

WELCOME TO THE LATEST VERSION OF **DIGITAL DINING!**

This manual contains instructions and helpful hints to get you through the early days of your Digital Dining experience. Most of the documents enclosed are duplicates of the detailed instructions you will find in the Manager's Guide (which is also enclosed). We strongly suggest that you file the Manager's Guide & make copies of the other documents to be posted at the different terminals where appropriate; this way you will always have a copy of these instructions ready at your finger tips. These are by no means a complete guide to everything you need to know about Digital Dining. For further information and assistance, refer to your Digital Dining Manual supplied by Menusoft, or call us at (603)431-3227 between the hours of 9am and 5pm.

We hope these instructions will help to make your Digital Dining experience an enjoyable one.

HDS New England

HOW TO REACH US

Our mailing & shipping address is:

*HDS - New England
235 West Road, Suite 10
Portsmouth, NH 03801*

Our phone numbers are:

NH: (603)431-3227 Fax: (603)431-3262

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Voice Mail Options

❖ **ALL Emergencies - ext. 3**

(Mon - Sun, 24 Hours)

❖ **Software Support - ext. 2**

(Mon - Fri, 9am - 5pm)

❖ **Sales - ext. 1**

(Mon - Fri, 9am - 5pm)

❖ **Accounting - ext. 6**

(Mon - Fri, 9am - 5pm)

❖ **For Paper & Ribbon Supply Information - ext. 2**

(Mon - Sun, 24 Hours)



Our voice mail extensions are:

110 - Mike Wolf

125 - Michelle Jordan

112 - Seth Moore

117 - Doug Avery

120 - Rob Miller

123 - Denys Arsenault

126 - Mandi Horning

END OF DAY PROCEDURE For Windows

IN DIGITAL DINING BACK OFFICE:

Step 1. Check for any open tables/tabs

Log On

Click on **Utilities**

Highlight **Process Utilities**, and then click on it

Enter the date you are checking, click on **Okay**, and then confirm

If there are any open checks, they will be displayed on the right half of the screen.

If there are open tables, pay out the checks accordingly

When there are no checks open, **Exit POS**

Step 2. If you do not use credit card authorization through Digital Dining, skip to step 4.

If you do use credit card authorization, you **MUST** do this step before you go any further.

If you use a phone line for credit cards this step should be done either during a slow period or when the restaurant is closed, since this will tie up the modem for a few minutes. No new charges can be authorized while the old charges are being posted!

Click on **Register Reports**

Choose **Receipt Reports**

Choose **Credit Card Report**

Print the credit card report, and then confirm all credit card transactions

Click on **Utilities**

Choose **Process Credit Cards**

Enter the date you are batching out, and then click on **Next Step**

Click on **Yes** to really batch out this day

On your screen, you will see the credit card transactions process on your screen.

When the cards have batched out, you will see the **Credit Card Batch Summary** report on the screen;

You want to print this!

(Continued →)

Step 3. Print your End Of Day Reports

Click on **Staff**

Highlight **Time & Attendance**

Choose **Time & Attendance Transactions**

Enter in the correct date

From the **Time & Attendance Report** that printed with your End of Day reports, go through the report & pick out any transactions that need to be corrected

Scroll through the list of employees clocked in for that day and change the necessary information. Type in a reason in the bottom box, then click on **Save**. Repeat for all others who need corrections.

Step 4. Edit your Time & Attendance

Go back into **Utilities**

Choose **Process & Report**

Confirm the date, and then say **Yes** to continue

.

***** Day 1 *****

Call your processor to confirm they have received your first batch.

Your processor is: _____

Restaurant/Account Name: _____

Merchant ID: _____

Tech Support #: _____

Please save this page for future reference in case you need to call your processor regarding future batches

END OF PAY PERIOD PROCEDURES For Windows

IN DIGITAL DINING BACK OFFICE:

Step 1. Staff Reporting & Resets

Click on **Staff**

Highlight **Staff Reports**

Highlight **Staff Tips** & click on it

Sort by Last Name (the box on the upper left)

Group by Department (the box to the right)

Click on **Print** (the button on the bottom)

Click on the Printer icon () at the top of the screen

Click on the “X” in the upper right corner to exit

Click on **Exit**

Click on **Staff**

Highlight **Time & Attendance**

Highlight **T & A Reports** & click on it

Select the **Weekly Time Cards** Report

Select the date range (the beginning date of the pay period to the ending date of the pay period)

Click on **Print** (the button on the bottom)

Click on the Printer icon () at the top of the screen

Click on the “X” in the upper right corner to exit

Select the **Consolidated T & A** Report

Select the date range (the beginning date of the pay period to the ending date of the pay period)

Click on **Print** (the button on the bottom)

Click on the Printer icon () at the top of the screen

Click on the “X” in the upper right corner to exit

Click on **Exit**

Click on **Staff**

Highlight **Staff Utilities**

Highlight **Staff PTD Reset** & click on it

Click on **OK 2** times to reset the PTD receipts & sales figures

END OF MONTH PROCEDURES For Windows

IN DIGITAL DINING BACK OFFICE:

Step 1. Print Receipts & Sales Reports

Log On

Click on **Register Reports**

Highlight **Receipts Reports** & click on it

Click on the ▼ to get your list of reports & choose **Profit Center Report**

Enter in the date range for the month

Click on **Print** (the button on the bottom)

Click on the Printer icon (🖨) at the top of the screen

Click on the “X” in the upper right corner to exit

Click on **Exit**

Click on **Register Reports**

Highlight **Sales Reports** & click on it

Click on the ▼ to get your list of reports & choose **Sales By Type**

Enter in the date range for the month

Click on **Print** (the button on the bottom)

Click on the Printer icon (🖨) at the top of the screen

Click on the “X” in the upper right corner to exit

Click on **Exit**

Click on **Register Reports**

Highlight **Discount Reports** & click on it

Click on the ▼ to get your list of reports & choose **Discount Summary**

Enter in the date range for the month

Click on **Print** (the button on the bottom)

Click on the Printer icon (🖨) at the top of the screen

Click on the “X” in the upper right corner to exit

Click on **Exit**

(Continued →)

Step 2. Print Staff Sales & Tip Information

Click on **Staff**

Highlight **Staff Reports** Highlight **Staff Tips** & click on it

Sort by Last Name (the box on the upper left)

Group by Department (the box to the right)

Turn off Primary Dept Only (just under the sorting options – click on the little box with the “x” to make the x go away)

Choose **Period To Date** for the range

Click on **Print** (the button on the bottom)

Click on the Printer icon (🖨) at the top of the screen

Click on the “X” in the upper right corner to exit

Click on **Exit**

Step 3. Print Accounts Receivable Statements

Click on **A/R**

Highlight **A/R Account Transactions**

Highlight **Post Batch** & click on it

Choose **Single Use**, then **Post** to confirm

(this ensures that any back office entries made to the accounts will show up on the statements)

Click on **A/R**

Highlight **A/R Account Reports**

Highlight **A/R Detailed Transaction Report** & click on it

Click on the tabs across the top & make sure to include everything

Back on the **Sort Order** tab, choose **Sort by Name** ***

Choose **Group by: None**

Click on **Print** (the button on the bottom)

Click on the Printer icon (🖨) at the top of the screen

Click on the “X” in the upper right corner to exit

Click on **Exit**

*** Please note that when you choose to sort by account number, you must enter the account range (1 to 99999), otherwise the report is blank.

(Continued →)

Click on **A/R**

Highlight **A/R Account Statements**

Click on the tabs across the top & make sure to include everything

Back on the **Sort Order** tab, choose **Sort by Name**

Choose **Group by: None**

Choose **Print** (If you just want to **Preview**, you must enter the account number)

Click on **Print** (the button on the bottom)

Click on the Printer icon () at the top of the screen

Click on the “**X**” in the upper right corner to exit

Click on **Exit**

Click on **A/R**

Highlight **A/R Account Utilities**

Highlight **A/R Aging** & click on it

Click on **Yes** to confirm that you really want to age the accounts

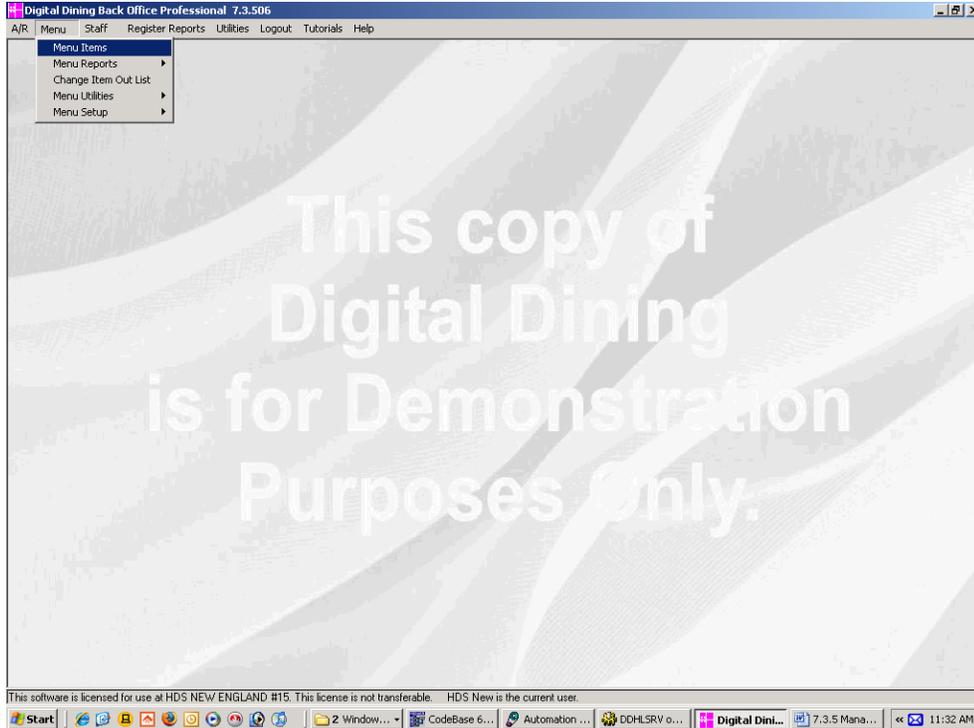
(This takes all A/R detail & lumps it into your beginning balance for next month)

ADDING MENU ITEMS

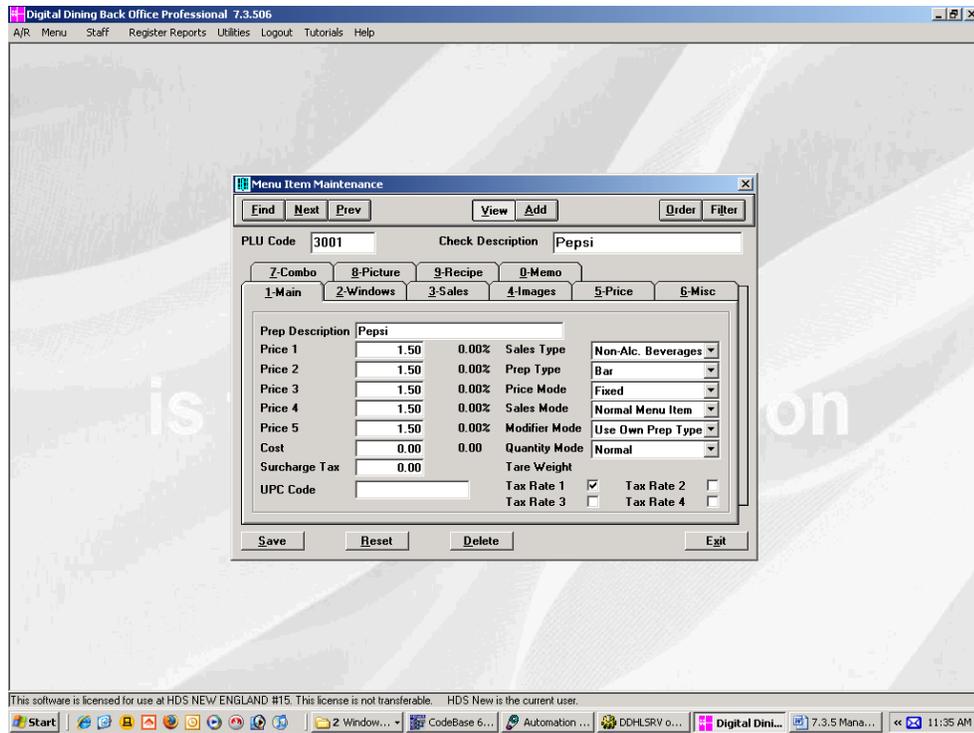
For Windows

Click on **Menu**

Highlight **Menu Items** and click on it



On the **Main** tab:



(Menu items comes up by default in view mode. To make things a little easier: Before adding a new item, stay in view mode and click on find and select an item that is similar to the item you want to add. Now many fields are already set the way they need to be.)

Click on **Add**

(Digital Dining will automatically go to the next available menu item code, placing the cursor in the check description field)

Type in the **check description**, then hit the **TAB** key twice

(This is how the item will appear on the ordering screen & on the guest check)

Type in the **prep description** if you would like it to be different than the check description, then hit

TAB *(This is how the item will appear in the kitchen or bar)*

Enter the **prices** for the item *(You MUST enter ALL 5 prices, even if they are all the same)*

Select the **Sales Type** by clicking on the ▼ to the right of the rectangle & then scanning the list by clicking on the ▼ & ▲ to the right

Select the **Prep Type** by clicking on the ▼ to the right of the rectangle & then scanning the list by clicking on the ▼ & ▲ to the right

Select the **Price Mode** by clicking on the ▼ to the right of the rectangle & then scanning the list by clicking on the ▼ & ▲ to the right

Fixed = Whatever price you enter in Prices 1 – 5 is the price charged for the item

Open = The POS will stop & ask for the price on this item (the price can be positive or negative)

Open Positive = The POS will stop & ask for the price on this item (the price will prompt as \$0.00 & can be positive only)

Open Negative = The POS will stop & ask for the price on this item (the price will prompt as \$0.00 & can be negative only)

Open 999.99 = The POS will stop & ask for the price on this item (the price will prompt as \$999.99 & can be positive or negative)

By Time = For pool halls, etc. where the price is determined by the amount of time the check is open.

Select the **Sales Mode** by clicking on the ▼ to the right of the rectangle to get your options

Normal = A regular menu item

Modifier = A modifier

No Sale = An on screen description (it can not be ordered)

Link Only = An item that only serves as a link to another window (you can only order one item from this linked window, then will be brought back to the window you started in)

Combo = A menu item made up of 2 or more items for a discounted price; for example, if you offer a burger, fries and a drink for \$5.99, you can create that combo here using this sales mode)

Link & Stay = An item that only serves as a link to another window (this option stays in the new window allowing you to order as many items as you like until you choose to go to another window)

Button Only = This is a label only on the screen.

Select **Modifier Mode** by clicking on the ▼ to the right of the rectangle to get your options

Inherit Prep Type = For modifiers that are following the menu item to the prep printer

Use Own Prep Type = For menu items or for modifiers that are not following the menu item, but are going to their own prep printer *(for example, if you have a Fried prep station & a Broiled prep station, you would want the Baked Haddock to go to the Broiled station and the Fries to go to the Fried station)*

Select **Quantity Mode** by clicking on the ▼ to the right of the rectangle to get your options

Normal = The item will not prompt for a quantity

Always = The item will always prompt for a quantity *(useful for items like Oysters On The Half Shell where you order by the piece)*

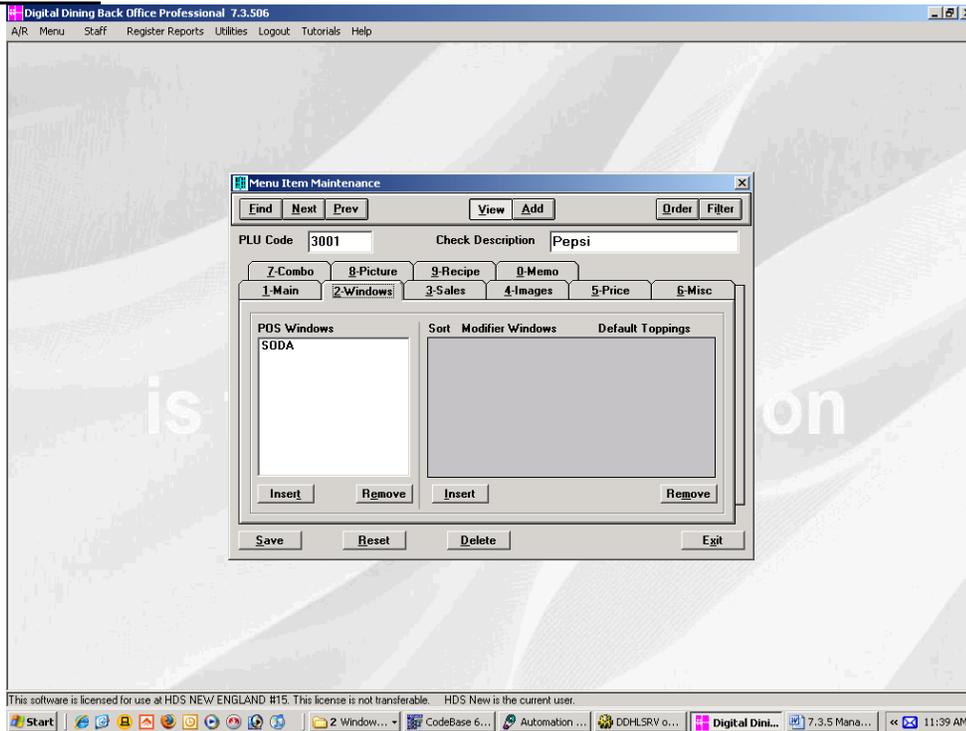
Decimal = The item will allow for a quantity with a decimal *(for items purchased by the pound)*

Scale = For scale interfaces

Click on the appropriate **tax rate**, making sure that only 1 rate is checked

- 1 = Meals Tax
- 2 = Beverage Tax
- 3 = Retail Tax

On the **Windows** tab:



Select the POS Window by clicking on the Insert button on the left & then typing in the first few letters of the POS Window, highlighting it & clicking on **OK** (If you are not sure of the name of the window, you can scan the list by clicking on the ▼ & ▲ to the right). Repeat for all of the POS windows you would like this item to appear in.

If this item needs to loop to a modifier or a series of modifiers, click on the Insert button on the right (under the Modifier column) & then type in the first few letters of the Modifier Window, highlight it & click on **OK** (If you are not sure of the name of the window, you can scan the list by clicking on the ▼ & ▲ to the right) If this item does not need any modifiers, make sure the Modifier Windows box is empty. Repeat for all necessary modifier options.

Example: The Sirloin Steak needs a temp, a starch, and then a dressing choice:

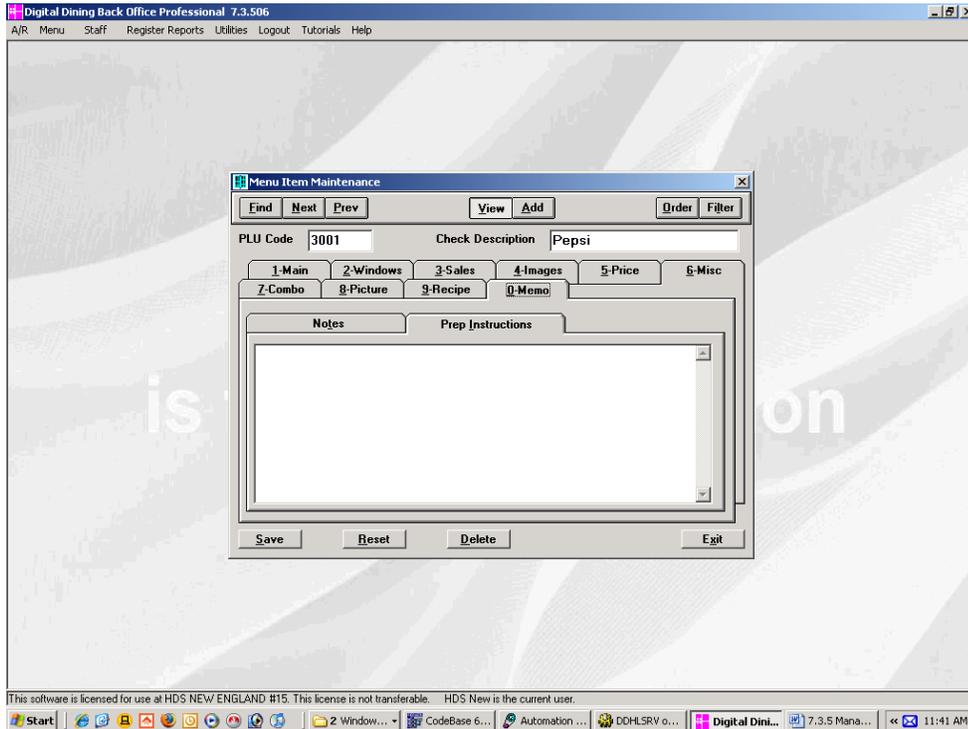
Meat Temps

Starches

Dressing

When a menu item needs more than one modifier option, you can add the modifier windows in any order, then sort them by clicking on the modifier window with the left mouse button & dragging and dropping the modifier windows in the order you want them to print on the prep slip.

