



System Options

Congratulations! You are almost ready to use your new system. You may change your mind with some of these settings later, but this initial questionnaire will help us get your system set up to your specifications. Please go through this guide and email it to info@microsale.net.

Taxes

Please check your local state tax laws to ensure accuracy.

1. What is your state tax rate?
_____ %
2. Do you have any other tax rates or settings that need to be accommodated?
____ Yes ____ No
If yes, please provide more detail:

Alcohol Tax

Please check your local state tax laws to ensure accuracy. If you do not have alcohol, please skip this section.

1. **Do alcoholic items need to include tax in the price of the item (tax inclusive)?**
Example of a tax inclusive item: A customer is charged a flat \$3.00 for a Budweiser. With a tax rate of 7%, the \$3 Budweiser was actually sold at \$2.80 and collected \$.20 in tax.
____ Yes, include the tax in the price of the menu item
____ No, have the tax charge in addition to the price of the menu item
2. **Does the sales tax of alcoholic items need to be reported separately from food sales?**
____ Yes, separate out the food tax from alcohol tax
____ No, all sales tax can be reported together
3. **Does your state charge taxes based on type of alcohol? Such as Beer Tax, Liquor Tax?**
____ Yes
____ No
If yes, please provide a list of taxes.

Tips

If you do not accept tips, please skip this section.

1. Do employees collect their tips at the end of every night? Or, do you withhold employees' tips for payroll?

Employees collect their tips at the end of their shift.

The restaurant collects and withholds the tips, the employees then receive their tips on their paycheck.

2. Does your staff tip out other staff members? Such as server tips out a bartender 2% of alcohol sales?

Yes No

If yes, please provide a detailed description on how the tip out needs work.

3. Do you want the system to automatically calculate this for you?

Yes No

4. Do you need "group audits", where tips are shared between groups of employees? Such as all bartenders share their tips, servers share floor tips, etc.

Yes No

If yes, does staff share tips by specific section or job? Such as all bartenders in the "Patio" share tips? Please provide a detailed description on how your tip share works.

5. Do you want the system to prevent tips over a certain percentage to be entered without manager approval? If yes, what percentage?

Yes % or higher

No

Payments

1. **Will you be using integrated credit card processing or stand-beside devices?** Integrated processing means that the POS system communicates directly with the devices; you can do tips, voids, refunds, and batch charges through the POS. Stand-beside means that there will be no communication between the POS and credit card devices; payment totals must be manually entered into the device.
 Integrated payment processing
 Stand-beside processing (no communication between the POS and payment devices)

2. **If you have not done so already, please request the processor to send support@microsale.net your VAR Sheet (merchant information used to process payments with the processor and deposit funds to your bank account).**
 VAR Sheet has been submitted

3. **Would you like pay at the table functionality?** This is where an employee brings the payment device directly to the customer to pay for the check. *Please check with your processor for available devices.*
 Yes No

4. **Would you like to enable QR Payments?** This feature prints a QR code on the customer receipt where a customer can tip and pay through their smartphone. [For more information on QR Payments, please click here.](#)
 Yes No

5. **Will you be utilizing [Cash Discounting](#)?**
 Yes No

Types of cash discounting:

1. **Do you want to add a surcharge to customers who pay by credit card?**

Warning: This feature is dependent on your credit card processor and affects your processing contract. Please contact your processor before answering this question.

Yes. What is the surcharge percentage? ____%

No

2. **Do you want to provide a true discount to customers who pay with cash?**

Yes. What is the discount percentage? ____%

No

If you want to provide an actual 'discount' to cash paying customers, please make sure your menu item prices are adjusted accordingly.

Close Out Settings

1. Do you want the system to automatically run the close out and batch your credit cards?

Yes. What is the discount percentage? ____%

No

2. If yes, what time do you want your batch to send? (Please allow ample time for your staff to enter in tips. Once the batch is sent to the processor, you cannot add tips).

The latest time my restaurant closes is: *(if you close at 11pm on Sundays and 3am on Saturdays, please write in 3am)*

Batch the credit cards at this time:

3. Do you want PDF reports to automatically email out after the close out is ran? If yes, what email addresses are needed?

