



How-To: Build your Menu – a condensed manual

MicroSale Version 9 [2019]

For the full Menu Programming Guide, please visit www.microsale.net/help

How-To: Build your Menu

Thank you for purchasing a MicroSale system.

This document will walk you through the steps involved in setting up your menu. We recommend reading through this document before getting started to familiarize yourself with the MicroSale terminology. Once you are familiar with the basic menu concepts, you can start creating your menu using the printed or online menu available to your guests as a reference guide. We recommend to use the names and terminology that match your menu ("Appetizers", "Starters", etc.).

Please have a keyboard and mouse attached when you are ready to start programming your menu.

KEY: **Blue text** indicates helpful notes

Part 1 – Creating Departments

Departments are large categories, or generic group names, assigned to each menu item. Departments are used in nearly all reports so restaurants can see Food sales vs. Alcohol sales or Food sales vs. Drink sales.

- Enter your ID number and select **Manager Menu**



2 Select **Menu Maintenance**



3. Select Department Menu



The Department Screen

There are typically less than four departments per menu; Keep in mind, menu items are also grouped by category (appetizers, entrees, etc.), so the departments will be broad.

Departments for restaurants with alcohol are typically Food, Alcohol, and NA Drinks. Restaurants without alcohol are typically Food and Drinks.

1. Type in a *Department Name* Example: Food
2. **Choose a Remote Printer** for the miscellaneous items of this department, such as "Kitchen"
3. Select **Save**
4. Repeat until Completed

A screenshot of the 'Department Screen'. The interface is divided into several sections. On the left, there is a 'Department Name' section with fields for 'Department Name' (dropdown), 'Master Department' (dropdown), 'Department Id' (text input with value '0'), and 'Qualifies for EBT' (checkbox). Below this is a 'Choose Remote Printer' section with dropdown menus for 'Remote Printer 1' through 'Remote Printer 6'. To the right is a 'Timed Event Pricing' section with dropdown menus for 'Timed Event 1' through 'Timed Event 5'. At the bottom are several buttons: 'QSR Categories' (yellow), 'Master Department' (yellow), 'Save' (purple), 'Remove' (red), and 'Exit' (red with a blue icon).

Part 2 – Creating Categories

4. Enter your ID number and select Manager Menu



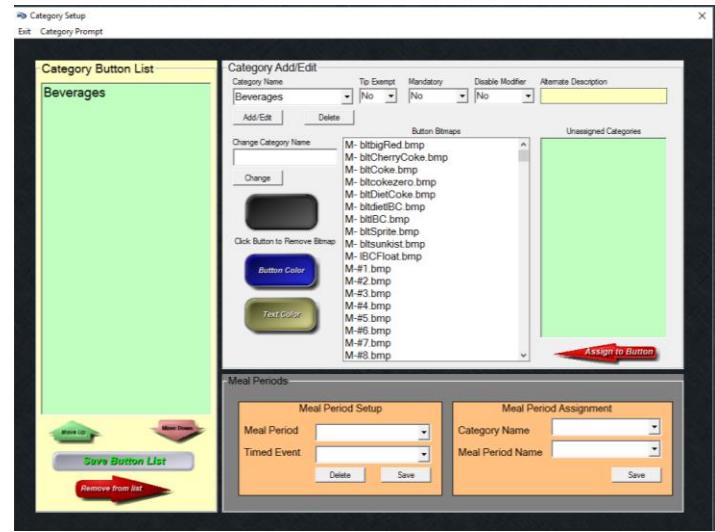
5. Select Menu Maintenance



6. Select Menu Category



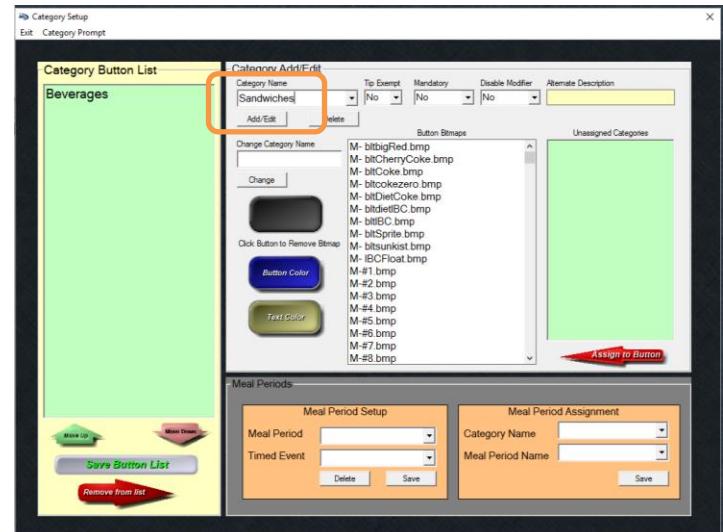
The Category Setup Screen



7. Type in a new category name

What is a category?

A category is used to group similar menu items together for both the POS screens and for reports. Categories are typically the section names of your menu (such as appetizers, sandwiches / soups, desserts, etc.).



8. Select Add/Edit and then Yes to save.

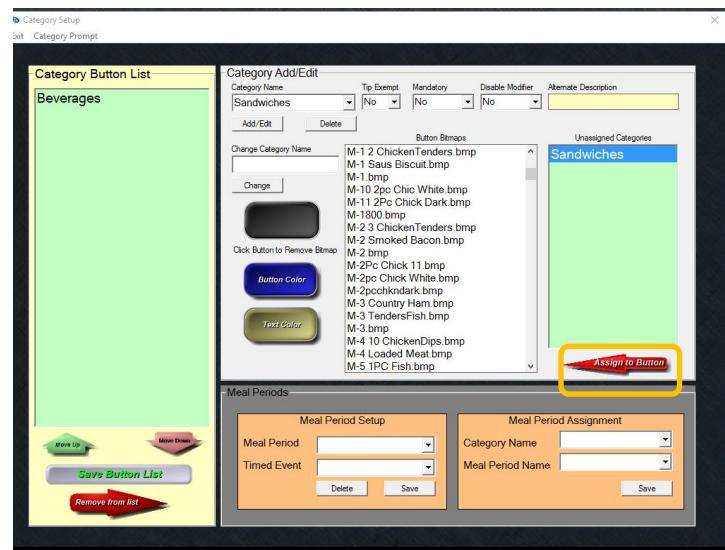


You should now see the category on the right side in the Unassigned Categories list.