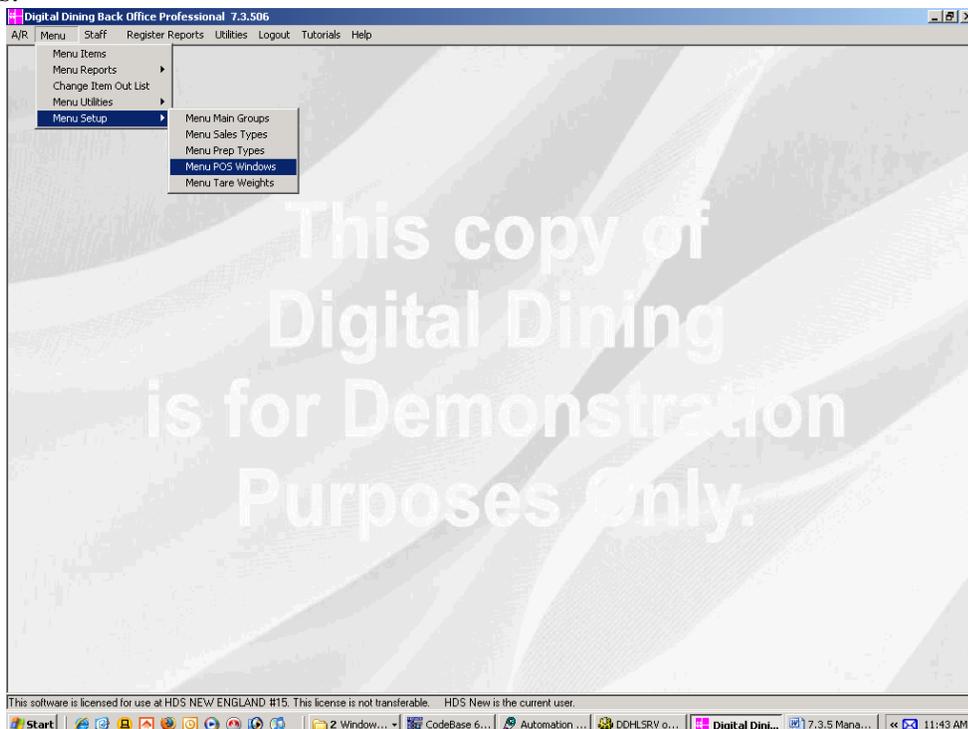
On the **Prep Instruction** tab (This is optional):

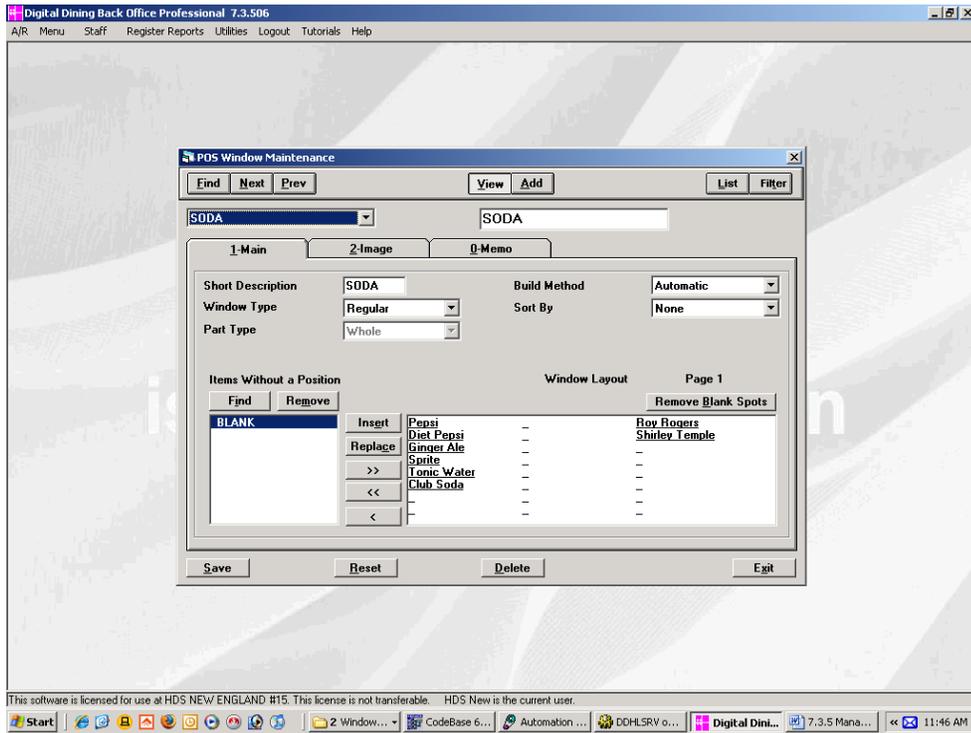


Click on the white text block to get the cursor there, then type in how to prepare the item (*like drinks at the bar*) or just a general list of ingredients (*for food items so that the server can see if there is an ingredient that a customer is allergic to*)

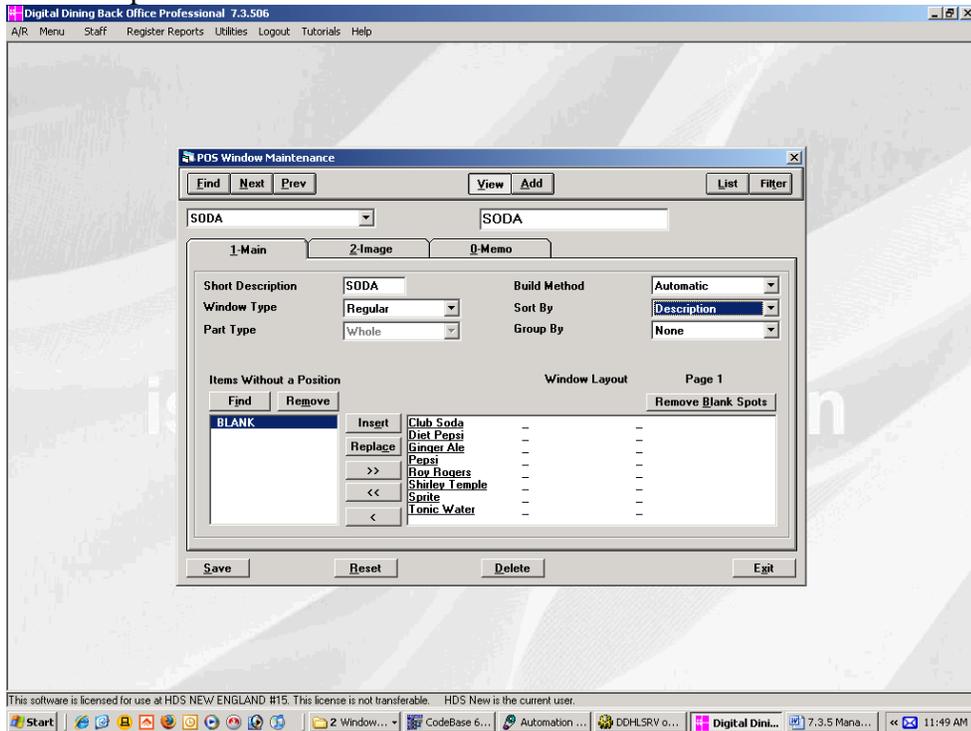
Click back on the **Main** tab, then on **Save**
Repeat for any other items to be added or **Exit** to get out

If you want to arrange the order of items in your POS window, click on Menu > Menu Setup > Menu POS Windows.





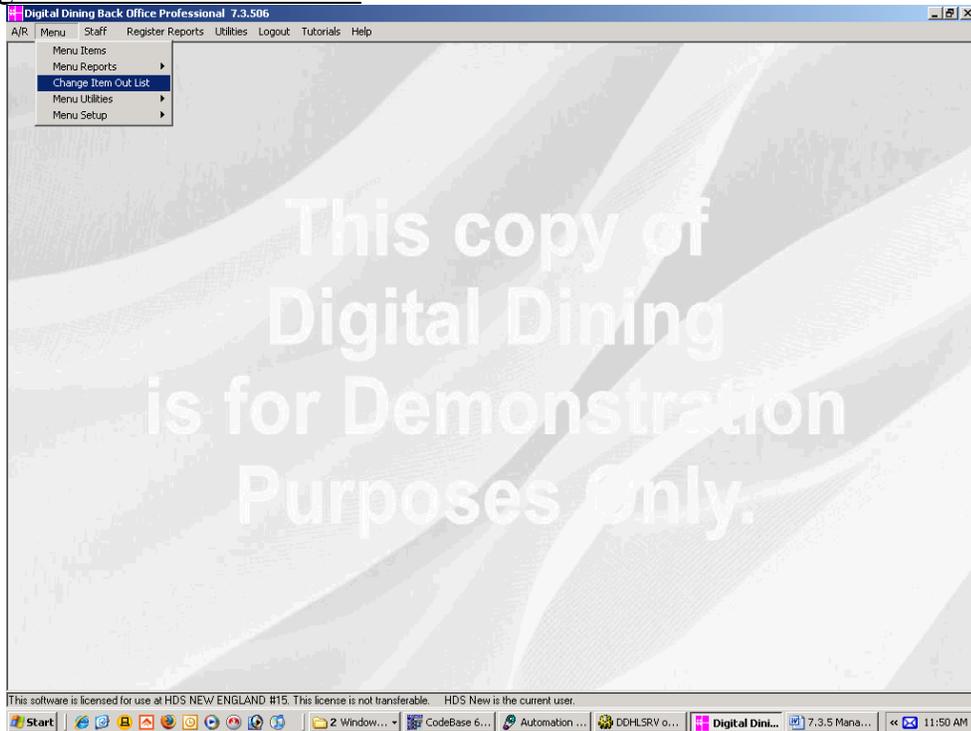
If you would like your items to be arranged alphabetically, click on the drop-down arrow in the **Sort By** field and choose “description”.



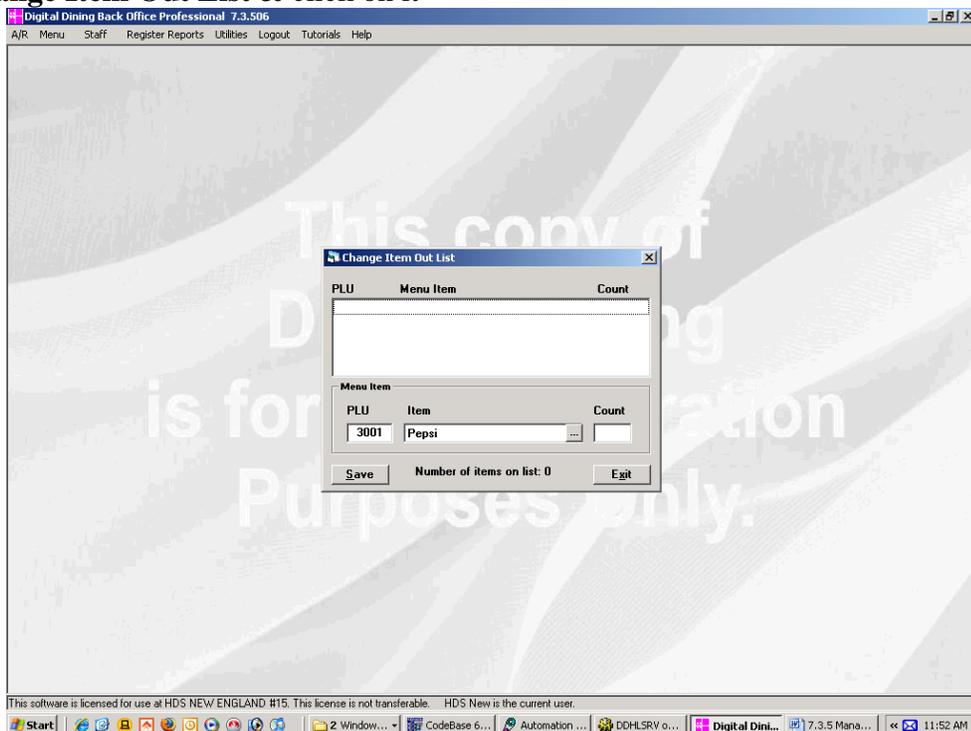
Click on **Save**
 Repeat for all windows
 Click on **Exit**

EDITING THE ITEM OUT LIST

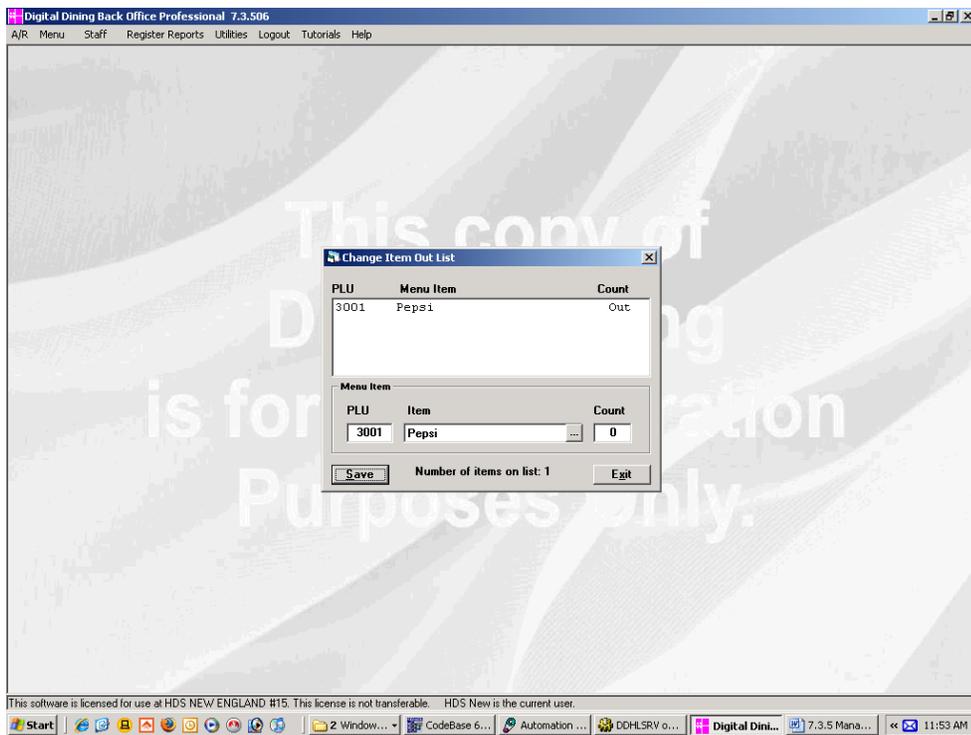
Adding Items to the Item Out List:



Click on **Menu**
Highlight **Menu Utilities**
Highlight **Change Item Out List** & click on it



Click on the ... next to **Item** & type in the 1st few letters of the item you are looking for
Highlight the item, click on it, and then click on **OK**



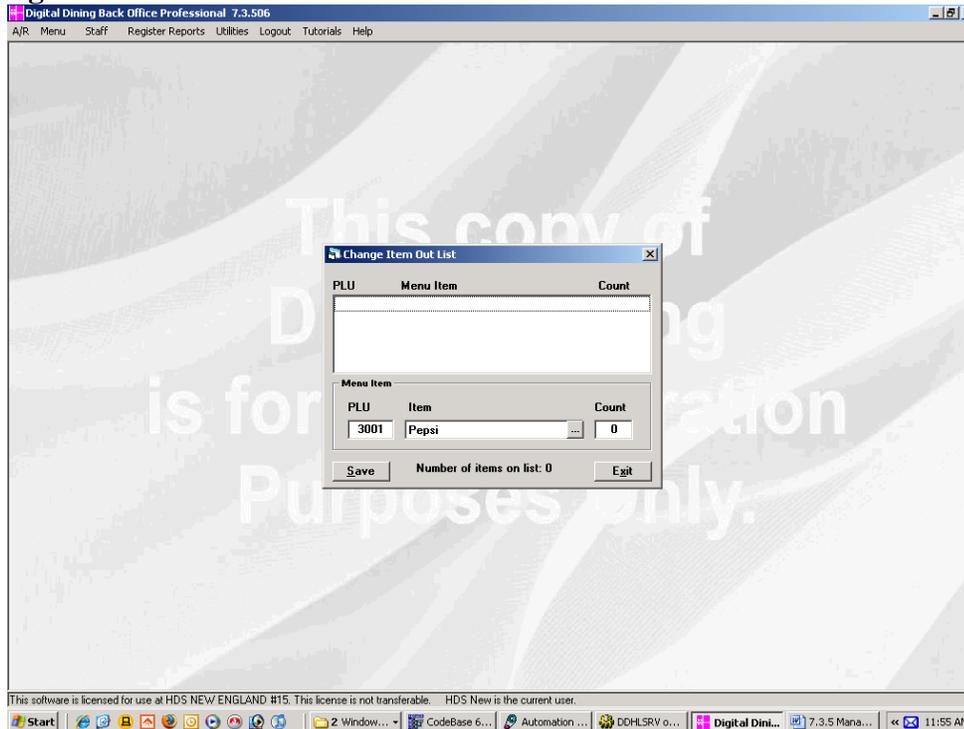
- Click in the white box next to **Count** & type in how many of this item are left
- Click on **Save**
- Repeat for all items to be added to the Item Out List
- Click on **Exit** when you are through

Removing Items from the Item Out List:

Click on **Menu**

Highlight **Menu Utilities**

Highlight **Change Item Out List** & click on it

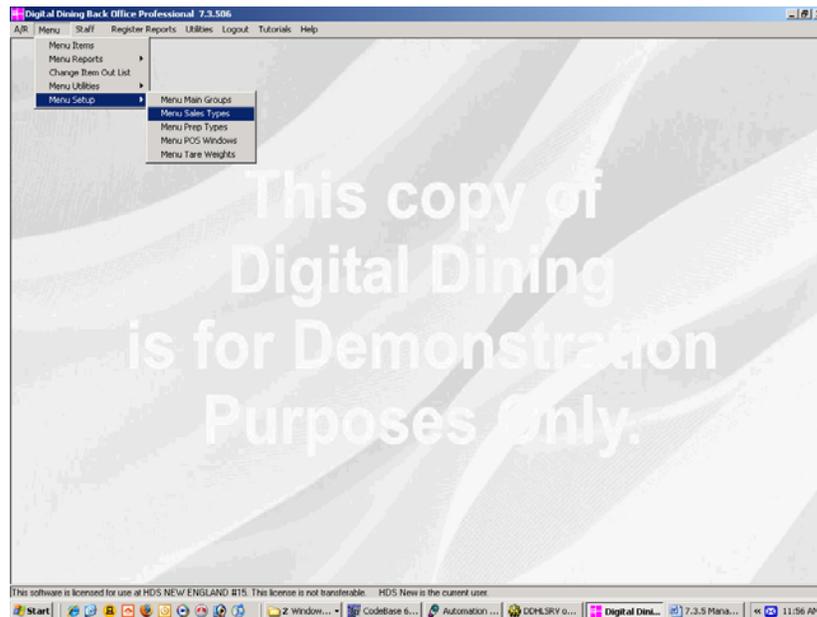


Highlight the item to be removed from the item out list & double click on it (the item will disappear from the list) – Do not click on Save, as this will only add the item back on to the Item Out List
Repeat for all items to be removed from the Item Out List
Click on **Exit** when you are through

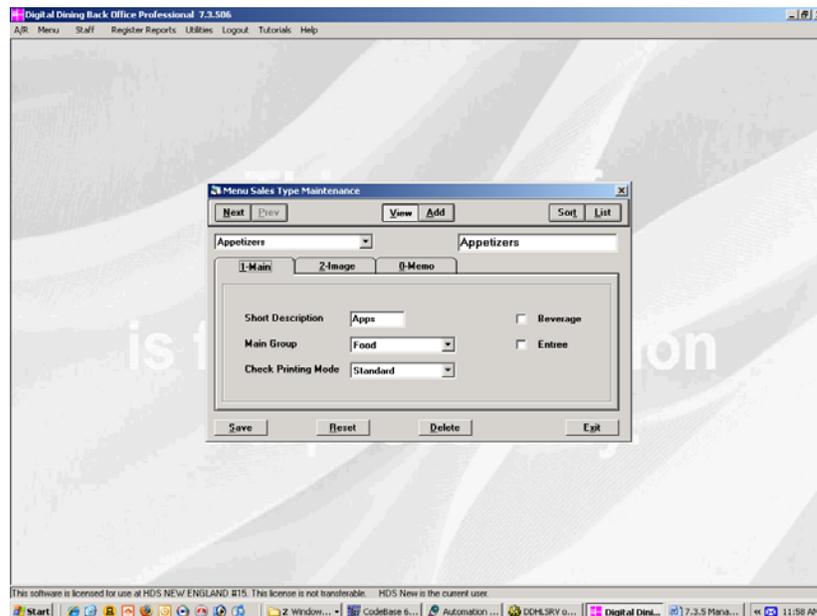
ADDING SALES TYPES

****limited to 24 total****

IN DIGITAL DINING BACK OFFICE



Click on **Menu**
Highlight **Menu Setup**
Highlight **Menu Sales Types** & click on it



Click on **Add**
Type in the description, then hit the **Tab** key
Click on the ▼ next to **Main Group** & choose the appropriate main group
Click on the ▼ next to **Check Print Mode** & choose **Standard** (*this means that if it has a price the item will print on the guest check; if it does not have a price, the item will not print on the guest check*)
Click on **Save**
Repeat for all new sales types
Click on **Exit** when finished

ADDING POS WINDOWS

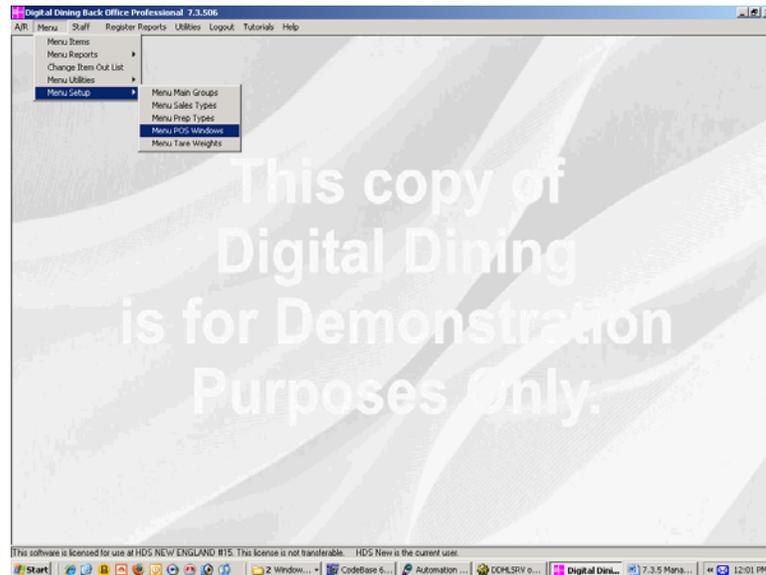
Step 1. Creating the POS Window

In Back Office:

Click on **Menu**

Highlight **Menu Setup**

Highlight **Menu POS Windows** & click on it



Click on **Find**

Type in **No Window** (this will bring up an empty POS window)

Click on **Add**

Type in the description, then hit the **Tab** key

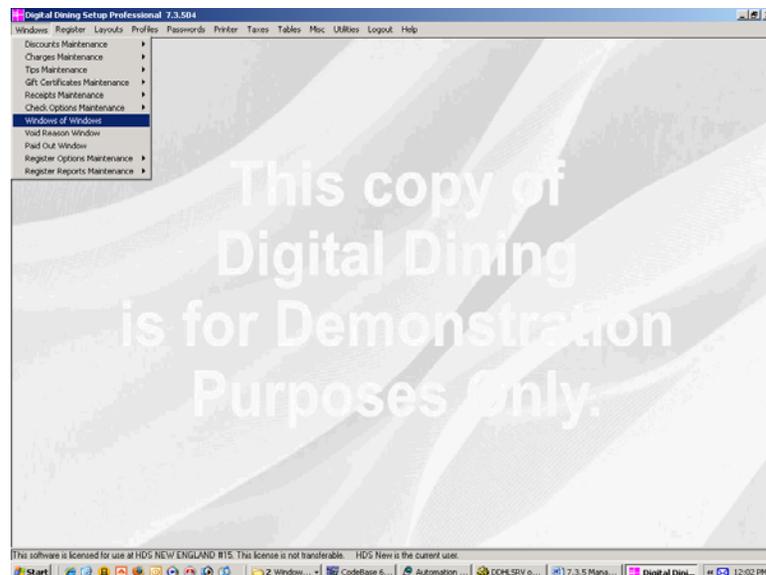
Click on **Save**

Repeat for all new POS windows

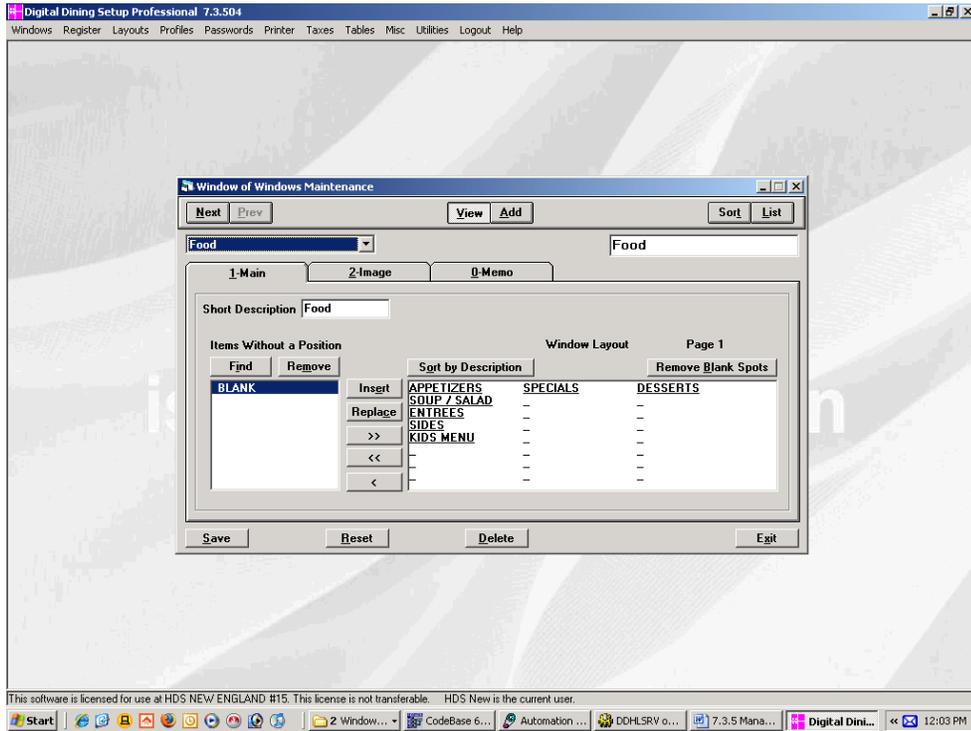
Click on **Exit** when finished

Step 2. Adding the POS Window to the Point of Sale Screen

In Setup:



Click on **Windows**
Highlight **Windows of Windows** & click on it



Click on **Next** until you find the Window of Window you want to add this POS window to
(these Windows of Windows are the buttons across your top panel at the Point of Sale,
i.e. Food, Liquor, Beer, etc.)

