three buttons: 'OK', 'CANCEL', and 'OK & RETURN TO REG'.

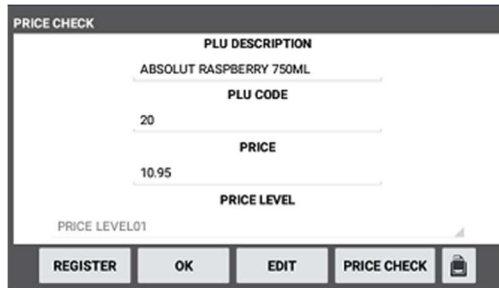
4. Enter the information for the new PLU:
 - **Price** for the item
 - **Group** assignment
 - **PLU Status Group** assignment
5. When finished, press **OK**; you are returned to the PLU INFO screen. Pressing **CANCEL** will exit without applying any changes.
6. Continue editing PLU's as necessary, press **OK & RETURN TO REG** to save the new price and return to the register mode.

Price Check Key

1. In the **Register Mode**, Press the **PRICE CHECK** key, the PLU info dialog displays:

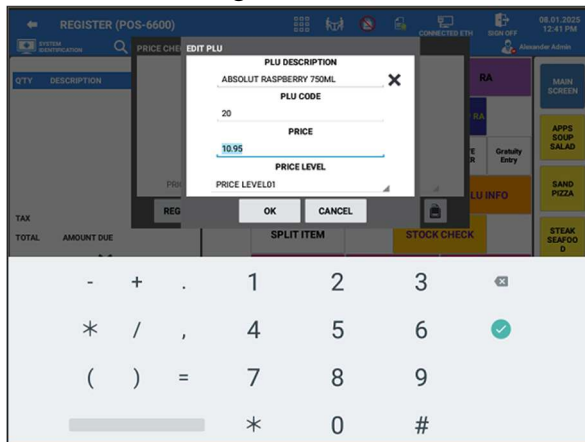


2. Type in the **PLU** code or scan an item in the database. Press **OK**.



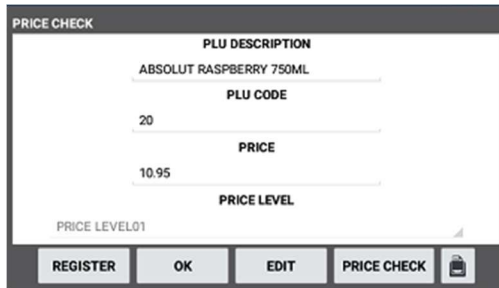
3. Edit the **PLU Description** and/or **Price** (for all price levels) as necessary.


- **REGISTER** – Goes back to the Register Mode. If the item was edited, the edits are applied and adds the item to the current transaction.
- **OK**- Returns to the main Register Mode screen without registering the item.
- **EDIT** – Opens the EDIT PLU screen. You can edit the PLU Description, and the Price for each Price Level assigned to the item. 1295

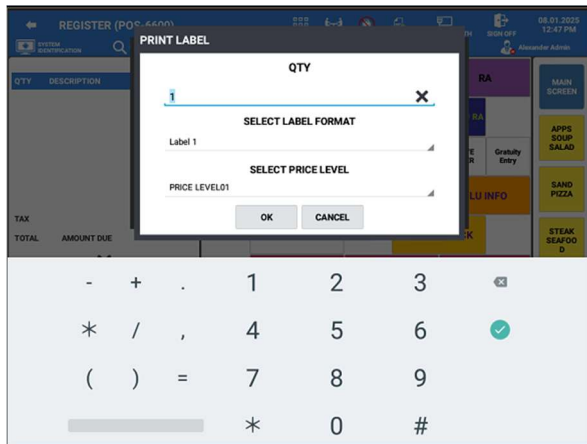


➤ Press **OK** after making your changes, or press **CANCEL** to exit without applying any changes.

- You are returned to the **PRICE CHECK** screen.

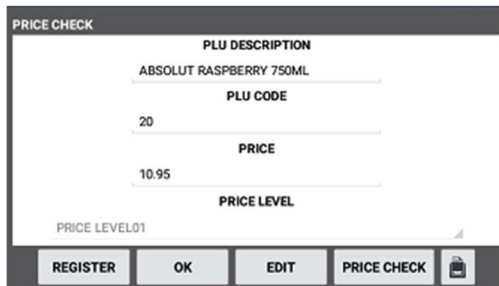


- **PRICE CHECK** – Allows you to select another PLU to check the price on.
-  – Pressing the printer icon opens the **PRINT LABEL** dialog to allow for printing a label for the selected item.



➤ Enter the number of labels desired, Select the appropriate label printer, select the desired Price Level. Press **OK** to print the Label, press **CANCEL** to exit without printing.

- You are returned to the **PRICE CHECK** screen.



Employee File Maintenance

The employee file contains information for register operators as well as employees who use the register only to clock in or out (employee time keeping.) Specific functions that are allowed or disallowed for each employee are determined by assigning the employee to an authority level.

Two 10-digit code numbers may be assigned for each employee. The clock-in code is used to clock in or out when the time keeping feature is used, and a separate operating code is used to Sign-On to operate the register.

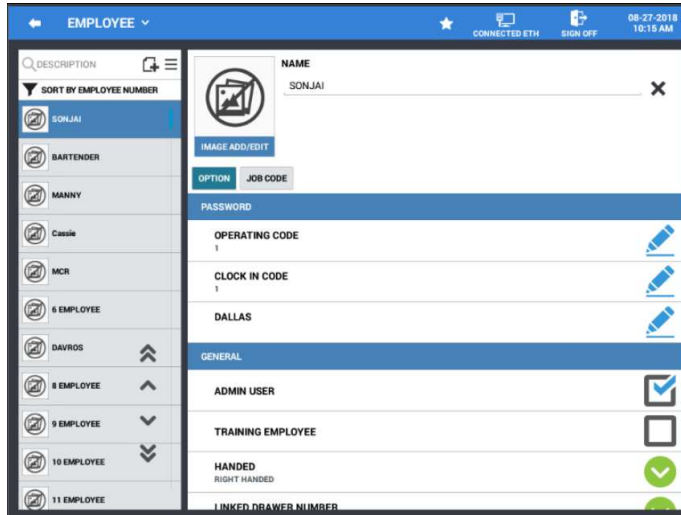
1. From the **PROGRAM MODE** touch **EMPLOYEE** to view the EMPLOYEE category selection window.





2. Touch the **EMPLOYEE** program category you wish to edit:
 - **Employee**
 - **Authority Level**
 - **Job Code & Pay Rate**
 - **Station**
 - **Option Category**

Add/Edit Employee's

1. From the **PROGRAM MODE** touch **EMPLOYEE** to view the employee program selection window.
2. Touch **EMPLOYEE** on the selection window to view all employees and the employee programming options. Here you can add, edit or delete employees as necessary.



3. All existing employees are listed. You can edit an existing employee by scrolling through the employee list to the specific employee you wish to edit.
4. If you have a large employee file, you can sort the employee list alphabetically or by employee number. You can also search for specific employees by name.
5. Touch the **Edit/Sort Menu** button  on the employee programming screen.
 - a. Select **SORT** from the available selections. Choose to sort from A TO Z, Z TO A, or EMPLOYEE NUMBER.
 - b. The **Edit Mode** allows you to delete the selected employees or set them as inactive. Inactivated employees will appear grayed out in the employee list.
6. Press the **New Record** icon  to add new employees to the database or you can select an existing employee to edit as necessary.
7. By pressing and holding the selected employee you can choose to:
 - a. **Delete** – to remove the selected employee from the database
 - b. **Copy To New Item** – to copy the settings for the selected employee to a new employee.
 - c. **Copy to Existing Items** – to copy the setting and options from the selected employee to other employees already in the database.
 - d. **Favorite Copy To Other Employee** – to set the selected employee as the favorite. This will copy the settings and options of the selected employee to newly added employees.

Employee Option Definitions

The Employee programming allows you to program the employee's name and add an image for the employee. You can also set specific options for the employee and assign job codes for the employee.

NAME

Type in a name for the Employee, the X at the end of the name field will clear the current name.

Option Button

The Option Button within the Employee Options programming breaks down into two program sections; a Password section and General section as defined below.

PASSWORD

OPERATING CODE

Enter a number (up to 10 digits in length) that will be used by this employee to sign in and/or out.

CLOCK IN CODE

Enter the secret code number (up to 10 digits in length) that can be used to clock in/out.

DALLAS

Not used in the USA.

GENERAL

ADMIN USER

If selected, this employee will be allowed to perform manager functions without entering a manager password.

TRAINING EMPLOYEE

If selected, this employee will be in training, regardless of the training mode status of the entire register.

KIOSK

Only check this option if this employee is to be a KIOSK employee. Sam4POS will show the KIOSK register screen for customer order entry operation. All KIOSK screens must be programmed before using this feature.

HANDED

Select *LEFT HANDED* or *RIGHT HANDED*; Controls display position in the sales mode.

LINKED DRAWER NUMBER

Select the drawer for this employee: No Drawer, Sam4s Cash Drawer, Sam4s Cash Drawer II, or Sam4s Cash Drawer III. If no drawer is assigned the employee can only perform check track postings but not payments.

RESET DRAWER ASSIGNMENT AT

NONE – Drawer assignment does not change. **CLOCK OUT** – Drawer assignment for this employee will need to be reassigned after the employee clocks out. When they clock in again the Linked Drawer Number selection dialog will display. **END OF DAY** – Drawer assignments for this employee will need to be reassigned after running the EOD report. **ALL** – Drawer assignments for this employee will need to be reassigned after every transaction.

EMPLOYEE AUTHORITY LEVEL

Operations and programs that can be accessed by this employee are determined by selecting an authority level; see 'Employee Authority Level' programming on page 314 for details.

EMPLOYEE AUTHORITY OPTION CATEGORY

Choose the Option Category to limit access to the available program categories for the selected employee as set in the Option Category Programming.

STATION

Select the station the employee will be assigned to. If set to STATION BY TERMINAL, assignment follows STATION OF TERMINAL. If setting is for a specific station, it will follow the STATION assigned for EMPLOYEE. Priority: STATION OF EMPLOYEE is first; STATION OF TERMINAL is next.

BIRTHDAY

CITY

ADDRESS

PROVINCE/STATE

TELEPHONE

SOCIAL SEC #

ZIP CODE

Job Code Button

The Job Code button is where you will assign the jobs and pay rates the employee will utilize; you can assign as many job codes to an employee as is necessary. Refer to 'Job Code & Pay Rate' programming on page 319 for details.

JOB CODE / PAY RATES

An employee might have more than one job, possibly with a different pay rate for each job. For example: in a restaurant, an employee might work as a server one day, and on a different day or shift, work as a cashier. Here you can assign all the different job codes and pay rates for each employee.