Yes. Please email the nightly reports to the following email addresses:

No

**4. Do you want the system to automatically clock everyone out when the close out is ran?
Not recommended: if employees forget to clock out earlier in the day, the employee is paid until the system automatically closes**

Yes No

Gift Cards

1. Do you offer gift cards?

Yes No

2. Do you want to use MicroSale's internal gift cards or will you be using a third-party company such as Valutech?

Internal gift cards (gift card accounts are stored locally in the POS; no transaction fees or monthly fees).

Third-party hosted gift cards (processing gift cards through companies such as Valutech or gift cards provided and hosted by your credit card processor)

Customer Receipts

1. Do you want a receipt to print after each sale or would you like to print a receipt only if needed?

Print a customer receipt after each sale.

Only print a receipt when needed (this option means that you will manually select "Print Receipt").

2. Do you want your restaurant logo to appear on the top of the receipt?

If yes, please provide a copy of your monochrome (black/white) logo.

Yes, include my logo on the top of the receipt.

No, only print the restaurant name and address.

3. What is your restaurant phone number?

4. Do you want suggested tip amount calculations to print? If yes, what three suggested amounts would you like to show?

_____ % _____ % _____ %

5. Do you want menu items without a price to print on the customer receipt (such as "Tap Water")?

Yes, print all items on the receipt.

No, only print items with a price.

6. Do you want all modifiers to print of the customer receipt or modifiers with upcharges only? *Only printing modifiers with upcharges makes your receipts significantly shorter and saves receipt paper.*

Print all modifiers on the customer receipt

Print only modifiers that incur an upcharge

7. Do you want to consolidate like items together on the receipt? Such as 2 Cokes; 1 Coke, 1 Coke)?

Yes, consolidate items together.

No, separately itemize each item on the customer receipt.

Kitchen and Bar Printing

1. Does your restaurant have kitchen/bar printers?

___ Yes ___ No

2. If you have more than one kitchen printer, what are the printer names or prep area names? Such as "Cold Printer", "Pizza Printer", etc.

Take-out orders

Manage all takeout in one place – pickup, delivery and online orders. View in real-time from a single, consolidated screen. Release orders to the kitchen immediately or have them release automatically 20 minutes (or your set production time) prior to the pickup/delivery time to ensure an order is never forgotten.

1. Do you accept take-out orders over the phone?

Yes No

2. Do you allow dine-in happy hour prices for take-out orders?

Yes No

3. Do you offer online ordering? MicroSale is partnered with Click4aMeal, OLO, OnlineOrdersNOW, and AtWare.

Yes No

4. Do you want to install an integrated Caller ID system?

Using integrated Caller ID through *Whozz Calling*, repeat customer's information auto-populates for quick reentry.

Yes No

If yes, please contact your sales representative for a quote on the Whozz Calling Caller ID box.

Third-party Delivery Options

1. Do you offer delivery services through third-party services such as UberEats, Grubhub, Postmates, etc.? If yes, which ones?

Yes, we offer delivery through the following services: _____

No

In-house Delivery Options

This delivery section is only for restaurants that are using in-house delivery.

2. Do you offer delivery services through your restaurant (where your employee(s) are the dispatched driver)?

Yes No

3. What is your delivery fee? Do you charge different amounts based on drive time or distance from the restaurant?

If you charge different amounts, please list out each amount based on the drive time or distance.

\$ _____

4. Do you split the delivery fee with the driver? If so, what is the dollar amount or percentage that is shared?

\$ _____ or _____%

Table Service & Bar Settings

If you are a quick service restaurant (where customers order and pay at the counter), please skip this section.

- 1. Do you want to use a table layout?** (graphical layout of your restaurant used for servers to start a check by selecting a table):

Yes No

If yes, please provide a diagram or sketch of your layout with table numbers. *Feel free to hand draw your layout, take a picture, and email it to us.*

- 2. Do you want the ability to start multiple, independent checks on one table?** (useful for communal tables or parties where multiple servers share one table. This feature allows multiple servers to access independent checks assigned to the same table).

Yes No

- 3. At the start of a new table, do you want the system to prompt to attach a credit card?** (useful in bars, breweries where you may want to pre-authorize a credit card to prevent walk outs).