Click on the **Find** under the “Items without a position” heading where you want to add your new
POS Window

Type in the 1st few letters of the name of the POS Window you are adding

Highlight it & click on **OK**

Click on **Save**

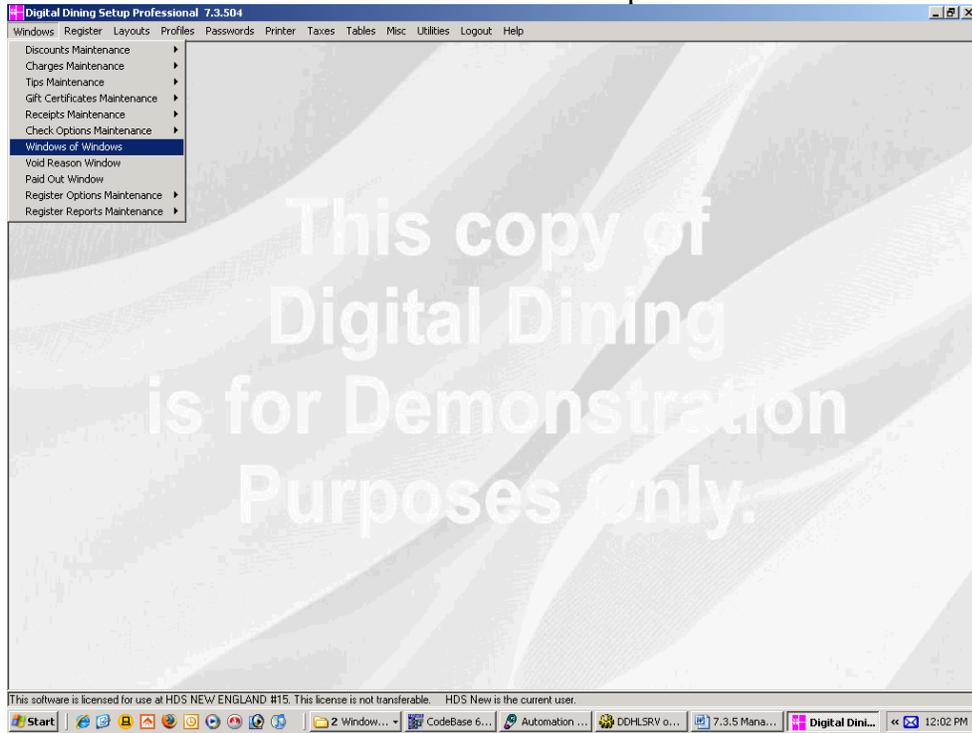
Repeat for all new POS Windows

Click on **Exit** when finished

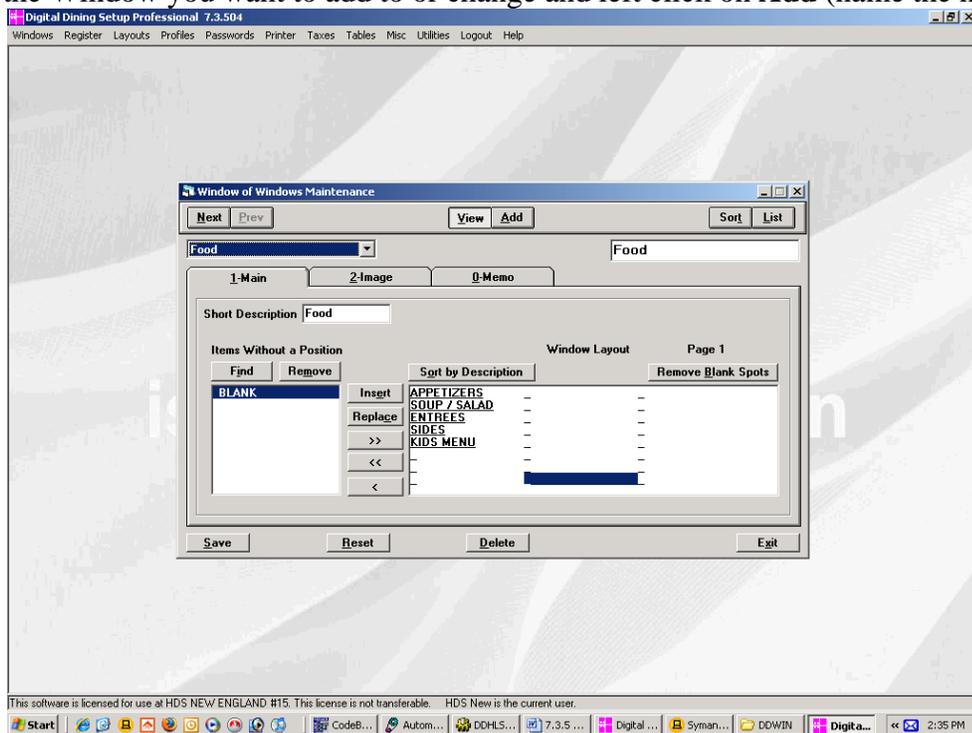
WINDOW OF WINDOWS DEFINITIONS

IN DIGITAL DINING SETUP:

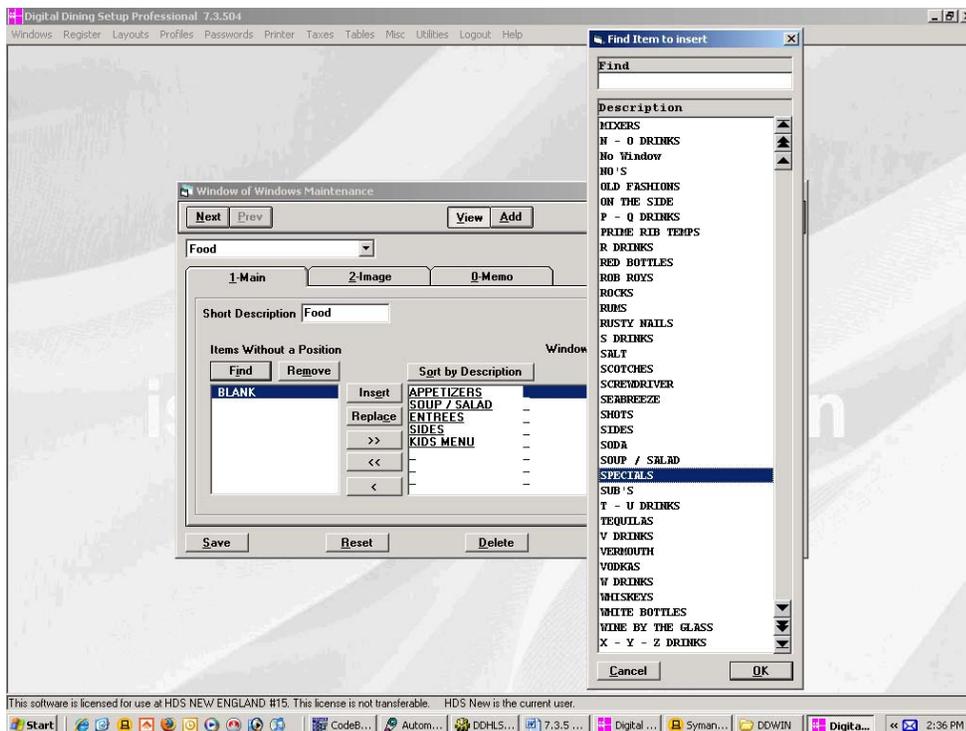
Step 1. Choose **Window of Windows** from the **Windows** drop-down menu.



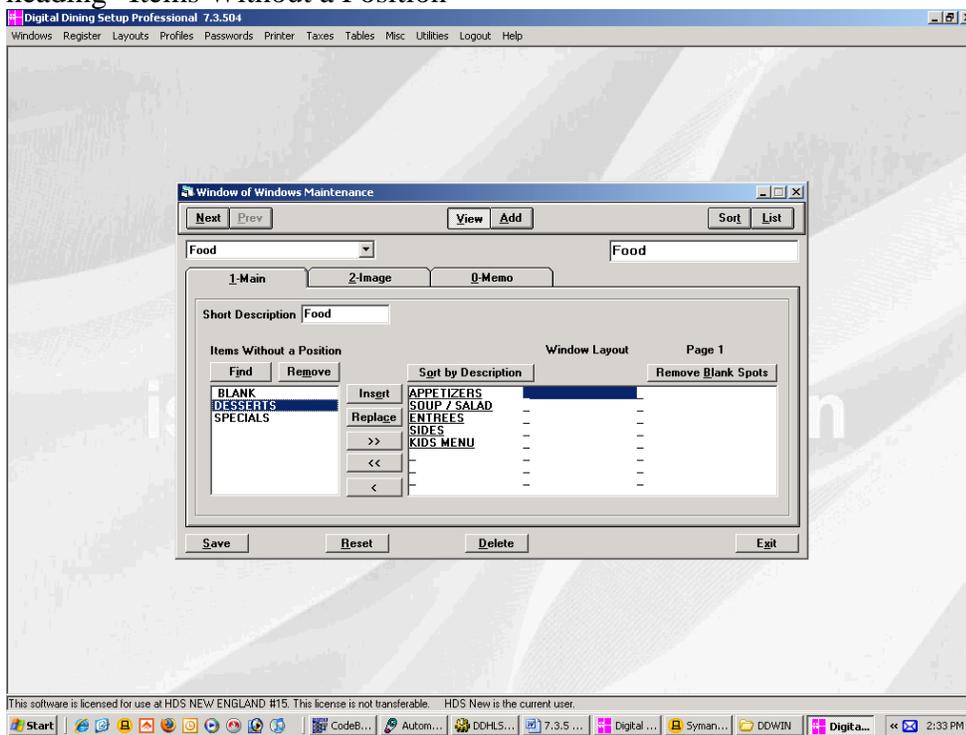
Step 2. Find the Window you want to add to or change and left click on **Add** (name the new window).



Step 4. Left click on the **Find** button (under the items without a description heading) and find your Window. You will have to do this for each individual Window you want to add.

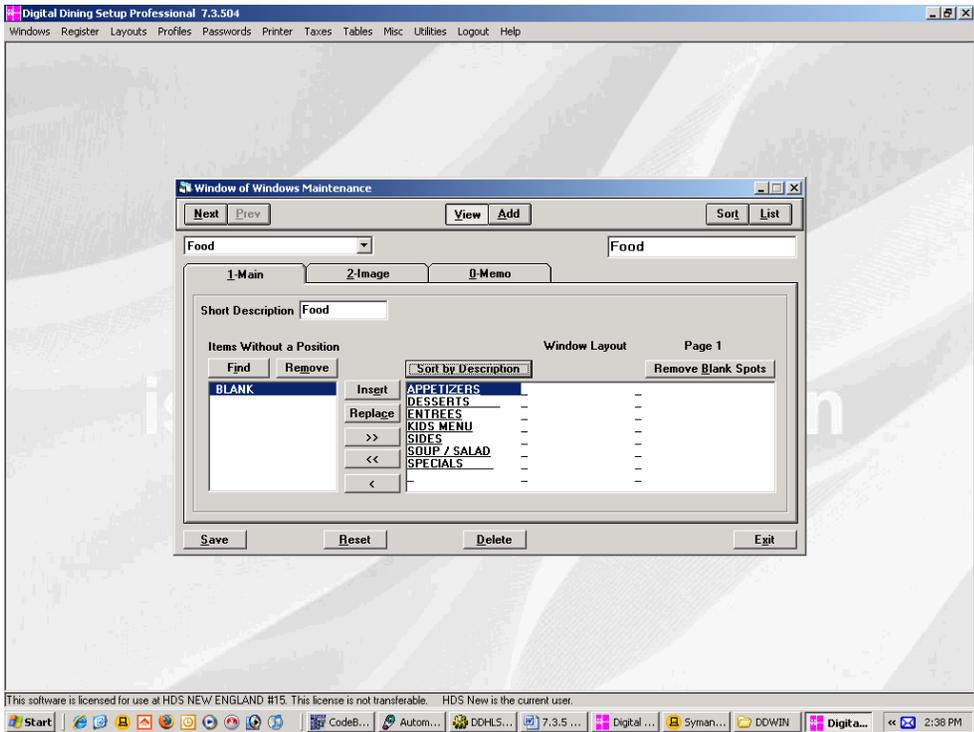


Once you find all of the windows you want to add to the window of windows, they will be listed in the box under the heading “Items Without a Position”



You will now need to move all of the items over to the Window layout panel. Do this by clicking on the double right hand arrow (>>) between the two panels.

If you would like the item in the window to sort alphabetically, click on the button that says “Sort By Description”.



Step 5. Left click on **Save** and **Exit**.

ADDING STAFF

Click on **Staff**

Highlight **Staff Members** & click on it

(You will automatically come up to #1 – Digital Dining)

Click on **Add** on the top bar

The screenshot shows the 'Staff Member Maintenance' window in the Digital Dining Back Office Professional 7.3.506 application. The window has a menu bar with 'A/R', 'Menu', 'Staff', 'Register Reports', 'Utilities', 'Logout', 'Tutorials', and 'Help'. The main area contains a form with the following fields and controls:

- Staff ID: 1
- First Name: Digital Dining
- Last Name: Digital Dining
- Buttons: Find, Next, Prev, View, Add, Order, Filter
- Tabs: 7-Sales, 8-Receipts, 9-Message, 0-Memo, 1-Main, 2-Personal, 3-Payroll, 4-Avail, 5-Dept, 6-Picture
- Report Name: Digital
- Home Street Address: [Empty]
- POS Name: Digital
- City: [Empty], State: [Empty], ZIP Code: [Empty]
- Security: System Administrator (dropdown)
- Regular Password*: [Empty] (Program button)
- Strong Password: [Empty] (Reset, Program buttons)
- Work Status: Current Employee (dropdown)
- Home Phone: () - [Empty]
- Other Phone: () - [Empty]
- Staff ID Card: [Empty] (Clear, Program buttons)
- E-mail / Web: [Empty]
- Buttons: Save, Reset, Delete, Find Active Only (checked), Exit

At the bottom of the window, there is a license notice: "This software is licensed for use at HDS NEW ENGLAND #15. This license is not transferable. HDS New is the current user." The Windows taskbar at the bottom shows the Start button and several open applications including CodeBas..., Automati..., DDHLR..., Digital..., Symante..., 7.3.5 Ma..., and 7.3.5 Ma... The system clock shows 2:46 PM.

On the **Main** tab:

Digital Dining will automatically go to the next available number & the cursor will be blinking on the first name

Type in the First Name, then hit the **TAB** key on your keyboard

Type in the Last Name, then hit **TAB**

Type in the Report Name or just hit **TAB** to accept the default from Digital Dining
(This is the name typed in when logging onto Back Office & Setup)

Type in the POS Name or just hit **TAB** to accept the default from Digital Dining
(This is the name that appears on the guest check, so if William goes by Bill, type it in here)

At Security, click on the ▼ to the right of the rectangle & choose the appropriate level

System Administrator = Can do anything & everything

Store Administrator = Can do anything except delete HDS

Staff = Can do nothing that is passworded

***Shift Supervisor** = Can only access passworded functions at the Point of Sale (can not access Back Office or Setup)

***Kitchen Manager** = Can only access Menu & Reports in Back Office (can not access checks and cannot access any manager functions at the POS)

***Manager** = Can access passworded functions at the Point of Sale along with limited access to Back Office

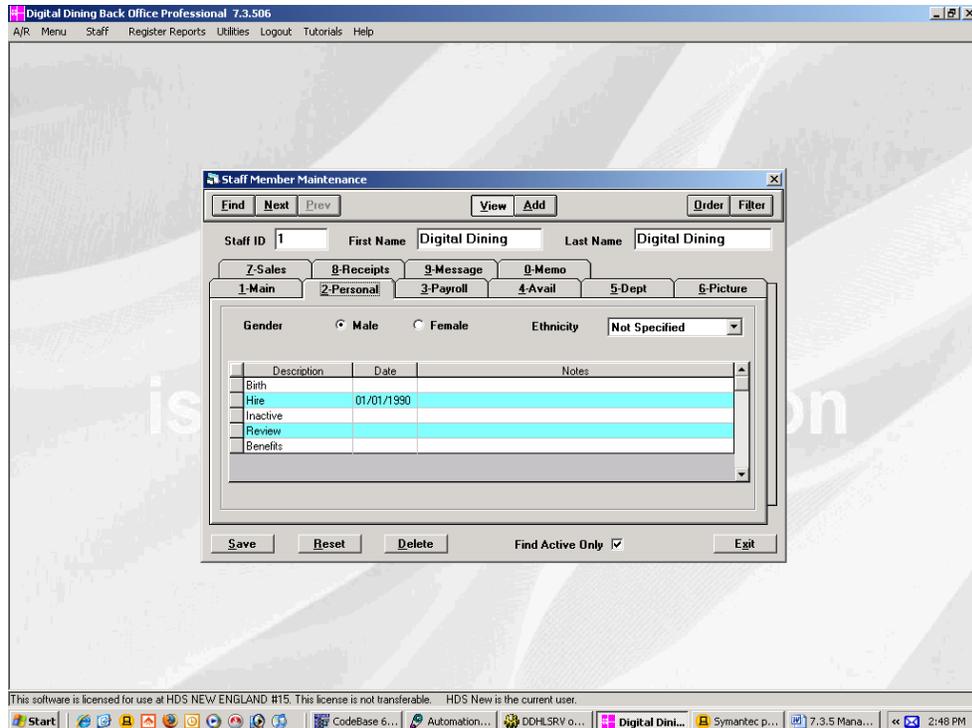
** These security levels can be adjusted to meet the needs of your restaurant; more security levels can be added as needed.*

Click on the **Program** button next to **Regular Password** to enter the password for this person (you must enter the password twice, then click on **Save**)

Enter the address and phone number of the person as well as email.

On the **Personal** tab:

(Optional) as well as DOB, gender and ethnicity (also optional depending on the policy of the company).



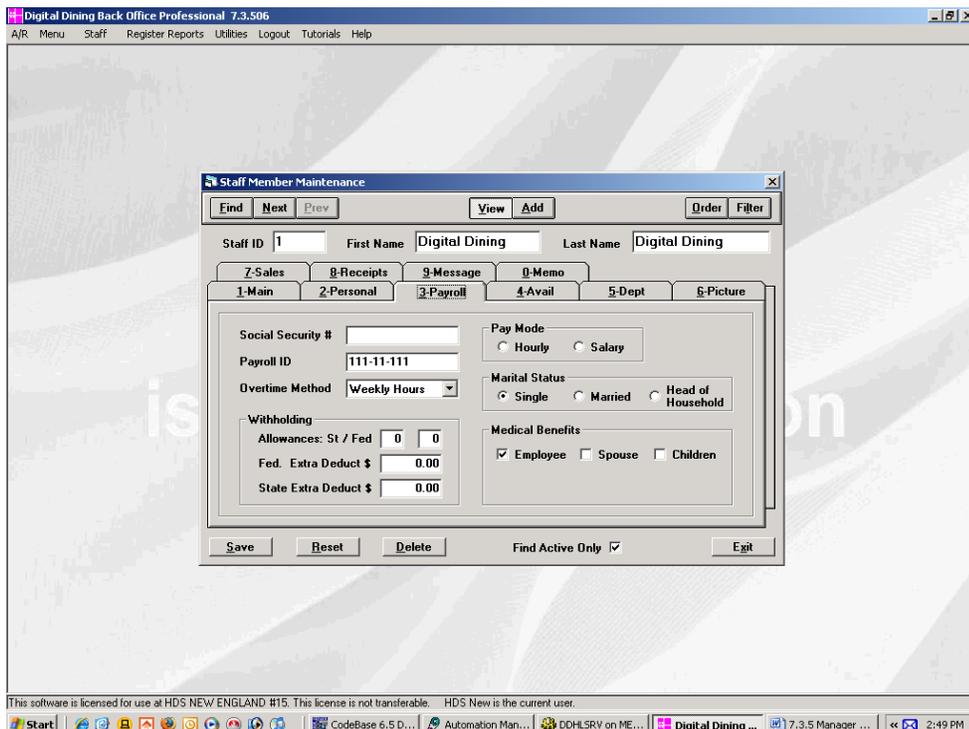
On the **Payroll** tab:

Enter the Social Security number for this person.