Employee Authority Level

Each employee must be assigned to an authority level; create authorities here to assign each employee. There are four main categories in the authority level programming; REG MODE, TIME IN/OUT, CHECK TRACKING and EDIT PGM/FUNCTION. The selections made here for each authority level determine the operations that will be allowed for each employee.

For example, in a restaurant application, an authority level with the descriptor Kitchen Help could be set to allow only clocking in/out, or an authority level with the descriptor Owner could be set up to allow all functions. Other authority levels could be defined for servers, cashiers and managers that allow only the appropriate operations.

Employee Authority Level Definitions

DESCRIPTION

Type a description (*up to 30 characters*) to identify the Authority Level.

REG MODE

SIGN IN/OUT USING MCR

This option forces the employee to use the Mag Card Reader for signing in and out of the ECR.

ALLOW DESTINATION CHANGE

If selected, the operator has the option of selecting a destination (i.e. eat-in, take out, drive thru) other than the default.

CAN PLU PRICE/HALO OVERRIDE

If checked, the employee can override the preset price or HALO on items set to allow price change.

ALLOW PRICE LEVEL CHANGE

Select this option if the employee is allowed to change price levels.

ALLOW CASH DECLARATION

If cash declaration is used, select this option to allow cash declaration operations.

ALLOW NOSALE

Allows the No Sale operation outside a transaction.

COMPULSORY TIP ENTRY

If selected, the employee is prompted to declare Tips when clocking out.

REG MODE ONLY

Select this option if you want to allow sales operations only for these employees.

CAN EDIT PLU FROM PLU INFO

Check this option to allow employee to use the PLU Info key in the Register Mode to edit the PLU's.

VOIDING OF SERVICED ITEMS

Allows voiding items off a check after the check has been services and recalled.

SHOW THE MENU OF EMPLOYEE REPORT IN REG MODE

With this option checked, tapping the Employee Name in the register mode will display the selections for :

Employee Report – Generates the employee report for today for the signed on employee.

Employee Report (Current Data) – Generates the Employee Report with current data only (*before the EOD is generated*) for the signed on employee.

TIP Report – Generates the TIP report for today for the signed on employee.

TIP Report (Current Data) – Generates the TIP report with current data only (*before the EOD is generated*) for the signed on employee.

ALLOW DISCOUNT

When selected, this employee is allowed to enter discounts in a transaction.

ALLOW TEAMVIEWER

When selected, this employee is allowed to use the TeamViewer application.

ALLOW END OF DAY IN REG MODE

When checked, the End Of Day report icon appears in the Utility Information on the title bar.

ALLOW VOID ITEM

When this option is not checked, the Cashier\Server cannot press and hold an item while in REG mode to VOID it.

ALLOW ASSIGN DIFFERENT EMPLOYEE WITH LIST PAID TIP ENTRY

Select this option if you want to allow ADMIN employees to be able to assign Tips received to any employee in register mode using the TIP Entry on the List Paid function.

ALLOW ANY EMPLOYEE REPORT IN REPORT MODE

The setting will allow Managers or Supervisors to run the employee report for any employee instead of only being able to run your own report.

SHOW LICENSE ICON

Check this option to display the License Icon  in the register mode.

SHOW UTILITY INFORMATION ICON

Check this option to display the Utility Information Icon  in the register mode.

NEED MANAGER FOR RECEIPT ON / OFF CONTROL

When checked, the manager password is required to toggle the receipt On/Off.

SHOW RECEIPT ON / OFF ICON

Select this option to see the receipt On/Off icon in the register mode (*displays on the title bar*).

TIME IN/OUT

TIME-IN/OUT ENTRY ONLY

When checked, employees are allowed to Time-In/Out Only and cannot enter sales transactions.

TIME IN/OUT USING MCR

This option forces the employee to use the **M**ag **C**ard **R**eader for clocking in and out.

ALLOW TIME CLOCK EDIT

Select this option to allow employee to edit the time keeping reports.

NEED MANAGER FOR TIME IN/OUT

When selected, employee needs manager to be able to clock-in/out.

TIME IN BEFORE SALE

Select this option to require employees to clock in before they can register sales.

PAID BREAK

Allows for clocking out for breaks and still being paid. Also see Time Keeping Option: Allow Breaks.

CHECK TRACKING

PAYMENT OF OWN GUEST CHECK

PAYMENT OF ANY GUEST CHECK

TRANSFER OF GUEST CHECK

CAN COMBINE/SPLIT GUEST CHECK

Selections are: Not Allow – Own – All

ALLOW EDIT ANY CHECK

CAN CLOCK-OUT WITH OPEN CHECK

GUEST CHECK ENTRIES ONLY

If selected, employee must begin a check before registering items in a transaction.

ALLOW CANCEL AFTER RECALL

When selected, when an employee recalls a check and adds new items, the employee is allowed to press cancel to remove the currently added items – Pressing Cancel will remove the currently added item and then store the check. This does NOT allow cancellation of the entire check.

ALLOW DELETE CHECK

When selected, this employee is allowed to delete checks without entering a manager password.

ALLOW TABLE MOVE

Uncheck this option to not allow this employee to move an order from one table to another table when using the Table Map.

EDIT PGM/FUNCTION

ALLOW PLU EDIT

Allow All – Employee can make any changes to any PLU.

Allow Only PLU Price – Employee can only change prices on PLU's.

Do Not Allow – Employee will not be able to make changes to PLU's.

ALLOW EMPLOYEE EDIT

ALLOW AUTHORITY LEVEL EDIT

ALLOW JOB/PAY EDIT

ALLOW STOCK EDIT

ALLOW MLU EDIT

ALLOW FLU EDIT

CAN ALL MEMO DELETE

ALLOW OPTION CATEGORY EDIT

If selected this employee can edit the settings in the Option Category programming.

These settings are used to define specific program categories the employee is allowed to edit. For example: allow managers to edit these setting but not allow other employees access.

END OF DAY

ALLOW EOD EDIT

If this option is checked, the employee is allowed to change the settings on the EOD screen.

ALLOW EOD MODE ACCESS

When selected, this employee will have access to the EOD reporting without entering the manager password. (Z-Mode reporting on the SAP-630/530 even if employee has the Z key.)

EJ REPORT

ALLOW EJ DELETE

Check this option to allow the employee to use the delete button on the EJ Report.

JOB CODE & PAY RATE

An employee might have more than one job, possibly with a different pay rate for each job. For example, in a restaurant, an employee might work as a server one day, and on a different day or shift, work as a cashier. Here you can create these different job codes and pay rates to be used for your employees. By assigning separate job codes and pay rates for each employee, the built-in time clock can track and report hours and wage costs appropriately.

1. From the **PROGRAM MODE** touch **EMPLOYEE** to view the employee program selection window.
2. Touch **JOB CODE & PAY RATE** on the selection window to view the current programming. Here you can add, edit or delete Job Codes & Pay Rates as necessary.

NO	JOB CODE :	NO	PAY RATE :
<input type="checkbox"/>	1 WAIT STAFF	<input type="checkbox"/>	1 7.00
<input type="checkbox"/>	2 BARTENDER	<input type="checkbox"/>	2 7.25
<input type="checkbox"/>	3 MANAGER	<input type="checkbox"/>	3 7.50
<input type="checkbox"/>	4 CASHIER	<input type="checkbox"/>	4 7.75
<input type="checkbox"/>	5 DISHWASHER	<input type="checkbox"/>	5 8.00
<input type="checkbox"/>	6 CHEF	<input type="checkbox"/>	6 8.25
<input type="checkbox"/>	7 COOK	<input type="checkbox"/>	7 8.50
<input type="checkbox"/>	8 ADMIN	<input type="checkbox"/>	8 8.75
		<input type="checkbox"/>	9 9.00
		<input type="checkbox"/>	10 10.00
		<input type="checkbox"/>	11 11.00
		<input type="checkbox"/>	12 12.00
		<input type="checkbox"/>	13 13.00
		<input type="checkbox"/>	14 14.00
		<input type="checkbox"/>	15 15.00

Edit Job Codes

Job codes are used to break down the hours worked for all employees into different categories (See "Labor Groups" report in the *Operation Manual*.) A breakdown of hours by job is also reported for each employee.

The job codes to be used by all employees are set up here. Each job code you create must be given a descriptor (up to 30 characters). You can create as many JOB CODES as are needed for your application needs. Job codes can be sorted alphabetically by pressing the JOB CODE heading.

1. From the **PROGRAM MODE**, select **EMPLOYEE**, then select **JOB CODE & PAY RATE**.
2. Select **NEW**, **EDIT** or **DELETE** as needed to maintain the job codes.

Edit Pay Rates

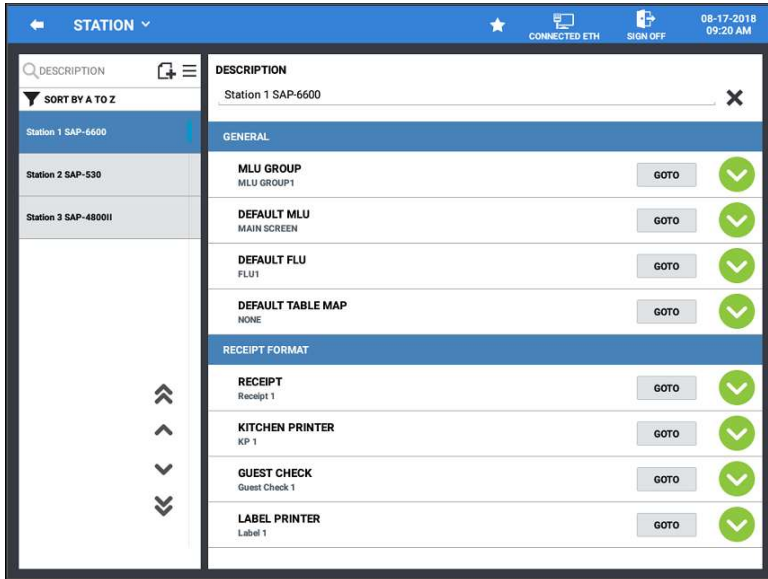
Similar to the job code programming, all employees' Pay Rates are set here; you can create as many pay rates as are needed for your application. Pay Rate values up to 999999.99 are allowed. Pay rates can be sorted highest to lowest or from lowest to highest if desired.

1. Select **NEW**, **EDIT** or **DELETE** as needed to create and maintain the pay rates.

STATION

Create stations to be assigned to employees. For example you may have a Bar Station and a Server Station. Stations can be assigned to default MLU/MLU GROUP, FLU and Printers. Stations can also have different Receipt, Guest Check, and Kitchen Printer assignments.

1. From the **PROGRAM MODE** touch **EMPLOYEE** to view the employee program selection window.
2. Touch **STATION** on the Employee selection window to view the station programming options. Here you can **ADD**, **EDIT** or **DELETE** stations as necessary. Stations can be sorted alphabetically if desired.



DESCRIPTION

Type in a descriptor for the selected station, you can use the **X** at the end of the description field to clear the current descriptor.