Yes No

- 4. Do you want the table to prompt # in party?**

Yes No

- 5. Do you want automatic gratuity based on a certain number of people in the party? If yes, what is the percentage?**

Yes %

No

- 6. Do you want to set drink requirements?** Where one drink must be entered for every person in the party? If yes, the drink requirement must be fulfilled before staff can send the order to the kitchen.

Yes No

Server Banking Options & Additional Settings

- 1. Will servers bank their own money?**

Yes No

- 2. Do you want to have a "hold item" function?**

Yes No

Do you want to use the feature of putting item(s) on hold for a specific number of minutes? (prompts a timer; allows held items to automatically fire after x amount of minutes)

Yes No

Bar Settings (POS terminals that will be used exclusively behind the bar)

1. Do bartenders share cash drawers?

Yes No

2. Do bartenders use a generic login number such as "PM Bar" or do they need to log in using their own, unique log in number?

Yes No

3. Do you want the ability to start a tab with a customer's credit card and hold the card data in the system?

Yes No

Warning: This feature is dependent on your credit card processor. Not all providers support preauthorization. Please double check with your processor before answering this question. Enabling the feature in the software without the processor's support will result in loss of credit card charges.

Order screen options

1. When an employee exits an active check, do you want the system to log out to go back to the ID screen or do you want it to stay logged in and go back to the table layout screen/server screen?

Yes No

2. Do you want the system to automatically logout after a certain amount of time? Or do you want the system to stay on the order screen indefinitely?

 Recommendation

For bar terminals where multiple bartenders use the same register, it is best to keep the order screen open. For table service terminals, it is best to log the employee out to prevent another employee from inadvertently ringing in an order under a different server's number.

Yes No

Quick Service Settings

- 1. Does your cashier need to take the customer's name? If so, should this be prompted at the beginning or end of the order?**

Yes No

If yes, do you want it to prompt at the beginning or end of the order?

Beginning of the order

End of the order

- 2. Do you want the kitchen ticket to print before payment is accepted or only print after payment has been accepted?**

Yes No

- 3. Do you have a drive thru? If yes, do you have a computer that will be assigned to a drive thru?**

Yes No

- 4. Do you want employees to start their own sales audit?**

Yes No

- 5. Do you want employees to close their own sales audit?**

Yes No

- 6. Do you want only employees assigned to the cash drawer to access the order screen? Or, can all employees use the computer and/or cash drawer?**

Yes No

- 7. Do you have a Drive-Thru?**

Yes No

If yes, do you have a terminal specifically assigned to the Drive-Thru?

Yes No

- 1. Do you have Dual Windows?**

Yes No

- 2. Dual Lanes?**

Yes No

- 8. Should orders print after the check is printed or when the cashier is on the order screen? (If you choose to have the items print to the kitchen after the guest check is printed, it slows down production time)**

Print when cashier is on the tender screen

Print to the kitchen after guest check is printed and is paid

9. Should cashiers open and close their own audits?

Yes No

10. Do you want all credit card slips to print?

Yes No

11. Do you want credit card slips to print if the check is over a certain amount? What should that amount be?

\$_____

Cabling

1. For credit card security, MicroSale's network must be isolated; only the POS equipment (computers and credit card devices) should be connected to the switch.
2. WiFi must be segregated from the public wifi and linked to the POS LAN network.
3. A network cable must be ran for each POS terminal and for any peripheral that requires a network connection (this includes EMV devices, kitchen and/or bar printers, and kitchen video systems).

Important

You can contract the IT company of your choice or you can use MicroSale's services. If you have any questions, please let us know. It is vital that the cabling is completed prior to installation.

___ Yes, cabling is complete.

___ Cabling is not yet complete, but the cabling has been scheduled.

___ Cabling is not complete and I do not know who to contact. Please have a MicroSale representative contact me to discuss my options.

Please sign and return the questionnaire to support@microsale.net and/or info@microsale.net.

I have reviewed this questionnaire and have answered it to the best of my knowledge. I understand that my responses here will directly affect the settings in the POS system.

Signature: _____ Date: _____

Thank you for your time. We look forward to serving you!