Menu Programming Manual

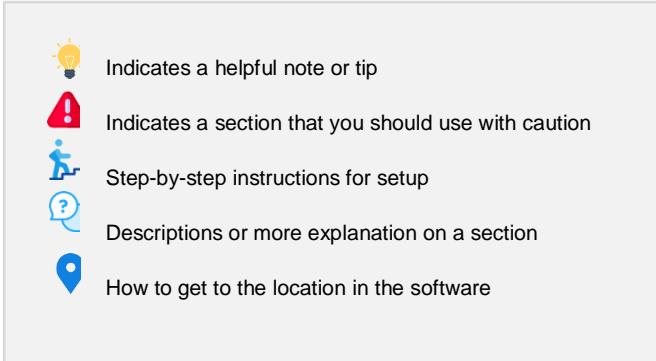MicroSale Version 9

Contents

Introduction

About

MicroSale has virtually limitless menu programming functionality. There are multiple ways to accomplish the same goal in the setup. This manual will provide you with the tools you need to set up the menu that best fits the need of the restaurant. To build a basic from start to finish, please reference the Condensed Menu Building guide (www.microsale.net/help/HowToMenu.pdf) .<<ADD THIS LINK AFTER TAX CHANGES ARE MADE!!!>>

Keys in Manual

Indicates a helpful note or tip

Indicates a section that you should use with caution

Step-by-step instructions for setup

Descriptions or more explanation on a section

How to get to the location in the software

Fundamentals

1. The goal is to minimize the number of touches it takes to complete an order
2. 13 category buttons fit on the order screen. If you have over 13 categories, the "Display All" button will need to be used. Try to consolidate as many sections as you can to prevent additional steps in the order taking process.
3. 45 buttons can fit on each category screen. If you have over 45 buttons, a page down arrow will appear on the screen. Subcategories are useful for categories that have over 45 buttons, as they will help further organize a section and helps users quickly find the items. For example, the "Beverages" category may be broken down into subcategories for "Beer" and "Wine".
4. The departments, categories, and printer names should be setup first in order to save significant time in the menu programming process– all other components such as timed events, modifiers, and shift levels can be completed in any order.

System Databases

MicroSale is driven from SQL and Access databases. To start a new menu, go to the M$CD Folder and click on **Blank Databases**. Select the Crmenu.mdb, Menumods.mdb, and Discounts.mdb files. Only copy the Crmenu.mdb, Menumods.mdb, and Discounts.mdb and paste the two files into the main Micro$ale folder.
If the Crmenu.mdb and/or Menumods.mdb are overwritten, they cannot be restored. It is beneficial to make multiple backups of your files in order to prevent mistakes or losing your data. Make a "Back Ups" folder on your computer and copy/paste the Crmenu.mdb and Menumods.mdb from the main Micro$ale folder regularly as you build your menu.

Planning the Menu

The organization of the menu affects all aspects of sales reports. Disorganized menus will result in poor or confusing sales reports. Map out how the menu should be organized; use the same terminology as the paper menu. Example: *Appetizers may be called "Starters".*

Menu Components

Your menu will use Departments, Categories, Menu Items and Modifiers. Aside from the main components, you may need Timed Events (also known as happy hour pricing), Shift Levels (also known as multiple sizes for one menu item; such as small, medium and large), and other advanced functionality to ensure optimal performance. If you are looking to create a simple menu without advanced functionality, please use the "Menu Programming: Condensed" guide, as it offers the basics of programming.

Shortcut Keyboard Keys

Control S (CTRL S)

With the curser in the Menu Item Name field (on the Menu Items and Pricing screen), you can press CNTRL S to save the menu item on the screen while keeping all other links on the screen such as kitchen names, modifiers, timed events, etc. This is beneficial for adding similar menu items such as draft beer, sides or mixed drinks.

Insert

When adding modifier names in the modifier setup area, press INSERT on the keyboard to move the modifier name into the modifier list area

Preparing the Registers and Organizing the Menu

Printer Names

Remote printers must be installed in Windows (with a printed test page) before they can be assigned in MicroSale. Before assigning the printers in MicroSale, rename the printers in Windows to the name the printers that will be assigned in MicroSale; for example Kitchen, Bar, Receipt. Make sure the ESC codes are inside the MicroSale directory.

Printer names must be created before they can be assigned to menu items. Up to 6 printers (excluding the receipt printers) can be attached to individual menu items. This is useful for restaurants with multiple bar prep areas or kitchen stations.

📍 ID Screen > Register Setup > **Printers / Devices Setup**

🚶 **Step-by-Step Instructions**

1. In the teal section of the Printer Setup screen, type in a name for a printer, such as Kitchen, Expo, Patio Bar, etc

2. On the right of the printer name, click the dropdown arrow under **Available Printers** and select *Ne00:*. This shows the **Device Name** (this is the device name in your Windows configuration). Keep selecting ports until the correct device name is displayed to the right. If you do not have printers installed, you can keep the Available Printers at "None".

3. Click **Save Remote**. Note: you MUST save each remote printer individually

4. You may also assign a *"Failed Printer"* to each remote printer. In order to use the "Failed Printer" option, the vendor specific drivers for that printer must be used; "Generic/Text Only" will not work.

   Each remote printer can also be set to route to another printer based on the destination of the order. Once you have a remote printer selected (and assigned device is populated), you can click on the drop-down menu for "Go Order" and "Delivery Order" and assign a different device for one or both types of orders.
      To enable this feature you must also go to Managers Menu> Register Setup> Register Options by Terminal> Printing/Cash Drawer Options> Advanced Options> put a check in the box next to "turn on remote printer routing for go and delivery orders".

Tax Rates

Set up your tax rates to comply with your state's standards. Although some of your items may be tax exempt, you will need to have your standard tax rate setup before using the system.

📍 Managers Menu> Register Setup> **Sales Tax Menu**

Adding a Tax Rate
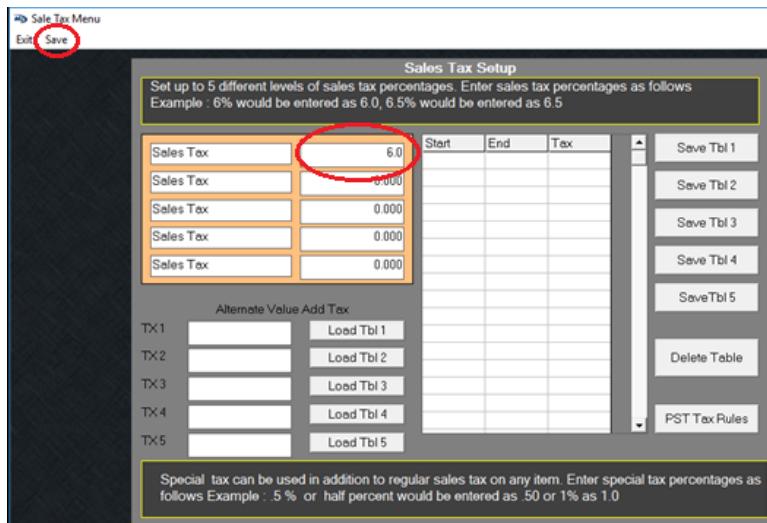
🏃 Adding a Tax Rate

1. Use your mouse and left click in the first field to the right of "Sales Tax".
2. Type in your tax rate without a percentage sign. For example, 6% is 6.0, 7.5% is 7.5, 8.25% is 8.25
3. Select Save (top left corner)
4. Restart MicroSale on all terminals (Managers Menu > Register Setup > Exit to Windows) > Double-click MicroSale icon

🏃 Editing a Regular Tax Rate

1. Use your mouse and left click in the first field to the right of "Sales Tax".
2. Use the backspace button on your keyboard and delete out the existing rates.
3. Type in your tax rate without a percentage sign. For example, 6% is 6.0, 7.5% is 7.5, 8.25% is 8.25
4. Select Save (top left corner)
5. Restart MicroSale on all terminals (Managers Menu > Register Setup > Exit to Windows) > Double-click MicroSale icon

Creating a Special Tax:

Once your standard tax rate has been set up, you may need to create separate taxes for specific menu items. For example, your state may have a different tax rate for alcohol. You will need to create a "special tax" in the tax setup area and then assign the special tax to each applicable menu item (assigning the tax to menu items are covered in the creating menu items section). If you need specialty taxes and additional rates programmed, please reference the *Tax Section* on the help desk.

📫 Adding a Special Tax

1. When using the Special Tax, you must assign a **Min Tax** and **Max Tax** in addition to the percentage amount and then select or type something other than "None" for the **Tax Exceptions**.
2. You can select an Order Destination for the **Tax Exceptions** if the Special Tax is not charged for certain orders (Pick Up, Delivery, etc.). If the Special Tax applies to all order destinations, then just type a word in the box to replace the word "None" (see attached screenshot for an example).
3. The **Min Tax** should be the smallest check total that qualifies for the Special Tax. Use .01 if there is no minimum amount.
4. The **Max Tax** should be the highest check total that qualifies for the Special Tax. Use 9999.99 if the is no maximum amount.

Tare Weights

💬 This section only needs to be followed for restaurants that use weighted items with an integrated scale: such as frozen yogurt, deli meats, or candy. MicroSale is NTEP certified by the National Conference on Weights and Measures. Using MicroSale with your scale will ensure time is saved for completing orders and guarantees you will meet the national standards.

📍 ID Screen > Menu Maintenance > **Tare Weights**

📫 Step-by-Step Instructions

⚠️ You must weigh each container prior to setting up the tare weights in MicroSale

1. Type the name of the container(s) that will be used for the scalable items and the weight of each container. *This amount will be subtracted when figuring the weight of the item.*
2. In the **Menu Items and Pricing Screen**, create a menu item (if you have not read this manual yet, please go to the Menu Items chapter to learn more).
3. Create a **Menu Item Name** such as Frozen Yogurt
4. Choose the appropriate Category, Department and Printer
5. Set the **Regular Price** to the price of one unit of measurement
   a. For example, if the restaurant charges *.53 an ounce*, the regular price is entered as **.53**
   b. In the Tare Weight (scale) field, use the dropdown and select the proper container for this menu item such as Waffle Cone, Bowl, or **Multi** (instructions for multi are below).

💡 To ring in **multiple** items on the scale at once **using multiple tare weights**, you must complete the following setup. If you only have one tare weight, you can ring in multiple items without using the Multi feature.

1. Create a tare named **Multi**
2. Set the tare weight to -2.00 (negative 2)
3. Save
4. Create all container names with the word **Multi** in front such as Multi Cup, Multi Cone, etc.
   a. Save each *Multi Container Name* with the appropriate tare weight
   b. The word Multi in front of the container names will allow the scale to properly deduct the tare weights from the menu item. If you only have one tare (or container), you do not need to set up the Multi feature.
5. After completing the tare weights and container names, go to **Menu Items and Pricing**
6. In the Menu Items and Pricing Screen, create a **menu item**
7. Create a Menu Item Name such as **Frozen Yogurt**
8. Choose the appropriate Category, Department and Printer
9. Set the **Regular Price** to the price of one unit of measurement
   a. For example, if the restaurant charges *.53 an ounce*, the regular price is entered as **.53**
   b. In the Tare Weight (scale) field, use the drop down and select **Multi**

Departments

Departments are global group names assigned to each menu item. Departments are used in nearly all reports so restaurants can see *Food* sales VS *Alcohol* sales.

📍 ID Screen > Managers Menu > Menu Maintenance > **Department Menu**

There are typically less than four departments per menu. Departments are typically broad, general groups such as food and drinks.

💡 Keep in mind, menu items also get grouped by category (appetizers, entrees, etc.),. **Departments for restaurants with alcohol are typically Food, Alcohol, and NA Drinks. Restaurants without alcohol are typically Food and Drinks.**

🚶 **Step-by-Step Instructions**

1. Type in a **Department Name**. *Example: Food*
2. Choose a **Remote Printer** for the miscellaneous items, *such as Kitchen*
3. Select **Save**.

Screen Breakdown

Department Name – where you will type in Food, Alcohol, Drinks, etc.

Master Department – used to categorize departments; such as Beer and Wine would go in a Master Department of Alcohol. **For most restaurants, Master Departments are unnecessary and can be left blank.**

Department ID – Used for specific above store interfaces such as RTI. **For most restaurants, the Department ID is unnecessary and can be left Blank.**

Qualifies for EBT – used only for restaurants that accept EBT cards.

Choose Remote Printer – used only when ringing in Miscellaneous Sales items. This allows the system to route misc. items to the proper printer. For example, a misc. item in the department of Alcohol may need to go to the "Bar" Printer. Or misc. items in the department of "Food" may need to go to the "Expo" printer.

Timed Event Pricing – you have the ability to connect a timed event to nearly every component of the menu. Most timed events will only need to be connected to a single menu item. However, in this area, you can set a timed event globally to all items within a department. For example, if you want all "Alcohol" items to have $1 off during a specific time. **For most restaurants, the Timed Event area in the Department menu should be left blank.**

QSR Categories – feature is designed only for QSR automations for reporting. Please refer to QSR reports for further clarification and setup.

Categories

Categories are independent from departments. Departments and categories are both assigned to menu items but a category is not assigned to a department.

> 💬 A category is used to group similar menu items together for both the POS screens and for reports. 9 categories fit on the main order screen; if you have sections of the menu with few items combine them into a single category. *Examples of categories are Beverages, Sandwiches, Sides, Appetizers, Sides/Desserts, etc.*

> 📍 ID Screen > Managers Menu > Menu Maintenance > **Category Menu**

🏃 Step-by-Step Instructions

1. Type in a category name
2. Select **Add/Edit** and then **Yes** to save
3. You should now see the category on the right side in the Unassigned Categories List
4. Select the item (highlights) and select **Assign to Button**.

> 💡 **You can have categories that do not appear on the screen – this is helpful for rotating or seasonal menus. Try to limit the number of categories to 9 or less for efficiency. If you have more than 9, the user will need to select Display All on the order screen to access the 10+ categories.**

5. Repeat steps 1-3 until you are done adding categories. You can also come back to this screen and add more at a later time

> 💡 **If you need to change the order of the categories, select the category text you wish to move and then use the Move Up or Move Down arrow**

> 💡 **If you need to delete a category, select the dropdown by Category Name and select Delete. You cannot delete a category with assigned menu items – you will need to un-assign the menu items before you can delete the category**

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

Screen Breakdown

To change the order on the Category list select the category name under Category Button List on the left side of the screen. The Category will be highlighted. Use the "Move Up" and "Move Down" arrows at the bottom of the screen to move the *category name*.

The **Disable Modifiers** button is terminal specific. This is designed for bartenders so that they do not have to go through modifiers to complete an order for drinks. By default all categories are set to **No**. If you want **to disable the Modifiers**, it is a two-step process. Click the No and it will become Yes. Next, go to Register Setup, Register Options by Terminal and in the blue Modifiers area check the **Disable Modifier By Category**. Select Save.

The **Mandatory** button forces one menu item in the mandatory category for every table cover. Use **COM** to allow a combination of categories such as drinks, beer, and wine.

The **Tip Exempt** button allows the Category Sales to be exempt from Tip Dollars. This appears on server reports as a tip exempt category. By default, all Categories are set to **No**. For example, a Catering Category may be exempt from tips.

The **Category Prompt** button is used to prompt a message when a category is selected. Type the message desired next to the category.

Category Menu Report allows you to choose desired categories that will be filtered in the Sales Mix, Mix by Category/Department report. Designed to allow management to quickly determine bread counts for sold sandwich items.

Change Category Name allows you to change the name of the category and will automatically reassign all menu items to the new category name. Select the dropdown by Category Name and type in a new category name under Change Category Name and select **Change**.

Meal Period Setup is used for restaurants that may have a full breakfast in the morning and then switches to a lunch/dinner menu. Meal Periods enable the restaurant to automatically switch from full breakfast to the regular menu without manual

intervention. Meal Periods work with Timed Events in order to setup the times of the Meal Period.

Requiring Drinks on a check (Labeled Mandatory on the category screen)

🧎 **To set required items:**

1. Select the category that should be required - in the Category Name dropdown (such as beverages)
2. Choose **Yes** or **Combo** under "Mandatory" - use combo if the server can use a combination of categories (you may have a beverages, beer, wine, liquor, etc., that may all count as a drink)
3. Select the **Add/Edit**
4. Continue until finished
5. Exit
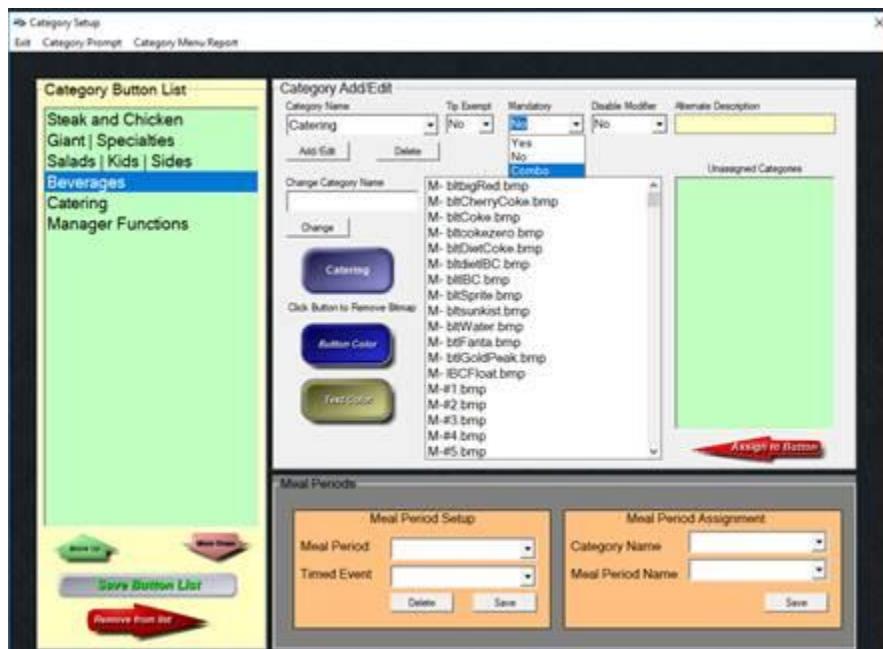
1.