9. Select the item so that it is highlighted, and select **Assign to Button**.

(you can have saved categories that do not appear on the screen – this is helpful if you have **rotating** or **seasonal** menus)

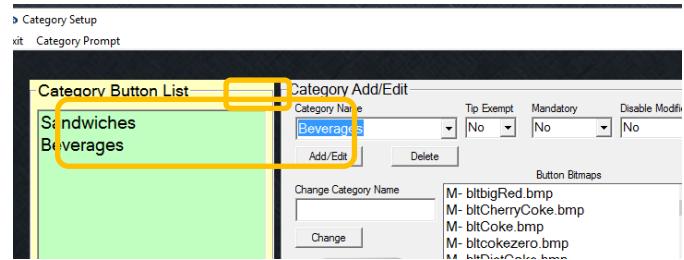
We recommend that you try to limit the number of categories to 9 or less for efficiency, but you can have as many categories as you would like.



Repeat steps 4-6 until you are done adding your categories – you can also come back to this screen and add more later.

If you want to change the order of the categories, select the category that you would like to move and select the **Move Up** or **Move Down** arrow.

If you change your mind and need to delete a category, select the drop down, select the category name, and select **Delete**



10. Select **Exit** when you are ready to leave the screen

Exit Category Prompt

Part 3 – Creating Menu Items

1. Select Menu Items and Pricing



The Menu Items and Pricing Screen

This screen is where all of your items will be created – think about the following questions as you look at the screen.

- What kind of item will I be adding?
- What category does this item fall into?
- What is this item: food, a beverage, or alcohol?
- How much are you selling this item for?
- Does this item need to print anywhere to be prepared (kitchen or bar ticket printer)?
- Can the customer modify this item? (such as meat temp, add toppings, etc)
 - Does this item come with a side item that should prompt on the screen?
- Is this item available for a happy hour price?

Creating a Hamburger or Similar Style Items

- 1. Type in your item. In this example, type in **Hamburger**.



2. Use the drop-downs to **select** the appropriate category and department name.

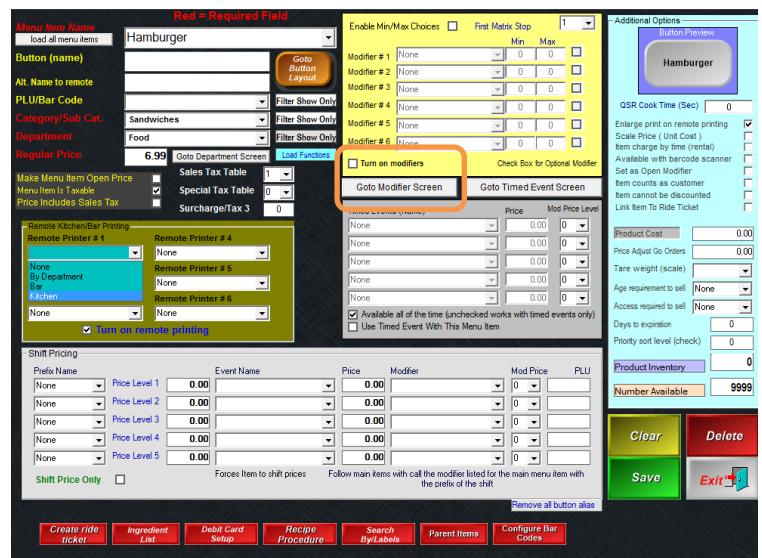
3. Type in a **Regular Price**

4. If this item needs to print in the kitchen, select **Turn on Remote Printing** and select **Kitchen** in the **Remote Printer #1** box.

If this item does not get modified and does not have a happy hour, go ahead and select **Save**. You can also save it and make changes at a later time.

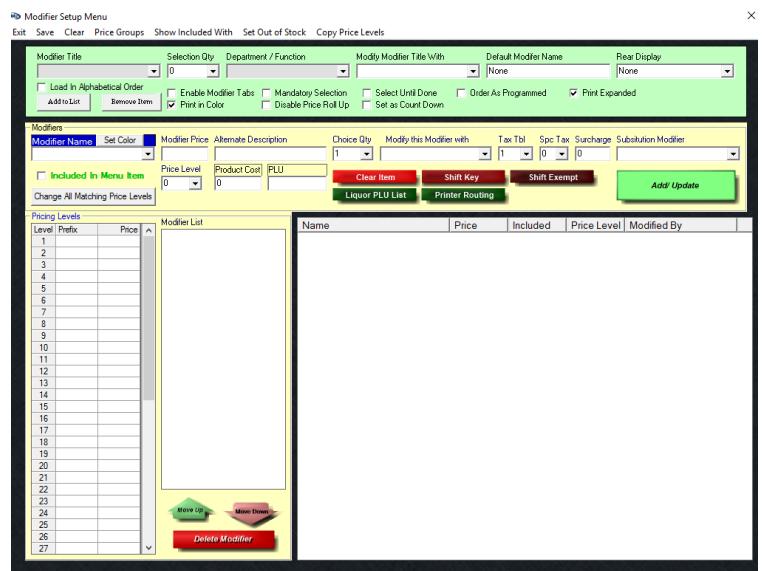
Part 4 – Creating Modifiers for Menu Items