GENERAL

The general section assigns the default MLU Group, Default MLU and FLU used for the selected station.

MLU GROUP

DEFAULT MLU

DEFAULT FLU

DEFAULT TABLE MAP

RECEIPT FORMAT

Receipt format is used to assign the default printers to be used for the selected station.

RECEIPT

KITCHEN PRINTER

GUEST CHECK

LABEL PRINTER

Select the label type to be used on the label printer for this station.

Use the **GOTO** buttons to directly access the programming for the option selection.

Option Category

The Employee – Option Category allows employees with the proper authority setting to be able to Hide selected categories from view when employees are in the program mode screen. This allows managers to have another level of control over what employees can access. Option categories created here are then assigned to individual employees in the employee programming.

Different option categories can be set up for different employees or employee job types as desired.

DESCRIPTION

Type in a descriptor (*up to 30-characters*) for the option category, you can tap the ✕ at the end of the description field to clear the current descriptor.

PGM MENU

Check the categories you wish to hide from view when in the employee programming.

HIDE PLU OPTION CATEGORY

HIDE TAX OPTION CATEGORY

HIDE FUNCTION KEY OPTION CATEGORY

HIDE PROMOTION OPTION CATEGORY

HIDE SCREEN EDIT OPTION CATEGORY

**HIDE NETWORK & REVENUE OPTION
CATEGORY**

HIDE SYSTEM OPTION CATEGORY

HIDE EMPLOYEE OPTION CATEGORY

HIDE OPTIONS OPTION CATEGORY

HIDE RECEIPT & MESSAGE OPTION CATEGORY

**HIDE PRODUCT & INGREDIENT OPTION
CATEGORY**

HIDE DEVICE OPTION CATEGORY

HIDE TIME SCHEDULE OPTION CATEGORY

HIDE ETC OPTION CATEGORY

Customer File Maintenance

The Customer category must be enabled in the program mode before this feature can be utilized, consult with your local dealer for details. When enabled, the Customer \ Delivery feature with Sam4POS maintains a customer data file for assigning a customer to an order for eat-in or pick-up or creating an order for delivery to a customer.

Customer records for the delivery feature are stored in the CUSTOMER category in the Program Mode. The Customer category has two program areas, Customer and Customer Group. Two separate function keys, a Customer key & a Delivery key can be used to initiate a transaction. New customers can be added from this program area or you can add or edit customers from the register mode by pressing the Customer function key.

Customer Programming:

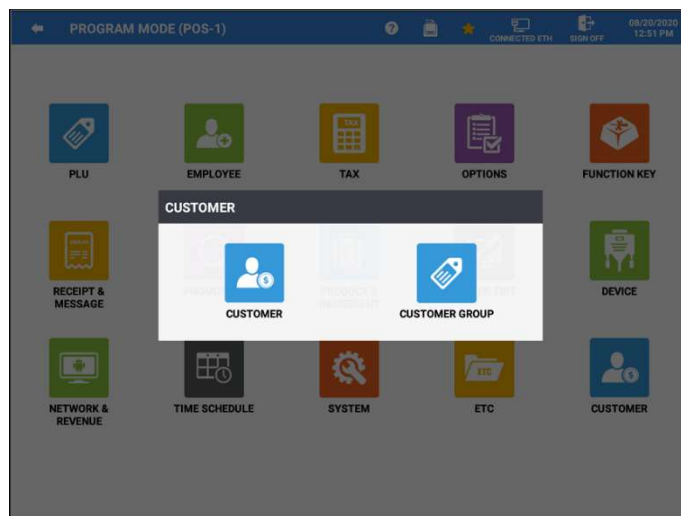
- The CUSTOMER program area INFO button has fifteen information entry fields available for each customer. You can enter data into all of the fields or just the entries necessary for your application.
- Pressing the ORDER button will display the Order history for the selected customer. You can choose the time period of orders to view by Day, Week, Month, or Year. Press the search icon to load the transaction according to your period selection. Choose an order from the list to view the receipt for transaction.
- CUSTOMER GROUPS can be used to assign a Point Rate for different companies or organizations.
Note: (Points cannot be “redeemed”, only the accrual of points is accommodated.)

Function Keys:

- The CUSTOMER function key is used to associate the current transaction to a specific customer.
- The DELIVERY function key is used to initiate a delivery or pick-up transaction. When touched, the Delivery key opens the customer record screen. Here existing accounts can be opened, new accounts created, or existing accounts deleted.

Operation:

- Pressing the Customer function key associates the current order with the selected customer.
 - Press the Delivery function before registering an order to create a delivery order. Delivery Orders are tracked by assigning a tracking file (*Recall Table/Store Table*) to hold the customer delivery orders.
 - The Delivery operation also allows you to accept orders and hold them for preparation and delivery at a later time.
1. Select **CUSTOMER** from the main **PROGRAM MODE** menu screen.

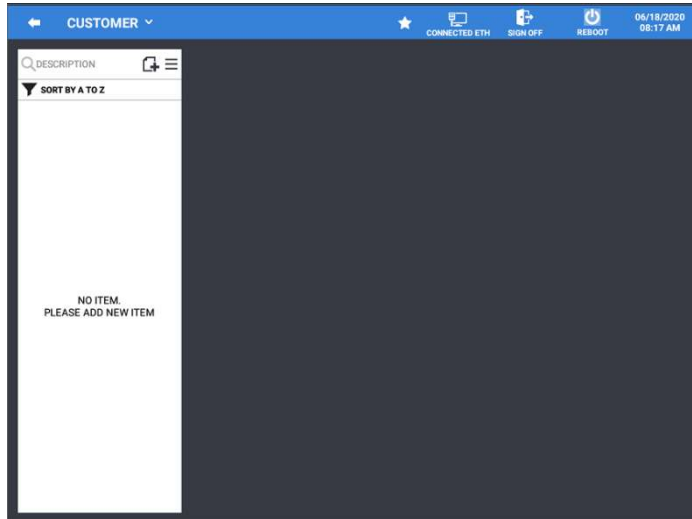


2. The **CUSTOMER** category selection screen displays. Select the program area you wish to edit.

Customer Database


The Customer category is where all the individual customer delivery records are maintained. The customer data files contain the customer's name, address, and other contact information.

1. Select **CUSTOMER** from the **CUSTOMER** category menu screen to display the Customer file.

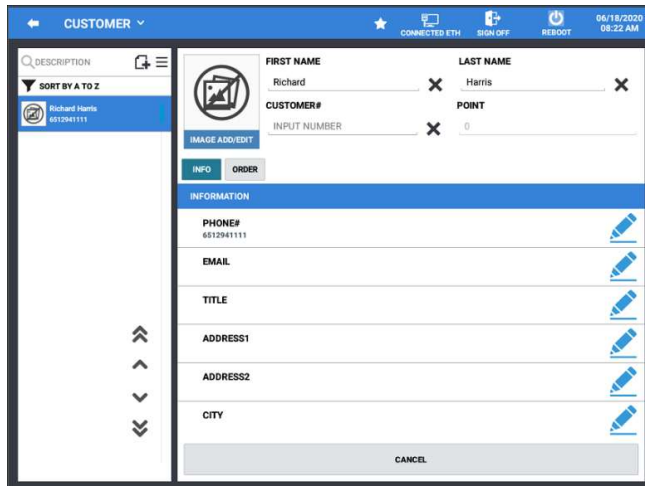


2. From this screen you can Add new customers or edit existing customer records as needed.

Add New Customer

1. Select **CUSTOMER** from the **CUSTOMER** category menu screen to display the Customer file.
2. Press the **add record icon**  to add a customer to the database, the NEW customer entry dialog will display:

3. Type in the customer information:
 - a. Input **First Name**: Up to 30 characters
 - b. Input **Last Name**: Up to 30 characters
 - c. Input **Phone #**: Up to 19 characters
 - d. Enter a **Customer #**: Up to 19 characters
4. Press **OK** to add the new recipe or press **OK AND CONTINUE** to add another customer. Pressing **CANCEL** will exit without adding the customer. Pressing the **X** at the end of each field will clear the current entry.
5. The new customer will be added to the list:



6. When the customer is added, additional entry fields are available. Enter addition data as necessary.

Note: New customers can be added from the register mode at the time of the sale as well by pressing the DELIVERY key. Then follow the procedure from step 2 above.




Customer Data Fields

Field	# Characters
First Name \ Last Name	30
Customer#	20
Point	Loyalty Points are not currently used. The Point setting is entered in the Customer Group programming.
Info Tab - Information	
Phone#	20
E-mail	50
Title	20
Address 1 & 2	40
City, State, Zip Code	20
Birthday	Select using Calendar. (Beginning in v2.0.95, if the birthdate is entered here, this will satisfy the age restriction on products where applicable.)
Info Tab - Option	
Price Level	Select NONE or choose a specific price level to assign the selected customer to. <i>This allows special pricing for individual Delivery customers.</i>
Customer Group	Choose a specific customer promotion group to associate with the selected customer or Select NONE. This allows point promotions to be applied based on the Customer Group (type of customer). (Customer Groups must be created before they can be selected\assigned here.)
Order Tab	
Order History	Displays the order history by Date & Total for the selected customer. Calendar selections for From ~ To and Date Type Selections: <ul style="list-style-type: none"> • NONE • 1 DAY, 1 WEEK • 1 MONTH, 3 MONTH, 6 MONTH • 1 YEAR • TODAY Select an order from the list to Preview that order.

Edit Customer Data


When a new customer is added, you will need to add the additional information or at some point the customer data may change, new location, new phone, etc. Customer data can easily be edited as described below.

INFORMATION

1. Select **CUSTOMER** from the **CUSTOMER** category menu screen to display the Customer file.
 - a. If you have a large customer file, you can use the search field  to search for a specific customer by First Name, Last Name, or Customer #.
 - b. Touch the Menu icon  on the Customer programming screen to Sort or Edit the customer file.
 - * Select **SORT** from the available selections. Choose to sort Alphabetically, First Name, Last Name or Customer #.
 - * The **EDIT MODE** selection allows you to select multiple employees in the database and Delete them all in one operation.
2. Choose the Customer from the list to edit their data; scroll to the data line you wish to edit and press the **Pencil icon**  to change the information.
3. Type in the data, pressing the **X** at the end of the line will clear existing data.
4. Press **OK** to complete the editing; Pressing **CANCEL** will exit without editing the data.



OPTION

Changing data in the Option area is similar to the Information area.

5. Press the **GOTO** button to edit the existing option selection settings.
6. Press the **Selection icon**  to change the assigned option selection.