Servers will be unable to send food to the kitchen until 1 required category item is on the check per table cover

Subcategories

As you build your categories and think about the menu items that will go into each category, remember that the goal of the categories is to organize your menu for reporting as well as on the order screen. A well-organized menu on the order screen will help optimize order entry and speed up customer turnover. Subcategories help staff find items faster.

💬 **Subcategories help further organize menu items. A subcategory is connected to a category and will appear as an unassigned menu item in the button layout of the assigned category. You will need to add the subcategory button to the order screen as you would a regular menu item. If you have one category for "beer", you may have 100 beer items. Use subcategories for draft vs. bottles and/or IPAs vs. Ciders**

📍 ID Screen > Managers Menu > Menu Maintenance > **Sub Category Menu**

⚠️ **Categories, subcategories and menu items must all have unique names.**

Creating identical names for a category and a sub category or a menu item will cause confusion in the system. There may be times that you need to make the names very similar. In that case, change something simple about the names, for example "Draft." (*with a punctuation mark*) instead of "Draft"

Step-by-Step Instructions

1. Type in a subcategory name
2. Select the dropdown to assign the subcategory to a category.
3. Select **Save**.

💡 **You can assign subcategories to Timed Events, however instead of the Timed Event raising or lowering the prices, it will simply make the subcategory button active or inactive. If a user selects the subcategory button on the order screen during a time not allocated in the Timed Event, it will prompt "Subcategory is not available during this time".**

4. Go to the Button Layout screen and find the category the subcategory is assigned to. Place the subcategory on a button. *Please follow the Button Layout Section to learn how to add items to the button layout.*

Menu Items

Creating Menu Items

All sales in the POS system come from the programmed menu items. It is important to thoughtfully and thoroughly create each item in the system to ensure the price and the behavior of the item is properly set.

💬 The **Menu Items and Pricing** screen is where menu items are created, organized, priced, set for tax, and linked. While on the Menu Items and Pricing screen, think about the following questions:

- What category does this item belong to?
- What is this item – food, beverage, alcohol? (department)
- How much is this item selling for?
- Does this item need to print anywhere to be prepared? (Kitchen or bar?)
- Can the customer modify this item? Such as meat temp, add toppings, etc.
- Is this item available for a happy hour price?

📍 ID Screen > Managers Menu > Menu Maintenance > **Menu Items and Pricing**

Step-by-Step Instructions

1. Type in a menu item, such as **Hamburger**
2. Use the dropdown to select the appropriate category and department name.
3. Type in a regular price
4. If the item needs to print in the kitchen or at the bar, select Turn on Remote Printing and select the appropriate printer name in **Remote Printer #1**
5. If you need to attach modifiers, please make sure the modifier group is already created, if it is not, skip to the Modifiers chapter
6. Check the option, **Turn on modifiers**
7. Next to Modifier #1, select the Modifier Title that is appropriate for this menu item
8. If the modifier group needs to prompt as soon as the cashier/server selects this menu item, leave the box unchecked *(the option box to the left of each modifier row)*

   💡 **Only important modifiers should be unchecked – such as meat temps, mandatory sides, and other additions that are important for the kitchen/bar to know. (if you leave all unchecked, meaning all modifier groups prompt, it takes the user more time to complete an order).**

   💡 **If the Optional Modifier box is check marked, modifier group will only appear if the cashier/server selects the *Modify Item* function button on the order screen.**

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

💡 Quickly Creating New Items (copying existing menu items)

1. 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. This will be used as a template for additional items. Example: Hamburger
2. Select **Hamburger** from the drop-down, and type a new menu item name over **Hamburger** (don't worry, you won't overwrite your Hamburger!)
3. 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.

Screen Breakdown – PART 1

Red = Required Fields

Menu Item Name – Type in a name for the menu item – this name will appear on the virtual check and on the customer's receipt.

Button (name) – this field can be left blank. However, if you need to have another name on the button vs. the check, please add in the name here. **This name will only appear on the order screen button.**

Alt. Name to Remote – this field can be left blank. However, if the kitchen needs a different name than the name used on the receipt, please add the name here. This can also be used to show menu items in the kitchen in another language or an abbreviated version of the menu item.

PLU/Bar Code – this field will generally be left blank. However, if you are using Berg Liquor Control or bar code scanners, you will need to type in the necessary PLU or barcode number.

Category/Sub Cat. – use the dropdown and select the appropriate category or subcategory name for this menu item

Department – the department field is used for a variety of special functions as well as regular menu items. For regular menu items, only choose one of the departments that you manually created such as Food, Alcohol or NA Beverages.

Regular Price – Type in the regular price for this item. Only type in numbers and decimals.

Make Menu Item Open Price – Disables the Regular Price and will prompt a keyboard to type in a price for the menu item. This is used for market price menu items or other items that may have a custom price.

Menu Item is Taxable – unless this is a tax exempt item, keep this checkmark.

Price Includes Sales Tax – used for tax inclusive items such as alcoholic drinks or concession stands that want totals to be whole numbers. **Tax Inclusive menu items must have the Taxable option checked.**

Sales Tax Table – unless you are using special taxes, keep this set at 1.

Special Tax Table – separate taxes on reporting such as alcohol tax from standard tax.

Surcharge/Tax 3 – if you are using an additional tax on top of standard taxes. Or, needing to tax a tax. (please reference Configuring Three Tax Rates document)

Turn on Remote Printing allows this menu item to print at the bar or kitchen. Even when this option is disabled, the item will always print on the receipt printer as long as there is a printer attached to the terminal. Use the dropdowns to assign the appropriate printer(s) to the menu items.

Screen Breakdown – PART 2: Shift Pricing

Shift Levels (or Shift Pricing) are typically used for menu items that have multiple sizes – such as draft beer or pizzas. You must create the shift levels in the Shift Levels setup area before you can complete this portion of the Menu Items and Pricing screen. You can save

The **Prefix Name** is the name that will go in front of the menu item, such as Small pizza. The Price Level 1 is the price associated with the prefix name. The Event Name to the right of the Prefix Name is used for Timed Events. For example, the small pizza is on special while the medium and large are regular price.

The **Price Level** is the price of the menu item for that size (or Prefix name).

Event Name is another name for a Timed Event. If the size (or Prefix name) uses a special Timed Event/price, assign the Timed Event name using the dropdown and put the appropriate price in for the **Price** next to Event Name – this is not a price difference. Put in the actual dollar amount of the menu item for the Event.

Modifier (next to the Event Name / Price) is used only if a specific modifier group needs to prompt for the size selected. This is typically used for "PTCHR" beer and then prompts number of mugs while the 12oz and 16oz beer does not prompt for number of mugs.

Mod Price means the *Price Level* the modifiers use in conjunction with the size (or Prefix name). For example, if you have modifier prices for each size of the menu item, you will use the Price Levels in the modifier setup area and assign each size to the corresponding level number.

PLU is used for third-party programs such as liquor control and/or online ordering. A representative at the third-party company will set the PLU numbers up for you.

Screen Breakdown – PART 3: Assigning Modifier Groups (yellow box on top right)

Check the option **Turn on modifiers** to allow modifiers to be connected to the menu item. You will need to have modifiers created before you can attach modifiers to the menu item. You can either save the screen you are on and go to the Modifier setup screen or you may select the "Goto Modifier Screen" shortcut to go to the screen without having to save/exit the screen you are currently on.

Enable Min/Max Choices will force the user to choose a certain amount of modifiers in the modifier group. For example, if a menu item comes with two sides, you would set the Min to 2 and Max to 2. Or if a pizza with up to 5 toppings, you would set the Min to 0 and Max to 5.

The Min/Max function is NOT REQUIRED. By default, the number of choices is set by the modifier group in the modifier setup screen (more information in the Modifiers chapter).

First Matrix Stop: Only used for quick service on *Conversational Ordering.* Example: Combo Meal:

Modifier #1: Sandwich Alterations
Modifier #2: Sides
Modifier #3: Drink

First Matrix stops '2'. This will bypass the first modifier on the *Matrix.* To access the Sandwich alterations, press the first matrix box, or simply finish the order and press the menu item on the virtual check. This will automatically pop up the alterations modifier.

Checkbox to the right of *Min/Max (Optional Modifier)* - If you want the modifier group name to prompt as soon as the cashier/server selects the menu item, leave the Optional Modifier box unchecked.

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.

Timed 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 five events such as *Happy Hour).*

Screen Breakdown – PART 6: Additional Options

Enlarge print on remote printing – checked by default, prints in size 14-font to the kitchen or bar instead of size 12.

Scale Print (Unit Cost) – option allows the item to be used with a scale. When this is selected, the Regular Price will be the unit cost for a lb. or oz., depending on the unit used in the system setup.

Item Charge by Time (rental) – option charges per minute from the time the item is entered on the check to the time the check closes. This is beneficial for pool table rentals or rentals for tables during sporting events.

Available with barcode scanner – option is needed when using a scanner for retail items.

Set as Open Modifier – links to a list of modifiers from the order screen that is not actually tied to a menu item – such as dips or sauces. The menu item name on the Menu Items and pricing screen will simply work as a link to get to the list of modifiers (assigned in the yellow area of this screen). Because the Menu Item name works as a link to get to the modifier list, the regular price field is ignored. If you have upcharges, they will need to be assigned to the modifiers.

Item Counts as Customer – useful in quick service or other restaurants that do not use table covers. Usually beverages are used with this checkmark as most people only order one drink per person but may order multiple sandwiches or sides.

Item cannot be discounted – menu items associated with this checkmark will never take a discount. Typically high food cost items will be exempted from all discounts. In some states, discounted on alcohol are prohibited.

Link Item to Ride Ticket – when using a ticket printer, the menu item will prompt a ticket to print. Such as "Child's Entry" menu item.

Product Cost – In many reports, you may notice your cost is at "0.00" The Product Cost is where the cost may be entered. This allows the restaurant to quickly find costs, percentages and totals that may otherwise only be found in the Inventory Module or 3rd party Inventory software.

Ex: A Cheeseburger has a price of $8.00 and the Product Cost (bun, burger, cheese, fixings) is $3.00. Your profit no counting labor and variables is $5.00 reflected in reports.

Price Adjust Go Orders –This is an "Adjustment" in price based on a to go order. Only put in a price difference. For example if a 'Coke' is $2.00 for Dine in but $3.00 To Go, put in 1.00. If the To Go's are sold at a lower price, adjust it with a negative, such as -1.00 if the soda is sold for one dollar less.

Tare Weight (Scale) – The Tare Weight containers will need to be set up before linking it to a menu item.

Age Requirement to Sell – *The Age Requirement stipulation is not to be confused with the Age Verification (swiping a license to ensure a customer is old enough for the product.* The Age Requirement is to allow the Server or Cashier to ring in the item. In some states, a cashier or server must be of a certain age to SELL the product to a customer. You must set the employees' age in the Employee Maintenance to use the Age Requirement stipulation.

Access Required to Sell – The Access Required will only allow employees of a specific or higher access level to ring in the item. This could be used for menu items that need to take precautionary measures or for coupons that are programmed as menu items.

Days to Expiration – When set (numerically, such as 50), the menu item will count down days. Days are recognized through Windows' settings. When the menu item expires, it will not allow employees to ring up the item.

Priority Sort Level – Menu Items can be sorted generally by category. For example, all of the drinks could print on the top of the check and desserts can print at the bottom. However, if you need to further define how menu items appear in the kitchen/virtual check, you may set priority levels.

Product Inventory – designed to track of such things as bottled beer. You cannot use this option for any item that has price shift levels, such as Sml, Med and Lrg. It is not intended for true inventory tracking. Restaurants wanting to track inventory should purchase the Inventory module.

Enter a number at the start of the day. The "Menu Inventory" report automatically prints on the Daily Close if a product inventory amount was entered for an item. To manually execute this report, go to *Managers Menu*, *Reports Menu*, *Menu Reports*, *and Daily Menu Inventory*.

On the Menu Inventory report, the "Amount On Hand" represents the "Product Inventory/Beginning Count" minus the quantity sold that day. If you did a physical count of how many are left at the end of the day, it should match the "Amount On Hand".

Number Available – If the default of 9999 is left as is, the feature is not active. This was intended to be used as a count-down for Daily Specials. Enter the total number of Specials available at the start of day or meal period in the Number Available field. The count reduces as each Special is ordered. This prevents the Servers from ringing up an item that is no longer available.

When the count becomes low, it shows "Low Stock Warning" along with the quantity left in stock on the chalkboard of the ID Screen. The menu item button will display the quantity still available on the order screen, unless there is a logo image on the button which hides the count. If Servers try to ring up an item that has already counted down to zero, a message appears "Menu Item is out of stock. Item has been 86".

Misc Menu Functions – Quantity Required; forces the user to type in a quantity before the item can be entered. The quantity will multiply the 'Regular Price' by the amount selected

Create Ride Ticket – this option will link the menu item with a ticket for rides or admission. The ticket must be in a .BCA format

Ingredient List – designed for Hibachi Style Cooking. MicroSale will print the ingredients that are required to prepare each entrée. This ensures that the proper food is taken out to the Hibachi Grill to prepare at the table in front of the guests.

Nutritional Value – prints the nutritional values for the items ordered. You will not see the Nutritional Values on the screen when you ring up a sale. The information only prints on the bottom of the receipt.

Debit Card Set Up – used with the InterCard or Sacoa Interface only. When using this, the department must be set to *Debit Card*. Touch the *Debit Card Setup*. For promotional value added to the card, you may give points, Bonus dollars, or Courtesy Group No. is no longer used. Time Play Card Set Up also uses the Debit Card setup. However, you must set the department to *Time Play*, Touch the *Debit Card Setup*. Set the Duration in

Minutes, Click the Start Time and the Hours and Minutes must be selected, then, select the Day of the week the card is active.

Recipes / Procedures – allows a recipe or procedure for that menu item.

Search By/ Labels – selecting the *Search By* button on the *Menu Items and Pricing* Screen allows three different methods to search for items in your database. If you have many items that you scan, the most helpful method would be to *Search by bar code*. Often it is not obvious what name or descriptor was given to the items with UPC #'s. You can also search by *Menu Item Name* or *Alternate Print Product Code*. This feature allows you to *create label files* for your items, and *print Bar Code labels*.

Parent Item – connects previously made menu items together. The 'child' item is dependent on the parent item. This means, when the child item is connected to a parent, it will not be able to be rang in until the parent item is rang in (and sent to the kitchen) first. Designed for 'All You Can Eat' scenarios.

Configure Bar Codes –Please reference barcode document.

Adding Tax to Menu Items

📍 ID Screen > Managers Menu > Menu Maintenance > **Menu Items and Pricing**

🚶 Setting up Standard Taxed Items

By default, menu items will already be set to the tax table "1" (The standard sales tax table)

1. In the Menu Items and Pricing screen, ensure the dropdown field is set to "1" when adding a new menu item that should have a regular, standard tax.

🚶 Setting up Untaxed Items

Certain items may need to be set as tax exempt. You can assign items to the tax rate of "0" for a tax exemption.

1. In the Menu Items and Pricing screen, navigate to the appropriate menu item.
2. In the Sales Tax Table area, select "0"

1.

2. **Save** when completed

🚶 Assigning Tax Included Items

It is a common practice to include tax on beer and liquor in the item price in order to make menu item prices a whole dollar figure. This means the price of the item will include the tax within the item price as oppose to tax being added on top of the price.

1. In the Menu Items and Pricing screen, navigate to the appropriate menu item.
2. In the Sales Tax Table area, ensure the Sales Tax Table is set to "1"
3. Check the option next to "Price Includes Sales Tax"
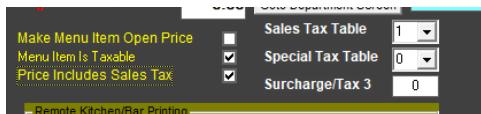
4. **Save** when completed

💬 **Smart Tax**

💡 *By default, the system is set for "Smart Tax"*

Smart Tax: Smart tax works with tax inclusive items. With Smart Tax, a *Tax Included Item* will display as a regular, Tax Not Included item when regular, Tax Not Included items are added to the check. This is useful for restaurants who would like alcohol-only checks to be Tax Included to optimize speed, but for tickets with Drinks and Food to be Tax Not Included. To disable smart tax, go to Register Options > Full Service > **Turn off smart tax**

Drink Recipes

📍 ID Screen > Managers Menu > Menu Maintenance > **Menu Items and Pricing**

There are two options for adding Drink (or Menu Item) recipes into MicroSale. If you will be using standard recipes, we suggest using the following website: https://mrbostondrinks.com. You will be able to copy/paste the recipe into MicroSale.

⚠️ Character Limit: **255**

If you are inputting drink recipes as you build the menu, use option 1. If you are going to bulk import a list, use option 2.

Option 1

💬 This setup will show a Recipe Window in MicroSale. This feature is useful to bartenders who may need a reference on how to build drink recipes at the restaurant.