Enter the Payroll ID for this person (*optional*), and then hit **TAB**

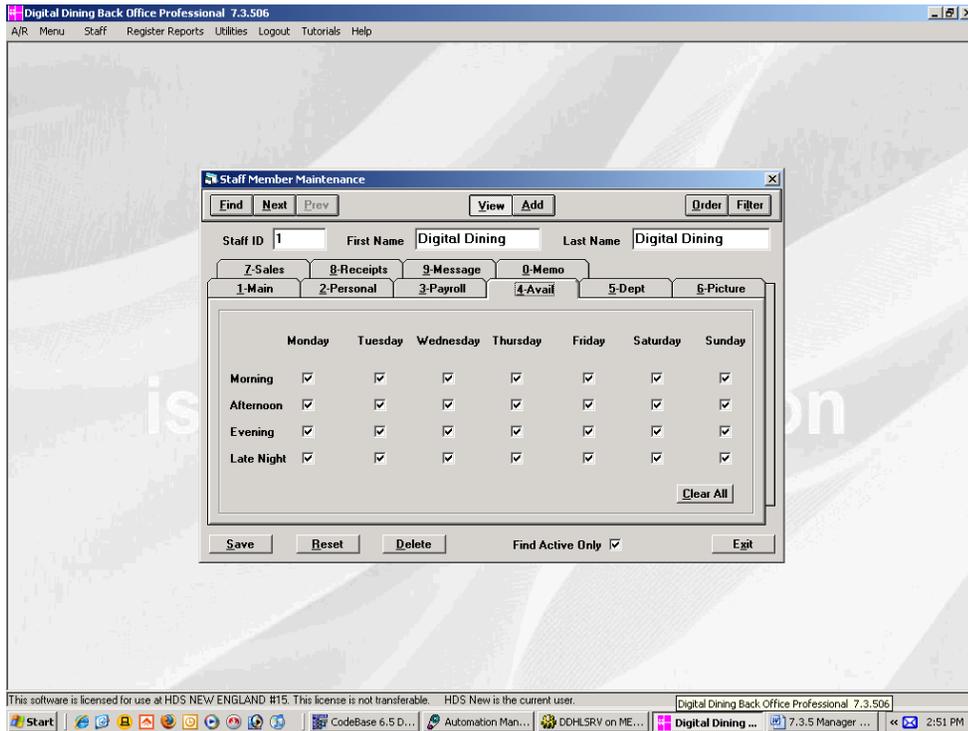
Enter the Overtime Method for this person (*Click on the ▼ to the right of the rectangle to get the list*)

You MUST choose an overtime method if you want the system to calculate overtime for you.

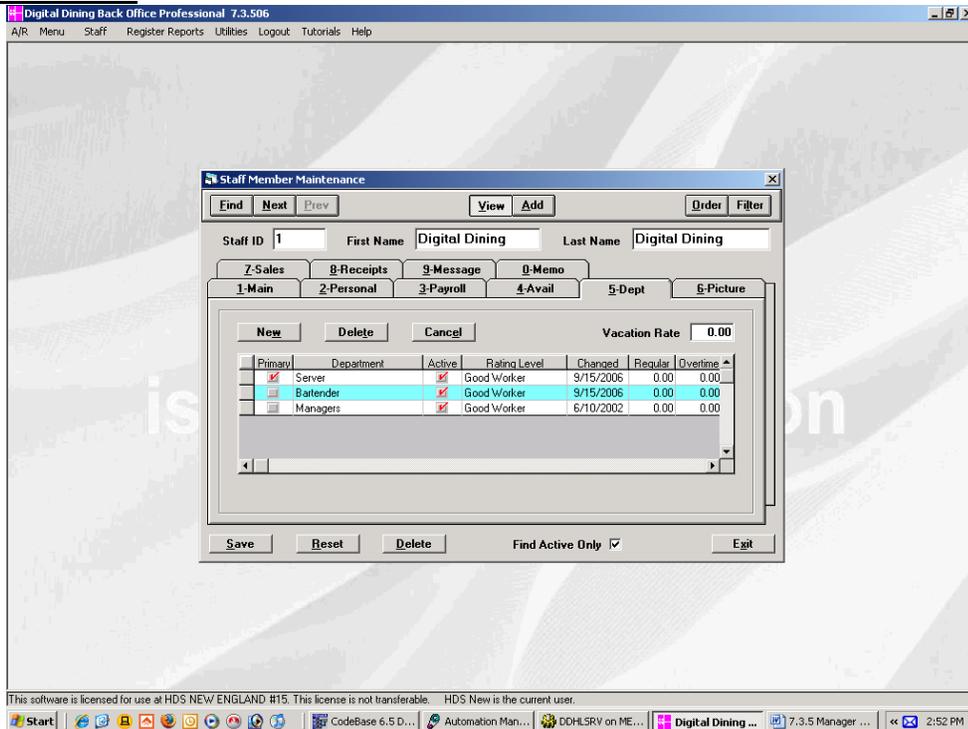


On the Availability tab:

Click on the rectangle on the bottom right to **Set All** (If the button reads “Clear All”, click on it so that it changes to Set All, then click on it again)



On the Department tab:



Click on the **New** & click inside the black box. Choose the appropriate department.

Enter the Regular Rate under the regular heading.

Enter the Overtime Rate under the overtime heading.

Enter the Worker Rating for this person (Click on the description of the ratings for other choices)

Repeat for all departments necessary (*To get rid of a department, click on the Active box next to the department in order to uncheck it*).

Set up this person's primary department by clicking on the Primary check box next to the department they most frequently clock into.

Click on the **Main** tab, then click on **Save** at the bottom

Repeat for all staff to be added.

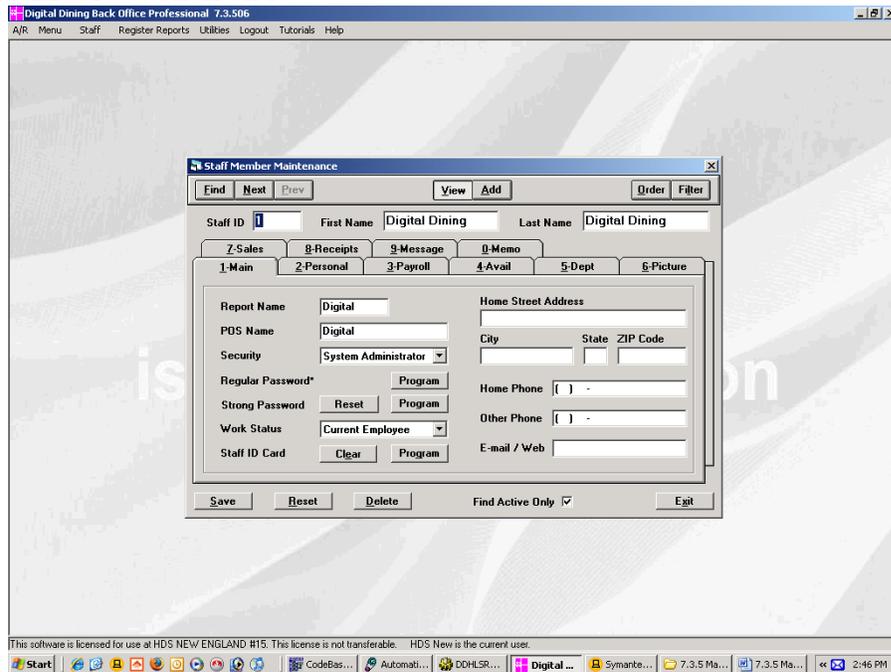
When finished, click on **View** to stay in Staff or **Exit** to get out.

SENDING DD MAIL

SENDING E-MAIL TO 1 PERSON:

Click on **Staff**

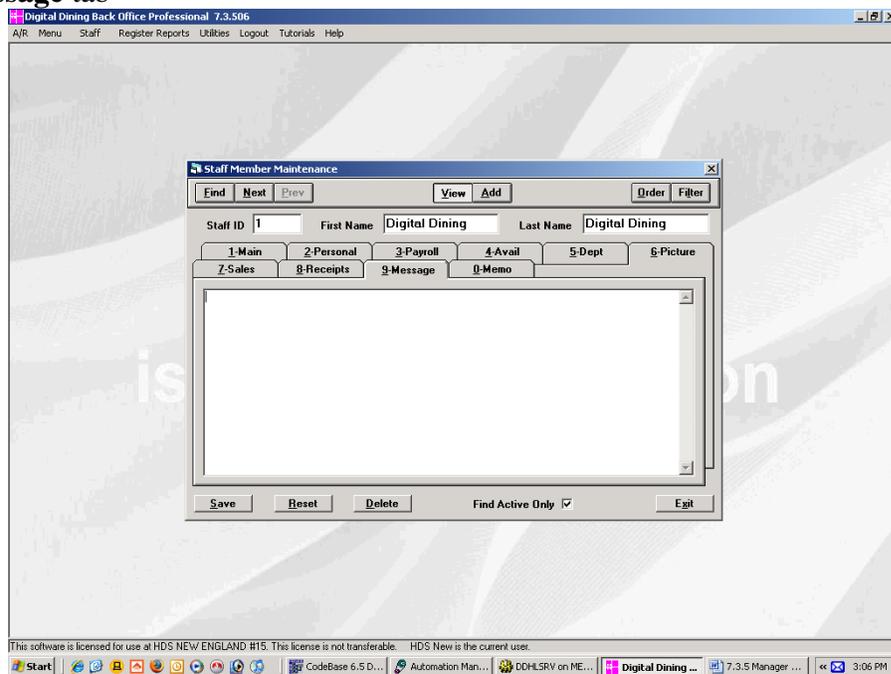
Highlight **Staff Members** & click on it



Click on **Find** in the upper left corner

Type in the first few letters of the last name, highlight the name you are looking for (in the box to the right), then click on **OK**

Click on the **Message** tab



Click on the white box to get the cursor blinking on the message pad, then type in the message you want to send.

Click on **Save**

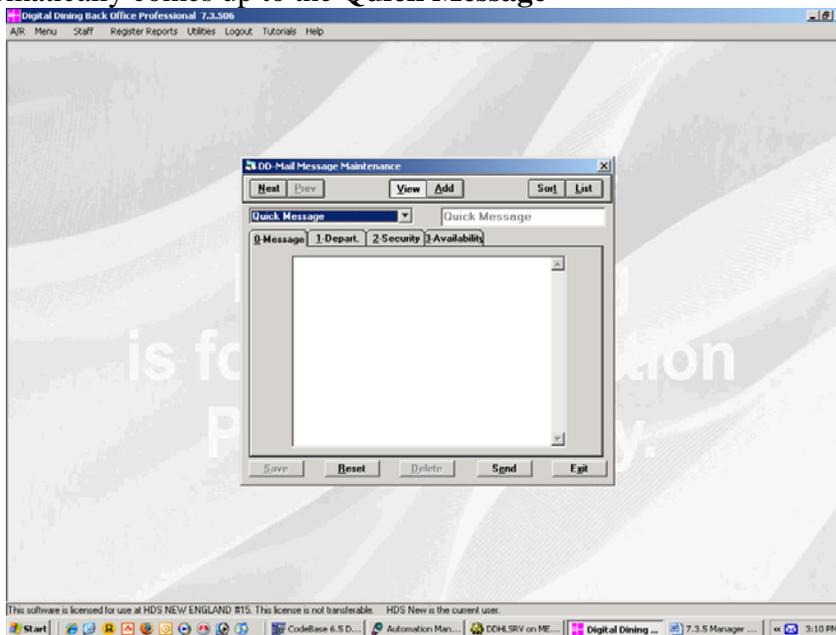
Repeat for all others, and then click on **Exit** to get out.

SENDING E-MAIL TO AN ENTIRE DEPARTMENT OR ALL EMPLOYEES:

Click on **Staff**

Highlight **DD Mail** & click on it

Digital Dining automatically comes up to the **Quick Message**



Click on the white message pad & type in the message

Click on the **Department** tab & include or exclude the appropriate departments

Click on the **Rating** tab & include or exclude the appropriate rating levels

Click on the **Security** tab & include or exclude the appropriate security levels

Click on the **Availability** tab & include or exclude the appropriate availabilities

Click on **Send** to send the E-mail

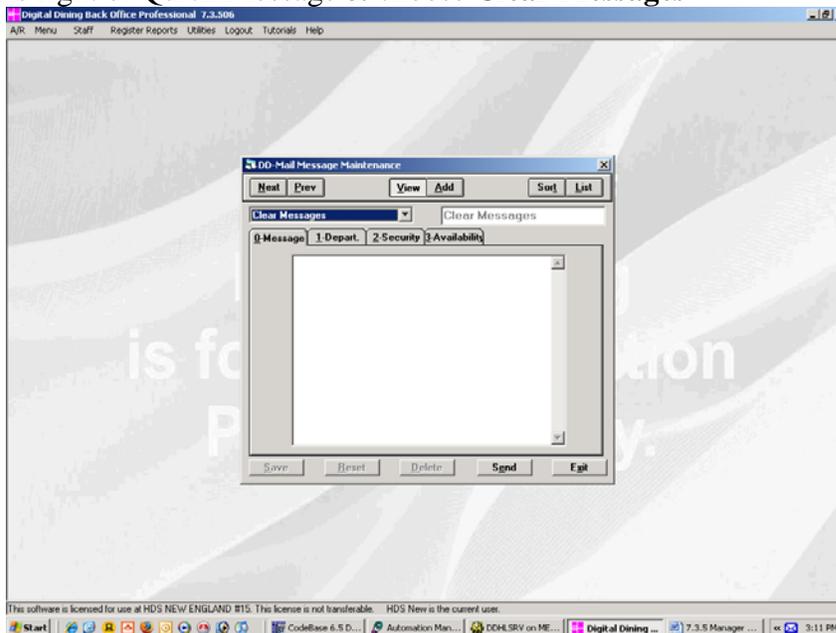
Repeat or click on **Exit**

CLEARING DD MAIL:

Click on **Staff**

Highlight **DD Mail** & click on it

Click on the ▼ to the right of Quick Message & choose **Clear Messages**



Click on **Send**, then **Exit**

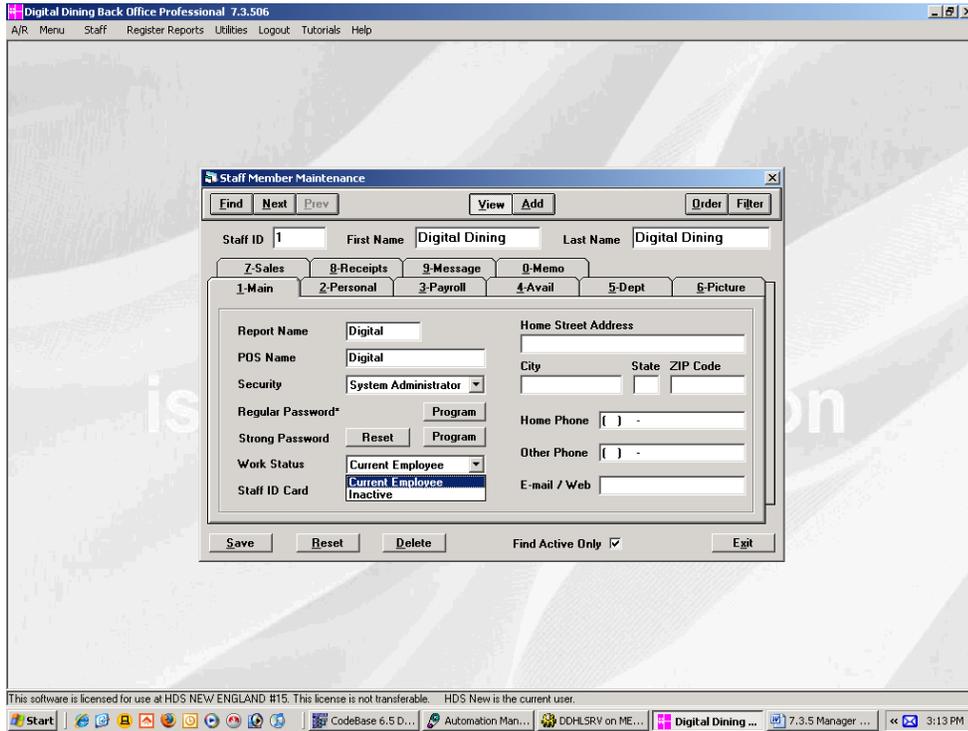
(Keep in mind that this clears ALL e-mail)

TO PURGE INACTIVE STAFF

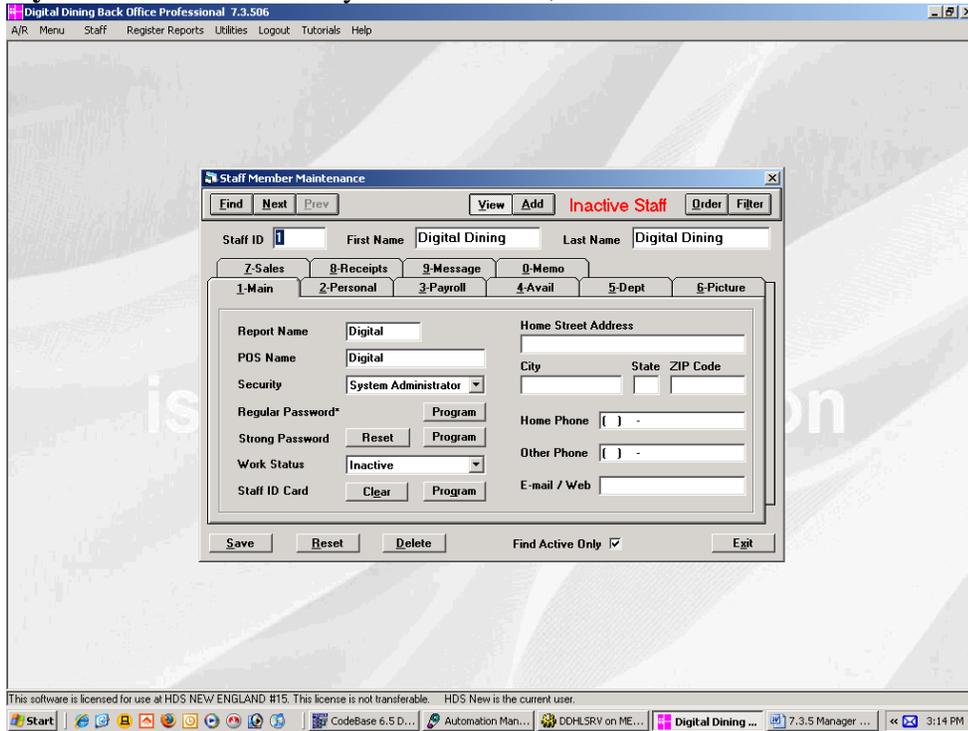
This should only be done once a year after the year has been closed out!!!

IN DIGITAL DINING BACK OFFICE:

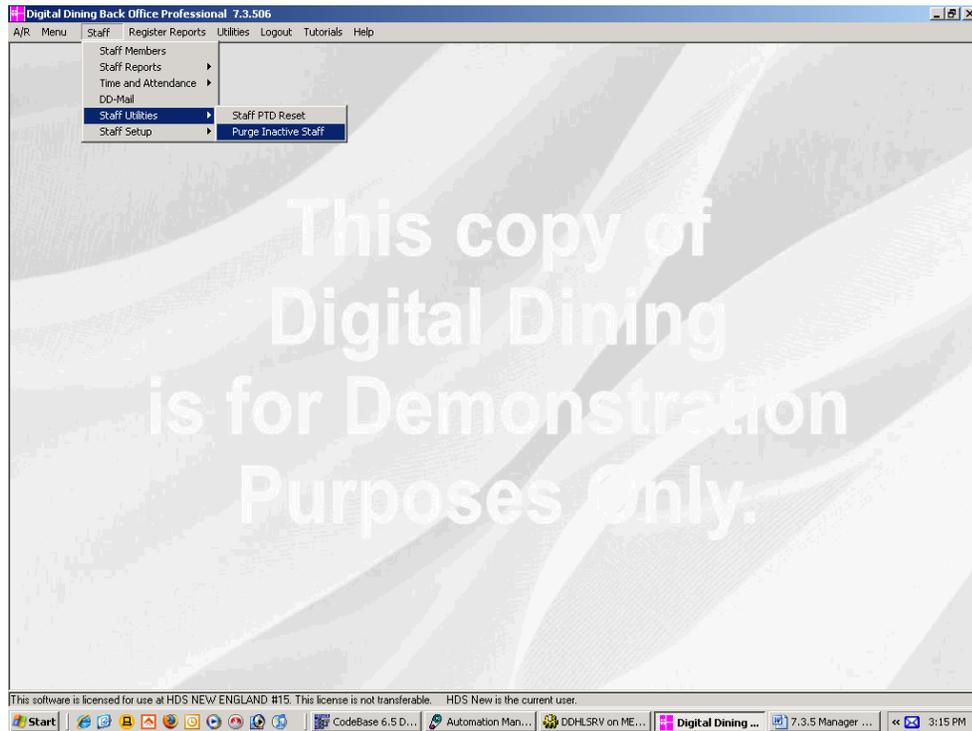
Step 1. Choose **Staff** then **Staff Members**



Step 2. Look at all Staff Members and change the **Work Status** field for those you want to remove from **Current Employee** to **Inactive**. When you are finished, click on **Exit**.



Step 3. Choose **Staff Utilities** from the **Staff** drop-down menu

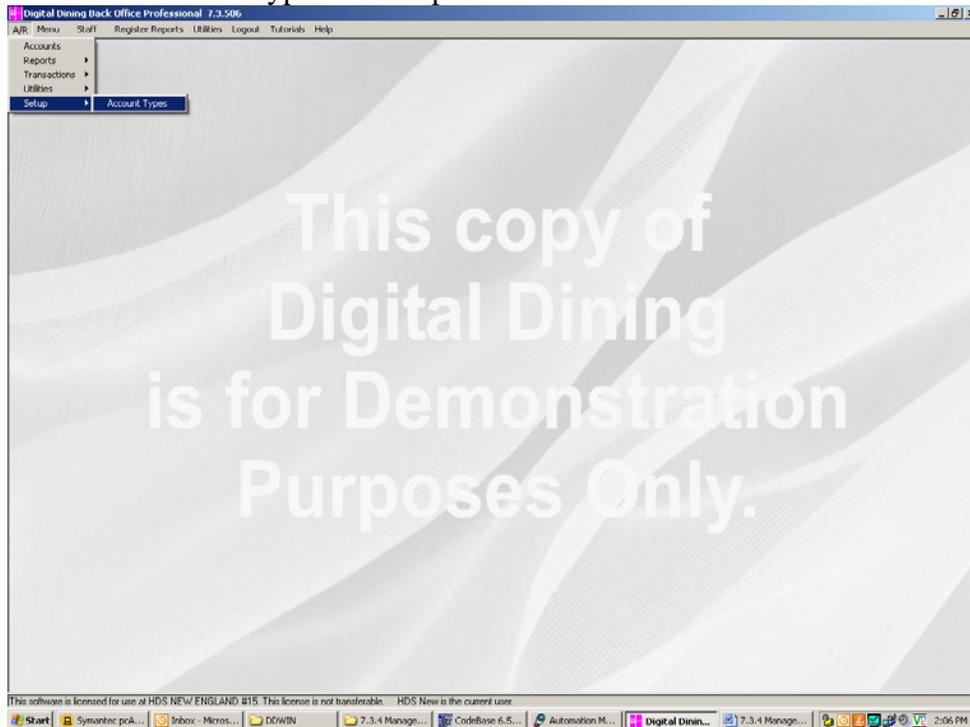


Step 4. Choose **Purge Inactive Staff**. Click on the **Yes** button when it asks you if you really want to do this. It will then tell you that the purge is complete – click **OK**.