5. If you need to create modifiers for an item – select “**Goto Modifier Screen**”

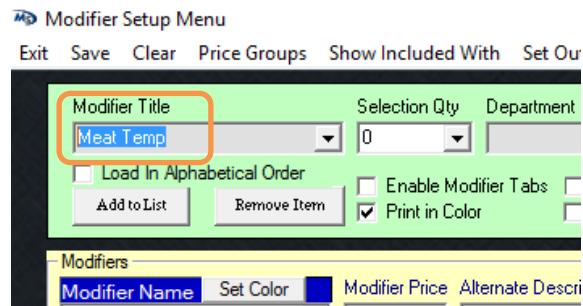


6. Create a **Modifier Title**

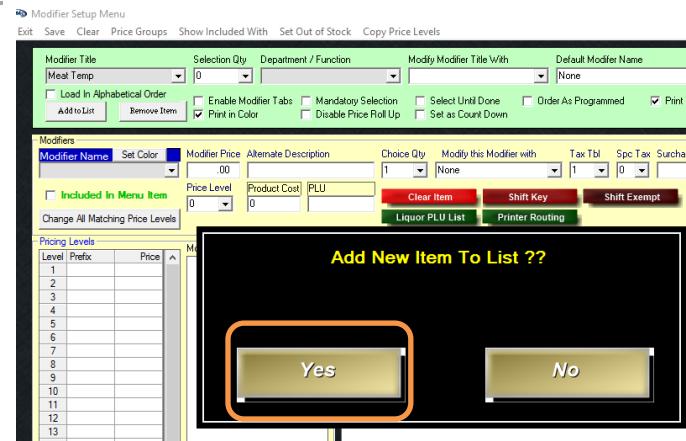
A modifier title is used to group similar modifier names together. Each **Modifier Title** will contain a list of one or more choices.



7. Type in a title appropriate for this group of modifier names – such as **Meat Temp**



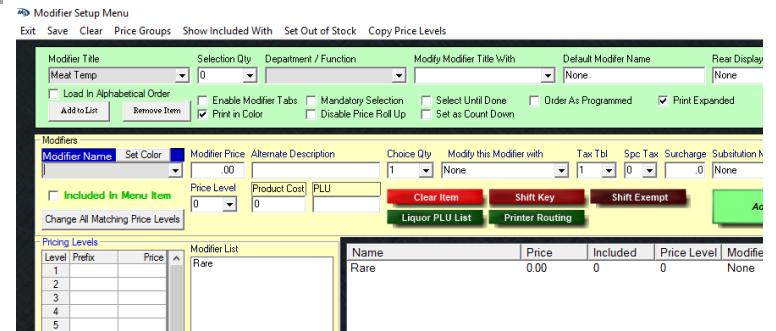
8. Click in the box under Modifier Name (Select Yes when it prompts “Add New Item to List”)



9. Type in a modifier name – such as Rare

10. Select Add/Update, assuming you do not want a price associated with this modifier name.

You should see the modifier name you just added in the white box.

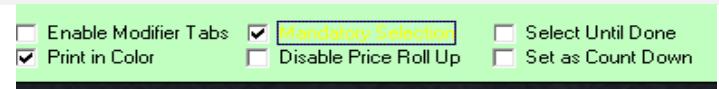


Continue adding modifier names until your list is complete – you can also save the modifier group and make changes later.

Before saving, think about the type of modifier group you created and answer the following questions –

- Do I want to force the cashier/server to select something on this screen? – if Yes, select **Mandatory Selection**.
- Do I want to allow the cashier/server to select as many modifier names as they want? If Yes, select **Select Until Done**. (If you want the screen to exit after one choice, leave the **Select Until Done** option unchecked.)

11. Select Save



While in the Modifier Setup screen, create a generic modifier group that will be used for all of your sandwiches or similar style items.

- Type in Modifier Title – such as **Sandwich Toppings**.

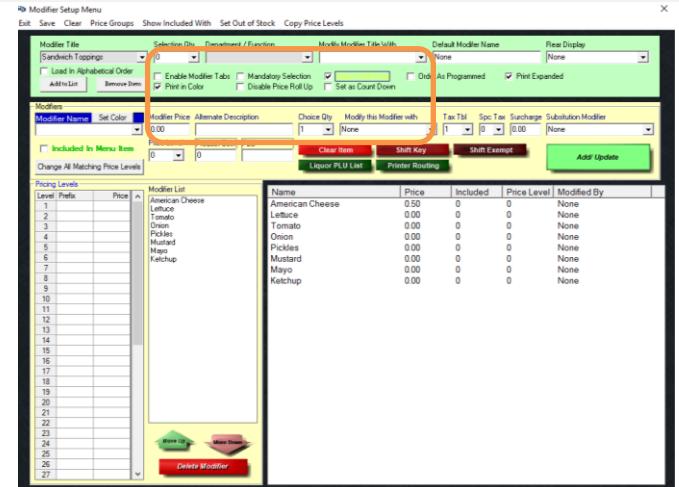
- Type in a **Modifier Name**, such as **American Cheese**.
- Type in a **Modifier Price** if the modifier name should have an upcharge.
- Select **Add/Update** – you should now see **American Cheese** at **.50** in the white box.



Continue to add modifier names until your list is completed.

When completed, decide if the group should be mandatory (where the cashier/server must select a modifier name before exiting the screen) and/or if the cashier/server can select as many toppings as they want before exiting the screen.

- With the toppings group, enable “Select Until Done” and do not make the group mandatory.