🚶 **Entering Recipes**

1. Build a menu item or select a previously programmed item.
2. Select **Recipe / Procedure** (red button on the bottom of the *Menu Items and Pricing* Screen) while the appropriate menu item is on the screen.
3. In the prompted **Recipe / Procedure** window, either type in your recipe or paste in the recipe from a website or outside source
4. When your recipe is completed, select **Done** and then **Save** the menu item

⚠️ When you are using the "Control S" shortcut to quickly create items, please note that it will also carry over the recipe / procedure. If you are creating multiple new menu items using the current menu item as a template, you will need to either 1) create the new menu items before putting in the recipe or 2) delete out the recipe for all new menu items created.

Using "Show Recipe"

1. From the order screen, select **Show Recipe**
2. Select your menu item button such as "Bloody Mary"
3. To **print** the recipe, touch anywhere in the recipe window
4. To close the window, select **Exit**

Option 2: Bulk Recipe Import

To use the txt files for drinks, use attached files into the MicroSale directory. (C://Program Files/Micro$ale. The "PpU210B.DRK" and "Recipes.zip" files. Files are located on www.microsale.net

1. This will prompt notepad over MicroSale when selecting "Show Recipe".

> ⚠ **You must unzip the Recipes.zip and copy/paste the txt files into the MicroSale directory. If you need to add additional drinks, you can do so as long as you save them as txt files.**

Priority Sort Level (Check)

📍 ID Screen > Managers Menu > Menu Maintenance > **Menu Items and Pricing**

By default, menu items are organized by category on the check. All menu items assigned to the first category will print at the top of the check, all menu items assigned in the middle categories print in the middle of the check and the last category prints at the bottom of the check).

If you need to further define how menu items appear in the kitchen/virtual check, you may set priority levels.

💡 **How Priority Sort Levels Work**

Menu items can be printed on a guest check in accordance with their Priority Sort Number (lowest number print first, largest number prints last).
When using Priority Sort Levels, you must assign numbers to ALL menu items.

It is easiest to prioritize by groups. For example, Drinks could be from 1-1000, giving an ample range to add more drink menu items as the menu grows. 1000=top of receipt. 5000=middle, 9000=bottom.

Print Items in Order as Entered

📍 Manager Menu > Register Setup > Terminal Configuration > Register Options > **Menu / Credit Cards**

Menu Items in Order as Entered
Check mark option: Menu items are in order as entered on the check. This option will cause all items on a check to print in the order that they were entered by the user. By default, menu items print on the guest check in the order of the Category Priority. The primary application for this option is in full service restaurants that have multiple courses; allowing the server to enter the items in the order the items are to be prepared.

Menu Items Grouped Together
Check mark option: Menu Items Grouped Together. The option is used with "menu items in order as entered" and groups menu items assigned by category together. For example, if you enter in a Coke, sandwich, Diet Coke, dessert, it will rearrange it on the virtual check/receipt to show Coke, Diet Coke, sandwich, dessert.

Dependent Menu Items

📍 Manager Menu > Menu Maintenance > **Menu Items and Pricing**

Designed for 'All You Can Eat' scenarios

The All You Can Eat (with a price) must be entered before you can ring in a 'Refill'.

Parent Item – connects previously made menu items together. The 'child' item is dependent on the parent item. This means, when the child item is connected to a parent, it will not be able to be rang in until the parent item is rang in (and sent to the kitchen) first.

📍 **Setting up parent/child items**

1. Select the **Parent Item Button**.
2. Select the **Parent Item** (must be made as a menu item first)
3. Select the **Child Item** (must be mad as a menu item first)
4. **Save**

Ingredient List

Ingredient List – designed for Hibachi Style Cooking. MicroSale will print the ingredients that are required to prepare each entrée. This ensures that the proper food is taken out to the Hibachi Grill to prepare at the table in front of the guests.

📍 **Setting up ingredient list**

1. Create a new menu item or pull up an existing menu item that needs an ingredient list attached
2. Select Ingredient List
3. Under Create Ingredients, type in the first ingredient (as whole items, such as "Chicken")
4. Select Save Item (gray button under the Create Ingredients field
5. Under the Menu Item Ingredient List, select the first field and select your ingredient
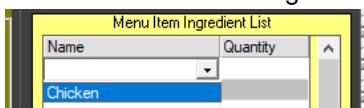
6. Next to Quantity, type in the amount needed for this item. Such as 4oz, 2, etc., an integer that will be understood for this menu item.
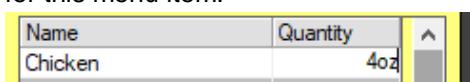
7. Continue creating your ingredients for this menu item.
8. In the Ingredient Printer field select the appropriate printer. When finished, touch the Done button.

⚠ **To have the ingredients print at the printer you selected, the following steps must also be done:**

Go to Managers Menu > Register Setup > Terminal Configuration > Register Options > **Printing/Cash Drawer**. On the Receipt Printer Options tab, put a check mark in the box beside **Print Ingredient List** to Remote. Save when completed.

💬 **Example of ingredient list feature:**

Menu Item Printed:	Menu Item Printed to "Ingredient Printer":
Surf n Turf Hibachi	*- Lists menu item name on top of the check, lists ingredients in bold. In the ingredient list for this item, the quantity displays on the left (example, 1 filet, 5 scallops, and 3 shrimp)*

Nutritional Value

📍 ID Screen > Managers Menu > Register Setup > Terminal Configuration > Misc System Configuration Page > **Nutritional Data** (displayed on toolbar)

💬 **Nutritional Value** – prints the nutritional values for the items ordered. You will not see the Nutritional Values on the screen when you ring up a sale. The information only prints on the bottom of the receipt.

🚶 **To set up the Nutritional Values**

1. Select a **Menu Item**
2. Enter the appropriate values
3. **Save**
4. Continue steps 1-3 until completed
5. Enable Nutritional Value Printing by exiting the current screen (you should now be on the Terminal Configuration Screen (shown below)

6. Select Register Options > **Printing/ Cash Drawer**
7. Select **Advanced Options**
8. Enable the option, **"Turn on nutritional values on bottom of receipt"**
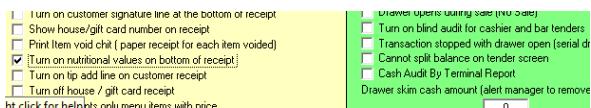
9. Save and Exit

Price Adjust Go Orders

📍 ID Screen > Managers Menu > Menu Maintenance > **Menu Items and Pricing**

If the restaurant does not change a price based on to go orders, leave the option set at 0.00. If the restaurant charges an additional fee or discounted price based on to go orders, you will set the adjustment in this field.

⚠️ The adjustment is a price difference. Do not put the price of the entire menu item in this field

For example if a 'Coke' is $3.00 for Dine in but $2.00 To Go, put in -1.00. If the To Go's are sold at a higher price, adjust it with a positive number.

Creating Sizes for Menu Items (and Pizza Builder)

Sizes, or Shift Levels, are useful for menu items that offer multiple sizes such as draft beer (12oz, 16oz, Pitcher) or pizza (Small, Medium, and Large). A Shift Level must be created in the Shift Level area before it can be assigned to a menu item. A shift level is the "size" and a shift price is the price attached to the level *(or size)*.

📍 ID Screen > Managers Menu > Menu Maintenance > **Shift Levels**
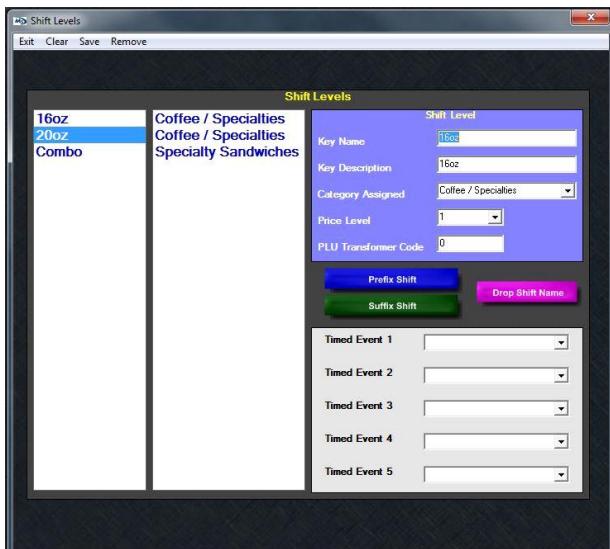

Screen Breakdown

The **Key Name** is the abbreviated size that will go in front of the menu item; Such as "SM"

The **Key Description** is displayed on the button in the POS for your staff to see only: 12oz Key Name and "Mug" for Key Description. Or leave this field blank if the Key Name and Key Description are the same.

💡 A Shift Level is assigned by Category in order to add the levels to buttons on the order screen.

Press the dropdown and put in the appropriate price level. (1 is the smallest size available, 5 is the largest. If you only have three sizes use levels 1-3)
The PLU Transformer Code will typically stay at the default number of 0. This is used for above store interfaces that use PLU numbers

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🏃 **Step-by-Step Instructions**

1. Type in a Key Name. (The Key Name is the abbreviated size that will go in front of the menu item) Such as "SM" Pizza.
2. Type in a Key Description. (The Key Description is displayed on the button in the POS for your staff to see only: 12oz Key Name and "Mug" for Key Description)
3. Press the drop down next to Category Assigned and choose the desired category. (A Shift Level is assigned by Category in order to add the levels to buttons on the order screen).
4. Press the drop down and put in the appropriate price level. (1 is the smallest size available, 5 is the largest. If you only have three sizes use levels 1-3)
5. The PLU Transformer Code can be level at 0. (This is used for above store interfaces that use PLU numbers)
6. Select Save
7. Repeat steps 2-7 for all remaining levels
8. Exit
9. Go to **Menu Items and Pricing**
10. Find a menu item that will use a shift pricing

11. When on your menu item, go to the bottom of the screen in Shift Pricing. Press the down arrow to find your shift names (under "Prefix Name).
12. Next to each size, type in the correlating price.

a.

13. If the cashier/server must choose a size, check the option for "**Shift Price Only**"
14. If the modifier prices should vary based on the size chose, please continue to the next section, "Using Price Levels in Modifiers.
15. **Save** and Exit

The **Prefix Name** goes in front of the menu item, such as 16oz Coffee. The Price Level 1 is the price associated with the prefix name. The Event Name to the right of the Prefix Name is used for Timed Events. For example, the small pizza is on special while the medium and large are regular price.

The **Price Level** is the price of the menu item for that size (or Prefix name).

Event Name is another name for a Timed Event. If the size (or Prefix name) uses a special Timed Event/price, assign the Timed Event name using the dropdown and put the appropriate price in for the **Price** next to Event Name – this is not a price difference. Put in the actual dollar amount of the menu item for the Event.

Modifier (next to the Event Name / Price) is used only if a specific modifier group needs to prompt for the size selected. This is typically used for "PTCHR" beer and then prompts number of mugs while the 12oz and 16oz beer does not prompt for number of mugs.

Mod Price means the *Price Level* the modifiers use in conjunction with the size (or Prefix name). For example, if you have modifier prices for each size of the menu item, you will use the Price Levels in the modifier setup area and assign each size to the corresponding level number.

PLU is used for third-party programs such as liquor control and/or online ordering. A representative at the third-party company will set the PLU numbers up for you.\

Using Price Levels in Modifiers

Sizes, or Shift Levels, are *levels* of pricing for a single menu item. With multiple levels for menu items, you may need multiple levels of pricing for modifiers. This is designed for pizza toppings. For example, your 16in and 20in pizza may charge differently for toppings.

📍 ID Screen > Managers Menu > Menu Maintenance > **Menu Modifiers**

🚶 **Step-by-Step Instructions**

1. Create a **Modifier Title**
2. Type in a Modifier Name such as *Pineapple*, leave the regular modifier price at 0.00

> Think about the shift levels that were setup in the above section. If you created shift levels for pizza, you may have a 16in size (using Price Level 1) and 20in size (using Price Level 2).

3. Type in the appropriate price that correlates with each size. In level 1, representing the 16in size, put the price in the first field. If there is no price, leave it at 0.00
4. Continue with the prices for level two and then select **Add/Update. (Note: unless you need Pineapple to say 16oz Pineapple, you can leave the prefix field blank).**

5. When you are done with your list of modifiers, select **Save** and **Exit**
6. Go to the Menu Items and Pricing screen and pull up a pizza menu item (if you do not have one in the list already, go ahead and add it now.)
7. Add your menu Modifier Title in the top right section of the **Menu Items and Pricing** Screen

8. In the shift level section of the Menu Items and Pricing screen, check the option for "Shift Price Only", so that the pizza cannot be rang in without a selected size.
9. After the shift levels are assigned to the item, next to the first price level (16in) select the Mod Price at 1. The 1 represents the first price level on all modifier groups attached to this menu item.
10. On the second price level (20in), select the Mod Price 2.

Shift Pricing

Prefix Name		Price Level		Event Name		Price	Modifier		Mod Price		PLU
16in	▼	Price Level 1	11.99		▼	0.00		▼	1 ▼		0
20in	▼	Price Level 2	16.99		▼	0.00		▼	2 ▼		0
	▼	Price Level 3	0.00		▼	0.00		▼	0 ▼		0
	▼	Price Level 4	0.00		▼	0.00		▼	0 ▼		0
	▼	Price Level 5	0.00		▼	0.00		▼	0 ▼		0

Shift Price Only ☑   Forces Item to shift prices   Follow main items with call the modifier listed for the main menu item with the prefix of the shift

Remove all button alias

Product Inventory

Number Available   999

Misc Menu Functions

None

Create ride ticket | Ingredient List | Debit Card Setup | Recipe Procedure | Search By/Labels | Parent Items | Configure Bar Codes | Clear | Delete | Save | Exit

11. Continue until all shift levels have an appropriate modifier price level.
12. **Save** when completed.

**If each size of pizza only uses 1 price level, you can set all associated "Mod Price" levels at 1.   **This will force all sizes to look at the first price level for all modifiers in the attached modifier group.

Creating Combos

MicroSale has multiple ways of setting up combos. Please review the following section to determine which way fits your customers' needs best.

Shifted Combos

A **Shift Combo** is a way to create a menu item into a combo meal after it is on the virtual check (when a customer changes their mind or does not say they want a combo before starting to order)

The cashier can touch the word "combo" or "meal", and then touch the menu item on the check. It will then recreate the single menu item into a combo (with appropriate pricing and modifiers).

🚶 **Step-by-Step Instructions**

Part 1

1. Go to **Shift Levels** in Menu Maintenance
2. Create a Shift Level, with the Key Name of *"Combo", "Meal"* or any other word desired. Make sure you put an exclamation point at the end, such as **Combo!**
3. Type in a **Key Description** (this word will be displayed on the button in the order screen)
4. Put in the appropriate category
5. The Shift Level may be **1** (one).
6. **Save** and **Exit**

Part 2

1. Go to **Menu Items and Pricing**
2. Create a **Menu Item Name.** Example: *Baconzilla*
3. Put in th**e price** for the single sandwich option
4. Assign the Baconzilla to a category and department.
   - 💡 Shift Levels are assigned to categories. In order for shift size to appear, you need to save the menu item in the appropriate category and then select the menu item again.
   - 💡 You should now see your shift level in the lower left corner of the screen.
5. In the Shift Pricing area, put in the price for the Combo version of this menu item. **DO NOT FORCE THE ITEM TO SHIFT!**
6. **Save**

1. Now create the combo version of the menu item, such as **Baconzilla Combo**. Put in all appropriate sizes and modifiers (such as sandwich mods, drink prompt and size prompt). The **Combo Name** must identically match the single menu item name plus the shift level name, such as *Baconzilla Combo*.

   a.
   | Baconzilla |
   | Baconzilla Combo |
   | Bag of Chips |
   | Bagel Box |

2. In the modifier area of the Menu Items and Pricing Screen, put in the sandwich modifier first (such as tomato, etc.) then put in the drink and the side. Put the first Matrix Stop at 2. This will bypass the first modifier for speed.

3. Put the *Combo Shift* function on a button. The shift name will appear as an unassigned button in the Button Layout area.

Two operational options for the function: Touch Combo then the Baconzilla to create the combo or ring in the Baconzilla, highlight then menu item, and then touch Combo

Combo Detection

The system can detect which items make up a combo meal. This helps the customer save money and prevents the cashier from reentering the individual items again as a combo.

Combo Detection has two options:

- **Automatic Combo Discount:** automatically discounts the items when applicable items are on a check
  Beneficial for automatic BOGOs, combination specials (ex: 18 wings, pitcher of beer, and side of fries for $x.xx), etc.
- **Recreating Items on the Check into a Combo Item:** automatically recreates the items into a combo menu item with the appropriate price
  Beneficial for quick service restaurants to create items into a "Cheeseburger Combo", Chicken Nugget Combo", etc.

Automatic Combo Discount

Automatically discounts the items that make up a combo or special. This is beneficial for restaurants that offer BOGOs, combo specials such as 18 wings and a pitcher for $X.XX, etc.