Delete Customer Record

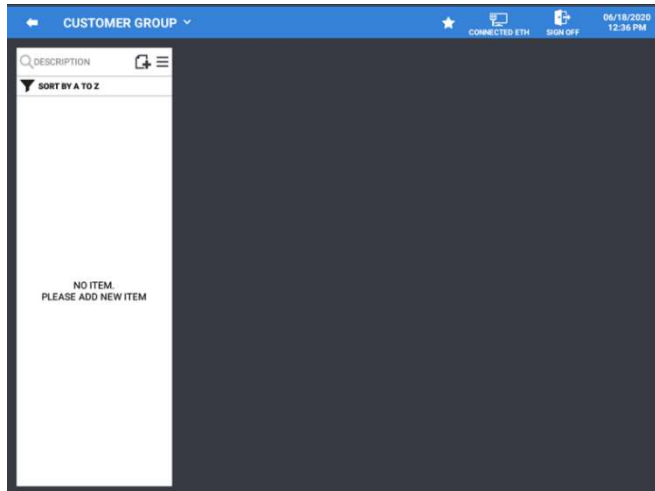
If you find it necessary to remove or inactivate a customer from the customer file, you can easily accomplish this a couple of different ways.

1. **Press & Hold** on a Customer in the list to **Delete** or **Inactivate** a customer record.
 - a. A dialog appears with selections to **DELETE** the selected customer record or **INACTIVATE** the selected customer record.
2. Alternatively, use the **Edit Mode** to select & **Delete** multiple Customer records in a single operation.
 - a. Press the **Menu icon**  at the top of the customer list.
 - b. Select **EDIT MODE**; choose the Customer records you wish to delete.
 - c. Press the **Trash Can icon**  to delete the selected customer records.
 - d. Press the **X** icon to exit Edit Mode.

Customer Group


Customer Groups are used for assign a Point Rate for customers, such as Loyalty Points.

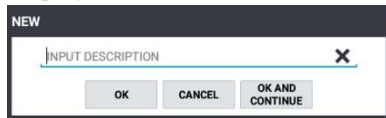
1. Select **CUSTOMER GROUP** from the **CUSTOMER** category menu screen to display the Customer Group screen.



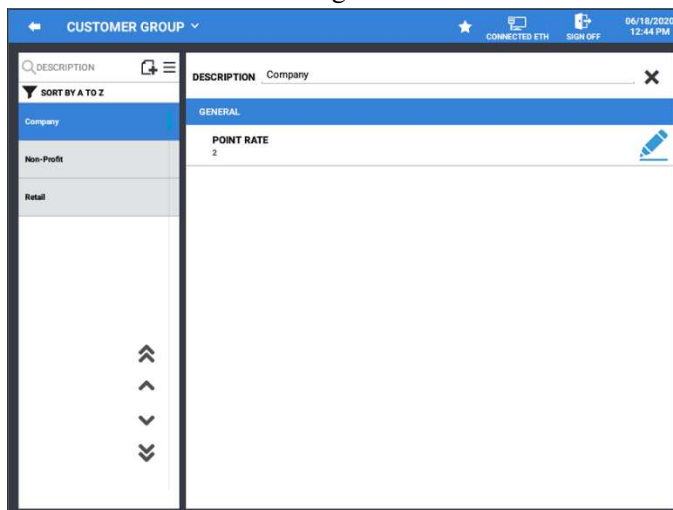
2. From this screen you can Add new Customer Group or edit existing Customer Groups as needed.

Add New Customer Group

1. Select **CUSTOMER GROUP** from the **CUSTOMER** category screen to display the Customer file.
2. Press the **add record icon**  to add a customer to the database, the NEW customer group entry dialog will display:



3. Type in a description for the new customer Group; Pressing the X at the end of entry field will clear the description field.
4. Press **OK** to add the new recipe or press **OK AND CONTINUE** to add another customer group. Pressing **CANCEL** will exit without adding the customer. The new Customer Group will be added to the list:




5. When the customer group is added the Point Rate entry field is available.

Customer Group Data fields




GENERAL

POINT RATE

The customer group is used to assign Points to a customer for each dollar of sales. The point rate is the multiplier number (up to 2-digits; whole digits only) for the points to be applied. Press the **Pencil icon**  to enter the desired Point Rate.

Edit Customer Group

Customer Groups are used to assign a Point Rate for groups of customers, such as Loyalty Points. The point rate may change at some time. Follow the procedure below to edit the customer group data.

1. Select **CUSTOMER GROUP** from the **CUSTOMER** category menu screen to display the Customer Group file.
 - a. If you have a large number of customer groups, you can use the search field  at the top of the column to search for a specific customer group by name.
 - b. The Menu icon  on the Customer Group programming screen is used to Sort or Edit the customer group file.
 - * Select **SORT** from the available selections to sort Alphabetically.
 - * The **EDIT MODE** selection allows you to select multiple groups in the database and delete them all in one action.
2. Choose the Customer Group from the list to edit the data; press the Pencil icon  to change the Point Rate setting.
3. To change the Description for the group; Press the **X** at the end of the line to clear existing description, then type in the new description for the group.

Integrated Credit

Introduction

The SAM4POS terminals only support EMV enable devices for integrated payment transactions. There are different EFT Devices that will integrate with Sam4POS through the terminal, each EFT Device sets up differently. Not all integrated credit option settings are used with all devices. Consult with your installation dealer for the specific equipment appropriate for your application needs and associated program set up and operations.

EMV (Europay®, Mastercard®, Visa®) is a payment standard that utilizes a difficult-to-duplicate microchip on the credit card rather than the traditional magnetic stripe. EMV cards interact with the point-of-sale device to make sure that the payment card is valid and with the use of a PIN, that it belongs to the person using the card.

The purpose of EMV is to reduce on-site credit card fraud by confirming that the card is both valid and in the hands of the correct owner. However, EMV does not protect data after the transaction, so it does nothing to prevent site-wide data breaches. For this reason, merchants should utilize processors that support end-to-end encryption and tokenization to protect themselves from data breaches.

To avoid giving employees access to the Program mode certain EFT operations can be accessed from the REG mode using the *EFT OPERATION* function key.

Note: Batch operations may be restricted to employees with assigned authority levels for these functions.

Password Security: The Sam4POS Series terminals feature an employee sign-on system. The employee file contains information for register operators as well as employees who use the register only to clock in or out (employee time keeping.) Specific functions that are allowed or disallowed for each employee are determined by assigning the employee to an employee authority level and employee authority option category.

Operations are not allowed until an employee is signed on and the receipt indicates the employee who performed each operation. Best practices include:

- Each employee should be set up as a unique employee in the system.
- Employee codes should be changed from the default setting.
- When there is employee turnover, employee codes should be changed.

Key Security: The SAP-630 Sam4POS Series terminals have a Mode Switch with different levels of key security.

<u>Key</u>	<u>Positions Accessible</u>	<u>SAP-630 Mode Switch</u>
VD	VOID, OFF, REG, X	
X	OFF, REG, X	
Z	OFF, REG, X, Z	
PGM	VOID, OFF, REG, X, Z, PGM	
C	ALL POSITIONS	

The “P” key lock position is where integrated payment functions can be performed. Keys that can access the “P” position should only be distributed to managers or employees authorized to perform those functions.

Important EMV Notes:

- **Close Batch** and **Clear EMV File** needs to be performed every day at the register even when the site is set for auto batch with their processor. This is how Sam4s clears the EMV token file. The EMV token file is used to allow for “By Record” transactions (such as Void and Gratuity entry).
- **PIN-Pad is customer facing....** There is no indication to the cashier what the end-user is doing (or not doing).
- **EMV Quick Chip** is an enhancement to EMV processing that speeds up EMV transactions to about 2 seconds or less. EMV Quick Chip is available for all processors that support Ingenico Pin-Pads, installations that expect fast processing times should use Processors that support Quick Chip.
- **Debit cards with EMV chip** – If the processor does not currently support EMV Debit, all EMV Debit cards are forced to be inserted and are then processed as regular credit cards. This may result in a higher rate for the merchant on transactions over \$25.
 - **Please Note:** Debit Transactions are processed in Real-Time; the tender amount is deducted from account when approval is received.
- The **Pin-Pad Timeouts settings** cannot be configured at the register. Some say they are too short, other say they are too long... cannot configure at register.
- **Consolidated Reports:** If an end-user wants consolidated reporting, they must use the configuration with TwinTran server (even if only two registers in their system) or NETePay Hosted. If you have an IRC installation with IPTran LT units, all stations will have a separate batch and work independent of each other (separate batching, separate reporting).
- **The Tran devices will need to obtain an IP address via DHCP.** They are not able to be assigned a Static IP address. It is recommended to set the DHCP lease time for 7 days if possible.

Gratuity Entry Notes:

When using the EMV transaction types below:

- **Debit Card transactions**
 - ⇒ Gratuity (*Tips*) must be entered using a PLU or other method prior to finalizing the sale.
 - ⇒ Alternately, Gratuity (*Tips*) can be added at the time of payment when the Sam4POS Gratuity Flag option is set to “Prompt For Tip On Pin-Pad”.
- **GIFT Card transactions**
 - ⇒ Gratuity (*Tips*) must be entered using a PLU or other method prior to finalizing the sale.
- **Contactless Payments**
 - ⇒ Contactless Payment is supported so long as the Pin-Pad being used supports this feature **AND** the processor also supports Contactless Payment method. .
 - ⇒ Payment methods such as Google Pay and Apple Pay, as well as some other processor platforms, do not allow EMV TIP Adjustments as well. Check with Datacap for details.

EFT Operation

Integrated Credit Card maintenance operations can be performed at the Sam4POS terminal from the EFT Operation menu. All interface types may be listed on the EFT operation screen, many of these interfaces are not used here in the U.S.A. This document will discuss the EFT Operation for the DC Direct interface only.

NOTE: SAM4POS only supports integrated credit card processing using the EMV protocol.

(There will be no Non-EMV integration.)

- In the Pre-EMV environment The integrated payment device stored transaction information in the device that allowed the registers to run some reports, such as the local transaction report.
- In the EMV environment the integrated credit device no longer stores transaction detail information so detailed credit card transaction reports are no longer available from the ECR.

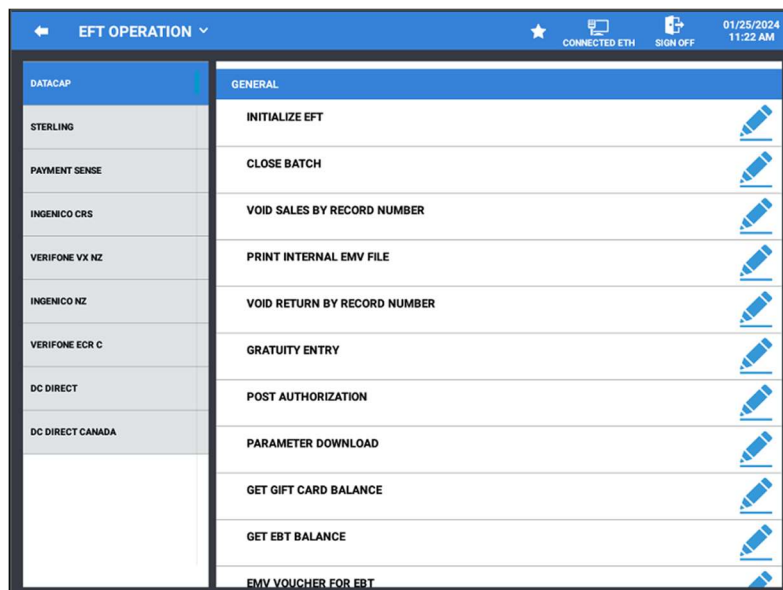
On the Sam4POS we are storing some information on the approvals at the register. This is required to be able to perform “By Record” transactions. The “Clear EMV File” in the DC Direct menu should be performed daily to clear this data.