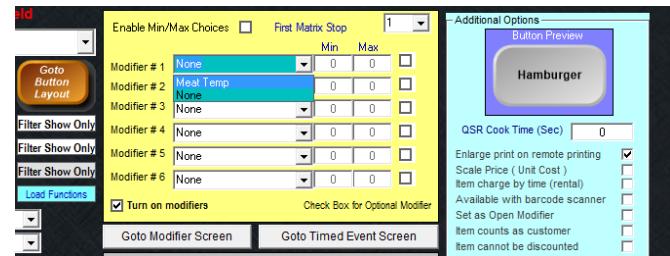
- Save and Exit.

Now that you have a modifier group built, you should be back on the screen with your menu item that you just created. If you do not see an item on the screen, press the dropdown and pull up an item.



- Select the option **Turn on Modifiers**

2. Next to **Modifier #1**, select the **Modifier Title** that is appropriate for this menu item.



If you want this modifier group to prompt as soon as the cashier/server selects this menu item, leave the **Optional Modifier** box unchecked.

Hint: You only want to prompt for modifier groups that are important to appear with the menu item such as meat temps, mandatory sides, other additions that are important for the kitchen to know, or additions that incur an extra cost.



If the **Optional Modifier** box is checked, it means that the modifier group will only show up if the cashier or server uses the **Modify Item** function button on the Order Screen.



3. Select **Save** when you are done.

Part 5 – Creating Happy Hours (and other Time-controlled Events)

You can program menu items to change price during a specific time and/day. Each menu item can have up to 6 prices (one regular and 5 timed events such as Happy Hour).

- From the Menu Maintenance screen, go to **Timed Events**



- Type in a descriptive name for your happy hour – Since you will only be able to see the Timed Event name that is connected to the menu item, you should use a name that represents the day and time that the happy hour occurs.

Try to use short designations or abbreviations when naming your Timed Events.



- Select a **Start Time** by clicking in the Start Time box – an Hour prompt will appear.

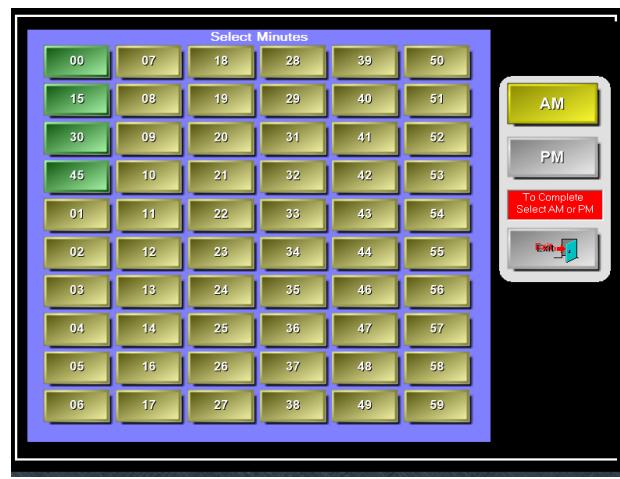


4. Then select **Minutes** – common denominations appear in green to the left.

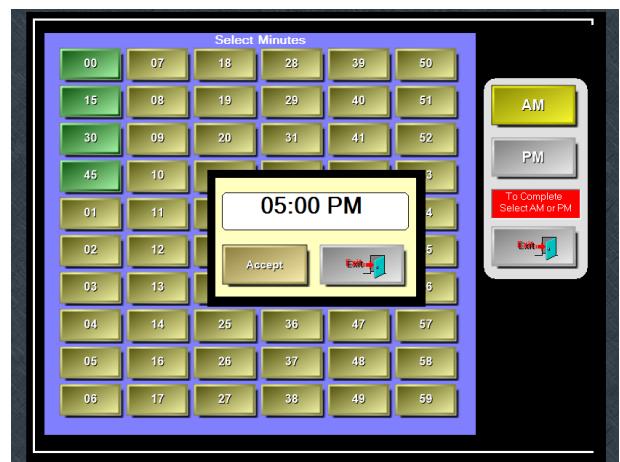
You can skip selecting “00” for the minutes, and simply select **AM** or **PM** after selecting the hour as shown in the next step.



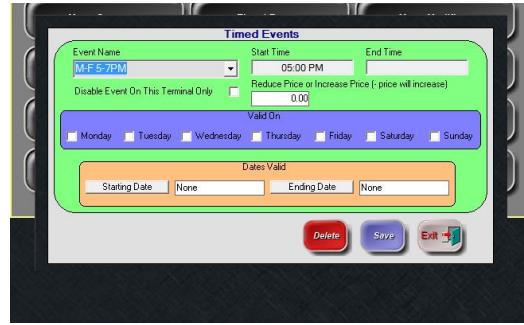
5. Select **AM** or **PM**



6. Ensure the time is correct and select **Accept**



7. Enter the **End Time** by repeating steps 3 – 6.

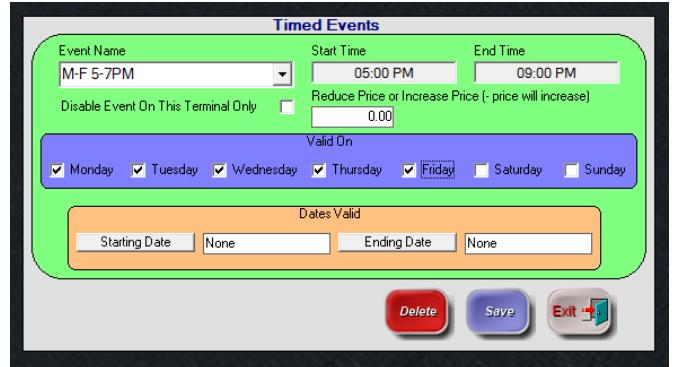


8. **Select the days** that this happy hour, or Timed Event, needs to be active.

IMPORTANT

If your happy hour, or Timed Event, runs after 12:00 AM, you do **not** need to select the following day – the system knows you are running the same business day up until the store closes even if that is not until 4am.