📍 ID Screen > Managers Menu > **Discounts, Gratuity and Maintenance**

🧍 **Step-by-Step Instructions**

1. Type in a Name such as "Meal", "Spec", "Combo", "Cmb", etc. *This Combo Name will be shown as a discount at the bottom of the check.*
2. Select the appropriate combo discount **Type** – only uses Combo Amount or Combo Set Amount

   💡 Combo Amount takes off a dollar amount off of the combo item.
   💡 Combo Set Amount forces the combo item to the amount set in the "Amount" box
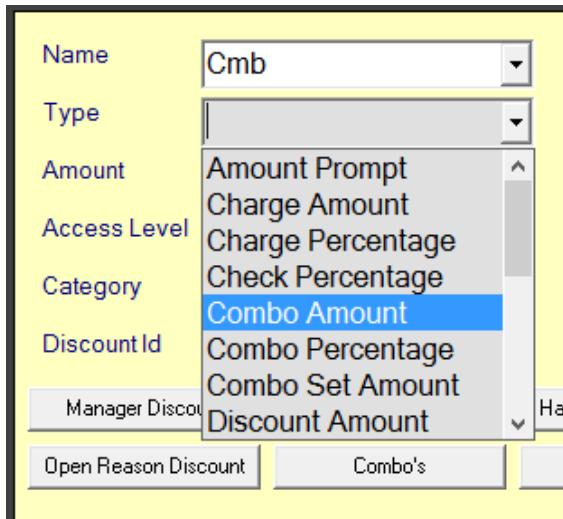
3. Choose **Combo Amount**
4. Choose a low Access Level for this combo item (this is typically designed for discounts that need to be set for a specific security level, since this is a combo, set it to the lowest possible access of **Cook**).
5. Select the Category of **Combo.**

Continue to Next Page

6. Click on the **Combos** button
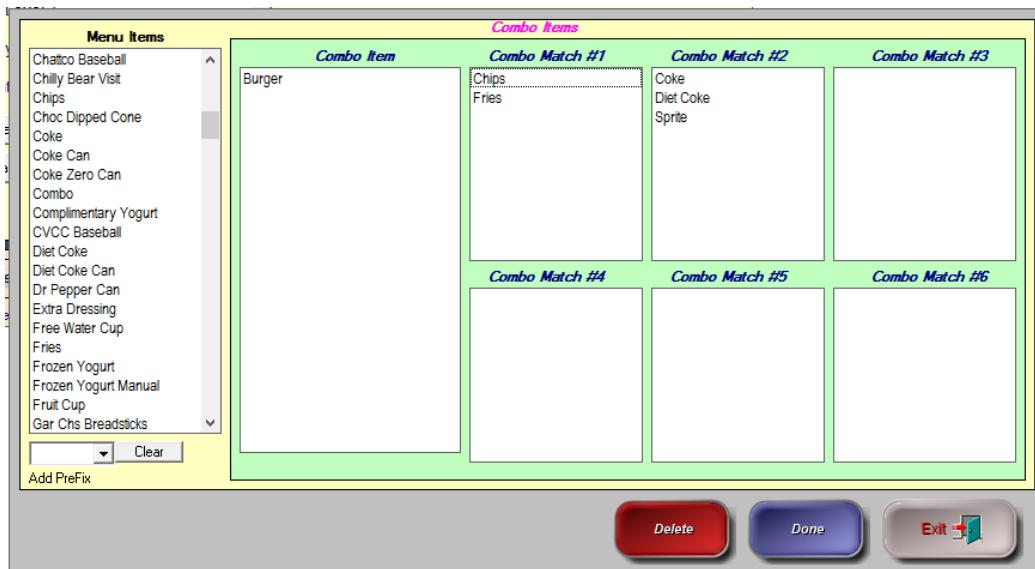
7. Select which items are included in the **Combo** menu item. This is designed specifically for combo meals. You cannot put the same menu item name in more than one box.
8. Choose the *primary menu item name* from the Menu Items box and insert it in the **Combo Item** box.
9. Choose an additional item for the combo such as a side in the Combo Match #1 box; Put all types of sides you can get in this box
10. Choose an additional item for the combo such as a drink in the Combo Match #2 box; Put all types of drinks in this box

> ⚠ **The combo feature must have exact matches to menu items. If you have shift pricing in your menu, you must put all shift prefixes in the combo boxes.**

Using Shift Prefixes:

1. Select the Menu Item in the Menu Items box (left box) and choose a *shift prefix* in the **Add Prefix Box**
2. Select the appropriate **Combo Match** box – you should see the menu item name with the shift name in front of the item.
3. Continue adding all similar items in each box until you are done.
4. Select **Done**
5. **Save** the Combo Discount
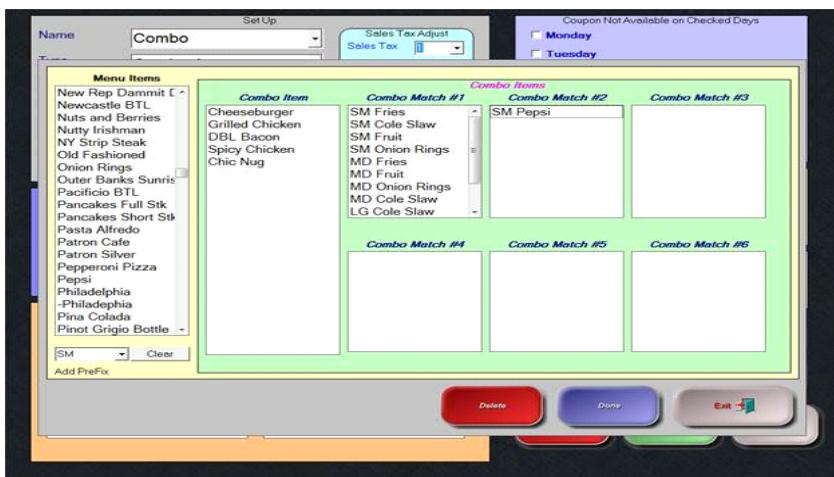
Recreating Items on the Check into a Combo Item

Automatically recreate the items into a combo menu item with the appropriate price.
Beneficial for quick service restaurants to create items into a "Cheeseburger Combo", Chicken Nugget Combo", etc.

📍 ID Screen > Managers Menu > **Discounts, Gratuity and Maintenance**

🚶 **Step-by-Step Instructions**

1. Type in a Name such as "Meal", **"Cmb"**, or "Combo". *This Combo Name will be suffixed at the end of the menu item from Combo Item box*

   > ⚠ **Keep in mind that receipts only allow 18 characters. If the menu item name is too long, your combo name may cut off and prevent the combo feature from triggering**

2. Select the appropriate combo discount **Type** – only uses Combo Amount or Combo Set Amount
   a. Combo Amount takes off a dollar amount off of the combo item.
   b. Combo Set Amount forces the combo item to the amount set in the "Amount" box
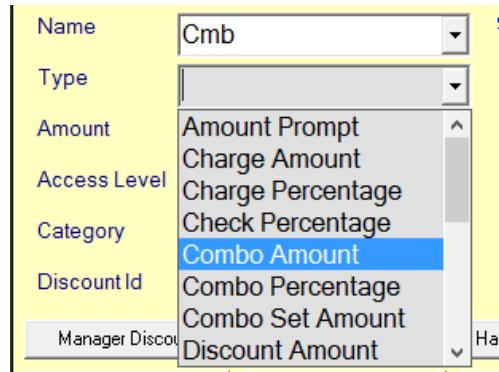
3. With this example, choose **Combo Amount**
4. Choose a low Access Level for this combo item (this is typically designed for discounts that need to be set for a specific security level, since this is a combo, set it to the lowest possible access of **Cook**).
5. Select the Category of **Combo Item.** Combo Item turns this 'discount' into a Combo Item vs. the regular discount of Combo.
6. Click on the **Combos** button
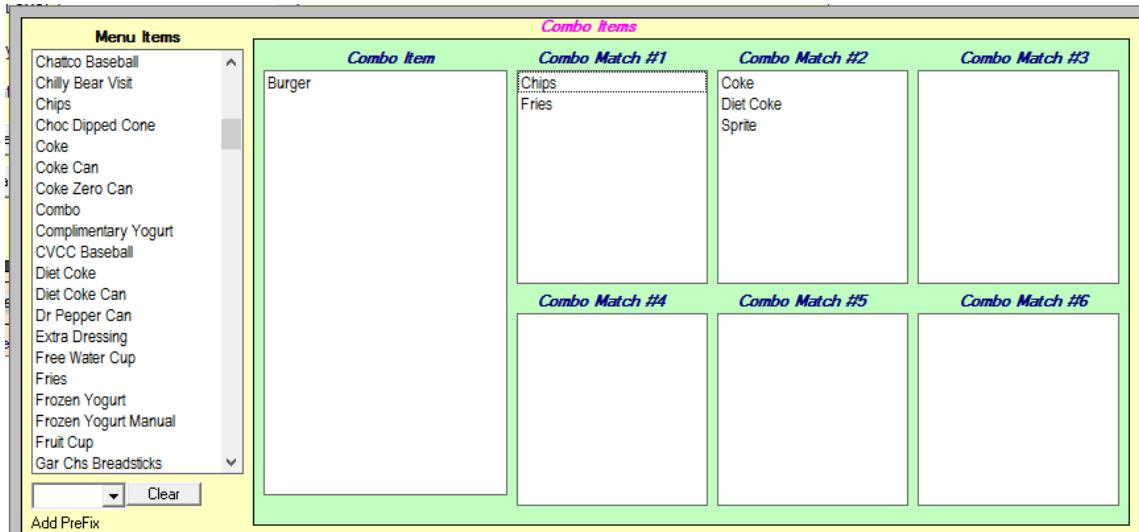
7.
8. Select which items are included in the **Combo** menu item. This is designed specifically for combo meals. You cannot put the same menu item name in more than one box.
9. Choose the *primary menu item name* from the Menu Items box and insert it in the **Combo Item** box.
10. Choose an additional item for the combo such as a side in the Combo Match #1 box; Put all types of sides you can get in this box

11. Choose an additional item for the combo such as a drink in the Combo Match #2 box; Put all types of drinks in this box

> ⚠️ **The combo feature must have exact matches to menu items. If you have shift pricing in your menu, you must put all shift prefixes in the combo boxes.**

Using Shift Prefixes:

1. Select the Menu Item in the Menu Items box and choose a **shift prefix**
2. Select the appropriate **Combo Match** box – you should see the menu item name with the shift name in front of the item.
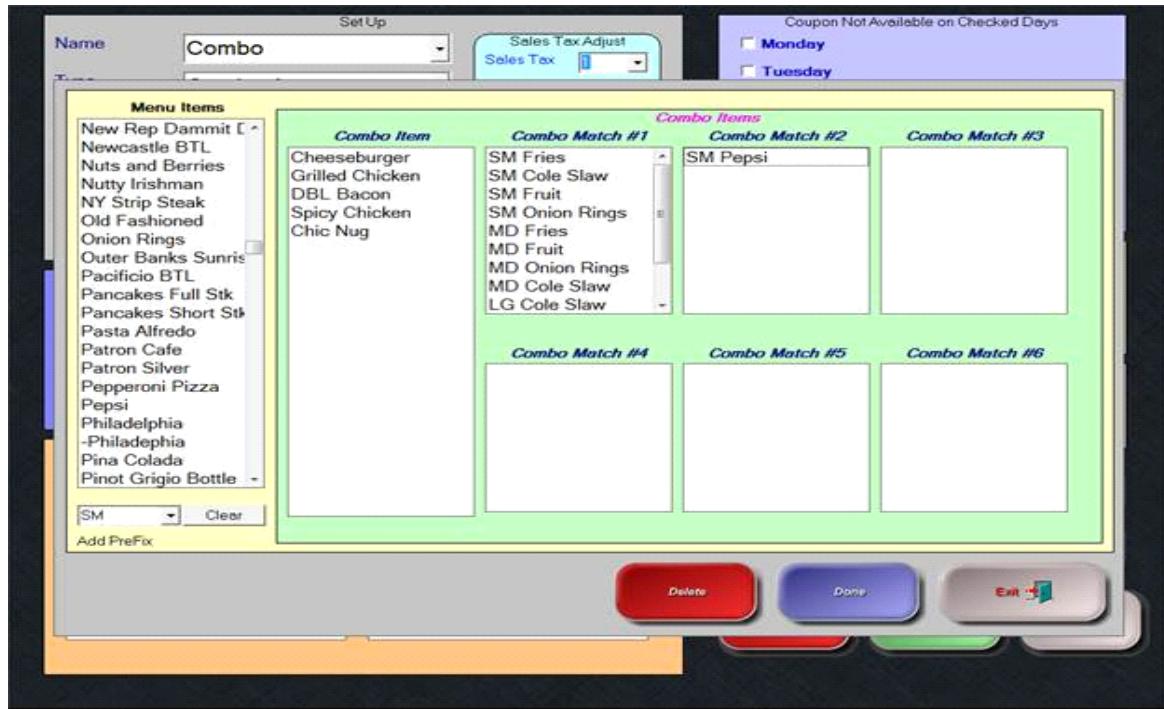
Item Reference

(Using the Recipe/Procedure Button)

This feature reminds the cashier to upsell a single item into a combo. When pressing the menu item, it will prompt a message asking if you would like to make the item into a combo. When pressing "yes", the menu item then references the combo version of the item.

📍 ID Screen > Managers Menu > Menu Maintenance > **Menu Items and Pricing**

🏃 **Step-by-Step Instructions**

1. Go to the Manager's Menu and then **Menu Maintenance**
2. Go to Menu Items and Pricing; set up a regular menu item
3. Press the **Recipe/Procedure** button at the bottom of the screen
4. Type in the word ***Prompt*** with a colon, followed by a closed question (Yes or No). After your question, put a dash and a reference word. MicroSale will automatically look for the reference word as a prefix. For MicroSale to look for that word as a suffix, put an exclamation point on the end.
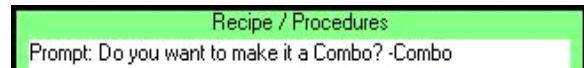5. Press **Done**
6. **Save** the menu item

Examples:
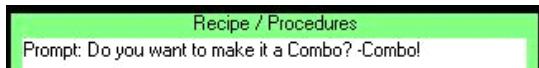
The reference word can be anything as long as it <u>matches to a menu item</u>

1. Create a Combo menu item using identical spelling with the added word of **Combo (or the word you used in the Recipe/ Procedure)**. Add in all necessary pricing, modifiers, etc.

> ⚠️ **If you used the Cntl S feature (where a menu item is saved and keeps all attributes of the previous menu item), please be sure that you delete the Prompt instructions in the Recipe / Procedure box. If you have the prompt again on the combo, it will throw the user into an endless loop.**

2. **Save** your new combo menu item
3. Put both menu items on to buttons

💬 By default, when the user touches "No", the prompt will not appear again on the current check. This is to prevent ongoing questions on the check. The **Yes or No** prompt is essentially designed to simply remind a cashier that another version of the menu item is available. To make the menu item **ALWAYS** prompt the question regardless of touching no, create a data file in the MicroSale directory.
   1. Create a new text file and name it **promptison.dat.** *Nothing needs to be inside the .dat file*
   2. Add the promptison.dat into the Dat Files folder in the MicroSale directory

Combo Menu Items

This function served as the original Combo feature in the system. This feature forces other items to follow a menu item name.

📍 ID Screen > Managers Menu > Menu Maintenance > **Combo Menu Items**

💬 **This feature is typically used for the following scenarios:**

1. To add a muffin/biscuit to the end of a menu item as a reminder to the kitchen that an additional item comes with an order by default
2. When selling a party package; ex; Party#1 comes with 100 wings, 3 2-liter sodas, and 3 sides of fries

---

🚶 **Step-by-Step Instructions**

1. Select the dropdown and select a menu item in the Combo Name. This will make the menu item the "leader" and you will then tell other menu items that need to follow the menu item set under **Combo Name**
2. Select the blank fields in the **Menu Items** box and select appropriate menu items that need to follow the **Combo Name**

💡 If the **Combo Name** does not have a price (price in the **Menu Items and Pricing screen** regular price), the Combo Name will not be shown; All menu items connected to the combo name will appear on the virtual check with individual prices.

💡 If a price is attached to the **Combo Name**, all menu items' prices attached to the Combo Name's prices will drop.

💡 If the **Combo Name** needs a specific discount attached to it, you will attach it here (or you can also attach it in the Discounts setup screen).
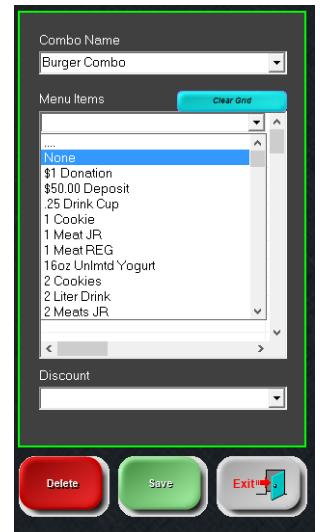
Liquor Doubles Builder

While you may simply want to create a modifier with an upcharge or ring in the item twice, below are several alternatives for ringing in liquor doubles, rocks and upcharges.

Shift Level Doubles

The benefits of the shift DBL:

1. The user can ring in the menu item first and then change it to a double after it is on the virtual check (by highlighting the item on the check and selecting "DBL") or by selecting DBL and then the menu item.
2. The reports will clearly show DBLs vs. Single liquor items so the inventory and product costs will be more accurate.
3. The system automatically doubles the price, you do not have to manually type in the price in the *Menu Items and Pricing* section.