Currently, if a Local Transaction Report is generated, we print the information from the approvals. However, this data should only be used for troubleshooting and should not be relied upon as accurate.

For example, if you perform a sale for \$1.00 and then perform a Void by Record Number of the same transaction, you will have two transactions. The register is only printing the information from the approvals.

EFT Operation Menu

1. From the main **PROGRAM MODE** menu, select **DEVICE**, then choose **EFT OPERATION**, from the device menu selections.



2. The **EFT OPERATION** menu is displayed; select **DC Direct** from the selections in the left column.

DC DIRECT Operation Definitions

For use only with Datacap DC Direct integrated payment in the U. S. A. only.

Refer to the separate Sam4POS DC DIRECT Supplement for complete set up & operation details.

Operation	Definition
Reset Pin Pad	Use to Initialize\Reset the Pin-Pad connected to the installed DC Direct device.
Close Batch	Closes the current batch and opens a new batch.
Parameter Download	Use this operation to get new PIN-Pad parameters from Datacap
Get Gift Card Balance	Select Get Gift Card Balance, the operator will be prompted to slide a gift card. The balance remaining on the gift card will be printed on the receipt printer
Get EBT Balance	Use to check the EBT food stamp balance on the customers EBT Card. The balance remaining on the EBT card will be printed on the stations receipt printer.
EMV Voucher For EBT	Use to manually enter EBT transactions.
Clear EMV File	This clears the internally stored token file that stores the Authorization Response messages that allow the Sam4POS to perform "By Record Number" transactions. Specifically, the Void Transaction by Record Number and Gratuity Entry.
Verify Card	Use this operation to verify a card is valid, activated, not reported as lost/stolen.
Batch Summary	Prints a summary report for the current batch.
Cash Out	Allows the customer to receive CASH OUT payment for the remaining balance on a Gift Card.
EMV Voice Auth	If electronic authorization is not approved and the merchant receives voice authorization, the transaction can be entered into the batch with this operation.
EMV Return (Add Balance)	Use to return funds to the customer's credit card.
Get EBT Cash Balance	Select Get EBT Cash Balance, the operator will be prompted to slide the EBT card. The remaining Cash Balance will be printed on the stations receipt printer.
Gratuity Entry	Use to enter gratuity (TIP) amounts. Pop-Up entry for Invoice #, Auth Code and TIP amount.
SAF Statistics	Use this operation to generate the SAF Statistics for the current batch.

DC DIRECT - EFT Operation Function Key

To avoid giving employees access to the Program mode, certain EFT operations can be accessed from the REGISTER mode using the *EFT OPERATION* function key.

Note: Batch operations may be restricted to employees with assigned authority levels for these functions.

You can access the operations on the EFT OPERATION function menu in one of two ways:

1. While in **REGISTER** mode, press the **EFT OPERATION** function key assigned to the Real-Keyboard or to an MLU on the display; select the desired operation from the list.
2. Enter the shortcut numeral for the operation and press the EFT OPERATION function key. This facilitates access to a specific operation through a macro. The shortcut numerals are shown below.

[1]	Reset Pin-Pad
[2]	Close Batch
[3]	Parameter Download
[4]	Get Gift Card Balance
[5]	Get EBT Balance
[6]	EMV Voucher For EBT
[7]	Clear EMV File
[8]	Verify Card
[9]	Batch Summary
[10]	Cash Out
[11]	EMV Voice Auth
[12]	EMV Return (Add Balance)
[13]	Get EBT Cash Balance
[14]	Gratuuity Entry
[15]	SAF Statistics

EFT Operation Macro

It may be desirable to further limit EFT operations so employees are only able to access a specific EFT Operation. We can accomplish this by using a MACRO to access the desired EFT Operation.

For example: If you wanted to allow an employee to be able to get a gift card balance only, you could create a MACRO to allow the operation from the register mode. The “Get Gift Card Balance” is the fourth operation listed on the EFT Operation function key.

Get Gift Card Balance Macro

- The MACRO sequence would simply be the numeric #4 followed by the EFT Operation function key:
[4]
[EFT OPERATION]
- The MACRO key would then be assigned to an MLU or FLU screen (*or the real-keyboard if you have the SAP-630/SAP-530 terminal*).

Performing EFT Operations

When performing EFT Operations, the EFT Operation communication between the ECR and the Tran device is displayed on the Sam4POS. When the specified operation is completed, the register will print the results of the requested operation at the register's receipt printer. You can also print out the EFT Operation communication to the register receipt if desired.

Reset Pin Pad

Use this operation to reset the EMV parameters in the DC Direct PIN-Pad.

1. From the main **PROGRAM MODE** menu, select **DEVICES**, then choose **EFT OPERATION**, from the device menu selections.
2. Select the **DC Direct** from the EFT Operation menu.
3. Select **RESET PIN PAD**; This will load the parameters for the Pin-Pad.
 - Alternatively, Register Mode \ EFT Operation function key: RESET PIN PAD

Close Batch

DC Direct™ performs centralized batching, even with multiple DC Direct devices at the same location. This is the default setting on the DC Direct™.

If the processor does not automatically close the current batch, You can manually close the batch.

CLOSE BATCH

- Program Mode \ Device \ EFT Operation \ DC Direct: CLOSE BATCH
- Register Mode \ EFT Operation function key: CLOSE BATCH

When the batch is closed, the batch settlement report prints from the DC Direct device.

Sample Close Batch Receipt

```
2025-01-08      10:39      WED
BATCH SETTLEMENT SUCCESSFUL
BATCH NUMBER : 1637743
BATCH COUNT : 14
BATCH AMOUNT : 140.93
-----
NO. 00000035   REG: POS-1      PATRICK
```

Parameter Download

When your device setting & mapping configuration is completed and connected to an active internet connection, Perform the Parameter Download after installing the DC Direct device. This operation tells the DC Direct PAX Pin-Pad to get new parameters from Datacap. Perform this operation after installing and mapping the DC Direct device. This Operation is not available on the EFT Operation function key.

Note: This operation does not work for Ingenico Tetra Devices (Lane/Move/Link/Desk).

The Parameter Download for Ingenico Axiom devices with DC Direct is not yet available. For now, the Parameter Download needs to be performed at the Ingenico device.

1. From the main **PROGRAM MODE** menu screen, select **DEVICE**, then touch **EFT OPERATION**.
2. Select **DC Direct** from the EFT Operation menu selections.
3. From the list of operations, touch **PARAMETER DOWNLOAD**.
 - o Alternatively, Register Mode \ EFT Operation function key: **PARAMETER DOWNLOAD**
4. The Pin-Pad parameters will be loaded to the DC Direct device. When the download is completed, the confirmation receipt will print at the ECR and the DC Direct device will reboot.

Sample Parameter Download Receipt

2023-10-26	08:18	THU
EMVPARAMDOWNLOAD		
EMVPARAMDOWNLOAD SUCCESSFUL, WAIT FOR REBOOT.		

NO. 00000001	REG: POS-1	EMPLOYEE 1

Get Gift Card Balance

Get EBT Balance

Get EBT Cash Balance

The Get “Card” Balance operations are all essentially the same operation, the difference being the type of card you are requesting the balance for. Some cards will prompt for a PIN entry (as with Debit & Gift Card) whereas others will not (as with Credit Cards). The procedure is as follows:

1. **Program Mode \ Device \ EFT Operation \ DC Direct** : Choose the **Get Balance operation** for your card type.
 - o Alternatively you can get balance from the Register Mode \ EFT Operation function key: Choose the appropriate Get Balance operation for your card type.
2. When prompted: Insert, Tap, Swipe, or Key the Card.
3. If the prompt **ENTER PIN** displays, Enter the PIN then press the **GREEN** button on the PIN-Pad keypad.
4. A receipt will print with the card balance.

Sample Get Gift Card Balance Receipt

```
2025-01-16      09:27      THU
CLERK ID : PATRICK

                BALANCE

GIFT CARD      *****2316
ENTRY METHOD: SWIPED

DATE: 01/16/2025      TIME: 10:27:32

BALANCE                USD$ 30.00

-----
NO. 00000001      REG: POS-1      PATRICK
```

EMV Voucher For EBT

Used to manually enter EBT transactions.

1. From the main **PROGRAM MODE** menu screen, select **DEVICE**, then touch **EFT OPERATION**.
2. Select **DC Direct** from the EFT Operation menu selections.
3. Scroll down the list of options and touch **CLEAR EMV FILE**.
 - Alternatively, Register Mode \ EFT Operation function key: EMV VOUCHER FOR EBT
4. Press **OK**.

Clear EMV File

This is the internally stored data file on the ECR that stores the Authorization Response messages that allows the SAM4POS terminal to perform “By Record Number” transactions.

The EMV file should be cleared every day as we have a limited amount of space to hold the file and most likely, “By Record Transactions” will take place on the same day as the original transaction. The EMV File is Cleared automatically when the CLOSE CURRENT BATCH command is performed. Some sites are set to Auto Batch and some processors only allow Auto Batch. If Auto Batch is utilized, this operation should be executed every day.

If the processor does not automatically close the current batch, we can also perform this operation manually from the Program Mode > Device > EFT Operation > DC Direct > Clear EMV File or from the EFT Operation function key in the register mode. If the processor does not automatically close the current batch, you can set the Clear EMV File option on the EOD screen to clear this file when the EOD is performed.

1. From the main **PROGRAM MODE** menu screen, select **DEVICE**, then touch **EFT OPERATION**.
2. Select **DC Direct** from the EFT Operation menu selections.
3. Scroll down the list of options and touch **CLEAR EMV FILE**.
 - Alternatively, Register Mode \ EFT Operation function key: ENV VOUCHER FOR EBT
4. Press **OK**.

Verify Card

Use this operation to verify a given card is OK to use.

1. From the main **PROGRAM MODE** menu screen, select **DEVICE**, then touch **EFT OPERATION**.
2. Select **DC Direct** from the EFT Operation menu selections; then touch **VERIFY CARD**.
The Pin-Pad prompts “Verify Card \$0.00 OK?”
 - Alternatively, Register Mode \ EFT Operation function key: **VERIFY CARD**
3. Press the **GREEN** button on the Pin-Pad.
4. When **APPROVED**, the Sam4POS displays the verification.
5. The verification will automatically be printed.