ADDING ACCOUNTS RECEIVABLES

In Back Office:

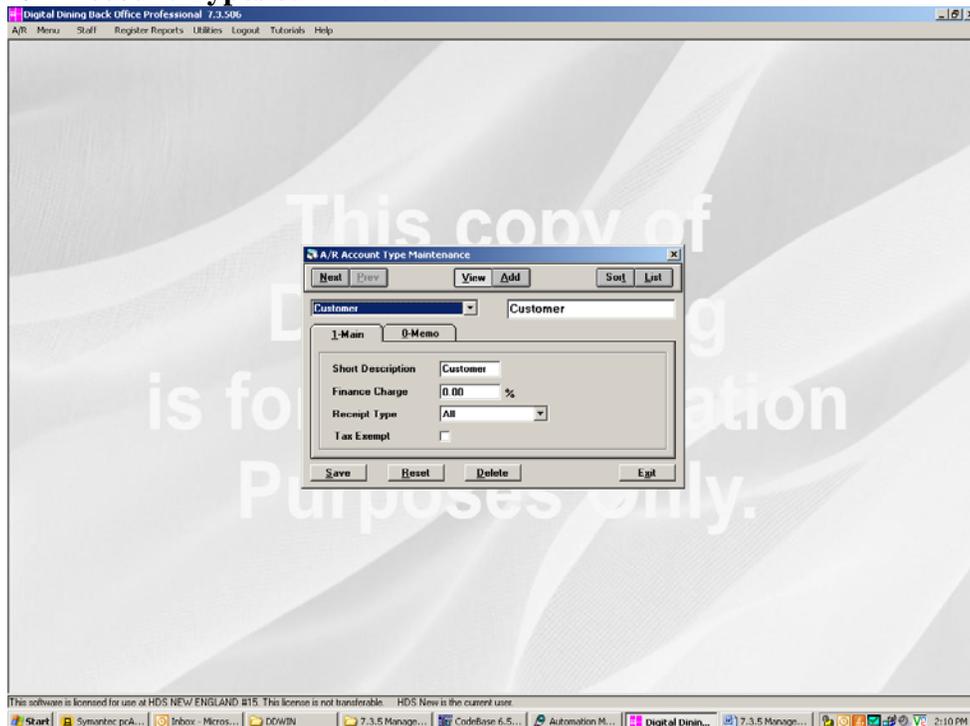
Step 1. Be sure that Account Types are setup.



Click on **A/R**

Highlight **A/R Account Setup**

Highlight **A/R Account Types** & click on it



Click on **Next** to scan through the list

If you need to add an account type, click on **Add**

Enter the description for the Account Type & hit **Tab**

Click on the ▼ next to the receipt type & choose **All**

If this Account Type is tax exempt, click on the next to **Tax Exempt** so that an **x** appears in it

Click on **Save**

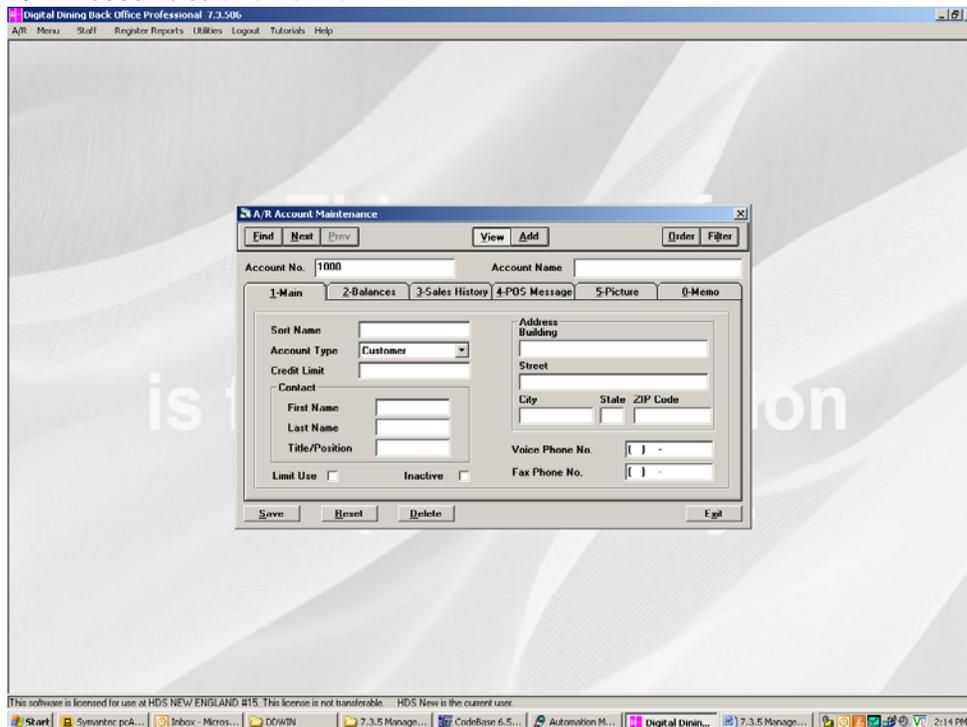
Repeat for any other Account Type to be added

Click on **Exit** to get out

Step 2. Add the new account

Click on **A/R**

Highlight **A/R Account** & click on it



Type in the account number for this account (if you have a specific number in mind – otherwise the software will generate one for you)

Type in the account name (*i.e. Mike Wolf*)

Type in the Sort Name (*Wolf if you want to look up this account by last name or Mike if you prefer to look up this account by first name*)

Choose the account type (*click on the ▼ next to Account Type to get the list*)

Type in the credit limit (*if there is one – this means that once the credit limit is reached, a manager's password will be required to charge to the account*)

Type in the contact information (*this information is optional*)

Type in the address

Type in the phone number (*this information is optional*)

Type in the fax number (*this information is optional*)

If a manager approval is required to charge to this account, click on the next to **Limit Use** so that an **x** appears in the box

Click on **Save**

Repeat for all accounts to be added

Click on **Exit** when finished

ACCOUNTS RECEIVABLES TRANSACTIONS

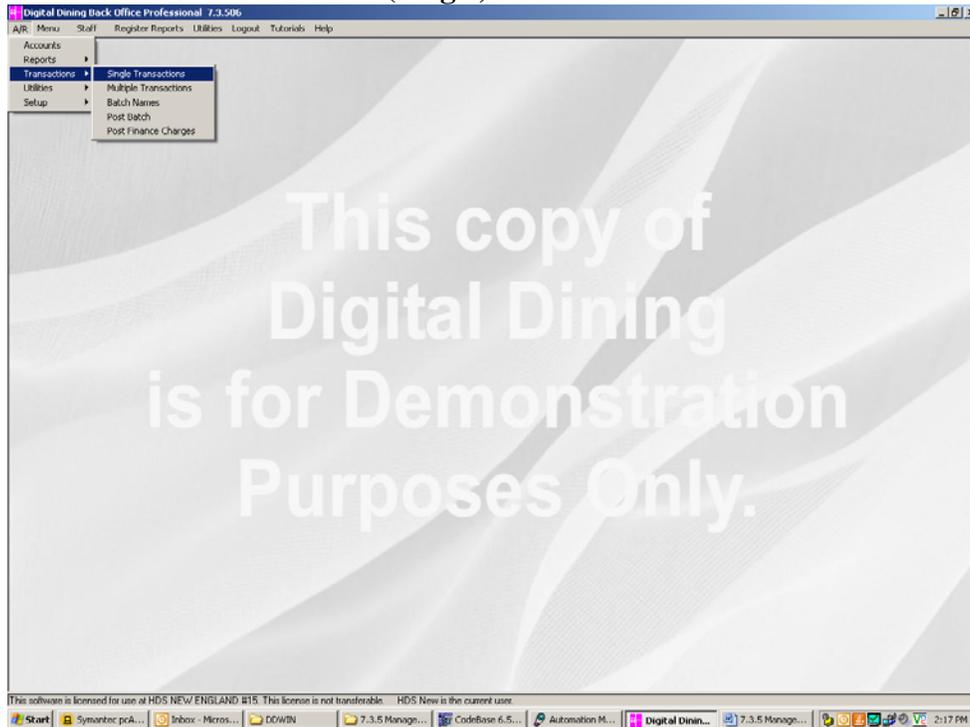
In Back Office:

Entering a Payment Against an Account

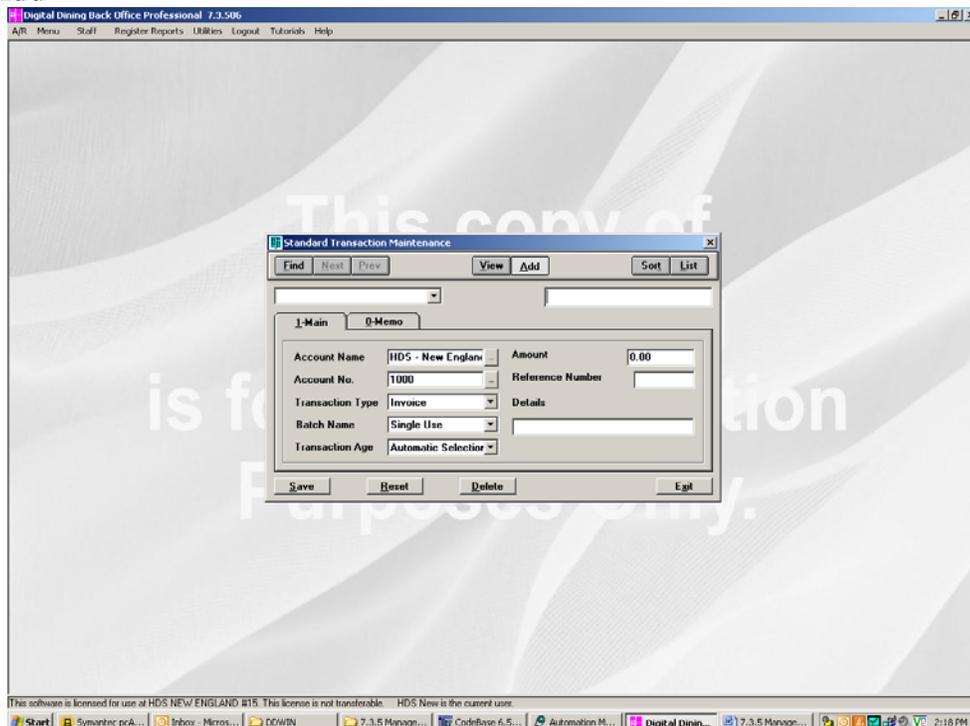
Click on **A/R**

Highlight **Transactions**

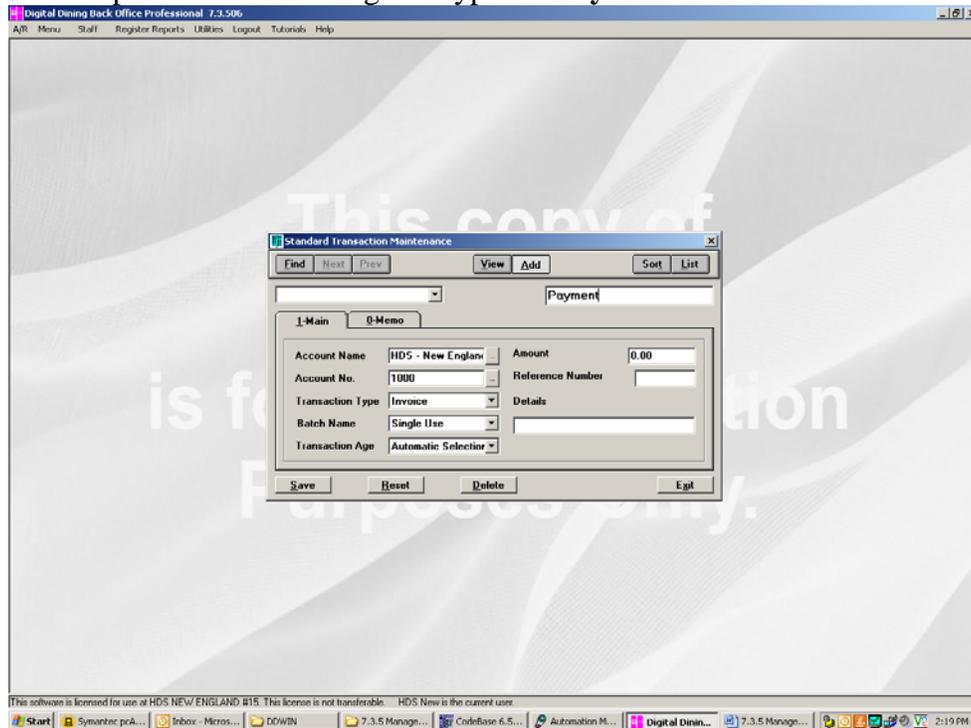
Highlight **A/R Standard Transactions (Single)** & click on it



Click on **Add**



Click on the description block to the right & type in **“Payment”**



Click on the ... next to Account Name, highlight the correct account & click on it

Click on the ▼ next to Transaction Type & choose **Payment**

Click on the ▼ next to Batch Name & choose **Single Use**

Click on the ▼ next to Transaction Age & choose **Auto Selection**

Enter the amount received

Enter a reference number (*such as the check number*)

Enter the details for this payment (*if there are any*)

Click on **Save**

Repeat for all other payments to be entered

Click on **Exit** when finished

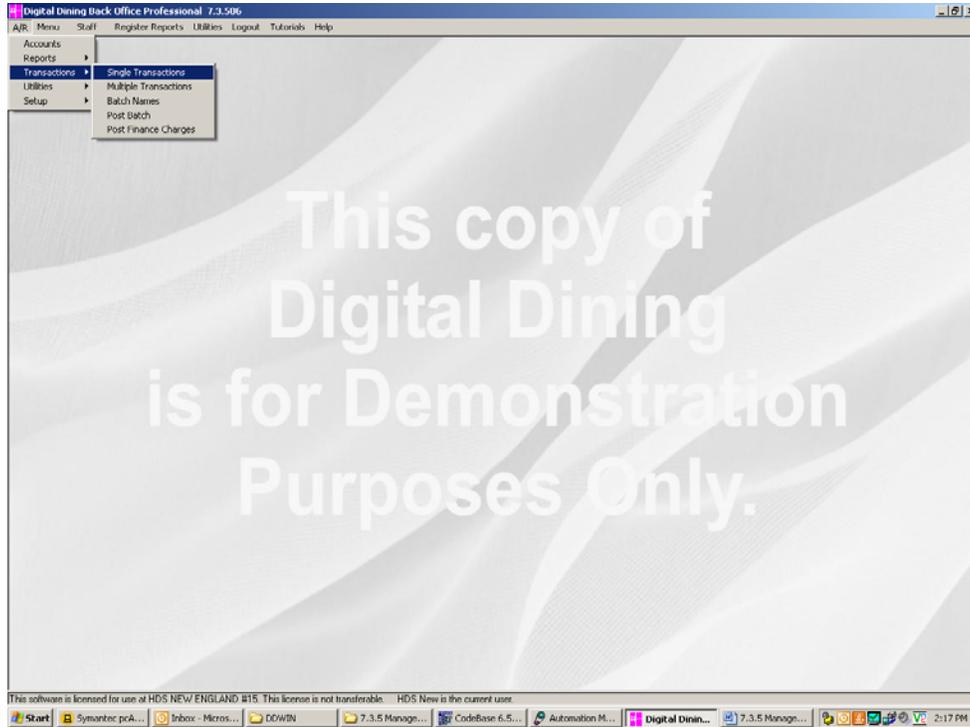
Entering a Debit Against an Account

(This would be used if you needed to add to the outstanding balance, for example if for some reason a guest check in the dining room was never charged to this account)

Click on **A/R**

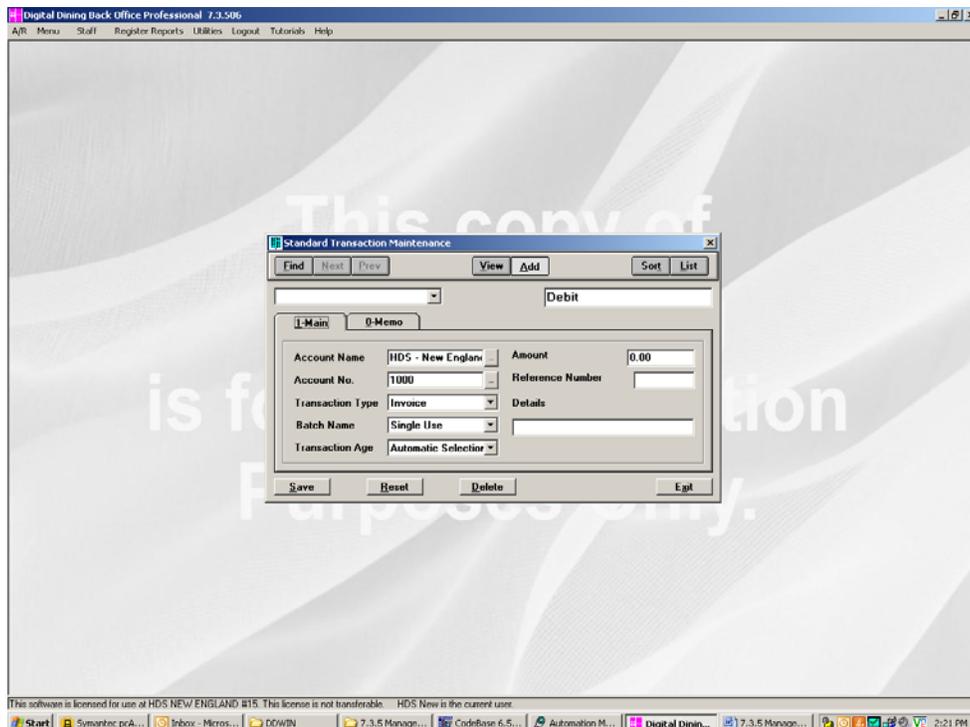
Highlight **A/R Account Transactions**

Highlight **A/R Standard Transactions (Single)** & click on it



Click on **Add**

Click on the description block to the right & type in **“Debit”**



Click on the ... next to Account Name, highlight the correct account & click on it
Click on the ▼ next to Transaction Type & choose **Debit**
Click on the ▼ next to Batch Name & choose **Single Use**
Click on the ▼ next to Transaction Age & choose **Auto Selection**
Enter the transaction date (*the date debit was for*)
Enter the amount of the debit
Enter a reference number (*if there is one*)
Enter the details for this debit (*the reason a debit is being applied*)
Click on **Save**
Repeat for all other debits to be entered
Click on **Exit** when finished

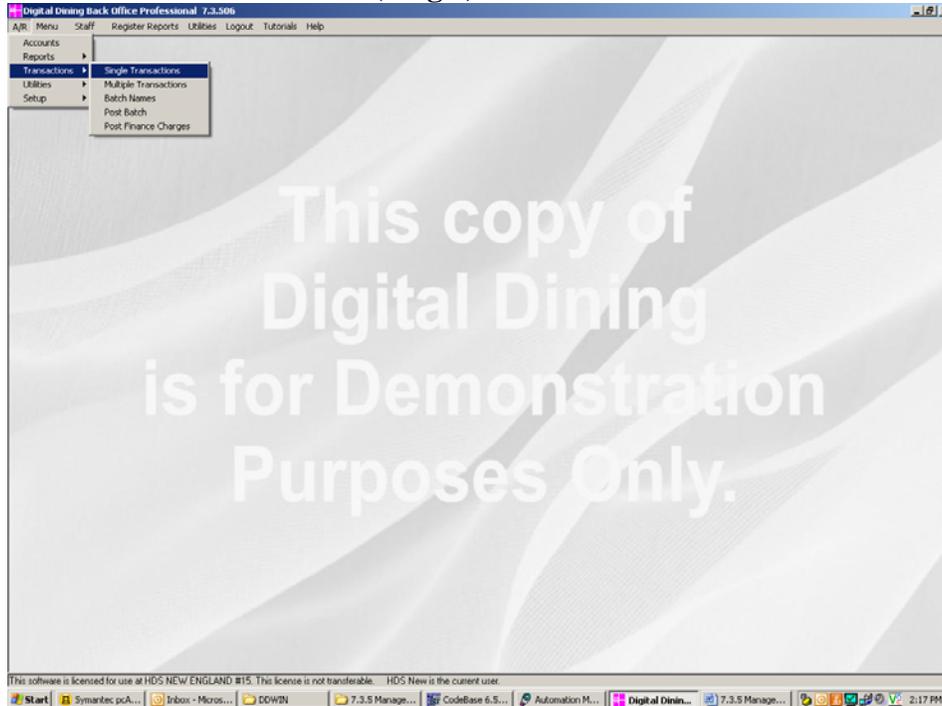
Entering a Credit Towards an Account

(This would be used if you needed to subtract from the outstanding balance, for example if for some reason a guest check in the dining room was charged to this account by accident)