If you select the following day, the day selected will activate again during the Start Time and End Time.



You do not need to set “Dates Valid” – the timed event will be active every week on the selected days.

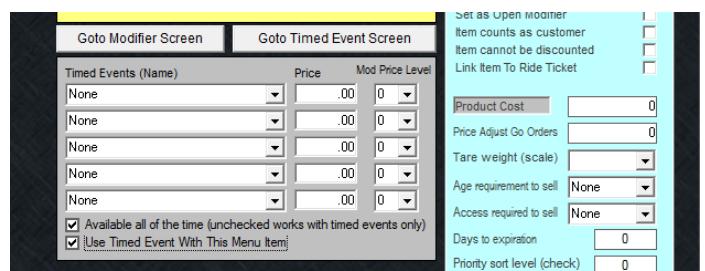
9. **Save** and then **Exit**

10. Now that your happy hour, or Timed Event, is created, you need to assign the Timed Event to a menu item.

11. **Go to Menu Items and Pricing**

12. **Select a Menu Item from the dropdown list.**

13. **Select Use Timed Event With this Menu Item**



14. Select the dropdown and choose the appropriate Timed Event name

Set as Open Modifier
 Item counts as customer
 Item cannot be discounted
 Link Item To Ride Ticket

Product Cost
 Price Adjust Go Orders
 Tare weight (scale)
 Age requirement to sell
 Access required to sell
 Days to expiration
 Priority sort level (check)

15. Type in the price that this item should be during the Timed Event

IMPORTANT

This is **not** a price *difference*. You need to type in the new total price for that menu item during the timed event. If the Regular Price is \$6.99, and the happy hour is \$1.00 off, type in \$5.99.

Item counts as customer
 Item cannot be discounted
 Link Item To Ride Ticket

Product Cost
 Price Adjust Go Orders
 Tare weight (scale)
 Age requirement to sell
 Access required to sell
 Days to expiration

16. Select **Save** and then Exit.

Part 6 – Shortcut for Creating Similar Menu Items

If you are adding similar menu items to one you have already built, pull up the existing menu item that is similar to your new item, and you can use it as a template for the new items.



1. Select **Hamburger** from the drop-down, and type a new menu item name over **Hamburger** (don't worry, you won't overwrite your Hamburger!)



2. Make other necessary changes such a new **price**, **remote printer** names, or **modifiers** and then select **Ctrl S** (Ctrl "Save") on your keyboard (pressing the buttons simultaneously)

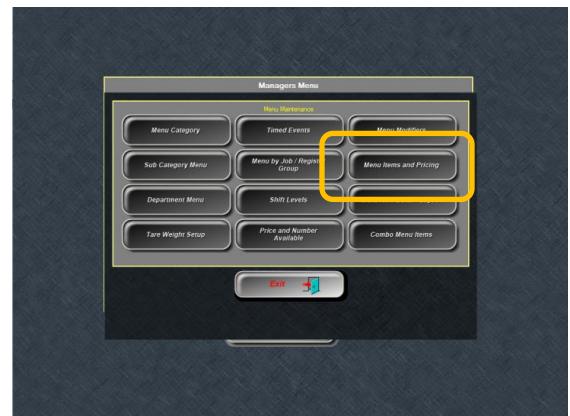
Ctrl S is a **shortcut** that allows the screen to keep all attributes to the menu item on the screen – it saves you time since you will not need to repeatedly choose the category, department, price, printers, and modifiers.



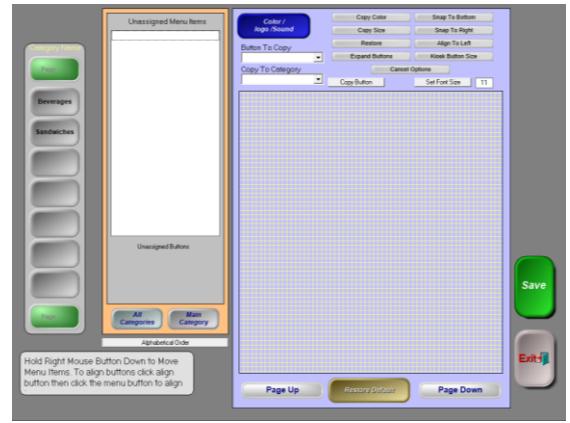
Continue adding menu items until you are finished.

Part 7 A – Creating Buttons for your Menu Items

1. Select Menu Item Button Layout



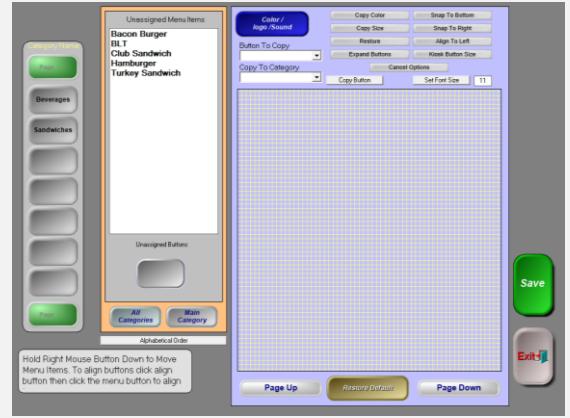
The Button Layout Screen



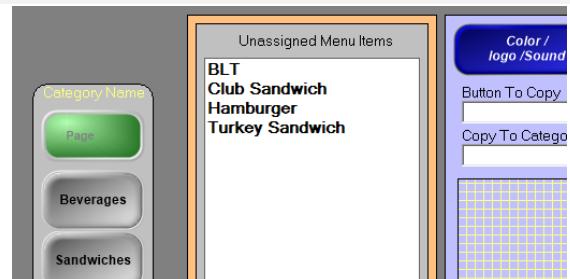
2. Select the appropriate category on the left side of the screen.