Batch Summary

Use this operation to print a summary of the transaction in the current batch. Must have transactions in the current batch for this operation. This Operation is not available on the EFT Operation function key.

1. From the main **PROGRAM MODE** menu screen, select **DEVICE**, then touch **EFT OPERATION**.
2. Select **DC Direct** from the EFT Operation menu selections; then touch **BATCH SUMMARY**.
 - Alternatively, Register Mode \ EFT Operation function key: **BATCH SUMMARY**

Sample Batch Summary Receipt

```
2025-01-16      09:44      THU
                BATCH SUMMARY
BATCH NUMBER : 141923
BATCH COUNT  : 5
BATCH AMOUNT : 28.15
-----
NO. 00000042   REG: POS-1   DENNIS
```

Cash Out

This operation allows the customer to receive a **CASH OUT** payment for the remaining balance available on their gift card.

1. From the main **PROGRAM MODE** menu screen, select **DEVICE**, then touch **EFT OPERATION**.
2. Select **DC Direct** from the EFT Operation menu selections; then touch **CASH OUT**.
 - Alternatively, Register Mode \ EFT Operation function key: **CASH OUT**
3. When prompted; Insert, Tap, Swipe, or Key-In the Card.
4. If the prompt **ENTER PIN** displays, Enter the PIN press the **GREEN** button on the PIN-Pad keypad.

EMV Voice Auth

If electronic authorization is not approved and the merchant receives voice authorization from their processor, the transaction can be entered into the batch with this function.

Note: This operation does not adjust any other cash register totals or counters.

1. From the main **PROGRAM MODE** menu screen, select **DEVICE**, then touch **EFT OPERATION**.
2. Select **DC Direct** from the EFT Operation menu selections.
3. Enter the **Invoice Number, Original Transaction Amount**; then press **OK**.
 - Alternatively, Register Mode \ EFT Operation function key: EMV VOICE AUTH

EMV Return (Add Balance)

Returns can be made to a customer credit card using the EMV Return (Add Balance) operation. The card must be present to perform this operation.

Note: The EMV RETURN (ADD BALANCE) operation will not correct ECR sales totals but will Return an amount to the customers credit card.

Alternately, The List Paid function key may also be used to perform the Return# operation on Credit Card transactions from the register mode. The option SHOW RETURN# must be enabled on the function key.

A credit card is not required to be present for this operation. This operation will update the register totals and remove the transaction from the current EFT batch. Refer to the “List Paid – Return#” operation on page 133 for details.

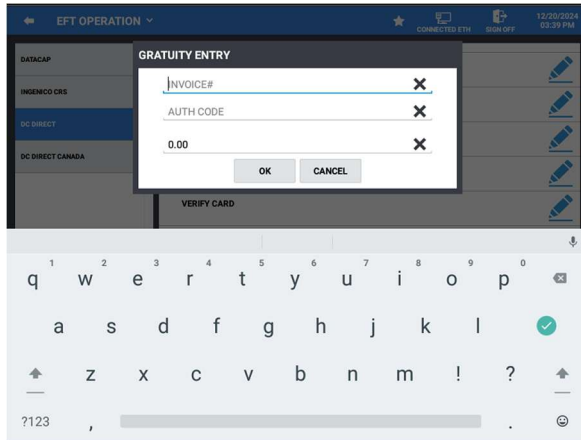
1. From the main **PROGRAM MODE** menu screen, select **DEVICE**, then touch **EFT OPERATION**.
2. Select **DC Direct** from the EFT Operation menu selections.
3. Select **EMV RETURN (ADD BALANCE)**; The EMV RETURN (ADD BALANCE) dialog is displayed.
 - Alternatively, Register Mode \ EFT Operation function key: EMV RETURN (ADD BALANCE)
4. Enter the **Return Amount** you want to refund; Press **OK**.
The Pin-Pad displays the amount confirmation; press **YES**.
5. When prompted; Insert, Tap, Swipe, or Key-In the Card.
6. The receipt and merchant voucher print.

Gratuity Entry

Beginning with v2.0.174, Gratuities (*Tips*) that were not entered at the time of the transaction can be entered using the Gratuity Entry selection on the EFT OPERATION \ DC DIRECT menu accessed from the Program Mode / Device menu selections. The Gratuity (*Tip*) entered here replaces any previous tip entered for the same transaction. This Operation is not available on the EFT Operation function key.

Gratuity Entry Operation

1. Select **GRATUITY ENTRY** from the **EFT OPERATION** function key menu or from the **EFT OPERATION** menu in the Program Mode – Device menu selections.
 - Alternatively, Register Mode \ EFT Operation function key: GRATUITY ENTRY.
2. The Gratuity Entry dialog displays:

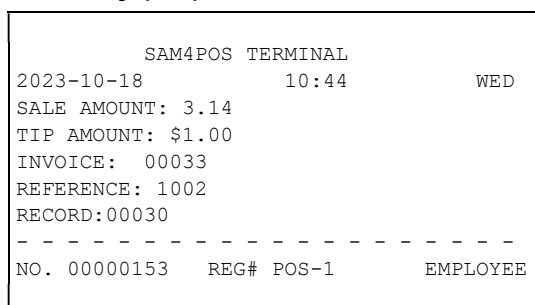


3. Fill the fields:
 - Invoice # (10-digit entry; enter leading zeros as needed)
 - AUTH CODE
 - TIP Amount
4. This information must exactly match the information for the transaction record. The message **“WORKING”** displays until the record is updated, select **OK** when approved. If the information entered does not exactly match the transaction record in the batch, the tip update will be declined.
5. The Display shows the tip entry on the EFT Operation dialog:



6. Press **CLOSE** to exit the TIP entry; pressing **PRINT** will print the information on the display.

Sample Gratuity (TIP) Chit



SAF Statistics

Use this operation to print a summary of the available SAF Statistics in the current batch when the SAF option settings in the System Option settings are enabled. This feature must be enabled by Datacap on the DC Direct device to function.

1. From the main **PROGRAM MODE** menu screen, select **DEVICE**, then touch **EFT OPERATION**.
2. Select **DC Direct** from the EFT Operation menu selections; then touch **SAF STATISTICS**.
 - Alternatively, Register Mode \ EFT Operation function key: SAF Statistics.

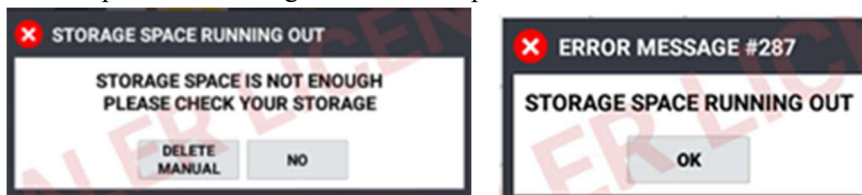
Sample SAF Statistics Receipt

```
2025-10-31          22:10          FRI
                SAF STATISTICS
SAF REQUESTS : 2
SAF PREAUTH REQ : 0
SAF SALE AUTH : 43.96
SAF RETURN AUTH : 0.00
TIME : 2025-10-31T21:22:21.460
-----
NO. 00000106      REG: POS-1      DENNIS
```

Appendix

Storage Space Running Out

When the Sam4POS detects that the storage is over 90% the warning message '**STORAGE SPACE RUNNING OUT: Storage Space is Not Enough Please Check Your Storage**' will appear. This warning will continue to appear until there is space in the storage and the sale operation will not be available.



There are two action buttons in the STORAGE SPACE RUNNING OUT warning message dialog.

- » **DELETE MANUAL** – Will send you to the Storage Management Screen to delete old storage data.
- » **NO** – Will clear the screen but the operator will continue to see the Error Message #287.

1. Choose **DELETE MANUAL** to delete old storage data or Sign-On as ADMIN to delete **Storage Management**. Refer to the “Storage Management” chapter on page 342 for details. Contact your local dealer for assistance with this operation.
 - Open Sales Data
 - Log Files
 - ETC Files
 - IRC Sync Data

Storage Management

The Sam4POS Database holds both the configuration data and the report data. If you are not using the Device Self-Storage Management you can manually control the memory storage management to back up data to a USB device or delete data to free up memory resources to improve performance.

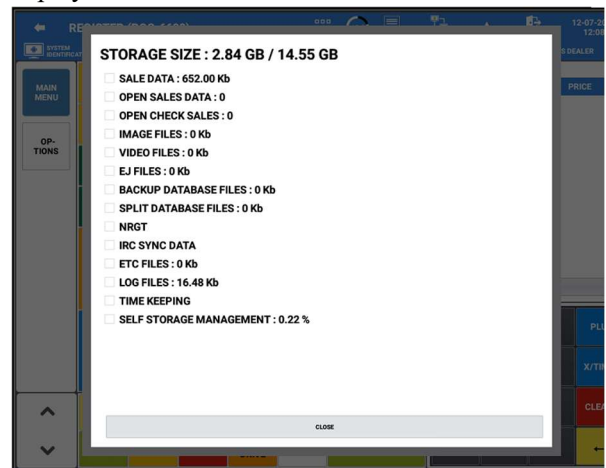
Checking Storage Size

The current Storage Size can be checked from the register mode.

5. From the register mode title bar, press the Utility Information icon.
6. The Storage Usage icon displays the current percentage of Memory Storage currently used.
7. If the percentage of total memory storage used is higher than the System Option: Storage Threshold % value, the Memory Storage percentage value will appear Red.
8. Tap the Memory Storage icon to show the total Memory Storage Size: Used / Available
 - The breakdown of memory used by category is also displayed.



Register Mode: Memory Storage Before EOD

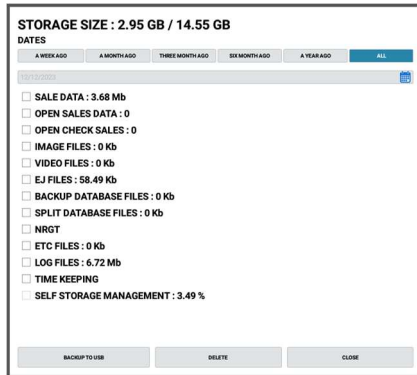


Register Mode: Memory Storage After EOD

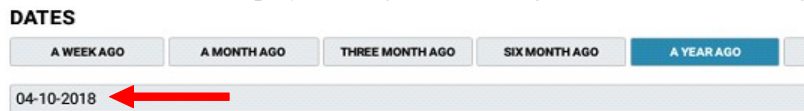
Manually Edit Storage Management

You can manually control the memory storage management to back up data to a USB device or delete data to free up memory resources to improve performance. Contact your local dealer for assistance with this operation.