Click on **A/R**

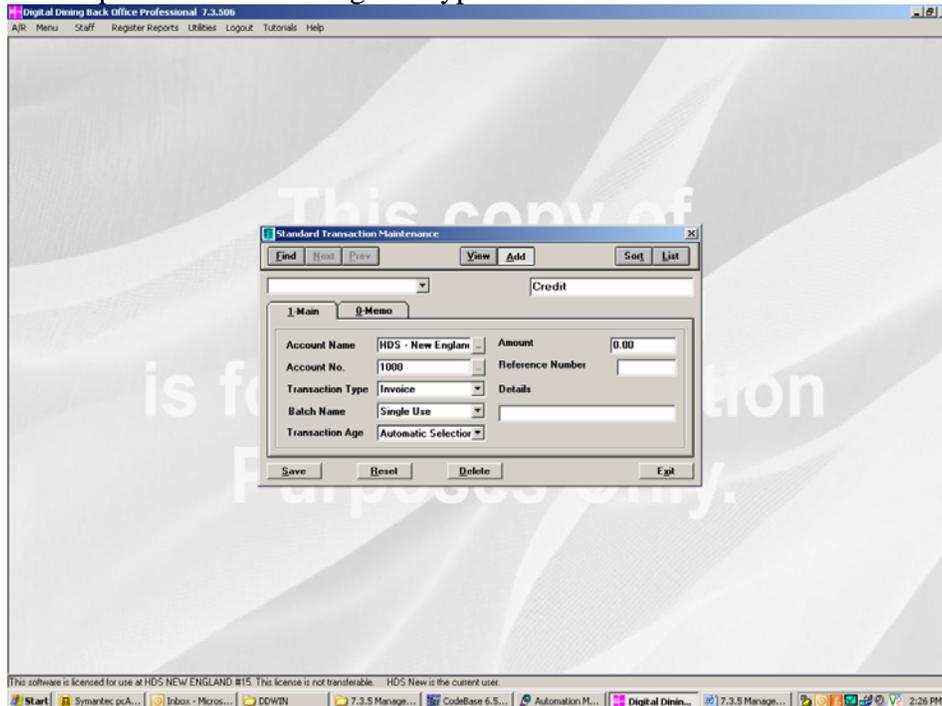
Highlight **A/R Account Transactions**

Highlight **A/R Standard Transactions (Single)** & click on it



Click on **Add**

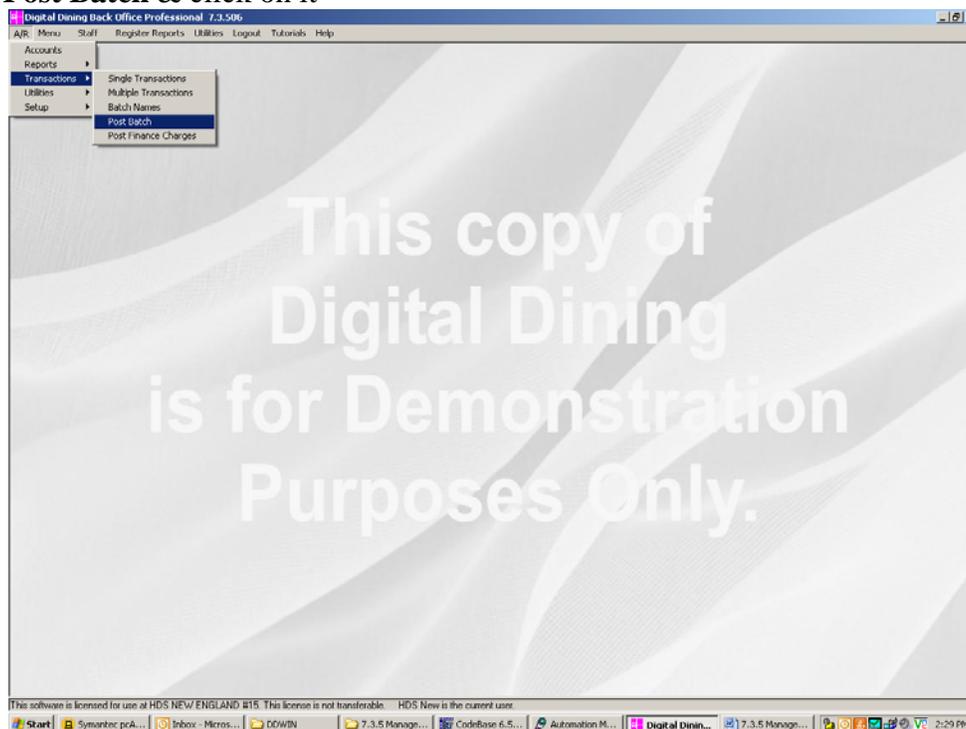
Click on the description block to the right & type in “Credit”



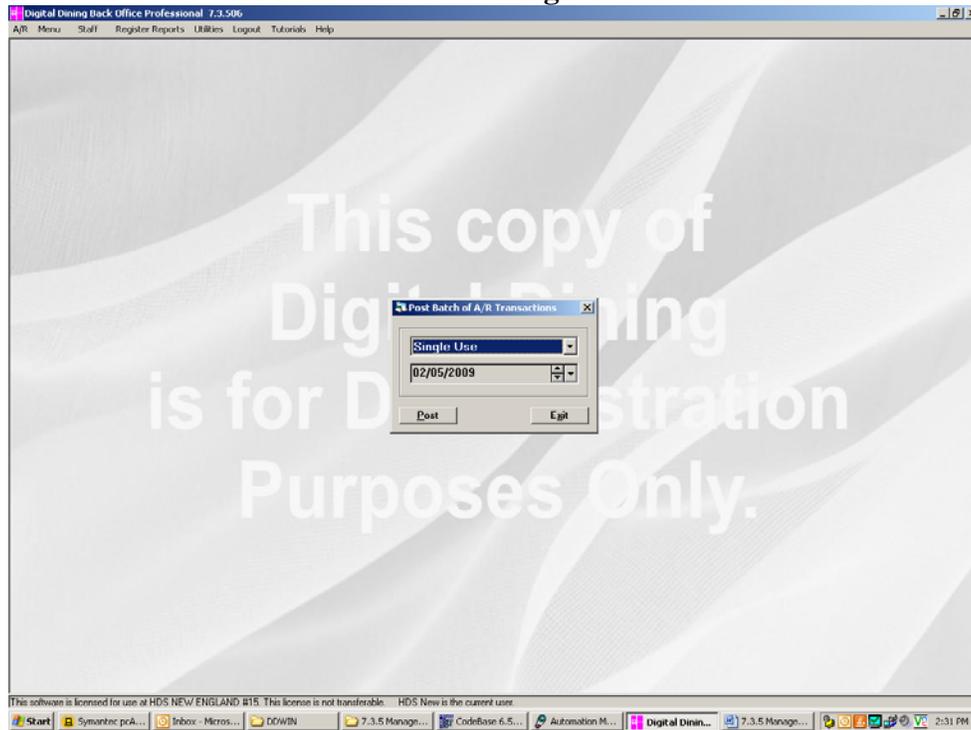
Click on the ... next to Account Name, highlight the correct account & click on it
Click on the ▼ next to Transaction Type & choose **Credit**
Click on the ▼ next to Batch Name & choose **Single Use**
Click on the ▼ next to Transaction Age & choose **Auto Selection**
Enter the transaction date (*the date credit was for*)
Enter the amount of the credit
Enter a reference number (*if there is one*)
Enter the details for this credit (*the reason a credit is being given*)
Click on **Save**
Repeat for all other credits to be entered
Click on **Exit** when finished

**** Once you are finished entering all of your transactions for the day you MUST do the following for these transactions to show up on the statements:**

Click on **A/R**
Highlight **A/R Account Transactions**
Highlight **Post Batch** & click on it



Click on the ▼ next to **Batch Method** & choose **Single Use**



The date will default to today

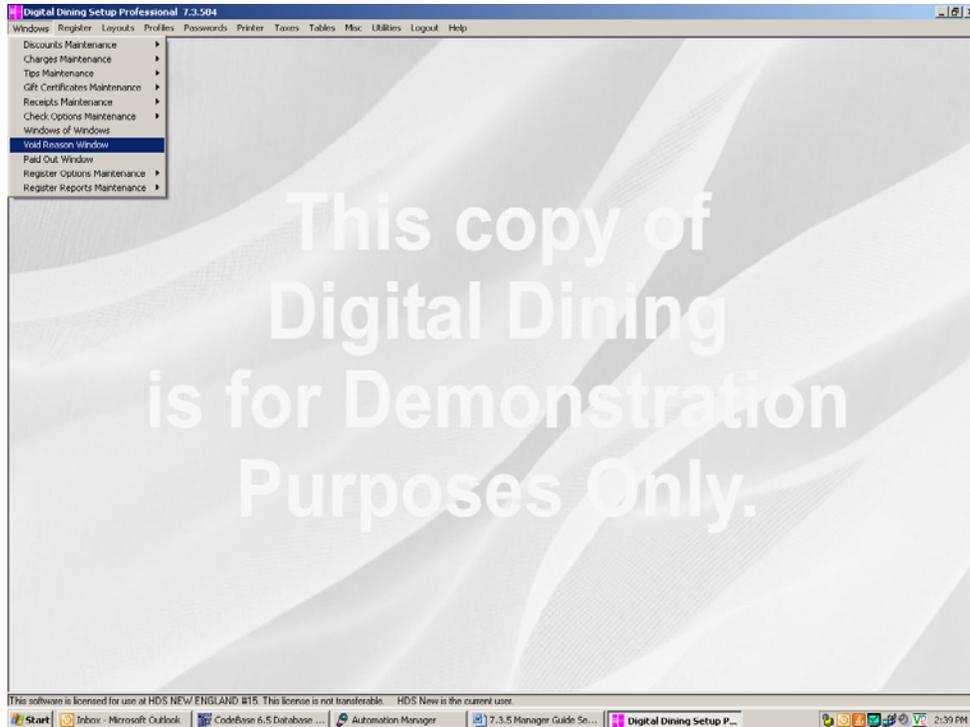
- Click on **Post**
- Click on **OK**
- Click on **Exit**.

ADDING VOID REASONS

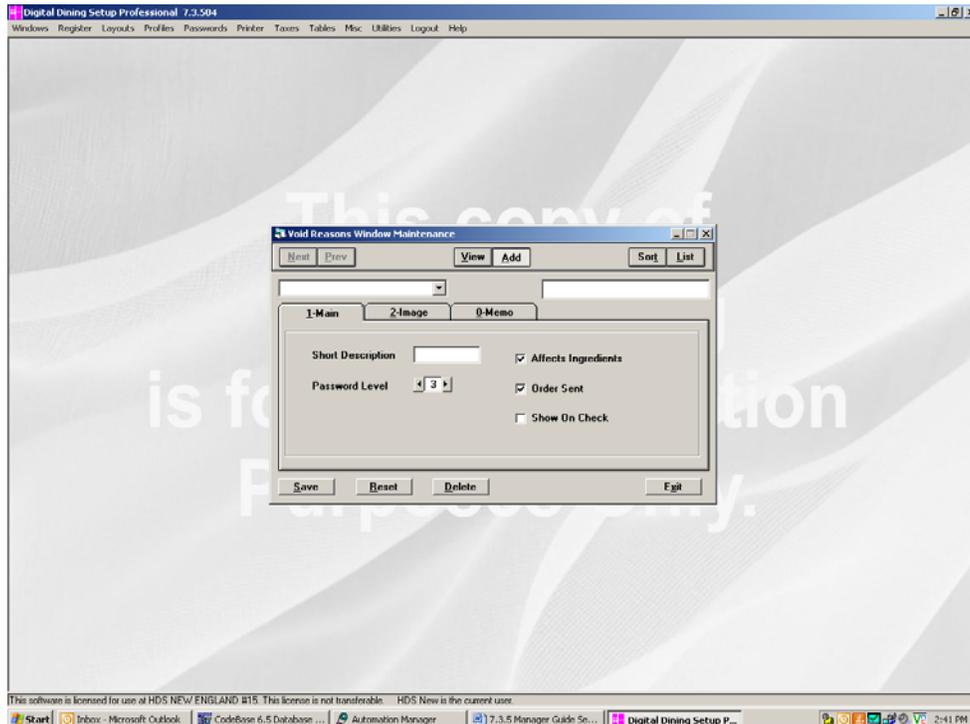
In Setup:

Click on **Windows**

Highlight **Void Reasons Window** & click on it



Click on **Add**



Type in the description of the new void reason & hit the **Tab** key

Select the password level for this reason

0 = A password is not required, the staff id will be tracked for reporting.

N = No password is required

*X = No one can use this void reason (you want to keep the reason for reporting purposes,
but it is no longer in use)*

If this void reason should subtract from inventory, click on the next to **Affects Ingredients**

If you want the cancelled order to print in the kitchen or at the bar, click on the next to

Order Sent

Click on **Save**

Repeat for all new void reasons

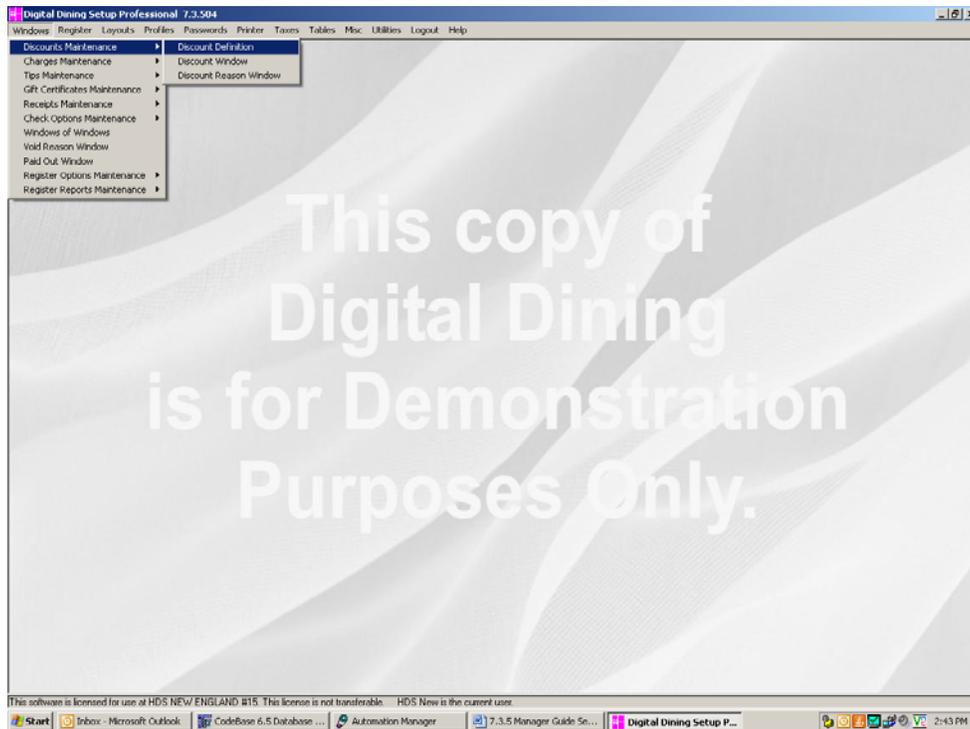
Click on **Exit** when finished

ADDING DISCOUNTS

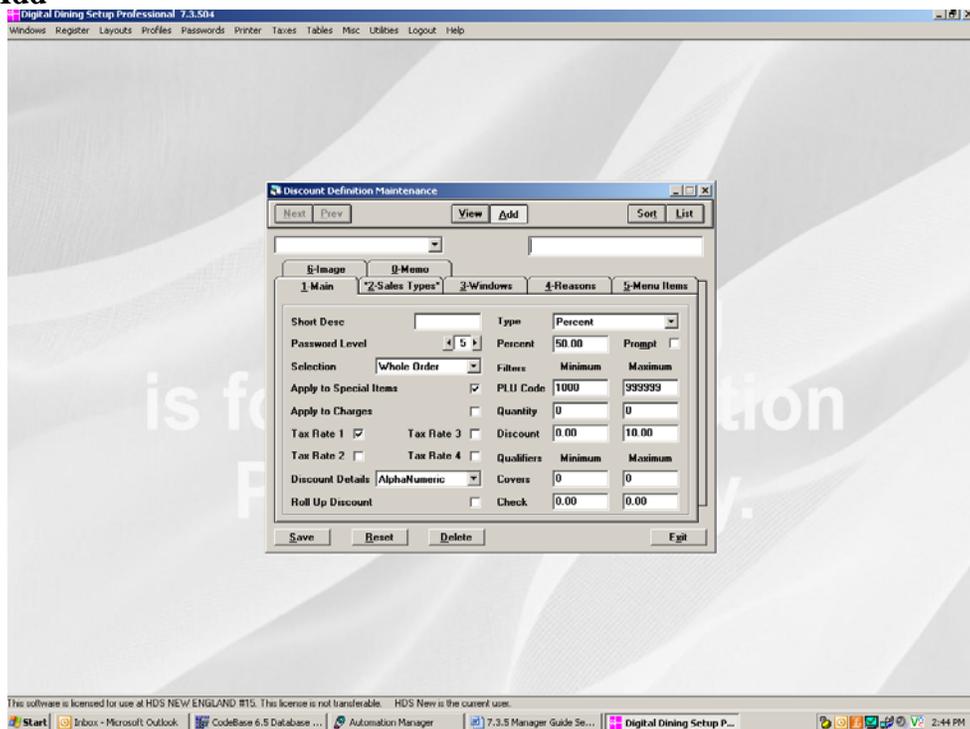
In Setup:

Click on **Windows**

Highlight **Discounts Maintenance** then **Discount Definition** click on it



Click on **Add**



On the **Main** Tab:

Type in the description of the new discount reason & hit the **Tab** key

Select the password level for this reason

0 = A password is not required, but the system will keep track of the staff person's id who uses this (for tracking and reporting purposes)

N = No password is required

X = No one can use this void reason (you want to keep the reason for reporting purposes, but it is no longer in use)

Choose the **Selection** by clicking on the ▼ (which items are included in the discount)

Last Ordered = Just the very last item ordered will be discounted

Whole Order = Everything on the check that meets all of the other criteria will be discounted

First Entry On Check = Just the very first item ordered on the check will be discounted

Marked Items: Once = Allows you to choose which item will be discounted (one per check)

Marked Items: Each = Allows you to choose which items will be discounted (unlimited per check)

If special items are included in this discount, click on the next to **Special Items**

If the tax should be backed off (meaning the customer only pays tax on the amount actually paid for), click on the next to the appropriate tax code.

Tax 1 = Food

Tax 2 = Beverages

Tax 3 = Retail Items

If the customer pays the tax on the full amount before discount, then none of the tax rates should be checked.

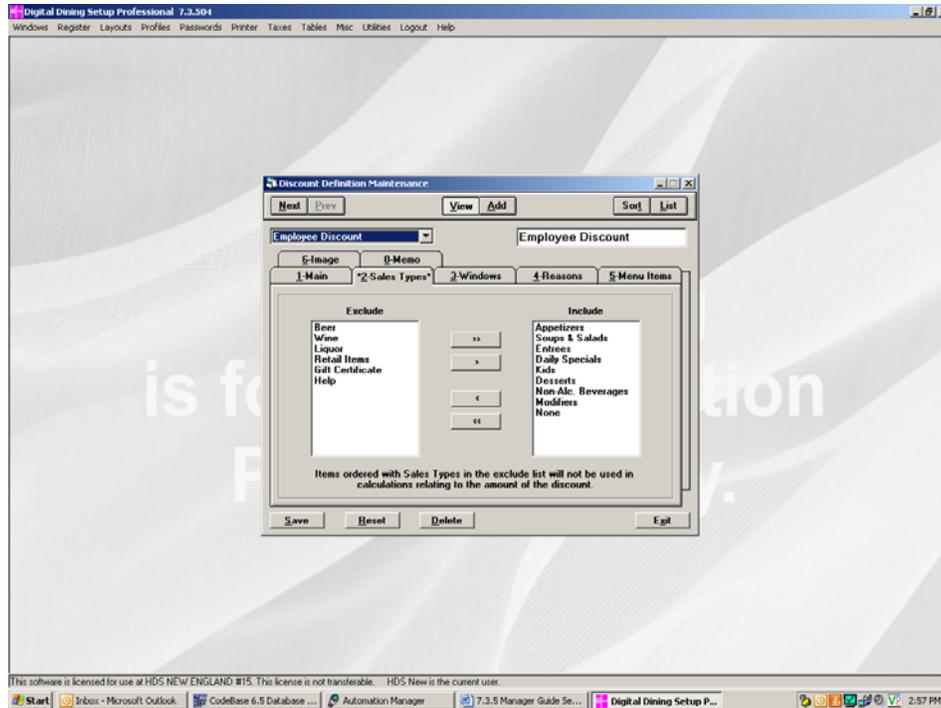
If this discount is a percentage, click on the drop down box next to **Type**. Select **Percent**. If this discount is a set dollar amount or is an amount to be entered at the Point of Sale, select **Flat Amount**.

Enter the amount (If **Percent** is selected, this amount will be the percentage. If Flat Amount is selected, this will be the set amount to be deducted. If you want to enter the amount at the Point of Sale, check off the Prompt box .)

Enter the minimum discount amount (usually 0.00)

Enter the maximum discount amount (for example, with the dine around cards, if the discount is buy 1 entrée, get a 2nd entrée free, up to \$20, the maximum should be \$20.00. Otherwise, set the maximum to 999.99)

On the **Sales Type** Tab:



Be sure to include all sales types that apply & exclude all sales types that do not apply (for example, employee discounts generally do not include beer, wine or liquor, so they would be excluded.)