🏃 Step-by-Step Instructions

1. Go to **Shift Levels** in the Menu Maintenance Screen
2. Type in *DBL* for the **Key Name.**

> ⚠️ **The letters "DBL" triggers the function of doubling the price of the menu item. If you do not want the system to automatically double the price, use a slight variation of this abbreviation such as "DBL." or "Dble".**
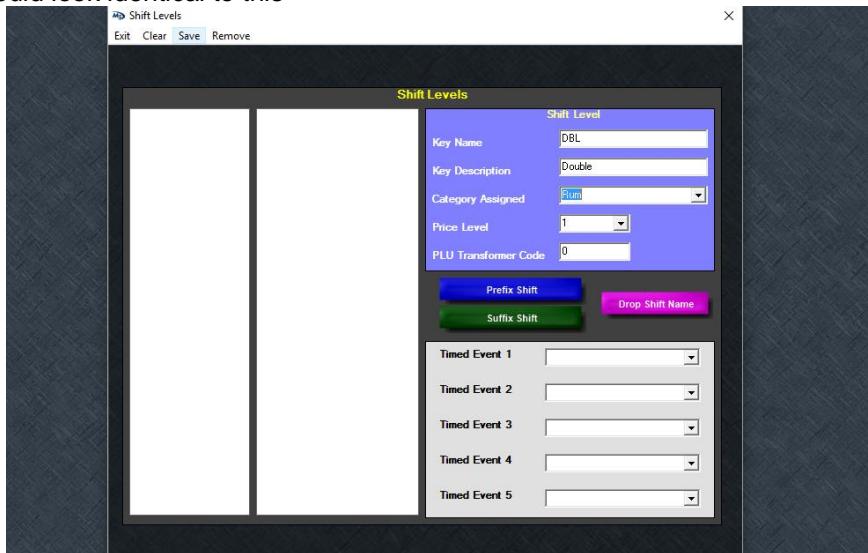
3. Type in *Double* for the **Key Description** (a key description is only shown on the button for the software user)
4. Select the **category** that will allow doubles (such as Rum)
5. Set the Price Level to **1**
6. **Save**
7. **You will need to repeat steps 2-5 for _all categories_ that will accept doubles**
8. Your screen should look identical to this

9. Go to a liquor item that will accept a double in the **Menu Items and Pricing Screen**
10. If you do not already have the liquor item programmed, program it now.
11. In the Shift Pricing area, press the dropdown and select **DBL**. *If you do not see anything in the dropdown list, the screen has not refreshed.* ***Save the menu item and go back to the item you just created.***
12. Next to Price Level 1, put in the price for the item with the **DBL. price**. This is not a price difference. **If you are using "DBL" which will double the price, leave the field blank as the system will automatically double the price of the value used in the regular price field.
13. For example, if a Captain Morgan is regularly $5 and a DBL. Captain Morgan is $8.50, put *$8.50* in the **DBL Price Level 1**.

14. **Do not check "Shift Price Only"** – this option forces the user to shift the item. This option is necessary for items that must have a shift attached such as a Small Coke, Medium Coke, and Large Coke. Since you can ring in this item without the Shift, <u>Do Not</u> checkmark the Shift Price Only option.
15. When you are done, select **save**

16. Since this item is not going to automatically shift the price, **you must put the DBL shift on a button**.
17. Go to **Menu Item Button Layout**
18. Select the appropriate category
19. Find *DBL* in the unassigned Menu Items list and add it on a button. Shift level buttons will always appear red on the order screen. **You cannot change this color.**

Prefix Doubles / Rocks

In several third-party inventory programs, it may be difficult to inventory modifier counts. The Prefix (or Suffix) function enables a menu item to transform into a new menu item. For example, if a user rings in Captain Morgan with the modifier, 'Rocks', the item will appear as *Captain Morgan Rocks* with the upcharge rolled into the menu item price.

> ⚠️ **For this function, the modifier group must prompt immediately following the menu item (meaning, leave the Optional Modifier box Unchecked).**

🏃 **Step-by-Step Instructions**

(Starting on the Modifier Setup Screen)

1. Create a modifier title
2. Select **Suffix** in the Department/Function screen *(or type in Suffix)*
3. If a choice must be selected, check **Mandatory Selection**
4. Create a modifier name such as *Dble*
   - 💡 Keep the name as short as possible, as this name will be added to the front/back of the menu item name. The max number of characters for a receipt printer is 18 characters, as the menu item name gets longer, pertinent letters may get cut off
   - 💡 You may choose to have an Alternate Description if you want the button name to appear differently than the name that will be shown on the guest check. The Alternate Description will also appear in place of the regular Modifier Name on the remote printers (kitchen/bar printers).
5. <u>The Modifier Price will be the price difference</u> – this number will be ADDED to the regular price.
6. **Save** when completed
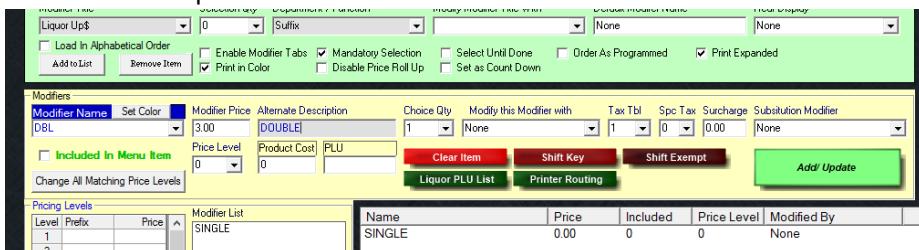
7. Assign this modifier group to the appropriate menu items, ensuring that this modifier group will prompt -leaving the Optional Modifier option Unchecked

Timed Events

Happy Hours, or Timed Events, automatically adjust prices based on the day of the week and/or time of day.

📍 ID Screen > Managers Menu > Menu Maintenance > **Timed Events**

💬 You can program menu items to change price during a specific time or day. Each menu item can have up to 6 prices (one regular and five timed events).

Screen Breakdown

Disable Event on This Terminal – disables the timed event from working on the register. This is beneficial if certain terminals in your restaurant have other Timed Events than the rest of the restaurant; such as having a later happy hour at the bar vs. the floor.

Reduce Price or Increase Price – if you have a global price increase/reduction for a department/category/menu item, you can put the price reduction/increase in this field.

> ⚠ **To prevent confusion when others are managing the menu, use the Timed Event price field in the *Menu Items and Pricing* screen instead of putting an amount here.**
> ⚠ **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.**

💡 **Use 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.

🏃 **Step-by-Step Instructions**

1. **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 names or abbreviations when naming your Timed Events
2. Select a **Start Time** by clicking in the Start Time box – an Hour prompt will appear.
3. Then select **Minutes** – common denominations appear in green to the left.
4. 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.
9. **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.**
10. If you select the following day, the day selected will activate again during the Start Time and End Time.
11. You do not need to set "Dates Valid" – the timed event will be active every week on the selected days.
12. **Save** and then Exit *–complete setup on following page*

Now that the *Timed Event* is created, assign the Timed Event to a menu item:

1. Go to Menu Items and Pricing
2. Select Use Timed Event With this Menu Item
3. If this menu item is ONLY available during the timed event, uncheck Available Daily.
4. Select the dropdown and choose the appropriate Timed Event name
5. Type in the price that this item should be during the Timed Event
   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.
6. Select Save and then Exit.

How to disable a Timed Event for a Terminal (or for a day)

If you are hosting an event or you need to temporarily disable a Timed Event, you can disable the timed event on the terminal and then enable it again when you are ready to use it again.

Manager Menu > Menu Maintenance > Timed Event -> Select Timed Event > Check "Disable Timed Event on this Terminal"

Button Layout

Up to 45 buttons fit on each screen. If you have more than 45 buttons, you will have to put the 46+ buttons on the next page, using the Page Down button on the Button Layout screen. If you do have over 45 menu items in a category, it will be easier for your staff to navigate through the screens with subcategories. Subcategories help further organize groups of menu items such as Gluten Free Pizzas, Vodka, Rum, Specialty Drinks, etc.

📍 ID Screen > Managers Menu > Menu Maintenance > **Menu Item Button Layout**

Screen Breakdown

The **All Categories** button populates all menu items in the system. This allows you to put menu items on multiple screens. For example, you may want your subcategories on every page or sides on every screen. While the items may be on multiple screens, it will only report to the category the item is assigned to in the Menu Items and Pricing screen.

Main Category is used after All Categories is selected. It will filter out the entire menu items not associated with the category screen you are currently editing.

Command Functions:

Select **Cancel Options** when you are no longer using a function. Otherwise, when you click a button, it will do the highlighted command.

Color / Logo / Sound – used for customizing the button color, adding a picture, or adding a sound. If you cannot find the picture you are looking for, you can create your own. Please reference the Customizing MicroSale document.

Restore Default – populates as many buttons on the layout as unassigned items in the Unassigned Menu Item list. Or, if you select this after buttons are on the screen, it will repopulate them all to the default size and grouped together.

Alphabetical Order – automatically populates all unassigned items onto the buttons on the screen. *This function works best if you use the Restore Default function first.*

Copy Color – copies one button color to another. Click the Copy Color function and then click (left click) the button that you want to copy and then left click one or multiple buttons to "paste" the color.

Expand Buttons – increases or decreases the size of a button. Click Expand Buttons and then holding a right click on a button, drag the button inwards or outwards. Use Expand Buttons first and then copy the new size to other buttons using **Copy Size**.

Copy Size – copies one button size to another. Click the Copy Size function and then click (left click) the button that you want to copy and then left click one or multiple buttons to "paste" the new size.

Restore – restores selected buttons back to the default size. Click Restore and then click (left click) one or multiple buttons.

Snap to Bottom | Snap to Right – 'snaps' buttons together to keep buttons aligned and organized. Assuming at least one button is on the layout screen, click (left click) the button that you want all other buttons to snap to, think of this as the base. After clicking the first button, left click one or multiple buttons that should snap together under/or right the base button. If you click too many times, you may have one button under another, so you will need to drag it out of the way and redo it (click Cancel Options > Snap to Bottom > then click on the last button that now needs to work as the base.

Align to Left – aligns buttons in a straight column. Click Align to Left and then click a base button followed by all buttons you want aligned under the base. This function is different than the Snap to Bottom, as it does not snap the buttons directly under another. The buttons will stay in the same row (or horizontal placement) but will all align in a straight column.

Set Font Size – increases or decreases the text on a button. Click font size or font number and input the desired size (the default font size is 9. Depending on your button size, font 11-13 will be best). After the size is inputted, double click one or multiple buttons that should use this font size. If you only left click once, you may think your text disappeared. Simply click again. With only one click, the system 'pends' the text, to allow you to place the text on another button on the screen.

Button to Copy and Copy to Category – select button text in the dropdown and then choose the category you wish to copy the button to, followed by Copy Button. This function is beneficial when you want the same button on multiple screens and want it in the exact same placement on the screen. If you do not need the button in the same place with the same attributes, the All Categories function will allow you to place the same menu item on multiple screens.

Kiosk Button Size – makes the button the default size for Kiosk functionality.

⚠ Button Layout Guidelines

1. Your computer must be in "1024 x 768 resolution to save the button layout.
2. You must click **Save** on the button layout before you toggle to another category or exit the screen. If you are unhappy with the layout and you do not want to save it, simply click **Exit** and go back.
3. You must click **Cancel Options** in order to deactivate a highlighted function
4. One left click on a button with text will *pend* the text in the system. It will allow you to click in the Unassigned Menu Items box to place it back in the box or will allow you to place the text on another button. Double click or click again to place the text back on a button.
5. If you want to put buttons on a second page (using **Page Down)**, you must have 45 buttons on the first page. To quickly see if 45 are on the page, click **Restore Default**. If any spaces are missing, you have not reached the 45 button maximum.
6. If you want to place a menu item on a screen that does not belong to that category, click **All Categories.** If you do not see an Unassigned Button, that means that there are no other menu items assigned to that category. Simply double click the menu item text to add a button to the screen.

⚠ **If the button layout prompts "1024 x 768 resolution is required" but your computer is in the proper resolution, the following changes will correct the error:**

Windows Desktop > Display Settings > Advanced Display Settings > Advanced sizing of text and other items > Set a custom scaling level > Set back at 100% > OK

🚶 Step-by-Step Instructions for adding menu items to the button layout

💡 **Shortcut -** Select Restore Default (this will populate as many buttons as there are menu items listed in the Unassigned Button area). Then start placing the menu item text on the buttons or use Alphabetical Order to automatically populate all menu items to the buttons.

1. Select **Menu Item Button Layout**
2. Select the appropriate category on the left side of the screen
3. You should see all of your saved items in the white box under "Unassigned Menu Items".
   (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).
4. Select an item that you want to add to a button. (left click)
5. Add the menu item on an unassigned button (left click)
6. Drag the button to the screen (holding a right click)
7. Continue until all items are on the screen
8. *Use your top button as your 'axis' point – meaning this is your "base" menu item for alignment.* (Left Click) Select Snap To Bottom
9. 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.
10. 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.
11. Select Set Font Size – and type in a desired size.
12. (Left click) double click all buttons that should use the new font size.
13. Select Save when you are ready to leave the screen – if you select Exit first, you will lose your changes!!!

Button Colors

Step-by-Step Adding 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. Select **Cancel Function** when completed.

Adding Pictures to Buttons

Step-by-Step Adding Pictures to Buttons

8. Select **Copy Color**
9. Select **Color / Logo / Sound**
10. Select an image
11. When you are satisfied with the button in the sample, (left click) select the appropriate button. *The image will overlay over the text on the order screen.*
12. If you need to take off the image, select **Cancel Function** and then double click the button.

Copying Button Colors

Step-by-Step Copying Button Colors from Existing buttons

In addition to creating new button 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.

Add buttons to Multiple Screens

Adding Menu Items to Multiple Screens

You can also add menu items from other categories by selecting All Categories. The menu items will report to its assigned category from the Menu Items and Pricing screen.

1. Double click the text to add a new button
2. Select **Yes** when prompted, "Add Button?"
3. Add the text to the unassigned button (gray button under the Unassigned Menu Item box)
4. Drag the button to the button layout

Blank Buttons

Blank buttons act as label names
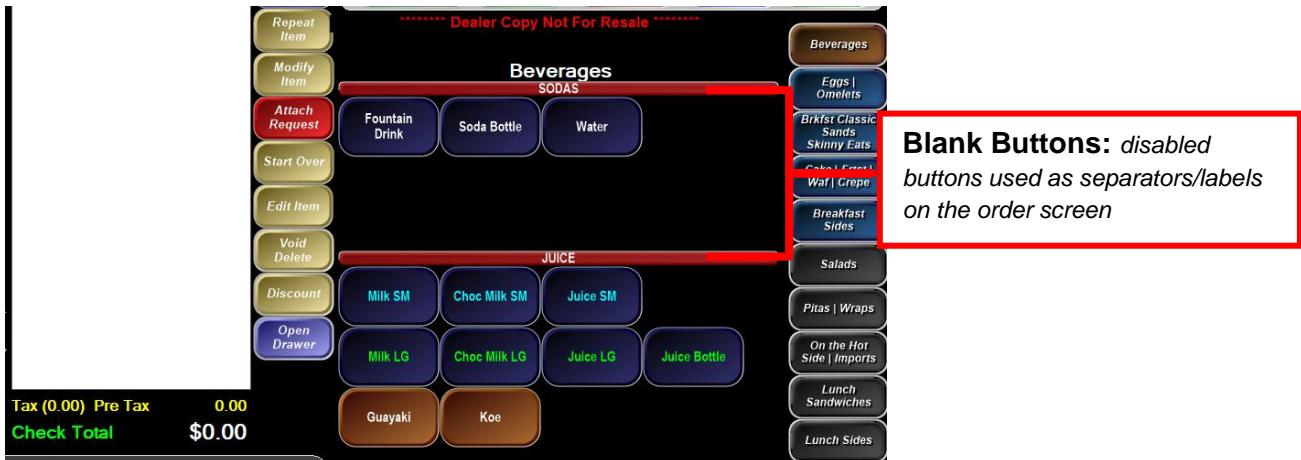
Blank Buttons: *disabled buttons used as separators/labels on the order screen*

🚶 Step-by-Step Instructions

1. Create a **regular menu item** with the text Blank in the name.
2. The word "Blank" is a trigger in MicroSale to deactivate the button – meaning, the button will not have functionality on the order screen. Blank buttons allow you to organize and separate sections of a screen. As long as the word Blank is a part of the name, you can add other words to it to help differentiate between all of your blanks (assuming you will be creating multiple blank buttons). Such as Soda Blank, Hot Dogs Blank, Bottled Beer Blank
3. Create a description for the **Button Name (under Menu Item Name)** for your blank button that will help describe the group of buttons that will be placed under the blank button.
    - 💡 Since this button is non-functional, it does not need a Regular Price but you will need to assign it to the proper Category name in order to find it. Set the Department to anything in the dropdown list (since the button is unable to ring in, you will not see this on your reports).
4. Save your menu item
5. Select **Menu Item Button Layout** (from the Menu Items and Pricing screen or from the Managers Menu)
6. Select the appropriate category on the right side and select (left click) the Blank- Sodas in the Unassigned Menu Items list
7. Add the menu item on an unassigned button (left click)
8. Drag the button to the screen (holding a right click)
9. Select Expand Buttons
10. Right click (and hold) the Blank button to expand
11. Keep holding until you have reached the desired shape of the button.
12. When you are satisfied with the button, click **Cancel Options** and **Save**

Modifiers

Modifiers are groups of items used to extend, alter, or further define menu items. Modifier Functions further define modifiers, allowing them to take on a new role or function that is different than the norm.

📍 ID Screen > Managers Menu > Menu Maintenance > **Modifier Setup**

Screen Breakdown – Tool Bar and Green Section

Modifier Title: used for a group of modifiers. The title should describe the modifier names within the group such as salad dressings, burger mods, etc.

Selection Qty: keep the Qty at the default of 0 unless the modifier title is used as a "modify this modifier with" (explained later this this chapter).

Department / Function: by default, modifiers follow the menu item in reporting and this field can be left blank. If you need the modifier group to go to a specific department or if the group uses special functions, please use the dropdown and select the desired name.

Modify Modifier Title With: This function is commonly used when there are more than six modifier groups assigned to an item, as you cannot assign over 6 groups to a menu item. This will link the **Modifier Group** you are currently on to another modifier group.

Default Modifier Name: typically left blank. This field is used for Preselects and Required functions (further explained in this chapter)

Rear Display: typically left blank. This field will assign a modifier group to a picture that will be shown on the register's rear display screen.