- From the main Sign-On screen, Sign-On to Sam4POS as the System Admin.
(Consult your dealer for assistance.)
- From the main **PROGRAM MODE** menu, press **SYSTEM**, select **DATABASE**, then touch **STORAGE MANAGEMENT** on the menu selection screen. The memory storage management dialog displays:

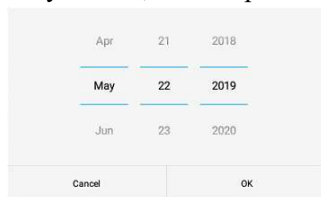


- The **STORAGE SIZE** is shown at the top of the dialog. This information shows the total memory Used & the total memory Available on the terminal.
- The **DATES** selection buttons are used to select the desired time frame you want to clear the data for. When choosing a date range; a week, month, year, etc. the date shown and everything previous to that date will be Backed up to USB or Deleted as selected. When a Time Frame is selected only sales data that has been stored after an EOD was generated will be deleted; Current Data will not be deleted. When ALL is selected for the Dates, ALL sales data including current data is deleted.
 - A Week Ago:** Deletes everything from the same date of previous week and earlier.
 - A Month Ago:** Deletes everything from the same date of previous month earlier.
 - Three Months Ago:** Deletes everything from the same date 3-months back and earlier.
 - Six Months Ago:** Deletes everything from the same date 6-months back and earlier.
 - A Year Ago:** Deletes everything from the same date of previous year and earlier.
 - ALL:** Clears all the data for the category selected, including current data (no data is saved).
 - Calendar:** Select a specific date to delete data from the selected date and earlier.
- The Date shown on the display will adjust according to the chosen date range selection:



Note: The date shown and everything previous to that date is the date that the data will be deleted.

Use the calendar on the date-bar to select a specific date. Scroll through the columns to select the desired Month – Day – Year, all data prior to the selected date will be deleted.



- Select the data **STORAGE CATEGORY** file from the list:

Storage Categories

Storage Category	Definition
Sale Data	Deletes old Sale Data. When a Dates Time Frame is specified, only sale data that has been stored after an EOD was generated will be deleted; Current Data will not be deleted. When ALL is selected for the Dates, ALL sales data <i>including current data</i> is deleted. **NOTE: Sale Data also includes configuration information, so the Sale Data will never go to zero. Operation Video Link: https://www.youtube.com/watch?v=7NLX2-8dHdU
Open Sales Data	To Delete any unsynchronized open sales data. OPEN SALES DATA counts transactions that remained with a sale status 'OPEN' on sale transactions. When starting a sale, the transactions has an 'OPEN' start status. When the transaction is finalized by any tender key, the sale status changes to a status like 'FINISH', 'CLOSE' etc.
Open Check Sales	Deletes all open checks (tables) in the terminal including table map. the open check file must be cleared at each individual terminal. A check may be in one terminal but could have been offline at the time whereas the other terminals do not know it exists.
Image Files	Image files stored in Sam4pos will be deleted.
Video Files	Deletes stored Video files.
EJ Files	Electronic Journal files will be deleted.
Backup Database Files	Use this selection to delete any Database Backup files that were saved to internal storage. If this is the most current database, you can Backup To USB before deleting these files.
Split Database Files	The Split Database files are used when generating historical reports, it is necessary to have this file on each station. Use caution when deleting old Sale Data - Split Database files, Historical report data prior to the Dates selection will be lost. Sale Data Split occurs automatically when the EOD report is generated and the working Database is over 30MB (<i>conditions apply</i>). Splitting the data speeds up normal transaction speed by making the working Database smaller.
NRGT	This will clear the <u>N</u> on- <u>R</u> esettable <u>G</u> rand <u>T</u> otal for reports.
IRC Synch Data	Deletes the IRC Synch Data. (Should be 0 at all stations.) Doesn't always show in storage management - is only created when Sam4POS needs the file.
ETC Files	This selection will allow for deleting of unneeded files in the Root directory.
Log Files	Logs are maintained in the root directory for 10 days on each station. This selection allows you to manually delete Log files in the Root directory.
Time Keeping	Deletes all time keeping data regardless of the date selection.
Self-Storage Management	Displays the percentage of storage used as per the System Option: Self-Storage Management Data Size Limit setting.

- You can select to **Back Up USB** (saves data to the SD:\SAM4POS\BACKUPFILES directory) or **Delete** data as desired. Press **CLOSE** to exit the Storage Management dialog.

****Note:** The Sam4POS DB holds both the **configuration data** and **report data**. Backing up or deleting data affects all stations in the system.

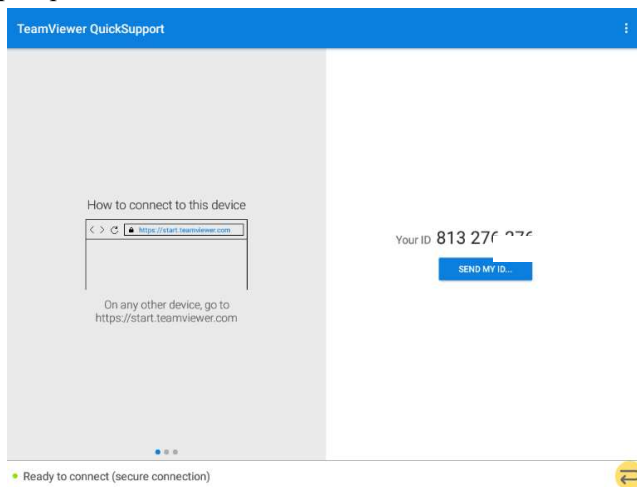
Team Viewer

Team Viewer is a remote access utility that can be used to remotely support the SAM4POS ECR APPLICATION. The Team Viewer Quick Support application is already pre-loaded on the SAM4POS ECRs. A connection to the Internet is required to be able to use this feature.

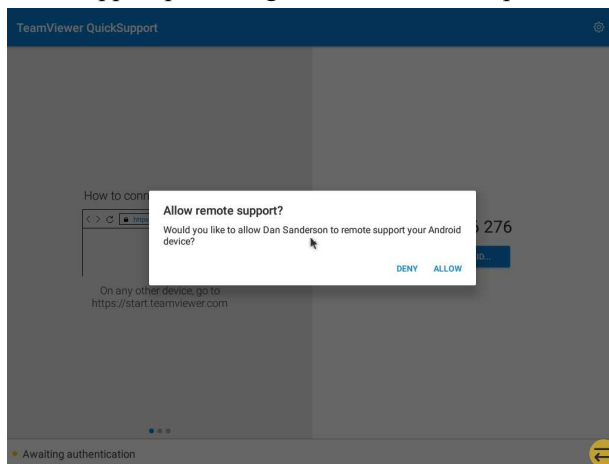
The device used to connect remotely to the Sam4POS ECR must have a premium (paid for) licensed version of TeamViewer. The Team Viewer license needs to include the Mobile Support module to be able to use with Sam4POS.

Note: In some cases, it also may be necessary to upgrade the TeamViewer Quick Support application on the Sam4POS ECR.

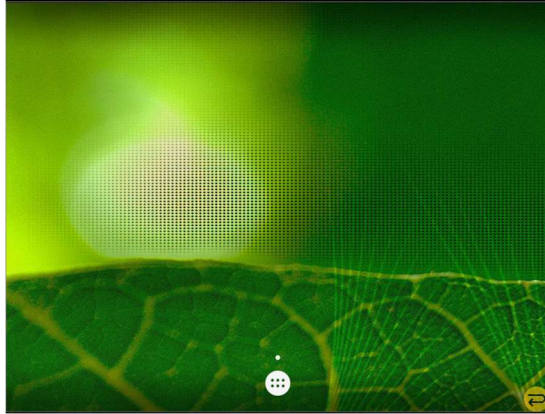
1. From the **SYSTEM** menu selection screen, touch **TEAM VIEWER** to allow remote access to the SAM4POS.
2. The **MANAGER REQUIRED / MANAGER PASSWORD** entry dialog displays (*depending on the current employee authority settings*):
3. Enter your manager password and press **ENTER**. (*The default manager password is 9999.*)
4. The **Team Viewer Quick Support ID** screen appears. You will need to provide this ID code to the support person to allow them access to this SAM4POS ECR.




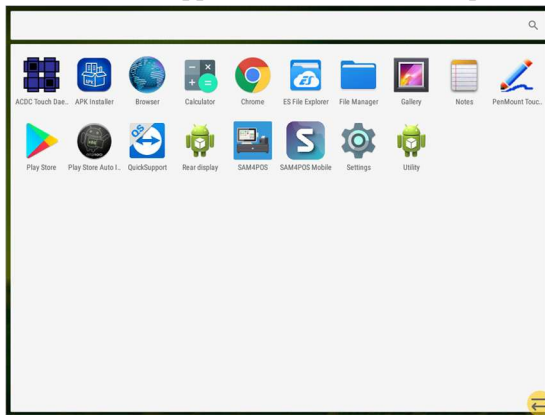
5. When the support person signs on with the code provided, the confirmation screen below is displayed.



6. Press **Allow** to confirm you want to allow remote TeamViewer Quick Support access.
7. The SAM4POS APPLICATION will close and the main Android screen is loaded.



8. Tap the “Android Applications” icon  to open the Apps selections.



9. Touch the **SAM4POS** icon to reinitiate the SAM4POS ECR APPLICATION. This operation can be accomplished remotely by the support personnel or by the local personnel at the site.
10. The main Sam4POS Sign-On screen will appear; Enter the code for the employee you want to Sign-On and press **ENTER**. ****Note: TEAMVIEWER MODE** displays on the tile bar on all screens.




11. When the remote support person has completed all their tasks, terminate the connection by simply pressing **“RELEASE TEAMVIEWER MODE”** on the main Sign-On screen.

Team Viewer – Reboot

The device used to connect remotely to the Sam4POS ECR must have a premium (paid for) licensed version of TeamViewer. The Team Viewer license needs to include the Mobile Support module to be able to use with Sam4POS.

When signed on to the station with Team Viewer – a **REBOOT** button is added to the Title Bar on all screens.



1. Press the **REBOOT** button  on the title bar if you want to reboot the station, The **REBOOT** dialog displays:



2. Press **YES** to proceed with rebooting the terminal. (*Pressing NO will cancel the reboot.*)
3. The terminal powers off (*the TeamViewer connection will be lost*) then the Sam4POS ECR Application will restart.



4. When the main Sam4POS sign-on screen loads, an Employee can Sign-On or initiate another TeamViewer session as necessary.




Remote FTP Log Backup

When reporting an operation issue or if you experience a generic FAILURE error message, we may ask to receive the Log's and Database files from all stations.

The Sam4POS ECR automatically generates a log file that saves operational data for the past 10 days. The log backup provides a means to save log data and database files to a USB drive or Internal Storage. We can also send the log data to an FTP site if desired. Backing up to an FTP site requires access to an active internet connection.