You should see all of your saved items in the white box under "Unassigned Menu Items".

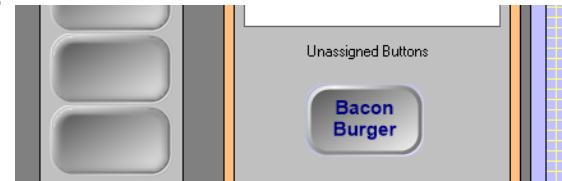
(Like categories, you can have menu items saved in the system without making them accessible on the Order Screen – this is useful for *rotating* specials or *seasonal* items).



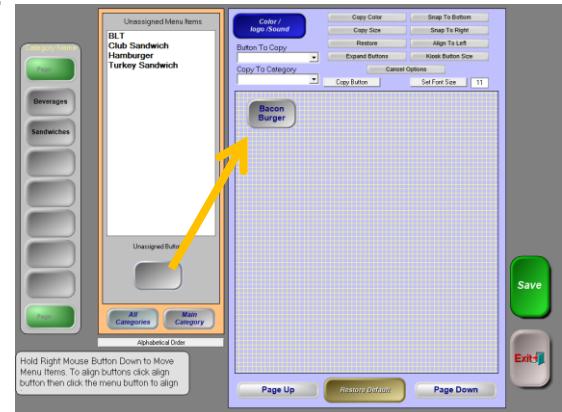
3. Select an item that you want to add to a button. (left click)



4. Add the menu item on an unassigned button (left click)

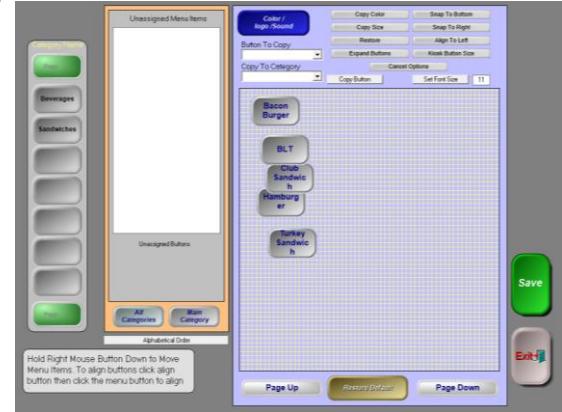


5. Drag the button to the screen (holding a right click)



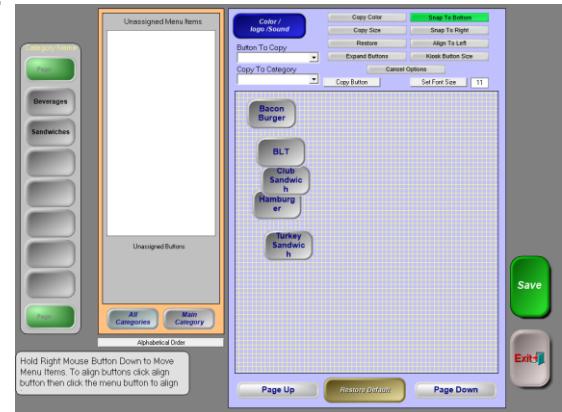
6. Continue until all items are on the screen

That looks messy, doesn't it? Let's straighten up the buttons!

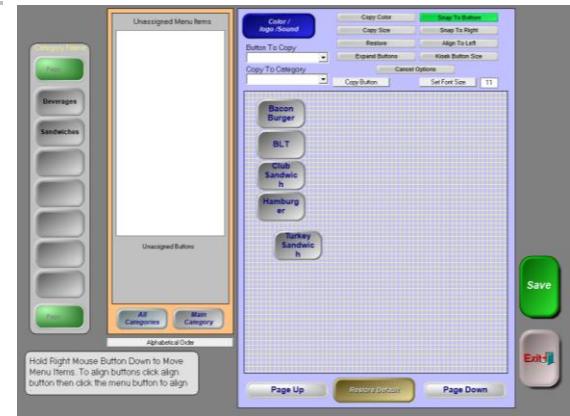


Use your top button as your 'axis' point – meaning this is your “base” menu item for alignment.

7. (Left Click) Select **Snap To Bottom**



8. **Left Click on your top button – in the example, Bacon Burger (the system now triggers this is your base item)**
Now left click on all items that you want to snap under it. If you mess up, select Cancel Options and start again.



Now your items should be perfectly aligned. When you are done aligning your buttons, select **Cancel Options** – otherwise the “Snap to Bottom” trigger will stay on.

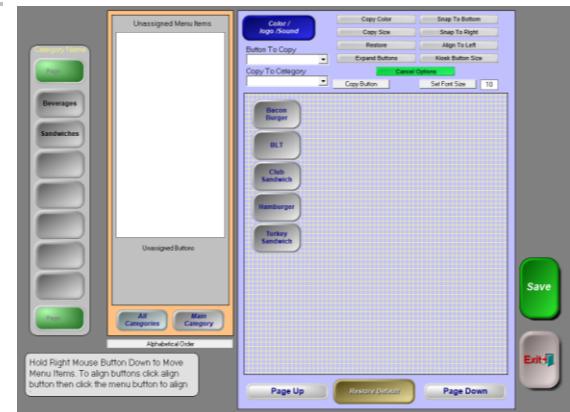
Is the text wrapping on the buttons?

Changing the font size will help.

1. Select Set Font Size – and type in 9 or 10 (11 is the default)



2. (left click) double click all buttons that should use a font size of 10.