Add to List: Adds the modifier group to the list of modifier groups in the system

Remove Item: Removes the modifier group from the list in the system. Make sure you do not have menu items connected to this modifier group before deleting it.

Load in Alphabetical Order: Select this checkbox and then pull up an existing modifier group to resort the list in Alphabetical   Order. If you would like to the list to be resaved in this order, select **Save** in the top left corner.

Enable Modifier Tabs: Check this for menu items that will require multiple modifiers. This will have to be turned on for the FIRST modifier choice. To the right shows what the Matrix looks like. In this case, you would have to check Enable Matrix on the first modifier of SPL Flavors 4. (see picture above)*This option allows the user to go out of sequence in the modifier choices.*

Mandatory Selection: This option means that you must choose a modifier before pressing DONE. (a mandatory selection turns the background dark red on the order screen)

Select until Done: This will keep the modifier screen open, allowing the users to choose as many modifiers as he or she would like until hitting DONE.

Order as Programmed: Despite how the order is rang in, the order will input as it is programmed on this screen with this enabled.

Expand Print on Check: all of the modifiers chosen will show on the receipt.

Print in Color: Modifiers will print in Red to kitchen when enabled

Disable Price Roll Up: by default, modifier upcharges will appear next to the modifier name instead of it adding to the menu item price. However, when you are using the register option "Roll Price into Menu Item", all modifier prices add to the menu item price. With this checkmark, it will disable the register option on any and all modifier groups.

Set as Count Down: function for wings or items with a high quantity choice allowing you to choose your own increments. (See Countdowns further in document)

Show Included With: a quick reference to see what modifier names are included in the modifier group. The "1" indication in the modifier list box also shows the items that are included

Placing Modifiers out of Stock -Designed for Kiosk. In kiosk, customers enter the menu items. If sides are listed as a modifier, and for example, you are out of coleslaw, a customer would need to know in order to make a different selection. This function pulls up the list of all modifier names so if coleslaw is listed in multiple groups, it only needs to be selected once to mark it as out.

Changing Shift Level Pricing at Once –Designed for Pizza using green buttons. If you have a topping that has a price increase or decrease, you can make that change throughout the modifier groups at once. Select a modifier in a list that you need to change, for example, Bacon. For Price Level 1, bacon should now be $1.25 instead of $1.00. MicroSale will find all Bacon modifiers that are listed

at $1.00 and change it to the new price.
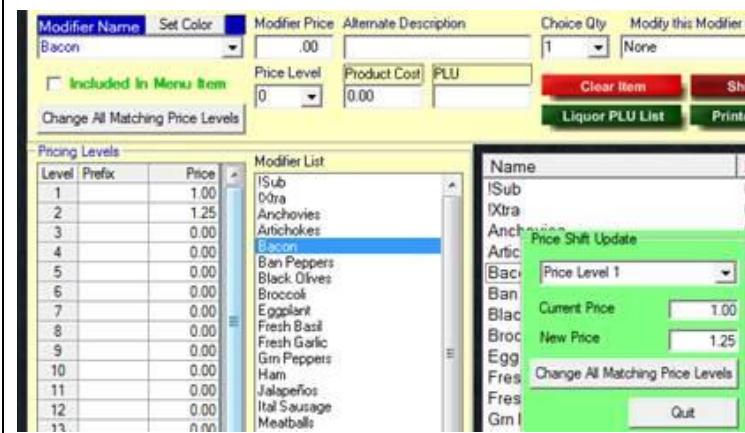
Screen Breakdown – Modifiers Area and Yellow Section

Modifier Name: name of the modifier such as lettuce, chicken, etc. By clicking on the label, Modifier Name, the color will adjust back to default blue

Set Color: Changes the text and border color of the modifier button

Modifier Price: the regular price of the modifier

Alternate Description: allows the modifier button name/remote printer names to differ from the modifier name used on the guest check. Useful when your kitchen uses abbreviations such as FF vs. French Fries.

Choice Qty: by default, the Choice Qty is one. If an entrée allows up to two sides but a side salad, for example, counts as two sides, you can set the Choice Qty to 2

Modify this Modifier with: connects another modifier group to a modifier. Useful for side salads that need to prompt a "Dressing" choice

Tax Tbl: default is set to 1. If you need the modifier name to use a different table, you can set it here

Spc Tax: default is set to 0. If you need the modifier name to use a different table, you can set it here

Surcharge: will charge a surcharge when this modifier name is selected

Substitution Modifier: allows you to sub out a modifier with a selection in the group connected to this modifier name

Included in Menu Item: turns the modifier button green indicating that the item is included in the menu item

Price Level (dropdown): used for preselect / prefix modifier functions (described later in this chapter)

Product Cost: allows you to add your cost to the modifiers selected with a menu item. While you will get more accurate costs using the inventory program, this is a free and easy way to better track food cost

PLU: typically only used in third-party programs

Clear Item: clears out the modifier name and attributes so that you can add a new item

Shift Key: adds in an exclamation point for a prefix name

Shift Exempt: exempts a modifier name from using a prefix name

Liquor PLU List: used for liquor control solutions

Printer Routing: routes modifiers to specified printers

Add/Update: adds a new modifier name to the list or updates an existing modifier name

Pricing Levels: the pricing levels works with the Shift Levels on the Menu Item and Pricing screen or the Timed Event Mod Price. This area allows you to have multiple prices for each modifier name.

Move Up/ Move Down: moves modifier names up or down in the modifier list.

List Box: shows modifier names in each modifier group. Double click the item in the list box to alter it, however, make sure you select "Add/Update" to add it back to the list.

Creating a Modifier Group and assigning it to a Menu Item

Step-by-Step Instructions

1. 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.
2. **Type in a title appropriate for this group of modifier names** – such as **Meat Temp**
3. **Click in the box under Modifier Name** (Select **Yes** when it prompts "Add New Item to List")
4. **Type in a modifier name** – such as **Rare**
5. 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.
6. *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.)
7. Select **Save.**

Now that you have a modifier group built, go to Menu Items and Pricing

8. Create a new menu item or select one in the dropdown
9. Select the option **Turn on Modifiers**
10. Next to **Modifier #1**, select the **Modifier Title** that is appropriate for this menu item.
11. If you want this modifier group to prompt as soon as the cashier/server selects this menu item, leave the Optional Modifier box unchecked.
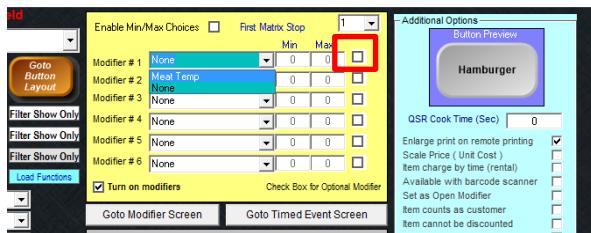
⚠ Only prompt for modifier groups that are important to appear with the menu item such as meat temps, mandatory sides, other additions that are important for the kitchen to know, or additions that incur an extra cost.

⚠ 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.
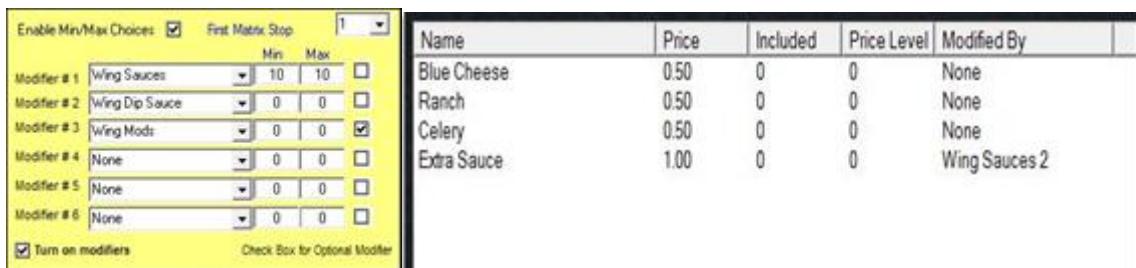

12. Select **Save (lower right button on the Menu Items and Pricing screen** when you are done.

Advanced Modifier Functionality

Order as Programmed

Sorts modifiers on the virtual check in the same order as they are listed in the modifier setup area.

If Order as Programmed is enabled on *any* modifier group connected to the menu item, it will enable Order as Programmed for ALL of the modifiers. This also includes modifier groups that are connected to a modifier name. This could be an issue for menu items such as "2 Tacos" where each taco needs to be modified separately. To ensure that the modifiers appear properly, make sure order as programmed is unchecked on all modifier groups pertaining to the menu item.

Modify this Modifier Title With

This function is commonly used when there are more than six modifier groups assigned to an item, as you cannot assign over 6 groups to a menu item. This will link the **Modifier Group** you are currently on to another modifier group.

> **AUTHOR NOTE:** program menus as simple as possible; Menu Items should not have over 6 modifier groups attached to it. Too many modifier groups will expend order taker's time and makes the menu more difficult to maintain for restaurant management.

Modifier Prefixes

!No-, !Add-, !Sub-, !Extra-

On the modifier screen, you can add modifier names that will go in front of another modifier name, known as a prefix. Prefixes are beneficial when the restaurant allows menu items to be altered or they allow ingredients to be added or deleted.
The Exclamation point triggers MicroSale to create the modifier name into a prefix. A prefix button can have up to 4 characters. (The button will turn Gold).

> 💡 **The !Sub- and !No- buttons strip off the Modifier Price. If you want a prefix to always strip off the Modifier Price, put a dash in front of the prefix such as *!-side.***

> 💡 **To be able to recall this modifier on the virtual check, add a DASH on the end of the name, For example !No- or !OnSd-.**
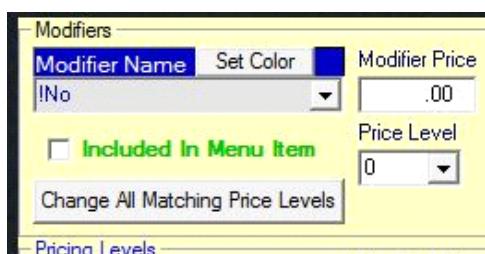
Modifier Prefixes with Specific Pricing (!Xtra-)

Such as Extra Lettuce is .25 cents and Extra Bacon is $1.00

👣 Step-by-Step Instructions

1. Create a prefix name such as *!Xtra-.* A prefix will only show four characters
2. **Set the Matrix Level to 1.** (Do not put in a price for the Xtra)

3. Insert the prefix into your modifier list by selecting the green **Add/Edit** arrow
4. Type in the modifier name. The below example, extra lettuce will cost an additional .25 cents. *Notice* that the matrix level is set to 0. This shows that lettuce regularly will not cost anything. When first pressing the prefix of "Xtra" the lettuce will then reference the .25 in the Price Level of 1.

   For further clarification, the modifier price to the right of the modifier name is a level of 0. The Shift levels in the gray then start at 1.
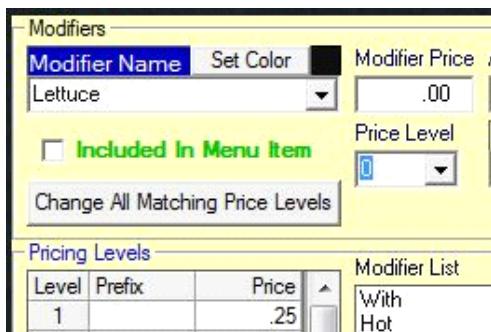
5. For additional items, such as "Bacon" that is not included such as lettuce, you can type in a price for the modifier, such as .50 cents. This will allow the user ringing in the item press Bacon and adds the .50 cents. However, if the customer wanted to add bacon plus add additional bacon, the below screen shot would then allow the user to press "Xtra- Bacon" for $1.00.
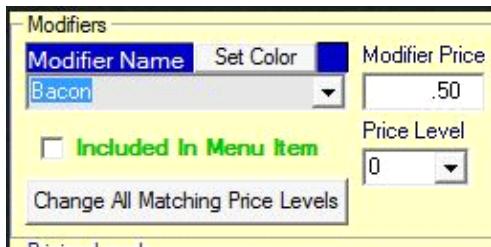
⚠ Exceptions to the '!Xtra' Rule

When using 'Included Modifiers "Green Buttons" ', the functionality for Xtra slightly changes. Instead of looking at only the price level, the !Xtra price will sum the 'Modifier Price' and Price Level price together. This allows non-included items to charge the regular price and the extra price together. If you need the included item to only charge the Price Level price for Xtra, delete out the regular 'Modifier Price' for that item.

Understanding Modifier Dept/Functions

In most restaurants, advanced modifier functionality is not used. However, in some cases, you may need to use the special functions to solve an issue with a complex menu.

Special Modifier Function Terms

Append
Modifiers in this selection will go to the bottom of the modifier list on a menu item. This works for optional modifiers and open modifiers.
BENEFIT: When you need certain modifiers to always be forced to the bottom of a menu item with modifiers, such as sides, biscuits, cutlery, etc.

Prefix and Suffix
Modifiers in this selection will go to the right (prefix) or left (suffix) of the menu item and not underneath as a typical modifier. If there is an attached price, it will add it to the main item. The Prefix and Suffix functions recreate the menu item, so this will be reflected in reports.

BENEFIT: Creates new menu items based on a prefix/suffix in reports and saves space on the order screen – for example, if the restaurant sells a Caesar salad with Salmon, Mahi, MKT price fish, or Chicken, you can create the proteins as a Prefix Modifier. This is also useful for liquor and you want doubles to show as DBL Stoli so that you can easily do inventory counts.

PreSelect

This function will automatically insert a "SM, MED, or LG" along with the appropriate price when choosing a drink, attaching an auto side to the menu item.
BENEFIT: Preselect modifiers are useful in combo meals and any other menu item that is ordered with a certain size most of the time.

🏃 Step-by-Step Instructions

Part 1 – Creating PreSelect Drinks

1. Create a **Modifier Title** for the drinks first. The Modifier Title can be anything, such as "Drinks"
2. Select **PreSelect** under the Dept/Function field
3. Under Modifier Name, type in **!SM-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
4. Under Price Level, select **1**
5. Select **Add/Update**
6. Under Modifier Name type in **!MD-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
7. Under Price Level, select **2**
8. Select **Add/Update**
9. Under Modifier Name type in **!LG-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)

10. Under Price Level, select **3**
11. Select **Add/Update**

⚠ **DO NOT PUT IN A PRICE FOR THE SM, MD, LG PREFIX NAMES**

12. Begin typing in the drink choices, such as **Coke**
13. Add in the prices for the drink under the **Pricing Levels**
14. In the first blank box, referring to the Price Level 1, assigned to the prefix "SM", type in 0 if there is not an additional charge for a SM Coke.
15. The .15 represents a .15 upcharge for a MD And .25 upcharge for LG

⚠ ***Preselects are cued by the default modifier color***

⚠ *If you change the color of the modifier button, it will strip off the predetermined prefix. –to get back to the default color, press the Modifier Name text (highlighted in blue to the left of Set Color. You may not want certain drinks to have a prefix such as Milk or Bottled Water.*

16. Press the green arrow to add the modifier to the list. (do not use the insert key on your keyboard, as the price levels will not carry over)
17. **Save**

PART 2 – Creating PreSelect Sides

1. Create a Modifier Title for the Sides. The Modifier Title can be anything, such as Sides
2. Select PreSelect under the Dept/Function field
3. Type in a Default Modifier Name (this will automatically insert on the virtual check).

⚠ **The spelling of the Default Modifier Name <u>MUST</u> match one of the choices in the modifier list.**

4. Under Modifier Name, type in **!SM-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
5. Under Price Level, select **1**
6. Select **Add/Update**
7. Under Modifier Name type in **!MD-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
8. Under Price Level, select **2**
9. Select **Add/Update**
10. Under Modifier Name type in **!LG-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
11. Under Price Level, select **3**
12. Select **Add/Update**

⚠ **DO NOT PUT IN A PRICE FOR THE SM, MD, LG**

13. Begin typing in the side choices, such as Fries
14. Add in the prices for the Fries under the Pricing Levels
15. In the first blank box, referring to the Price Level 1, assigned to the prefix "SM", type in 0 if there is not an additional charge for a SM Coke.
16. The .15 represents a .15 upcharge for a MD And .25 upcharge for LG

⚠ ***Preselects are cued by the default modifier color***

⚠ *If you change the color of the modifier button, it will strip off the predetermined prefix. –to get back to the default blue, press the Modifier Name text (highlighted in blue to the left of Set Color. You may not want certain drinks to have a prefix such as Bowl Chili or Baked Potato.*

17. Press the green arrow to add the modifier to the list. (do not use the insert key on your keyboard, as the price levels will not carry over)
18. Do not forget to **Save** the Modifier Group!!! (to the right of the Exit)

Prefix Modifier

- Prefix modifiers are similar to "PreSelect Modifiers" however; PreSelect Modifiers pull in the default modifier on the following screen. Prefix Modifiers allow you to go from one screen to the next without pulling in a default modifier on the second modifier screen.