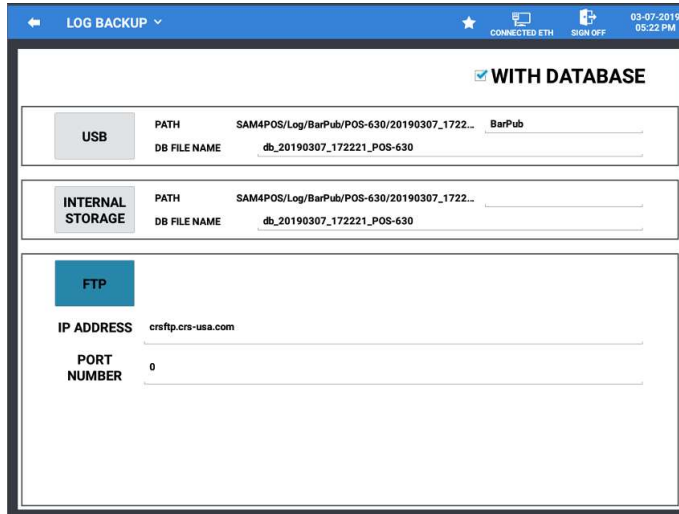
1. From the **PROGRAM MODE**, go to **SYSTEM** and select **LOG BACKUP**. The Log Backup dialog screen displays:

2. Check the “**WITH DATABASE**” selection to back up the database along with the Log Backup.
3. In the **DB FILE NAME**, you can use the default file name or type in a custom file name if desired.

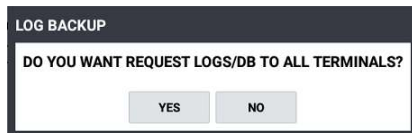
4. Enter the **IP ADDRESS** or URL for the FTP site where you want to send the backup to; Press **Next** (the  icon).
5. Enter **0** for the **PORT NUMBER**; Press **Next** (the  icon).
6. Enter a '**Store Name**'; Then Press **Done** (the  icon).

Note: The default FTP settings are set up to send to the CRS FTP site. If you are uploading files to the CRS FTP, no changes are required.

7. Make sure the '**WITH DATABASE**' option is checked; Press the **FTP** button to initiate the backup.
Note: **PATH** and **DB FILE NAME** are not used when backing up to FTP.



8. If you select to backup to FTP, you have the option to select all terminals in the IRC system:



9. Press **YES** to send the backup from all terminals in system, (*eliminates having to send from each terminal individually*); press **NO** if you want to send the backup from just the one station
10. The SAM4POS connects to the FTP Server, then the Backup begins, the progress dialog displays:



11. Each Log file currently available in the SAM4POS will be backed up to the FTP Site along with the database.
12. When the backup is complete, the confirmation messages will display briefly:



13. The data files are saved to the FTP site.
14. Press the back-arrow icon on the title bar to exit the log backup.

15. When Logs and Database have uploaded; provide the following to CRS:
 - a. Dealer Name
 - b. Store Name
 - c. Terminal Name
 - d. Date & Time issue occurred
 - e. Examples showing issue

If the FTP Backup Fails

If the backup to the FTP site fails, some things to check would be:

1. Verify the **FTP settings** are correct:
 - a. IP Address: Default = crsftp.crs-usa.com
 - b. Port Number: Default = 0
2. Check to see if there are any **0 byte log files** on the terminal; delete them if there are:
 - a. Log in with Team Viewer
 - b. May need to install ES File Explorer (available on the Sam4POS page\CRS web site)
 - c. Exit to the main Android screen; go to the File Manager.
 - d. Look for any **0 byte log files** in the Sam4POS \ Log Folder; delete the 0 byte files.
Note: Only delete log files that are 0 bytes!

Revision Record

Edition	Date Published	Revision Contents
Preliminary	09/25/2017	Initial release
v0.2	09/28/2017	Added: Integrated Payment
v0.3	10/12/2017	Updated: Integrated Payment information
v0.4	10/19/2017	Updated: Price Check operation
v0.5	11/9/2017	Added: Alpha Check; Edited List Check
v1.1	9/6/2018	Updated: operations to accommodate current firmware
v1.2	9/14/2018	Updated: Repeat operation, Error Messages Added: Sales Screen Size Edit
v1.3	10/18/2018	Updated: EFT Operation function key
v1.4	12/4/2018	Updated: List Paid-TIP entry; Added Detailed Reports
v1.5	1/21/2019	Updated: Logo
v1.6	2/18/2019	Added: Menu Icon info (Register Mode) Updated: screens, Program Maintenance, Integrated Payment Transactions & draft examples
v2.0	3/8/2019	Combined SAP-6600/SAP-630 manuals. Updated: Authority Level: Allow EOD in REG Mode.
v2.1	3/28/2019	Updated: Function Keys\Stock Check
v2.2	4/2/2019	Updated: Add PLU operation - OK AND ADD NEXT PLU option; List Paid information
v2.3	4/18/2019	Added: Quick PLU, Gift Card Sale operation Updated: Price Check, End Of Day & Report Mode
v2.4	6/5/2019	Added: Promotion\Coupon Search operation and Promotion function key; Gift Receipt; EBT Transaction; PLU Maintenance: Copy to Items by Range. Updated PLU Info Function.
v2.5	6/19/2019	Updated PLU programming 'Copy to Item by Range'; 'Load All PLU's'
v2.6	6/27/2019	Updated List Paid
v2.7	7/29/2019	Updated Table Map; PLU Maintenance: Copy to existing item; EOD report
v2.8	8/6/2019	Table Map: Dynamic; EOD reports
v2.9	9/4/2019	Function Keys: EJ report Edit Mode
v2.10	12/4/2019	EOD report, Void Item operation, Default Item
v2.11	1/10/2020	Employee, Authority Level
v2.12	2/27/2020	Cash Declaration, R/A & P/O, Training Employee, Added Help File information
v2.13	3/20/2020	Alpha Text key
v2.14	3/31/2020	Employee Authority Level
v2.15	4/15/2020	Employee Authority Level; End Of Day reporting; Report Mode: EJ Report; Function Keys
v2.16	5/14/2020	Function Key Descriptions

Edition	Date Published	Revision Contents
v2.17	9/2/2020	Added Customer Delivery
v2.18	9/16/2020	Updated Customer Delivery
v2.19	11/11/2020	Gift Card Sale Operation
v2.20	11/18/2020	Edited "Displayed Error Messages"
v2.21	4/29/2021	Updated Detail Report information, Report Samples, List Paid operations
v2.22	6/25/2021	Added RA\PO MEMO Operations
v2.23	9/23/2021	Age restricted item registration
v2.24	10/20/2021	Updated Scale Operations
v2.25	11/2/2021	Updated List Paid;
v2.26	12/3/2021	added Note# key operation; TIP (Gratuity) operation, Void Sales operation;
v2.27	1/3/2022	Current/Today selection added to Report Mode Quick-View summary reports
v2.28	1/5/2022	Table Service: Merge & Split operations
v2.29	2/1/2022	PLU Programming added Filter: PLU By Stock Range; edited Price Level Shift; Added License Info Notes and Connection Method Notes
v2.30	2/17/2022	Paid Out operation
v2.31	4/14/2022	Time Clock Edit; Detailed Reports
v2.32	4/28/2022	Promotions
v2.33	7/21/2022	"Do It Discount" operation; Sales And Labor% Report; Integrated Credit-Void Transaction; Split Item Operations
v2.34	8/31/2022	Gallorage PLU, Note # operation, List Paid operations, EOD: Options
v2.35	10/5/2022	EFT Operation; Report Mode & EOD; Passwords
v2.36	10/31/2022	MISC Tender; EMV Notes, Sales & Labor % Report notes; Storage Management
v2.37	11/21/2022	Using Promotions; TIP (Gratuity Entry) notes
v2.38	12/22/2022	Updated TIP Entry methods; Voids by Record Number & Gratuity Entry
v2.39	1/30/2023	Edited the RA/PO Memo operation
v2.40	2/6/2023	Added TeamViewer info to Appendix, license expiration notes, Time Schedule Promotion
v2.41	3/10/2023	Updated License Expiration Notes; Void Item operations
v2.42	3/31/2023	Labor Report: End Of Pay Notes;
v2.43	4/5/2023	Added: Edit Tax Rates; Updated: Copy PLU, Guest Check Order Tracking, Financial Report NRG T
v2.44	6/9/2023	Financial Report NRG T Tax & Discounts; Memory Storage; EOD Notes
v2.45	6/29/2023	Tax Table: # of Break Points; Displayed Error Messages; Currency Conversion, Customer Operations; Gratuity Entry Notes; Sync Type Setting; Quantity Multiplication of PLU's
v2.46	9/26/2023	Main Menu screen, MEMO operation, Time Clock Editing, Navigation Tips
v2.47	10/27/2023	List Paid; Using the Table Map; Program Maintenance
v2.48	12/5/2023	EOD: Sale Data Split & Self-Storage Management
v2.49	1/18/2024	Updated List Paid Operations; Integrate Payment Transactions
v2.50	1/19/2024	Program Maintenance; EFT Operation
v2.51	2/16/2024	Updated: Report Filters & Options; Alpha-Text operation. Added: First Time Item Is Registered operation; Storage Space Running Out;
v2.52	4/4/2024	Added Canadian Donut Law example
v2.53	5/31/2024	Added: Financial Report NRTG Note, PLU Stock Edit

Edition	Date Published	Revision Contents
v2.54	7/1/2024	Check-Cashing operation
v2.55	8/2/2024	Updated: EOD Filters & Options, List Paid function key, Detailed Reports.
v2.56	9/13/2024	Updated: Report function key, Employee Authority Level
v2.57	10/25/2024	Updated: Period Report, List Paid function key
v2.58	1/2/2025	Updated: Report Dates, Report Samples
v2.59	2/12/2025	Table Map Operations, Mode Switch. Added Sapphire terminal information. Updated MLU & FLU information.
v2.60	3/11/2025	Added Price Embedded Barcode
v2.61	4/29/2025	Updated Paid Out operation
v2.62	5/9/2025	Added CHECK tender to PO (Paid-Out) operation.
v2.63	6/2/2025	Edited Guest Check Tracking: Drive-Thru
v2.64	8/1/2025	Employee File Maintenance, Tax Programming, PLU Maintenance, Print & E-Mail EOD Reports
v2.65	9/10/2025	Print & Email EOD Reports; PLU programming
v2.66	9/30/2025	Retired Terminals; Employee Authority Level
v2.67	11/7/2025	Changed Integrated Payment to DC Direct; Added Store And Forward;
v2.68	11/11/2025	Report View\Print\Export; License Expiration Notes; PLU Menu Filter
v2.69	12/22/2025	Added Sync Data function key
v2.70	1/13/2026	PLU Report Export;
v2.71	2/12/2026	CASH Tender: Rounding; PLU Profit Report; Printed Reports
v2.72	4/21/2026	Report Samples; Program Scans
v2.73	4/30/2026	Alpha-Text Function Key
v2.74	5/15/2026	EOD Function Key; Guest Check Tracking
v2.75	6/16/2026	Device Self-Storage Management, Checking Storage Size
v2.76		