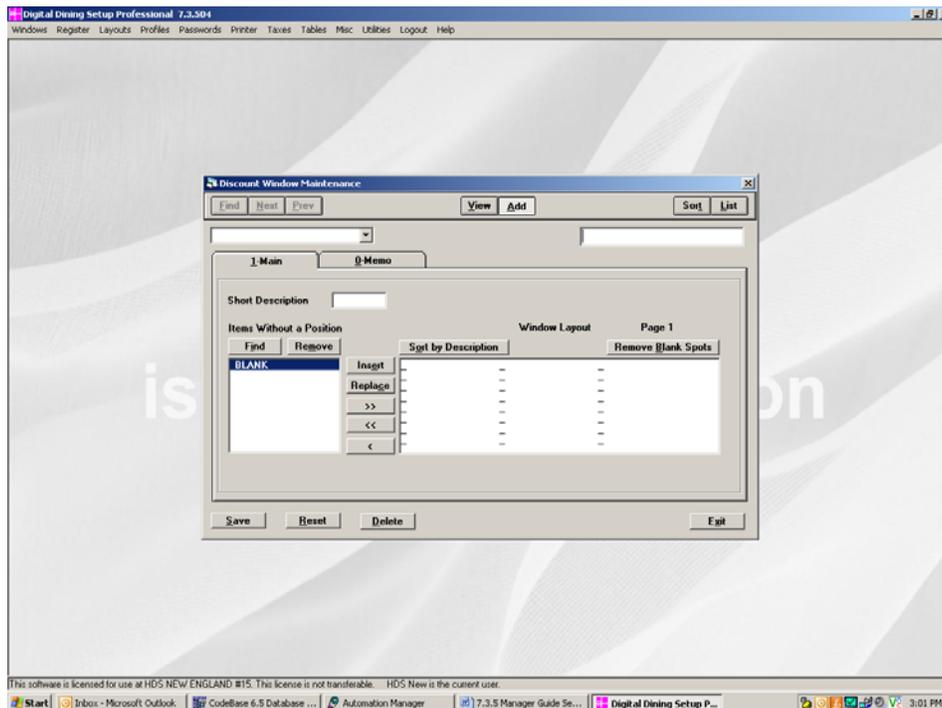
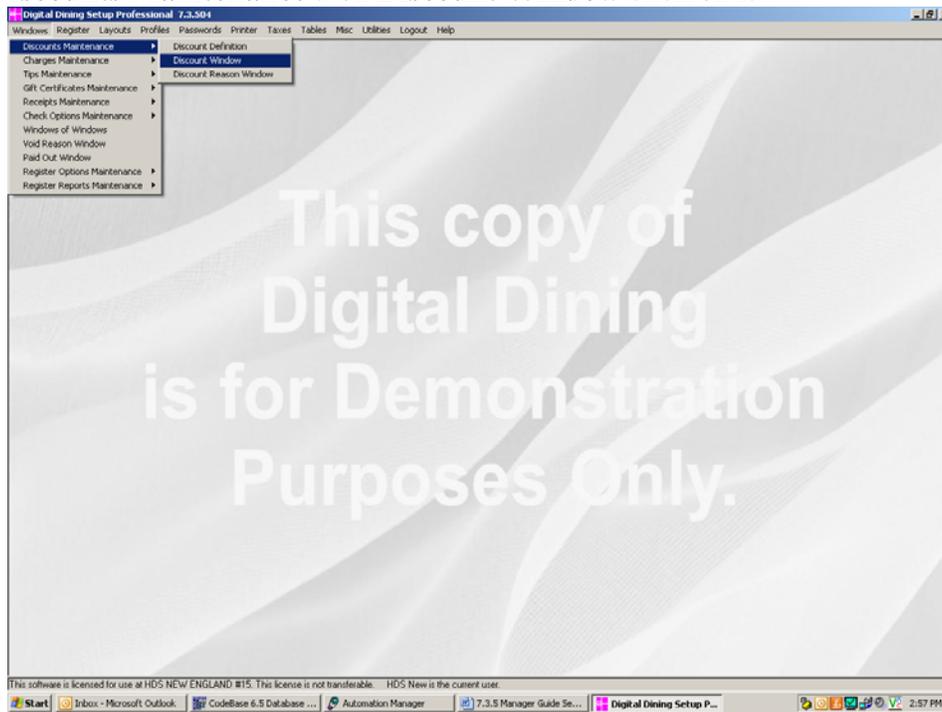
Click back on the **Main** Tab

Click on **Save**

Repeat for all new discount reasons

Click on **Exit** when finished

Next you need to make sure all of the Discounts are included in the Discounts Window.
Click on **Windows**
Highlight **Discounts Maintenance** then **Discount Window** click on it



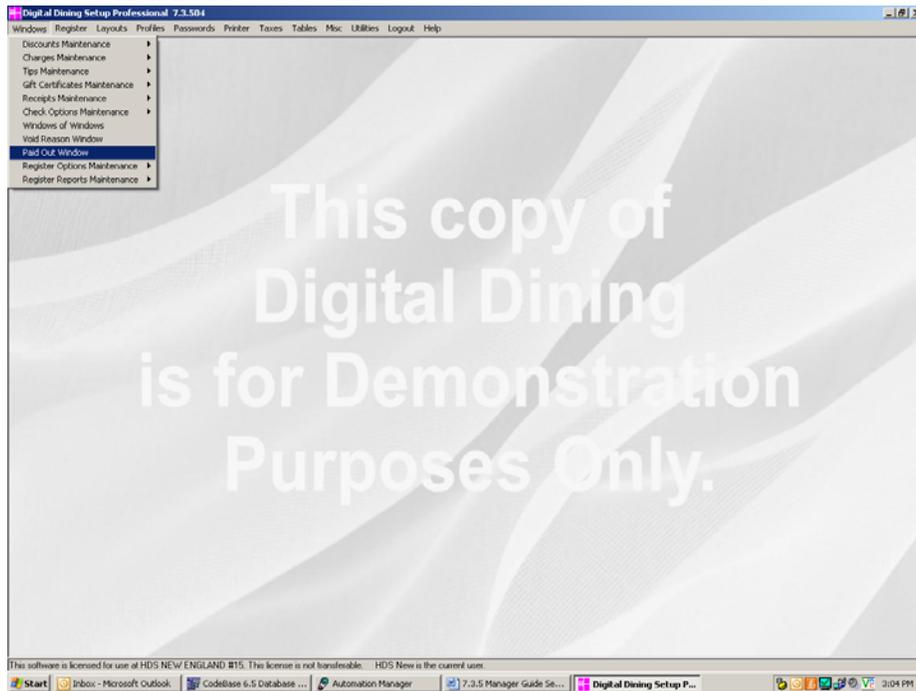
If this loads a blank window like the picture above, you will not need to do anything else, just exit out. If you have multiple discount windows, you will have to add in the new discount(s) using the Find button located under the heading "Items without a position"

When you are finished, choose **Save** and **Exit**

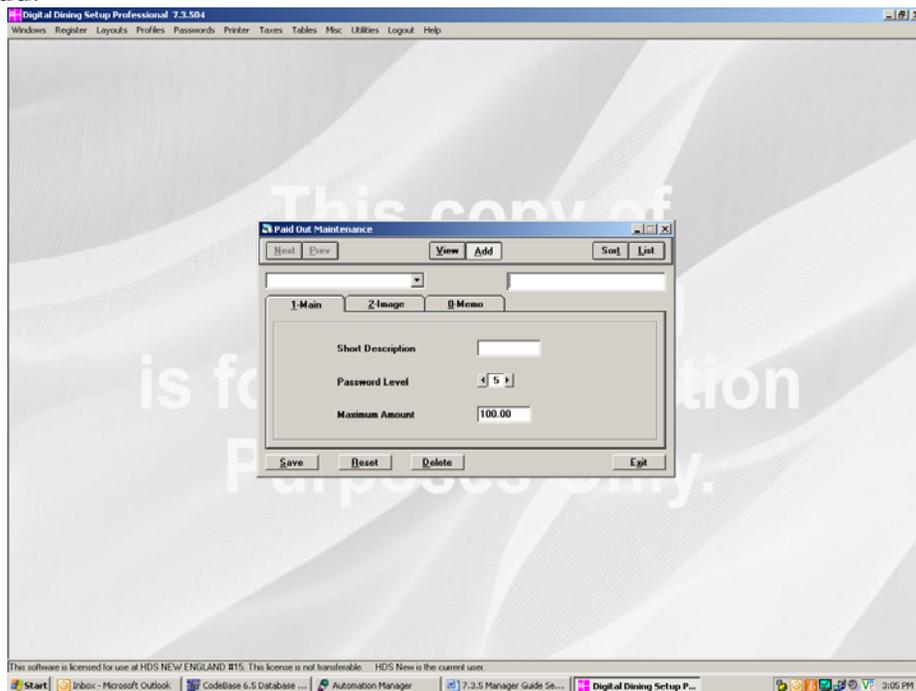
ADDING PAID OUTS

In Setup:

Click on **Windows** then **Paid Out Window**



Click on **Add**.



Type in the description you want to use of the new Paid Out Reason & hit the **Tab** key.

Set the password level, if desired. Enter a cap for the maximum allowable paid out.

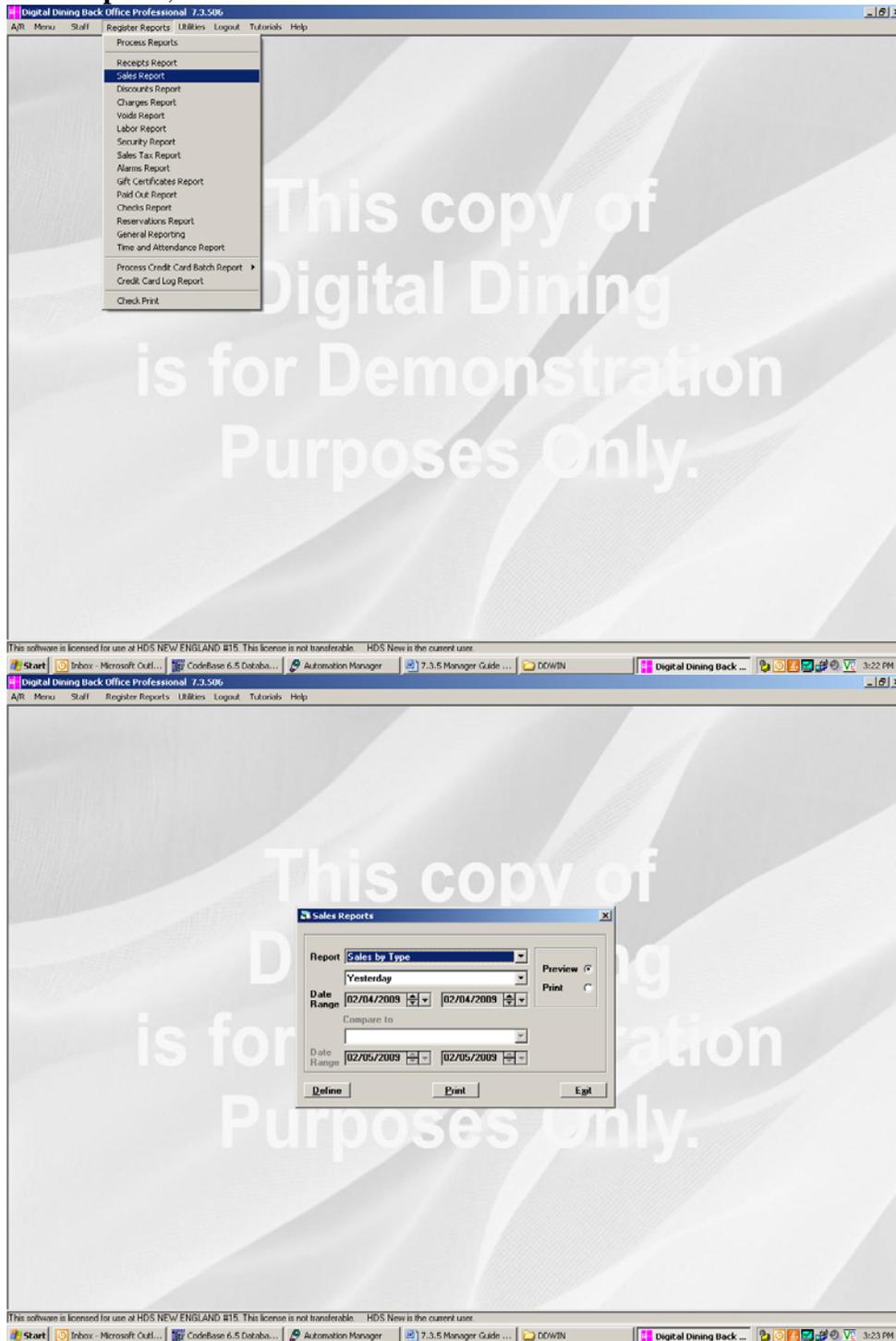
Left click on the **Save** button. At this point you may continue to add new paid out reasons, or **exit**.

DEFINING SALES REPORTS

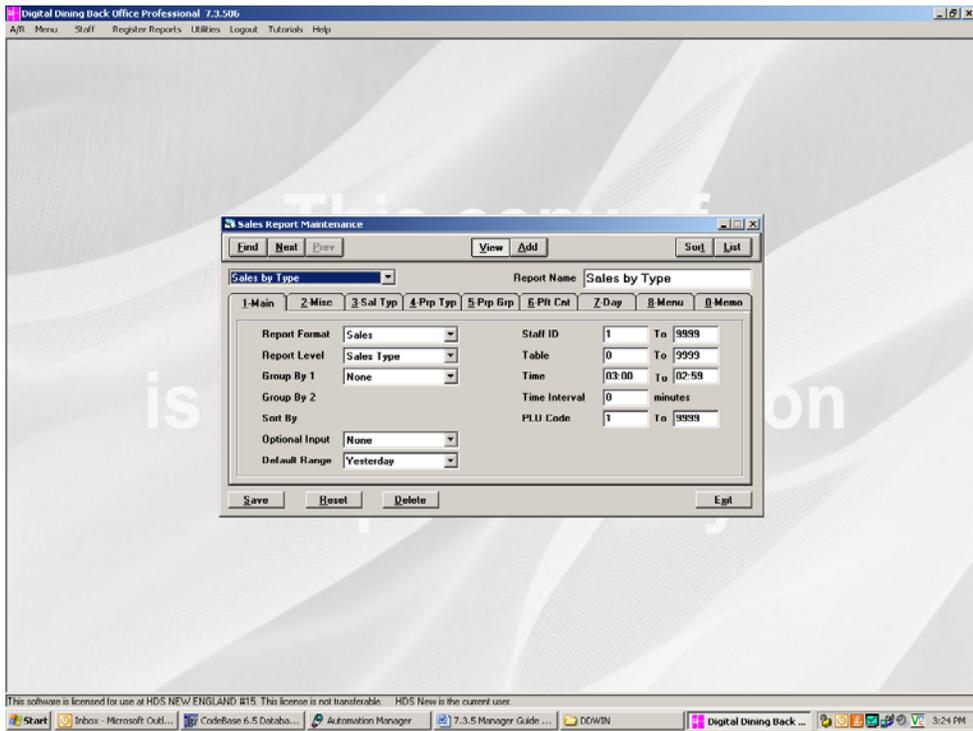
In Back Office

Click on **Register Reports**

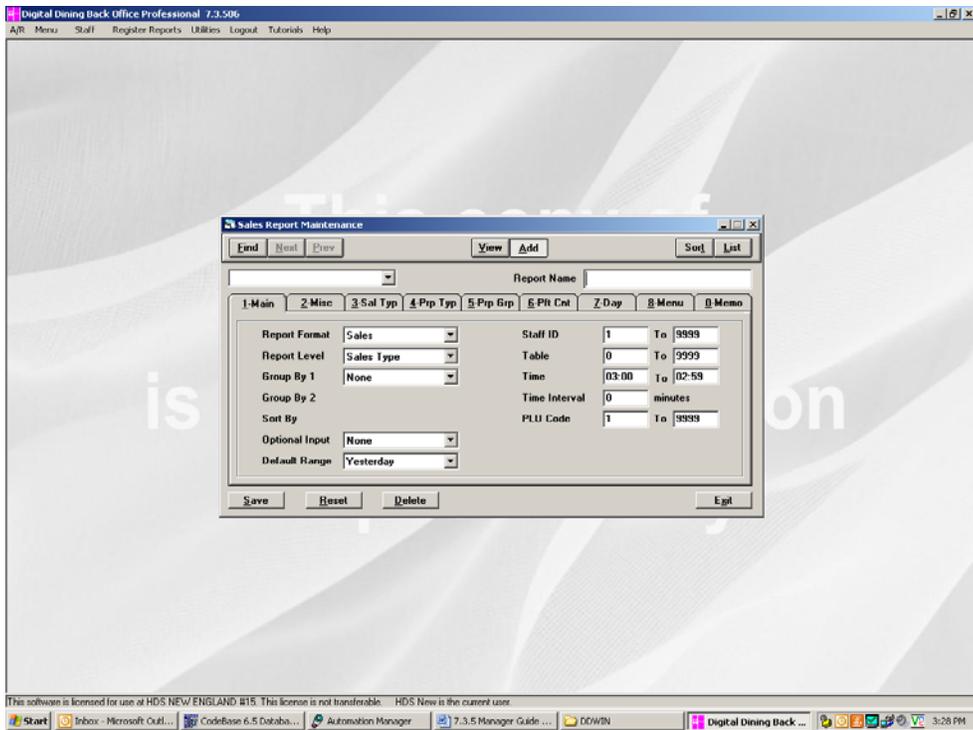
Highlight **Sales Reports**, and then click on it



Click on Define in lower left corner

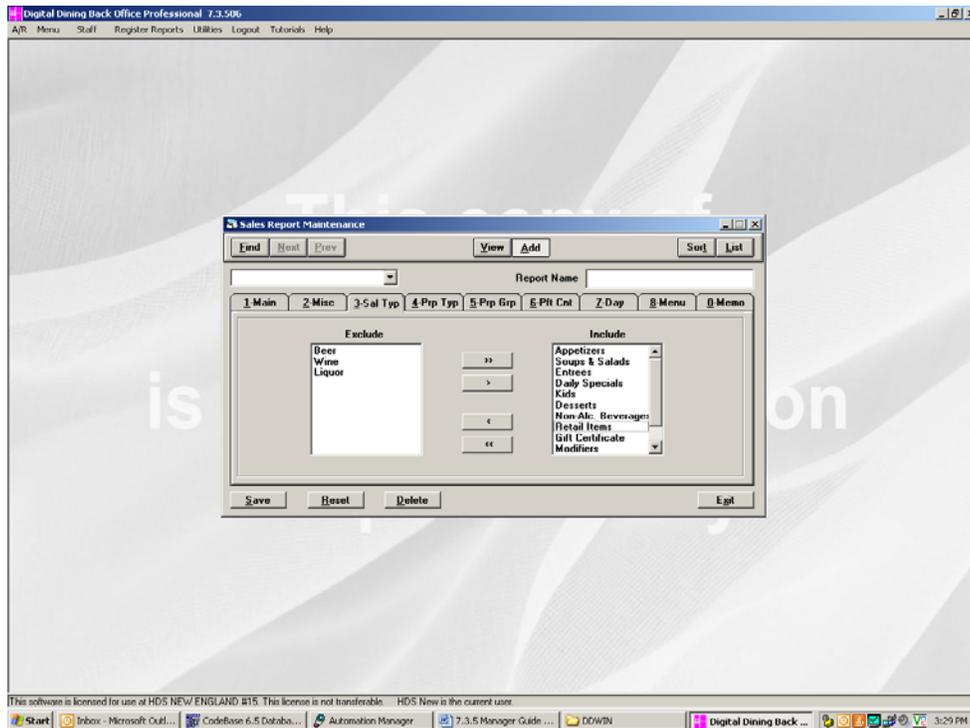


Click on **Add**

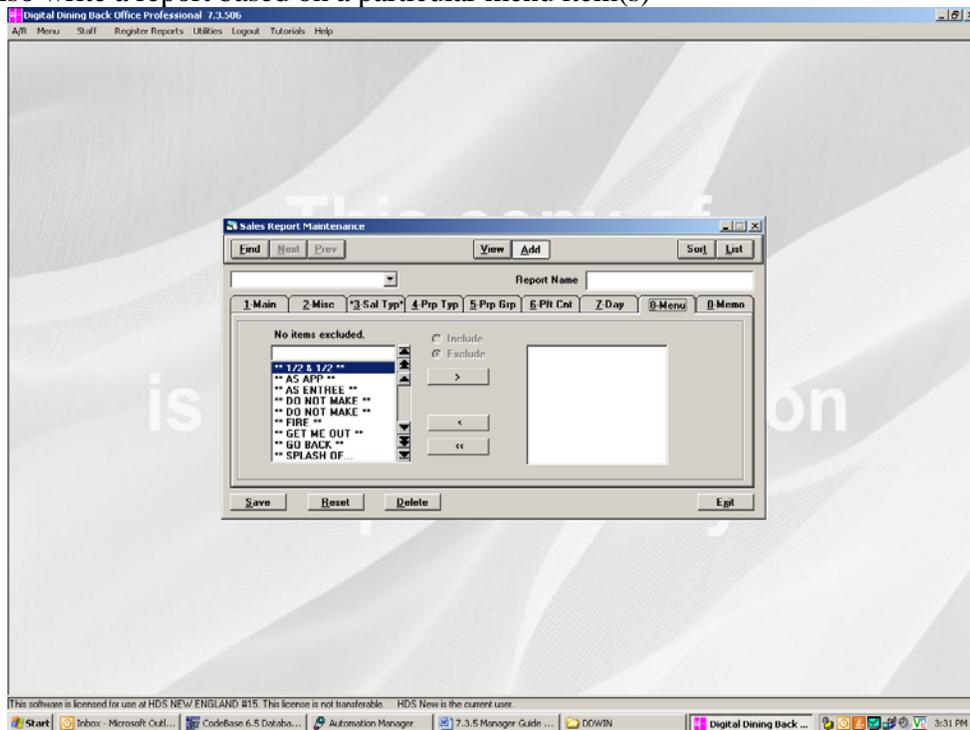


Set the report for the type of information you would like to see.

Next, click on the **Sales Type** tab and decide which types you want to include or exclude.
 For example, if you are creating a report for food, exclude beer, wine and liquor from the report.