3. Select **Save** when you are ready to leave the screen – if you select **Exit** first, you will lose your changes!!!

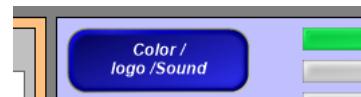
Part 7 B– Creating Buttons for your Menu Items (Additonal Options)

Changing Button Colors

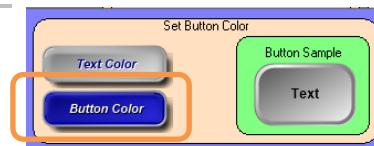
1. Select **Copy Color**



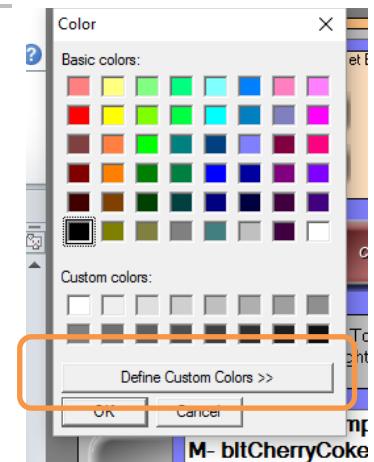
2. Select **Color / logo /Sound**



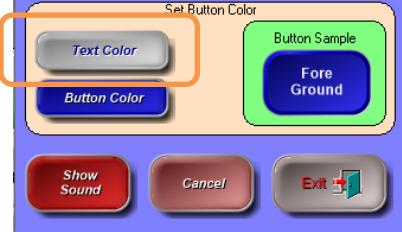
3. Select the **Button Color**



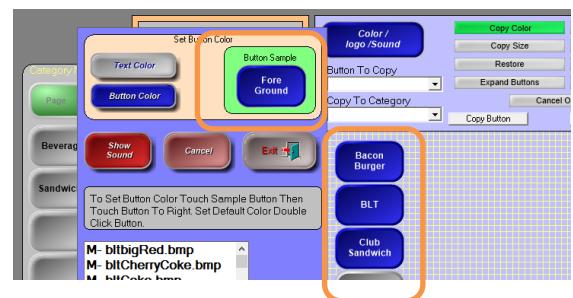
4. Choose a desired color, or select **Define Custom Colors >>** for more options



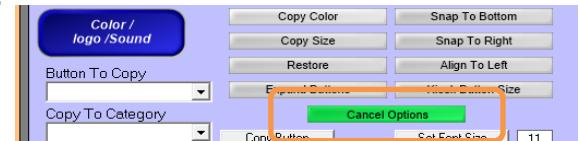
5. Select **Text Color** (if you do not change the text color, it will stay the default color of Navy Blue).



6. When you are satisfied with the button in the sample, (left click) select each of the buttons on the grid that should use the same attributes as the button sample.



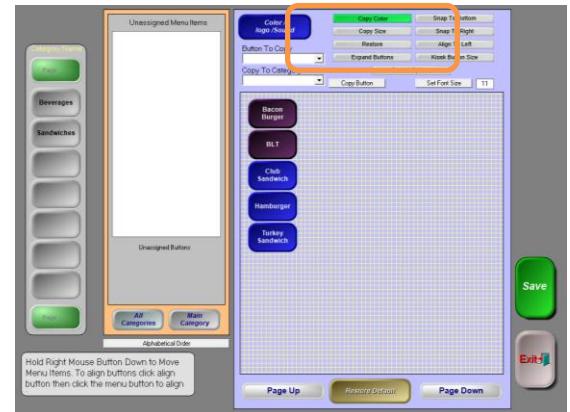
7. When you are done, select **Cancel Options**



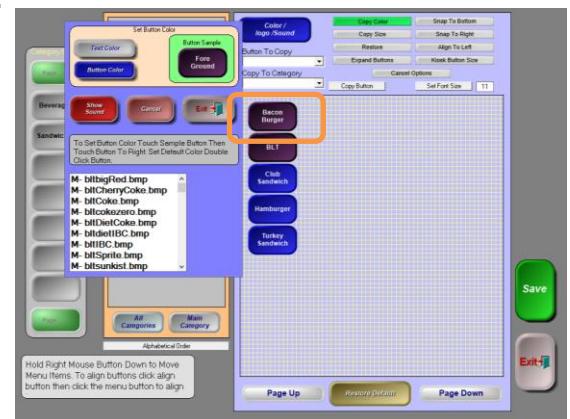
Copying Colors of Existing Buttons

Other than creating new colors, you can also copy existing buttons' colors onto new buttons. This is useful when you are adding new buttons to an existing screen.

1. Select **Copy Color**

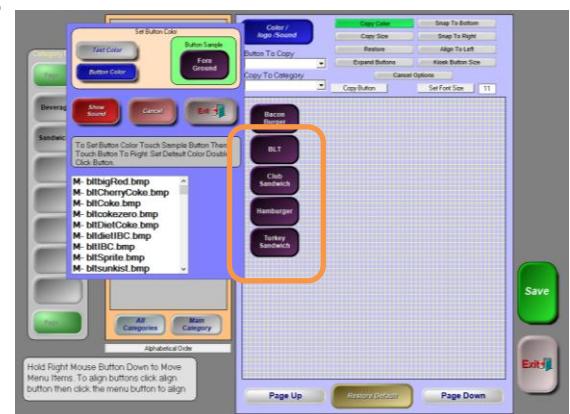


2. Select the button that you want to copy. *The Set Button Color window will appear.*



Ignore the window that appears.

3. Select (left click) the other buttons that you want to use the same color scheme as displayed on the Button Sample.



4. Once you are happy with your changes, select **Save** before Exiting.

Part 8 – Testing your Menu

1. To test your new menu, select **Exit** to leave the Menu Maintenance screen.



2. Then select **Go Back** to leave the Managers Menu screen.



Once you are on the **ID Screen**, log into the **Order Screen** (enter your login number and press OK). If you do not have an audit, you will need to start one in order to ring in your test sales.