- Prefix Modifiers are cued by the default color. If you change the color of the modifier button, it will strip off the predetermined prefix. *(WHY?) This allows you to have all of your drinks on one screen. On drinks such as Milk, Juice, Bottled Water, you would not want it to pull in a size.*

Step-by-Step Instructions

1. Create a Modifier Title for the drinks first. The Modifier Title can be anything, such as *Combo Drinks*
2. Select **Prefix Modifie**r under the Dept/Function field
3. Under Modifier Name, type in **!SM-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
4. Under Price Level, select **1**
5. Select **Add/Update**
6. Under Modifier Name type in **!MD-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
7. Under Price Level, select **2**
8. Select **Add/Update**
9. Under Modifier Name type in **!LG-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
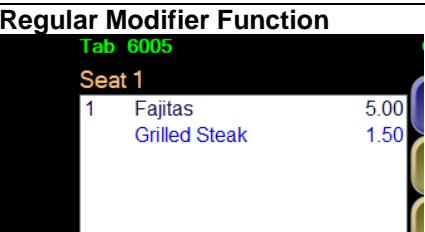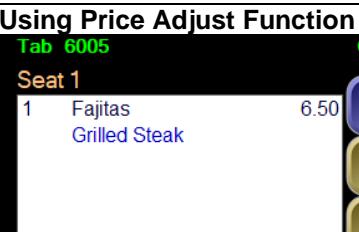10. Under Price Level, select **3**
11. Select **Add/Update**

⚠ **DO NOT PUT IN A PRICE FOR THE SM, MD, LG prefix names**

12. Begin typing in the drink choices, such as Coke
13. Add in the prices for the drink under the Pricing Levels
14. In the first blank box, referring to the Price Level 1, assigned to the prefix "SM", type in 0 if there is not an additional charge for a SM Coke.
15. The .15 represents a .15 upcharge for a MD And .25 upcharge for LG
⚠ ****Prefix Modifiers are cued by the default blue color****
⚠ **If you change the color of the modifier button, it will strip off the predetermined prefix. *–to get back to the default color, press the Modifier Name text (highlighted in blue to the left of Set Color. You may not want certain drinks to have a prefix such as Milk or Bottled Water.***
16. Press the **green arrow** to add the modifier to the list. (do not use the insert key on your keyboard, as the price levels will not carry over)
17. **Save**

Price Adjust

The department/function *Price Adjust* enables the modifier group to 'roll' or 'sum' the price of the modifiers into the menu item that the modifier group is attached with. While there is a register option to "Roll Price into Main Item", in some cases, you may not want this option set on every modifier screen.

The Price Adjust function is useful when you do not want your guests to see an itemized upcharge next to a modifier choice. Examples such as "Grilled Steak $1.50" or "Shrimp $4.00".

Regular Modifier Function	Using Price Adjust Function

Regular Modifier Function:
Tab 6005
Seat 1
1 Fajitas   5.00
   Grilled Steak   1.50

Using Price Adjust Function:
Tab 6005
Seat 1
1 Fajitas   6.50
   Grilled Steak

Requiring a Shift (Shift Required)

- 💡 *Requiring a Shift vs. Prefix Modifier… what's the difference?*
  - o A Prefix Modifier automatically inserts a prefix shift. **Shift Required** will not automatically insert the prefix and will prompt the user that a prefix shift must be chosen prior to selecting a modifier. Unlike the Prefix Modifier, the default blue color is not involved in the set up. You can choose any modifier color.
  For the modifier to trigger the shift prompt, use a negative one (-1) price level for each appropriate modifier.

🏃 Step-by-Step Instructions

1. Create a Modifier Title for the drinks first. The Modifier Title can be anything, *such as "Drinks"*
2. Select **Shift Required** under the Dept/Function field
3. Under Modifier Name, type in **!SM-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
4. Under Price Level, select **1**
5. Select **Add/Update**
6. Under Modifier Name type in **!MD-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
7. Under Price Level, select **2**
8. Select **Add/Update**
9. Under Modifier Name type in **!LG-** (exclamation point creates the item into a prefix, The dash (-) enables the prefix to become recalled after order entry.)
10. Under Price Level, select **3**
11. Select **Add/Update**

Required

- 💡 *Required vs. Mandatory… what's the difference?*
  - o A mandatory checkbox will force the user to touch a modifier before exiting the modifier screen. The **Shift Required** function enables the user to continue ringing in multiple items without interrupting the customer. Before the user tenders the order, it will remind them that you are missing criteria that is *required* before the order can be completed.

QUICK SERVICE ONLY; USING THE SKIP REGISTER OPTION

Step-by-Step Instructions

1. Type in a modifier title and choose **Required** for the Department/Function

⚠ **You MUST have a Default Modifier Name. The Default Modifier Name will be a short instruction, such as MISSING DRINK or MISSING SIDE**

⚠ **Since the Default Modifier Name is not a choice in the modifier list such as Coke, Diet Coke, Sprite, etc., MicroSale will know that a choice was not actually picked. (Refers to the above picture after touching Pay Order). When you press OK, it will link you back to the modifier screen(s) that needs a selection.**

2. Check **Mandatory** so the software requires a choice selection before tendering the order

Stack

This function allows two prefixes to go on the same line. For example, you can choose Wings, XC and XWET, (XC and XWET set as prefixes). This will allow all 3 words to be on the same line on the virtual check and printed receipt.

👤 Step-by-Step Instructions

1. Type in a Modifier Title
2. Choose *Stack* in the **Department/Function**
3. Add prefixes in the modifier group, such as *!XC* or *!XWET*
4. Add in the modifier names such as Mild, Medium, BBQ, etc.
5. When you are done, select **Save**

Select ½ (Pizza Half Function)

Select ½, Select ½ 100%, Select ½ 75%, are used for pizza menu items where a customer can get toppings on half of the pizza. Based on the function you choose, such as 100%, 75%, etc., the topping will be discounted by that percentage. Some restaurants may want to charge exactly half price for toppings that only go on one side of a pizza while others may need to charge more or less. If the percentage that needs to be charged is not listed in MicroSale, you can type in a custom number such as Select ½-66%, Select ½-20%, etc.

👤 Step-by-Step Instructions

1. Go to Menu Maintenance and then **Menu Modifiers**
2. Find the modifier group that should include the pizza half functionality
3. Under the Department/Function, select "Select 1/2" if you want to charge exactly ½ for the half toppings. You may also choose "Select ½ 100%", "Select ½ 50%", or "Select ½ 75%", which will take that percentage of the topping price when using the halves.

Modifier Title	Selection Qty	Department / Function	Modify Modifier Title With	Default Modifer Name	Rear Display
Pizza Toppings	0	Select 1/2	None	None	None

☐ Load In Alphabetical Order
☑ Enable Modifier Tabs ☐ Mandatory Selection ☑ Select Until Done ☑ Order As Programmed ☑ Print Expanded
Add to List   Remove Item   ☑ Print in Color ☐ Disable Price Roll Up ☐ Set as Count Down

4.

5. Select **Save** and **Exit**

Changing the Default "L" and "R" Terminology

On the order screen, the user will select L or R for Left Half or Right Half of the pizza. If you would like to use different terminology, please go to: Manager Menu > Register Setup > Terminal Configuration > Register Options > Under General, select **Misc Options >** Type in *1st* and *2nd* or any other terminology of your choosing > Select Finished > **Save > Exit.**

Upick-

Upick- is a function that has been created for scenarios where you may have a certain number of modifiers (or toppings) for free and after the maximum amount has been chosen, the modifiers need to start charging a price. Since you may choose any number as your maximum, the option is not 'hard coded in the software'. You will need to create the function with the number of maximum free choices.

🏃 Step-by-Step Instructions

1. Type in a Modifier Title
2. In the Department / Function, type in *Upick-* followed by the amount of toppings that will be free.

Modifier Title	Selection Qty	Department / Function
Pizza Toppings ▼	0 ▼	Upick-3 ▼

☐ Load In Alphabetical Order

3. ⚠ The number typed in the department is the trigger, it will know that you can only get up to that specific quantity at no charge

4. Type in a Modifier Name such as *Cheese.* Type in a prefix such as c- or $- and a price in the Price Field. The prefix is crucial to this setup.

   ⚠ The Price Levels MUST be used in order for the Upick- to work as designed. To differentiate the 'freebees' versus chargeable items, it will use a prefix with the new price. For example; the user touches, Cheese 0.00, Cheese 0.00, Cheese 0.00, c- Cheese .50.

   ⚠ The prefix makes it able to separate the free items and the chargeable when editing the modifiers on the virtual check. The prefix can be anything such as c- or $-. You must put a dash at the end of the prefix in order for it to be recalled and changed on the virtual check.

5. After you are done with the modifier name, select Add/Update
6. When you are done with your modifier group, select Save

Modifiers

Modifier Name	Set Color	■	Modifier Price
Cheese ▼			.00

☐ Included In Menu Item   Price Level 0 ▼

Change All Matching Price Levels

Pricing Levels

Level	Prefix	Price	
1	c-	.50	

Modifier List

7. ⚠ Any modifier that has a regular Modifier Price will be exempted from the freebee selection. Example: Lettuce, Tomato, Onion, can count as the 3 free. However, chicken at $2.99 will never be a part of that list. When the user rings in chicken, it will still allow you to ring in three additional items for free.

   ⚠ You cannot have more than one Upick modifier groups connected to the same menu item. MicroSale will not properly account for the free choices. If you need more than one of the groups, create one modifier group with the free choices, set a min/max and then create another modifier group with charges and set the Min/Max to 0/0.

Specific Modifiers in a List Reporting to a different Department

By default, modifiers connected to a menu item follow the menu item in reports. With this special function, modifiers can report to a dedicated department.

Example: if you need all "Bacon" modifiers to report to the Department of Breakfast instead of the following the main menu item used.

Step-by-Step Instructions

1. Go to Menu Maintenance, and then **Departments Menu** (where regular departments are programmed)
2. Type in *Open Department*
3. **Save**
4. Go to the Modifiers section and choose "Open Department" as the Dept/Function for the desired modifier list
5. Save.
6. Exit out of MicroSale and go to the Micro$ale Directory (Micro$ale Folder)
7. Create a new text document, called Open Departments.txt (there is a space between Open and Departments)
8. Inside the .txt file, type in the modifier names and the department each modifier name should be assigned to. The structure is **Modifier Name=Department name**; example **Bacon=Breakfast** (no spacing). Add all appropriate modifiers in the .txt file each on its own line
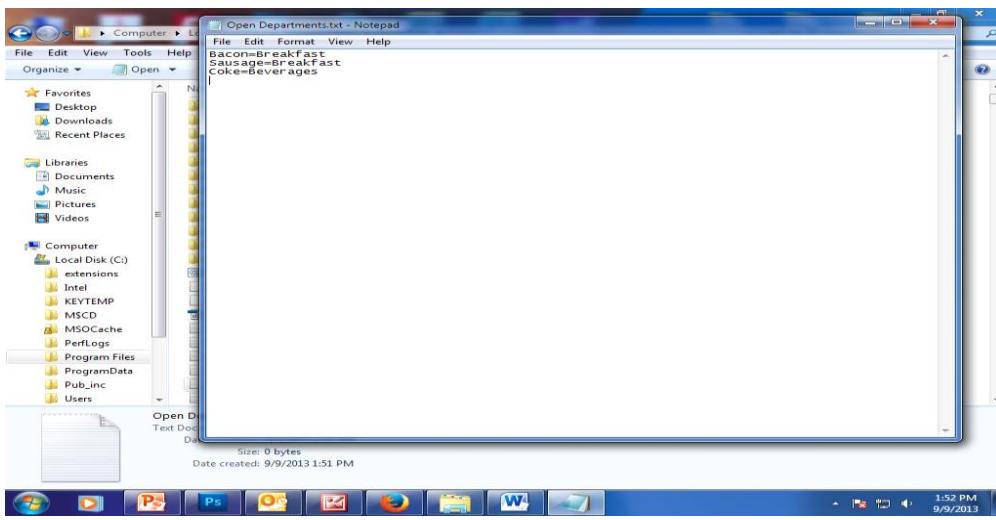
9.

10. The file needs to be in the Micro$ale folder on each terminal.

Modifying Modifiers and Substitution Modifiers

The most common use for Modifying Modifiers is for items such as a side salad or baked potato. Once you choose one side, the screen goes away. With this feature, a side salad will prompt a list of salad dressings (QTY: 1). To stay on the modifying modifier screen, set the Selection QTY to 0.
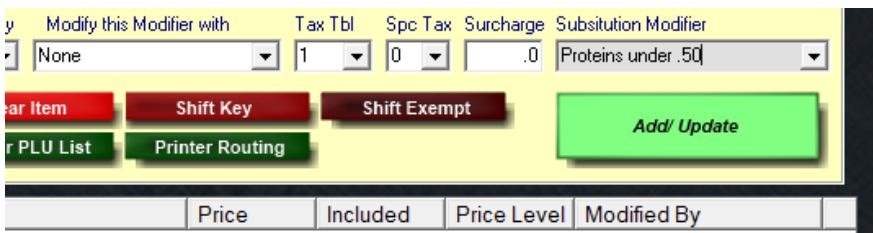
Step-by-Step Instructions
1. Create a **Modifier Title**
2. Add a Modifier Name such as *Side Salad*
3. Use the dropdown and select a modifier group that will attach to the modifier name, such as *Salad Dressing*
4. The Salad Dressing or other modifier group MUST be created before you can link it to a modifier name. If you have not already created the modifier group, save your current screen and create a salad dressing modifier group.

If you need to add multiple salad dressings or multiple modifiers that is attached to the modifier name, Side Salad, you must change the Selection QTY to the maximum allowed choices, if there is no max, use the quantity of 10

5. Select **Add/Update**
6. Select **Save** when you are finished

Substitution Modifiers

The substitution modifier function is used to only allow a cashier to sub out an equal or less expensive modifier choice. You must use prefixes for this function to activate. After the user selects No – Bacon, for example, it will prompt the modifier group that is attached to the bacon.

Step-by-Step Instructions

1. Create a Modifier Title
2. Add a Modifier Name such as Bacon
3. Use the **dropdown** and select a modifier group that will attach to the modifier name, such as Proteins under .50 in the Substitution Modifier
4. Select A**dd/Update**
5. Select **Save** when you are finished

Assign Alternate Remote

By default, modifiers print to the same remote printer as the menu item to which they are attached. However, it is possible to send a modifier to a different printer or to not print the modifier at all. A list of all system printers will be displayed in the pull- down box including "None" and "Pass". *None* is the default setting that will cause the modifier to follow the menu item. *Pass* will cause the modifier to not print at all, and any other selection will cause the modifier to go the alternate printer. When Alternate Remote is set, it will redirect the entire menu item to the route by the modifier chosen. You can also set this with the Route Printing Dept/Function which will cause the menu item to reroute to the printer assigned to the modifier selected.

Understanding Min/Max

"What is Min/Max and do I need to use it?"

Min/Max is not necessary for 95% of menu items with modifiers.

If "Select until Done" is not checked in the modifier setup area, the user will be bumped out of the modifier screen after one modifier is selected. "Select Until Done" means the user can select as many modifiers as they want until actually selecting the word "Done".

Min and Max is used for the following scenarios:

Wing Countdowns
When enabling "Countdown", MicroSale *must* use the Min/Max. Countdown enables a quantity bar at the bottom of the modifier screen to 'count down' the quantity until the maximum amount is met.

Specific number of modifiers that must be selected
This is useful for sides or pizza toppings. For example, if you can get less than 3 toppings but you cannot exceed 3, enable Min/Max and set it to 0 and 3. Or, you want to have 2 side choices, and you cannot choose less than 2 or more than 2, you would set the min to 2 and the max to 2.

⚠ **Min/Max is an ALL OR NOTHING function; if you enable it, it will be used for all modifier groups connected to that specific menu item.**

If a choice must be selected and you can only get one, put 1 in the min and 1 in the max. At 0 and 0, MicroSale interprets this as "Select Until Done". The Min/Max function will always override what is programmed in the modifier setup (meaning,

even if Select Until Done is unchecked (meaning only one choice is allowed) but the Min/Max is set to 0 and 0, Select Until Done will be enabled for that modifier group.
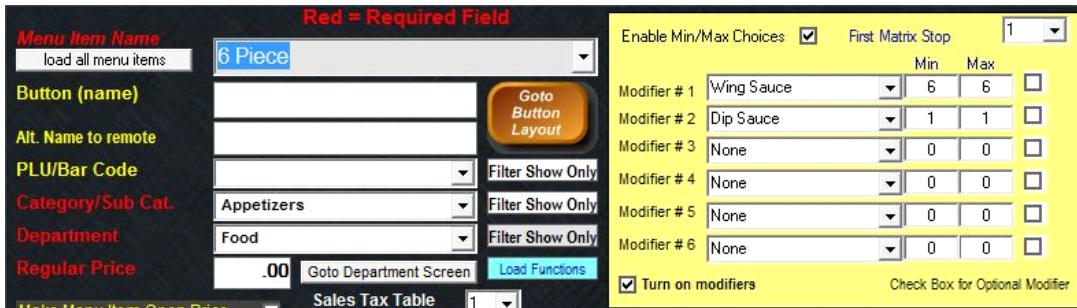

Modifier Countdowns

🚶 Step-by-Step Instructions

1. Create a Modifier Title and check the **Set as Count Down** box.
2. Add modifier names such as Mild, Medium, Hot, etc.
3. Add in a modifier name called **Half**
4. The word half is a trigger in MicroSale. It understands to use half of the total quantity. Ex: Pressing Half Honey BBQ, will show (3) Honey BBQ (when the total Min/Max is set to 6).
5. Go to the **Menu Items and Pricing** Screen.
6. Select **Enable Min/Max Choices**

7. For the Modifier #1, Choose the amount of Wings (or bagels, whatever item is used for the Countdown). Choose the min and max as the same. The menu item has 6 wings, the min is 6 and max is 6, meaning you cannot ring in more than 6 choices or less than 6 choices.
8. Since the Min/Max is enabled, the other modifier groups MUST have a min/max as well. If you get one sauce, choose 1 for both the min and the max. If the option should be "Select Until Done" set the Min and Max to 0 and 0 to disable the min/max with that modifier choice.

$ Shift and % Shift

The $ Shift and % Shift functions were designed for donation type giveaways. It will shift a dollar amount or percentage from the menu item into the modifier so that at the end of the day, you will see the proper amount of money for each type of donation.