You can also write a report based on a particular menu item(s)

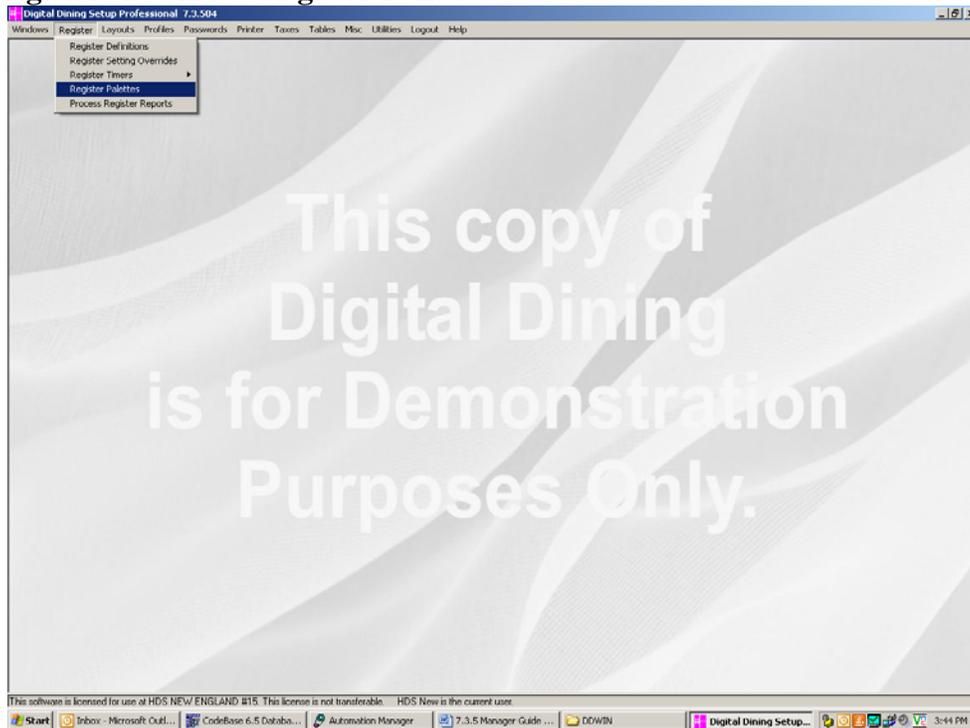


Simply use the find button to find the menu items you specifically want to include or exclude.
 When you are done defining the report click on **Save & Exit**

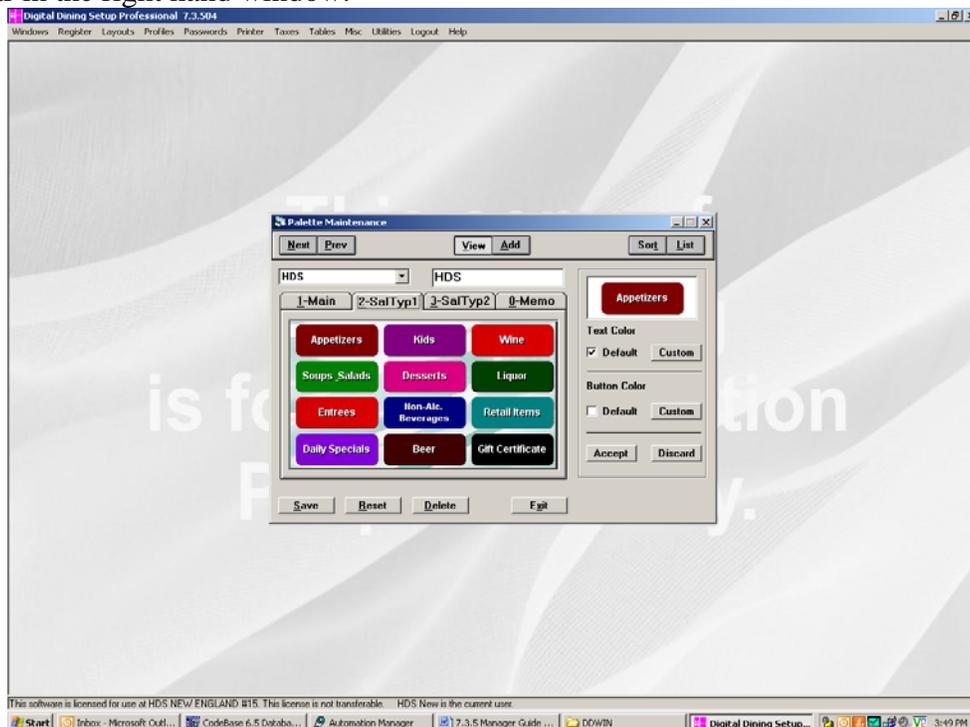
DEFINING COLOR PALLETS

In Setup

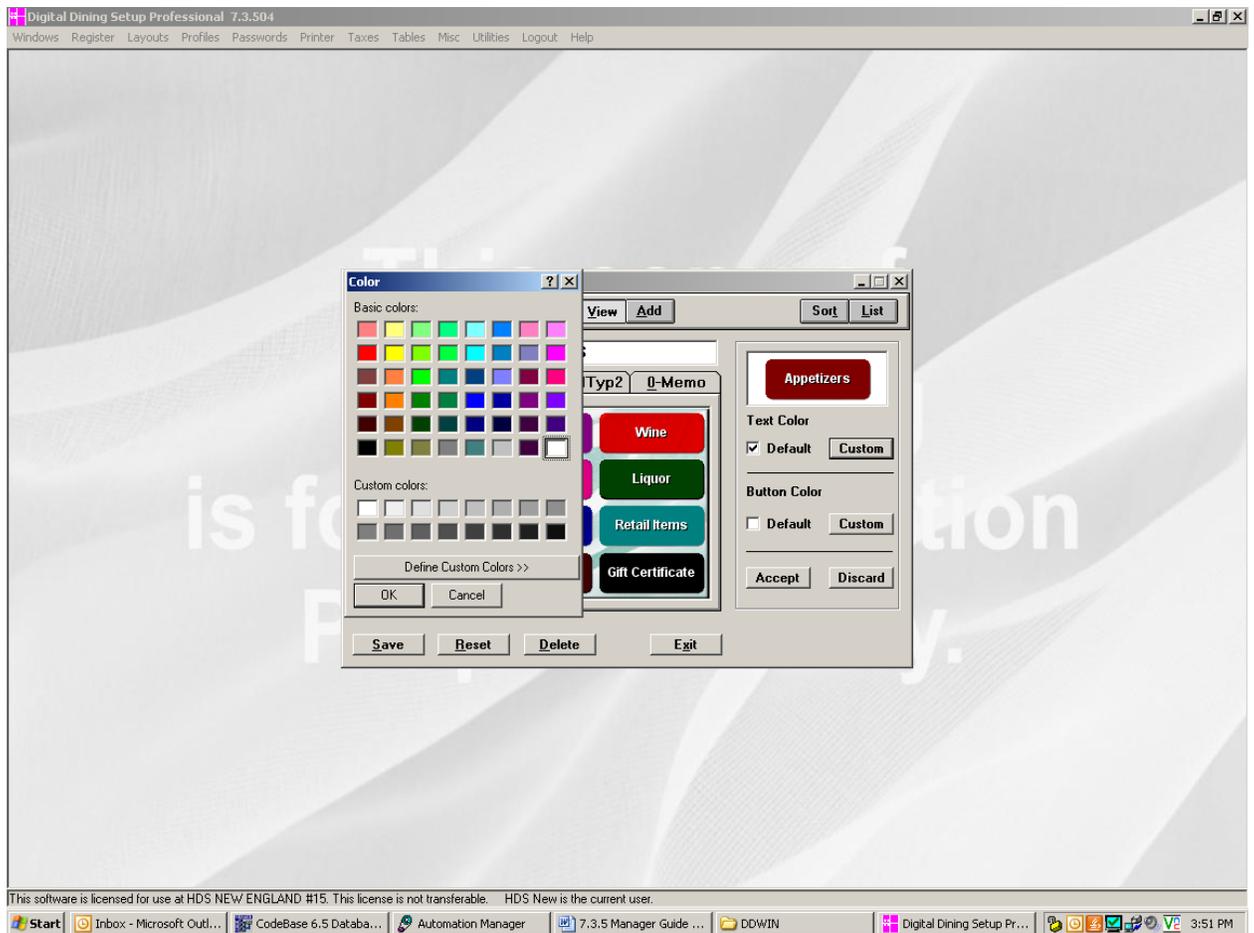
Click on **Register** and choose **Register Palettes**.



Find the pallet you want to change, click on the button that you want to change the color on, it will appear in the right hand window.



Click on **Custom** to change the text color or the button color.

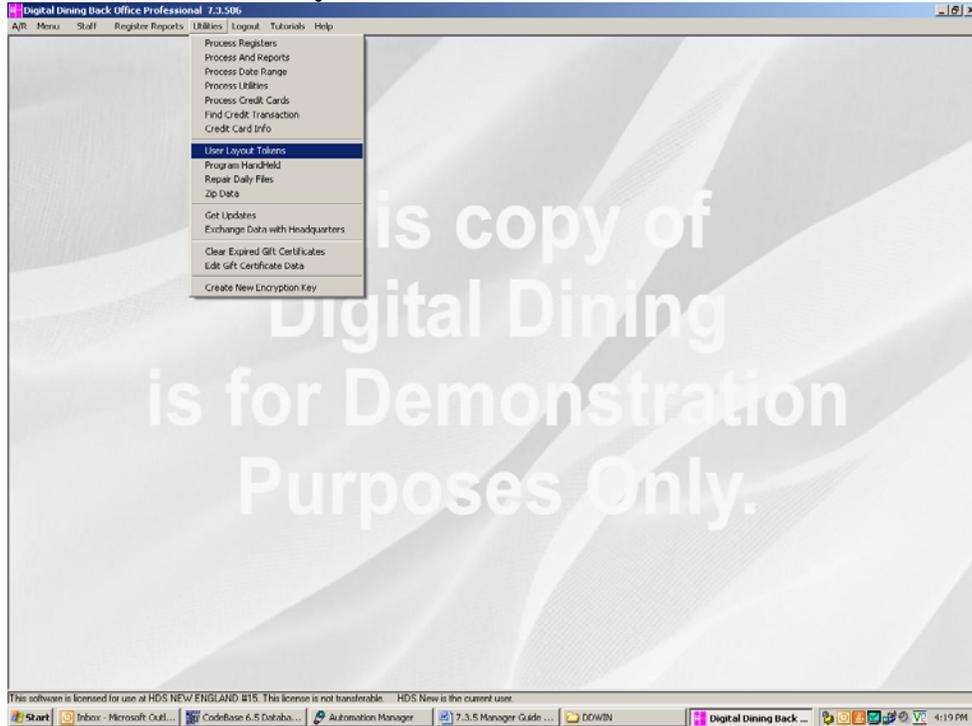


When you have chosen the colors you want click on **Save** and **Exit**.

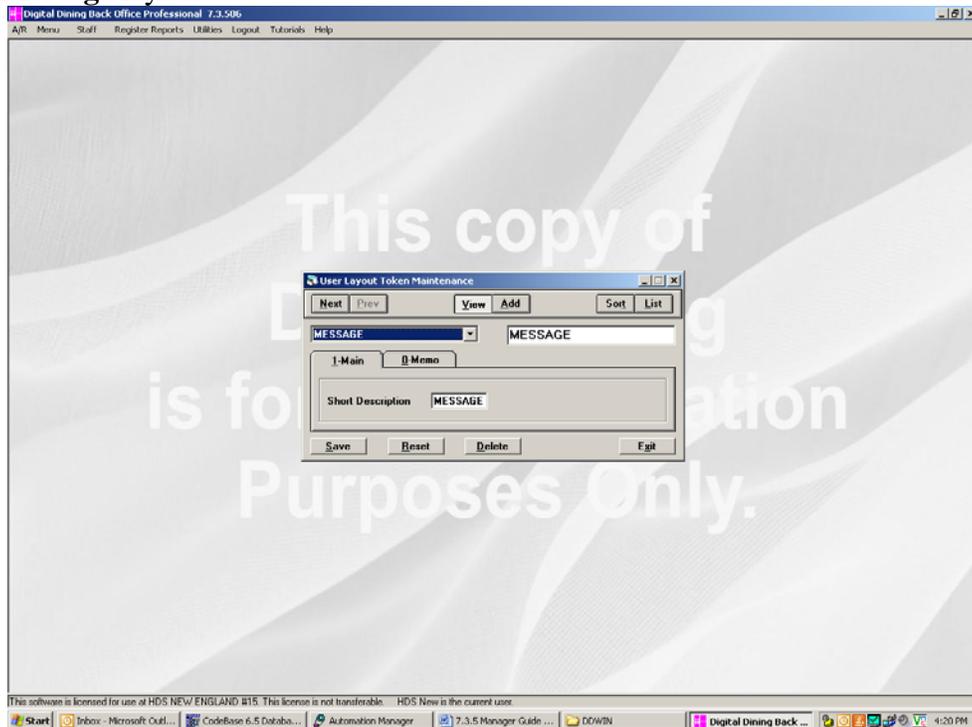
CHECK LAYOUT

In Back Office

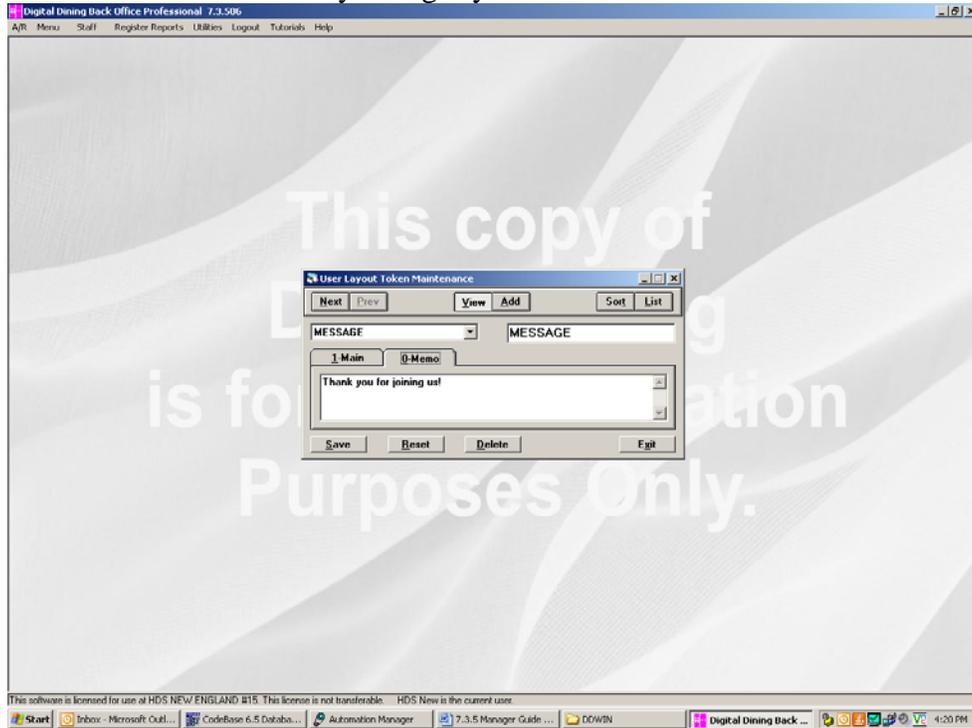
Choose **Utilities** and then **User Layout Tokens**.



Go to the **Message** layout



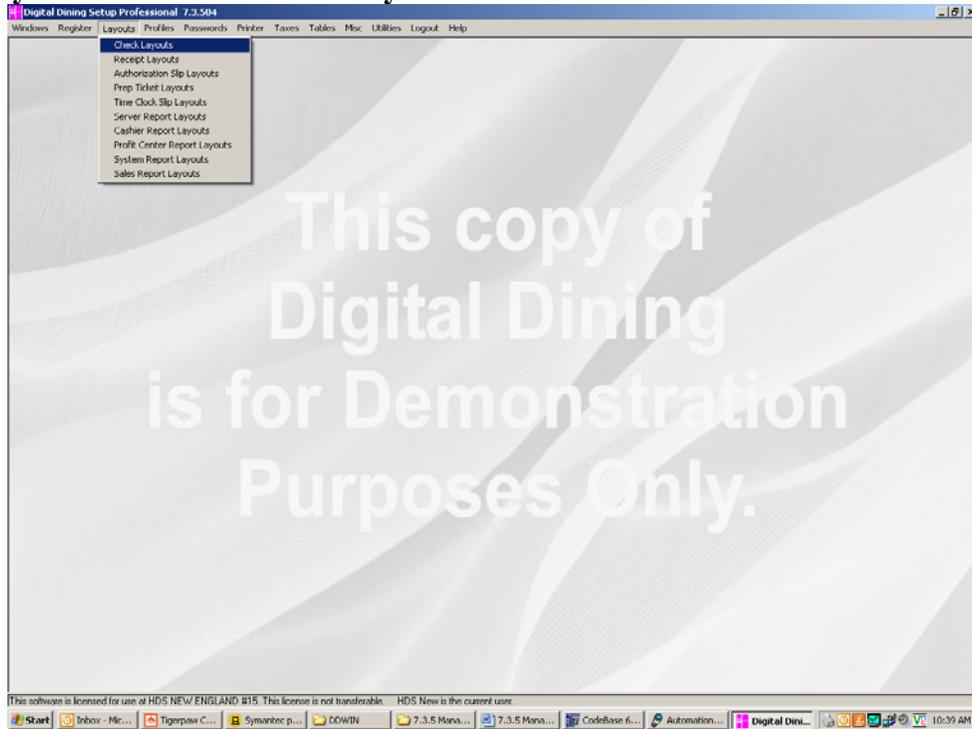
Click on the **Memo** tab and make any changes you want to make.



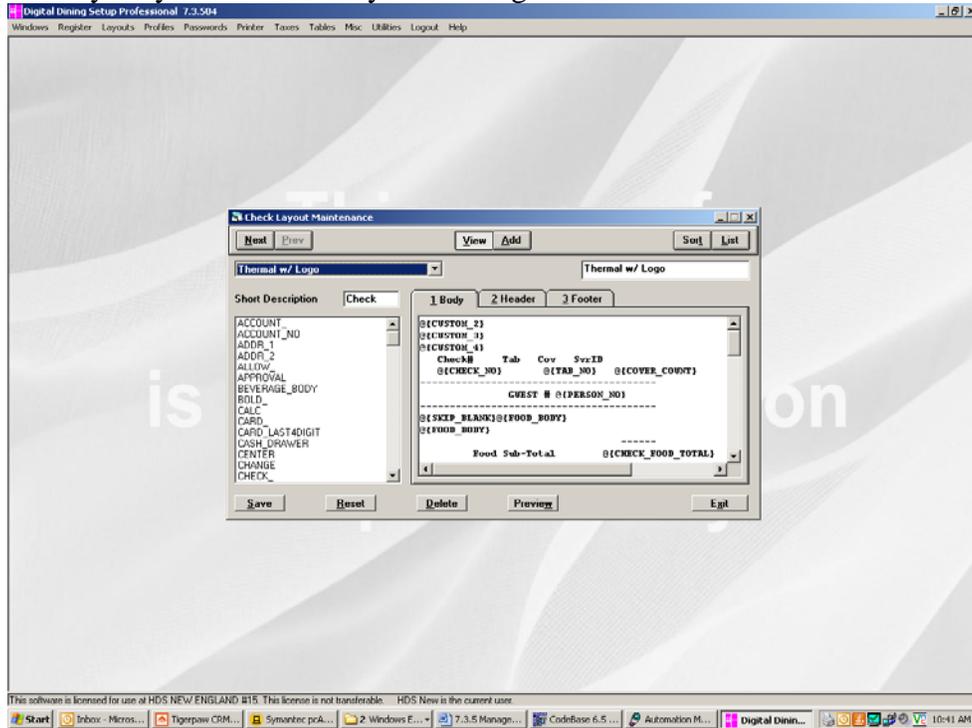
When you are satisfied, click **Save & Exit**.

In Setup

Choose **Layouts** then choose **Check Layouts**

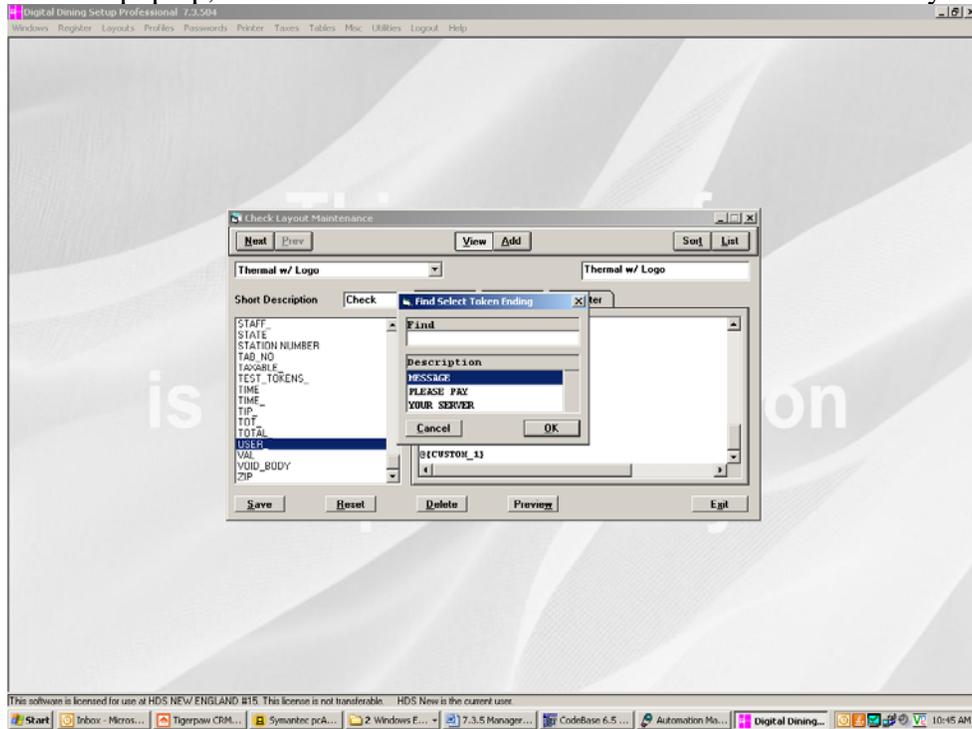


Find the check layout you want to add your message to



Scroll down to the bottom of the layout and find where you want to add your message, click the mouse to make the cursor blink.

On the left side of the screen you will see tokens, look for a token called "USER_" and double click it. A box will pop up, double click on "MESSAGE" to add the token to the layout.



Click on **Preview** to view your layout and check the spacing on your user message.

Click on **Save** and **Exit**.

You may have to restart your Print Server on the file server as well as the print server on all workstations. .

RESTARTING THE CREDIT CARD SERVER

1. Hold down the **CTRL** and the **ALT** keys and tap the **DELETE** key (the CTRL & the ALT keys are located on the bottom left corner of the keyboard - the DELETE key is located to the right of the ENTER key).
2. Click on **TASK MANAGER**; make sure you are on the Applications tab.
3. Highlight the **DDCDSRV1** then click **END TASK**.
4. Close **TASK MANAGER** by clicking on the “x” in the top right corner of the Task Manager box.
6. Click on the yellow Digital Dining folder, then double click on the icon labeled “**Credit Card Server**”. After about 20 seconds, an icon with a yellow cogwheel labeled “**DDCDSRV1**” should appear on the bottom of the screen.
7. Click on the **DDCDSRV1** icon and wait for the test box to read “**Ready**”.
8. Left click on the minimize button (the minus sign) in the top right corner of the screen.

If this does not get your credit cards to start authorizing, check to make sure you can access the internet from your Digital Dining computer. If you cannot, you will need to reboot your system and your router.

REBOOTING DIGITAL DINING

*** **WARNING:** This should be done ONLY at a time when your system can be taken down (i.e. first thing in the morning before you open). Follow these directions exactly!!!

At EVERY Workstation:

Touch **Exit Register** (enter manager ID & Password, if necessary)



Touch **Exit to OS** (enter manager ID & Password, if necessary)



Touch **DD Print Server** minimized on the bottom of the screen
Touch the X in the upper right hand corner of the Print Server box
Touch **Yes** to confirm that you do want to shut down the print server
Repeat for **ALL workstations**

Hint: Closing the Print Server can be tricky due to the small size of the X; try using the eraser on a pencil to touch the screen.

On the Office Computer (the file server):

To Restart Your Computer:

Click on **Start** in the lower left corner of the screen



Click on **Shut Down**



Choose **Restart** from the drop down menu
Click on **OK**
The computer will go through the restarting process

Go To Each Workstation:

Touch **Start** in the lower left corner of the screen
Touch **Shut Down**



Choose **Restart** from the drop down menu (*again, the eraser on a pencil makes it easier to touch this option*)
Touch **OK**
The workstation will restart itself, loading all of the programs necessary to run Digital Dining

SHUTTING DOWN DIGITAL DINING

At EVERY Workstation:

Touch **Exit Register** (enter manager ID & Password, if necessary)



Touch **Exit to OS** (enter manager ID & Password, if necessary)



Touch **DD Print Server** minimized on the bottom of the screen

Touch the X in the upper right hand corner of the Print Server box

Touch **Yes** to confirm that you do want to shut down the print server

Hint: Closing the Print Server can be tricky due to the small size of the X; try using the eraser on a pencil to touch the screen.

Touch **Start** in the lower left corner of the screen

Touch **Shut Down**



Choose **Shut Down** from the drop down menu (*again, the eraser on a pencil makes it easier to touch this option*)

Touch **OK**

The workstation will turn itself off.

Repeat for **ALL workstations**

On the Office Computer (the file server):

To Restart Your Computer:

Click on **Start** in the lower left corner of the screen



Click on **Shut Down**



Choose **Shut Down** from the drop down menu

Click on **OK**

The computer will shut itself off

To Restart Your Computer:

Hit the power button on your computer

The computer will automatically load all of the programs necessary to run Digital Dining.

Wait until the computer has loaded all of the Digital Dining programs on the bottom before proceeding to the next step.

Go To Each Workstation:

Turn the workstation back on.

The workstation will restart itself, loading all of the programs necessary to run Digital Dining