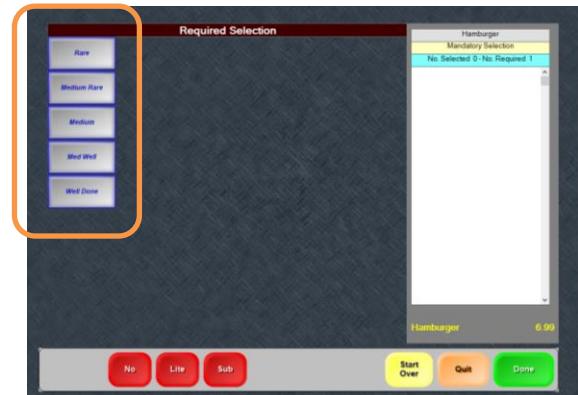
Managers Menu > Sales Audit > Choose your name –If you need further clarification, please reference the ‘starting an audit’ training document.

From the Order Screen, select the category that you wish to test.

1. Select “Hamburger” to test your modifier groups to ensure they are working correctly.



2. Your first prompt will be to choose the **Meat Temp**

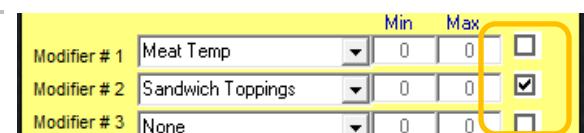


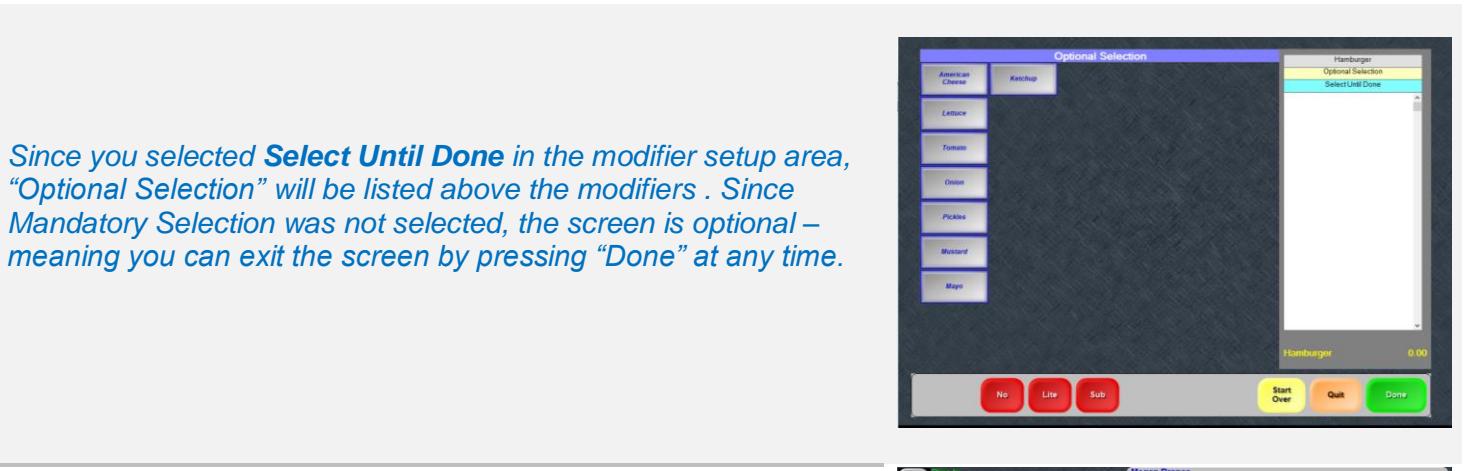
Back in the setup, you selected Mandatory Selection, which you will see at the top “Required Selection” and No. Required is 1 (If select until done is NOT checked, you will only get one choice.)

3. After selecting a temp, you will be put back on the Order Screen and will see your Hamburger on the virtual check along with the selected modifiers.



4. If you need to further modify this item, select **Modify Item** (this will prompt *Sandwich Toppings* – remember, this is triggered from the checkmark next to the modifier title on the Menu Items and Pricing Screen.)





Since you selected **Select Until Done** in the modifier setup area, “Optional Selection” will be listed above the modifiers. Since **Mandatory Selection** was not selected, the screen is optional – meaning you can exit the screen by pressing “Done” at any time.

5. After selecting all necessary sandwich toppings, select **Done**.

You will now see your menu item with all modifiers you selected listed under the menu item along with any associated price.



MicroSale's menu functionality can be setup to be as simple or complex as your business needs. If you would like to use more advanced functionality, please reference the Menu Programming documentation listed on www.microsale.net/help.

Appendix –Tips and Recommendations for Creating your Menu

PLAN! PLAN! PLAN! - Spend some time planning out the menu structure before you get started. You want to setup your menu in an efficient manner so that it is easy for employees to learn to use and quick for them to ring up orders while still generating the desired level of detail on the reports for managers and owners.

- The goal is to minimize the **number of touches** to complete an order, not to eliminate buttons.
- The **Categories** and **Departments** should be set up first; everything else can be built in any order.
- Do not use the same name for **Menu Items**, **Categories**, **Subcategories**, and **Departments**.
- Keep colors **bold** and **easy to read**. Try to use dark buttons with light text, or vice versa.
- **13 Categories** fit on the main **Order Screen** without have to use the “Display All” button to see more.
- **Subcategories** can help organize **Menu Item** buttons within a **Category**.
(ex: the **Beverages** Category could have **Beer**, **Wine**, and **Liquor** as Subcategories).
- **45 Menu Item** buttons fit on each **Category** screen before having to “Page Down” to the next screen.

FOR ADDITIONAL HELP

support@microsale.net

toll free: 844-454-4900