Ex: A Cheeseburger is sold for $5.00. When touching the "Children's Hospital" modifier for $1.00 (as shown above), the Cheeseburger will drop to $4.00 and put the $1.00 in the "Children's Hospital" area.

Change Item

By default, when a modifier is recalled (pressed on the virtual check) it is replaced with whatever modifier you choose when the list prompts. However, if a prefix is in front of the item it gets replaced by the new modifier as well. **Change Item will keep the prefix and only change out the modifier behind it.**

Multiply Prefix

Multiply Prefix will put the modifier name in front of the menu item and multiply the menu items price by the number in the modifier name's price. The price field takes on the functionality of a multiplier instead of a price.

Ex: a Vodka Double is 2 times the price of a regular vodka shot. The Modifier Name would be written as Double or DBL with a 2 inserted in the price field. Vodka $5.00 | Double Vodka $10.00

- 💡 **Multiply Prefix may also be used as a percentage.**
  - 💡 Ex: a guest orders a Margarita with double tequila. The restaurant owner does not want to double the price of the margarita but instead will add a percentage to make up the difference for the tequila. This will allow you to reuse the same modifier for all drinks, raising the price 20%, 30%, etc. The percentage is represented as a decimal. Keep in mind that the percentage in the modifier name is working as a multiplier. If you only put in .25 (to represent a 25% price increase, the menu item price will actually be discounted to 25% of the menu item price. To add 25% on top of the menu item price, type in 1.25.

25% Price Increase: $8.00(1.25)=$10.00   *$8 menu item multiplied by 1.25 is $10.00*

Creating a Negative Priced Modifier

In some scenarios, you may need to take off an amount based on a modifier chosen. Such as "No Side" for $1.00 less than the menu item. The negative price sums into the menu item price; it does not show it as a line item.

Example: Rice Bowl at $8.00, No Rice= -.60, Rice Bowl= $7.40

You will create this modifier the same way you create a regular modifier, except instead of a positive value, enter a negative in of the value such as -.60 for $.60 off the menu item price.

Modifier Names with Triggered Functionality

Specific words flag functionality in the system; such as Half, With, Keyboard, Invisible, and exclamation points.

Keyboard

While you can add requests with the Attach Request function button, you can add a Keyboard button to the modifier screen. Type in **Keyboard** (with a capital K).

Need to upcharge?

Type in **Keyboard$** to prompt a keyboard and price keypad.

With

This function can only be used when selecting more than one quantity. For example, a taco restaurant has a menu item of "taco". The user pressed the quantity "2", the With Key will appear on the modifier window allowing different modifications for both tacos.

In the modifier screen, type in the word With. (Capital W, this is just the word, not a prefix). This word will only show up on the modifier screen if the Quantity bar is selected with a quantity greater than 1. Make sure that the Order as Programmed flag is NOT checked. When ordering, press the With button first to enable the quantity bar at the bottom of the modifier screen.

Invisible

Invisible buttons are used as spacers for modifiers. By typing in *Invisible,* a space will be added. If you are using more than one Invisible button, be sure to add numbers to the end. Ex- Invisible 1, Invisible 2….3, etc., as you cannot

Open Modifier

Links to a list of modifiers from the order screen that is not actually tied to an item – such as Sauces or Dips

🚶 Step-by-Step Instructions

1. Create a modifier group (as you normally would with appropriate prices on each item)
2. Go to **Menu Items and Pricing**
3. Create a menu item name such as "*Condiments*"
4. Link it to a category and department (department would be a regular department that you are already using in the menu such as "food", "entrees", etc.)
5. Checkmark the option for **Set as Open Modifier** (automatically checks "modifiers are enabled")
6. Attach your modifier group to it (displayed in the yellow box below)
   - ⚠ **Do not put a checkmark beside the modifier group name – it must prompt to work correctly**
7. Put the menu item name on a button

⚠ **With the open modifier feature, the menu button simply works as a link to get to the group of modifiers. Because of this, the Regular Price field (shown under the department) is ignored. If you need to have upcharges, please put them with the modifier names.**

Modifiers on the Order Screen

You can add simplistic modifiers on the order screen that attach to an item on the virtual check – such as "No Ice", "Drums Only $.50", "AS APP", etc.

🧍 Step-by-Step Instructions

1. Go to **Menu Items and Pricing**
2. Create a Menu name such as **No Ice**
3. Link it to the appropriate category
4. Set the department to **Modifier**
5. Add a price and printer name if necessary
   - ⚠ **You cannot link this modifier name to a modifier group**
6. **Save**
7. Put on a button
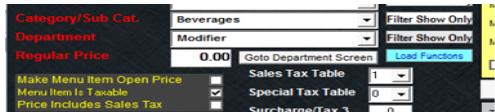
Adding Modifiers to Multiple Button Layout Screens

You can put menu items on multiple screens by selecting "All Categories" on the Button Layout. If you do not see an unassigned button (as a gray button above All Categories, Main Category), double click the menu item text to populate a button.

Included Modifiers "Green Buttons"

This functionality is beneficial mainly for quick service restaurants; however any restaurant establishment may use it. It was originally designed for quick service restaurants to help cashiers read off included ingredients such as Lettuce, Tomato, and Onion.

⚠ **The Included Modifier functionality works differently than regular modifier groups; Included Modifiers, or green buttons, work as an on/off toggle to speed up order entry. With the on/off toggle, specialty modifier functions will not apply.**

"Green Button" Rule Exceptions:

1. When using 'Included Modifiers "Green Buttons" ', the system does not allow for "Modifying Modifiers" or "Substitution Modifiers". Checking one modifier in the list enables the "green button" functionality for the entire modifier group.

2. When using 'Included Modifiers "Green Buttons" ' (see page 53), the functionality for *!Xtra* slightly changes. Instead of looking at only the price level, the *!Xtra* price will sum the 'Modifier Price' and Price Level price together. This allows non-included items to charge the regular price and the extra price together. If you need the included item to only charge the Price Level price for *!Xtra*, delete out the regular 'Modifier Price' for that included item.

🧍 Step-by-Step Instructions

1. Create a Modifier Title
2. Add a Modifier Name such as *Lettuce*
3. Select the checkbox Included In Menu Item
4. Select Add/Update
5. Add other modifiers that do not come on the item such as specialty upcharges or other options such as Mayo, Bacon $.50, Toasted Bun, etc. The more options listed, the less time it will take for the cashier/server to flip through multiple modifier pages.

Modifying Modifiers Using the "Green Buttons"

⚠ **You CANNOT link off to a "modifying modifier". The purpose of the Green Buttons is to create a quick and visual way to add, delete, and sub out items.**

Using **Modify this Modifier With** creates a **Pop Up Prefix**. A Pop Up Prefix is programmed as "Modifying a Modifier" but instead of the item linking to another modifier list, it will prompt a prefix choice. You could use this for wings, salad dressings, or anything that could use further modifications for the Green Button modifiers. The prefix list is created from a regular modifier list (links to a regular modifier group). The prefix list may include Crispy, XSauce, Dry, etc.

Ingredients

Used with the green buttons, the Ingredients Function will auto insert modifiers included on the virtual check/printer. You must have "Items Included With" to use this function correctly. The function was added to remind kitchen staff ingredients of menu items.

⚠ In order for the ingredients to auto insert, the modifier list must prompt automatically; it cannot be used as an optional modifier group (using the modify item function).

Adding a Menu Item Function Button

Understanding Menu Item Function Buttons

Apply Tip – Allows a server to apply tips to their credit card charges

Attach Discount – Will attach a discount that is linked to a specific number already set up in the system. Allows the system to allow access to this discount only by this number

Change Destination – Quick Service function only – changes the order destination from Dine-In to Go or vise-versa.

Check ID – will allow the bartender to check the customer's age prior to serving alcohol. When Check ID is selected, it will show "Enter birthday month, day and year". Simply swipe their driver's license and the customer's age displays on the screen.

Customer Name – will allow the server to type the customer's name at the beginning or end of the transaction. The customer's name will display at the top of the order.

Discount Card (**Use Discount Card**)

EBT Total – Works in conjunction with the EBT tender type and Department setup. Will Tax Exempt the order and expand the check total box to include the EBT Total.

Edit Account No – (**Member Look Up**)

Fast Time/Slow Time – Works as a toggle button between Slow and Fast time

Intercard (Debit Card)

Item Refund – Allows you to refund the entire open check from the ordering screen.

Keyboard – allows you to type a short message to be attached to a menu item. This will bring up an on-screen keyboard. (**Attach Request**)

Manager's Menu – takes you to the Manager's Menu if you have the appropriate access level assigned to your ID #

Member Reward – Access the frequent diner redemption window (**Frequent Diner**)

Message to Manager – allows servers to type a message to the manager who may not be on the site at that time. When the manager signs in, they will see the message.

Open Drinks – Launches a window to enter letter(s) to search for a menu item and menu functions

Phone Orders (Phone Order)

PLU Lookup (Lookup Item)

Print By Seat (Print by Seats)

Refund – Allows you to refund the entire open check from the ordering screen

Release Holds – will release a transaction that had been placed on hold, such as a sale that was rung up and the customer realized they left their wallet in the car.

Resend to Kitchen (Resend to Remotes)

Show Sent Items/Hide Sent Items – Works as a toggle button between showing and hiding sent items on the customer check. (**Hide Sent Items**)

Tab Deposit – allows a guest to leave before the rest of the group by paying only his portion of the tab, for example $20. When the entire check is paid, the portion paid is added automatically.

Table Tent – works in conjunction with the "Table Tent" options under the Register Options, Printing/Cash Drawer so the server delivering the food to the table can match the proper table number to the ticket.

Tray Review – (**Review Order**)

Verify Account – (**Member Look Up**)

Verify Balance – Launches the House Account lookup window. You can search by swiping their house account card, entering the account number, search by first name, search all, and attach memo.

Verify Member – (**Member Look Up**)

Waste – This will prefix every item on the check with "WASTE >" and zero out the total of the check. It will then close the check and print a void slip.

How to Create a Menu Item Function Button

The Edit Order Screen allows you to add a new set of function buttons to your function button layout. But what happens when you run out of available space? You can add the same function buttons you see in the rightmost column of the Edit Order Screen page as a menu item function button instead.
MicroSale has a preprogrammed list of function buttons that just need to be "activated".

1. Go to the Managers Menu → Menu Maintenance → Menu Items and Pricing Screen
2. From the "Department" dropdown select "Function"
3. Select the word "Department" next to the newly selected "Function" option
4. Select the dropdown for "Menu Item Name" – Only a list of available function buttons is displayed
5. Select the one you wish to add and then select the "Save" button

Note: Assign the function to any category. Since this is not an actual menu, it will not appear in your sales reports.

How to Add a Function Button to the Button Layout

1. Go to the Button Layout screen. Menu Maintenance > Button Layout
2. Select the Category to put this button within
3. Select the "All Categories" button
4. Find and select your new function button
5. Select the blank button and then right-click to drag and drop it onto the layout
6. Position the button and when finished select Save
7. Repeat as necessary

Message Item

1. Type the name of your item in the "Menu Item Name" field. Example: "Message"
2. Next, in the "Category/Sub Cat," click the drop-down arrow to select a category
3. In the "Department" field, select the department called "Remote Message".
4. Touch the "Save" button when finished.
5. Assign the menu item to a button in "Menu Item Button Layout".

Items Sold by Time

1. Create a menu item (with the appropriate category and department)
2. In the "Regular Price" field enter the price of the item for 1 minute. Example: Pool table rentals might be $7.00 per hour. **7.00/60= $.12** per minute.
3. Place a check mark in the box **Charge by Time**
4. Select **Save** when finished

Gift Cards

1. Type in a menu item name such as *Gift Card*, *$5 Gift Card*, etc., in the Menu Item name field
2. Click the dropdown arrow to select appropriate category
3. In the Department field, select one of the following departments:
4. Gift Certificate- MicroSale's built in Gift Card/House Accounts.
5. Account Payment- MicroSale's built in Gift Card/House Accounts.
6. Mercury Gift- Mercury Payment System's integrated Gift Cards.
7. Gift Epay New Issue- Datacap Systems integrated Gift Cards.
8. Gift Epay Reload- Datacap Systems integrated Gift Cards
9. Take the checkmark out of the box labeled **Taxable**
10. Place a checkmark in the box labeled **Enable Open Price**
11. Select **Save** button when finished.
12. Assign the gift card to a button in **Menu Item Button Layout**

Putting Discount Names on Order Screen Buttons

In some cases, you may want a discount to be on an order screen button in addition to the Discounts screen.

1. Type in the discount name in the Menu Item Name field identically to the Discount name (you must already have the discount created).
2. Choose the category that you want to see this discount in
3. Choose Discount as the department
4. Leave the regular price and all other components blank.
5. Save.
6. Go to the Button Layout screen and add the discount to a button.

Paid Outs (used for taking cash out of the cash drawer)

If you need to take cash out of the drawer to pay cash out to a vendor or contract worker, you must use a paidout. A paid out will properly account for the missing cash.

1. Type the name of your item in the **Menu Item Name** field. Example: "Message"
2. Select the appropriate category.
3. Select the department called "**Paid Outs**".
4. Put a checkmark in the box **Enable Open Priced Item**
5. Select **Save** when finished
6. Assign the item to a button in **Menu Item Button Layout**

Menu Related Register Options

Register Options are set by individual register. If you need the same options set from terminal to terminal, please add the register options to each terminal. Or, you can update all registers from the General screen using the bottom right drop down box that says "Terminals".

Understanding Menu Register Options

Enable Menu Meal Periods - This option connects menu categories to timed events so that only the desired categories show at different times of the day. Use with option, ***Load Active Meal Periods Only***

> **Load Active Meal Periods Only -** By default, the option will be set to **No**. When the option is set to No and the "Enable Meal Periods" is set, categories that are not connected with a meal period will still show on the order screen; such as a drinks category that should be available at all times.
>
>> **Yes**, will only show categories assigned to that specific meal period. For example; it will only show "Breakfast" during the hours for that meal period.

Quantity Limit - The option affects the Quantity button on the order screen. It will block the quantity amount that is over the number typed in the box. In this case, you may not press Quantity 101Bud Light. (to ring in over 100 of the item at one time.

Disable Modifier by Category - This function allows certain modifier titles to be disabled from use in a specified category. The option is register specific and would need to be set on each register that you would like the modifiers to be disabled on. Example: a restaurant has server stations as well as bar stations. The server station will need to select mixers and other drink modifiers for alcohol so that the bartenders know what to make, however, the bartenders do not need to select modifiers for bar items.

Enable ¼ on Modifiers - When the option is checked, it will turn on the ¼ option as well as the ½ by modifier (Select ½ Modifier Function). The option will ONLY appear when the Select Half Modifier Function is turned on. (Please reference Modifier Functions for more information)

Matrix- Hold Screen for Review - The option holds the modifier screen open until the "Finished" button is touched. When checked, it will automatically check "Allow Finish Any Time"

Matrix-Stop for Mandatory Only - The option will bypass all optional modifiers in the Matrix (group of modifiers linked to an item) and only stop for mandatory modifier groups.

Enable Modifier Qty - This option allows the quantity to be carried over to the modifiers when the "Quantity" button is used with the associated menu item. Example: Press Quantity of 5Cheeseburger(choose a cheese) (5) American Cheese

Enable Countdown Pricing - By default, if a modifier adds a price to a menu item that is using countdown then the modifier price will be added once. If this option is checked then the modifier price will be added to the item multiplied by the countdown number.

Disable Countdown Edits - By default, you may go back and change the modifier associated with a countdown. This option will not allow the user to edit anything in the modifiers for items that is using the countdown function. It will make you delete and rering the item if a mistake is made or the customer changed his/her mind. Example for default (not checked): 10 Wings(5)Mild, (5) Hot. You may change the Mild to Honey BBQ, which maintaining the same quantity in front. Example for checked option: 10 Wings(5)Mild, (5) Hot. It will only highlight the line item and not do anything. It will not allow any type of edit.

Turn On Time Event Prefix - When the option is enabled, the timed event name becomes the prefix for the name of the menu item associated with a timed event. By default, the price will automatically shift during the correct time interval

without a name change. The option checked will display the timed event name in front of the item shifting a price, such as HH Friday-Bud Light Draft.

Menu Items Grouped Together - The option is used with "menu items in order as entered" and puts the items together by category before they are put into the order as they were entered. For example, If you enter in a Coke, sandwich, Diet Coke, dessert, it will rearrange it on the virtual check/receipt to show Coke, Diet Coke, sandwich, dessert.

Menu Items in Order as Entered - This option will cause all items on a check to print in the order that they were entered by the user. Normally menu items print on remote checks and customer receipts in the order of the Category Priority list (see Menu Maintenance). The primary application for this option is in full service restaurants that have multiple courses; allowing the server to enter the items in the order the items are to be prepared.

Use Keyboard with Open Price - The option will work similar to MISC item, however it will not force not force you to choose a department. You will create a menu item with any name and check open price. When the option is checked, it will overwrite the menu item name with whatever name is typed in using the keyboard.

Hold Price Shift Until Done - When the option is enabled, the selected shift level will remain in effect until either the "done", "tender", or same shift key is touched.

Disable Modifier Price Adjust - The option will disable price levels when using Timed Events.

Sending Menu Item Prices to Kitchen - Manager Menu > Register Setup > Register Options by Terminal > Printing/Cash Drawer > Advanced Options > Remote Printer Options > **Check "Print Menu Item Prices"**

Rolling Modifier Prices into Menu Items - Manager Menu > Terminal Configuration > Register Options > Printing / Cash Drawer > enable the option, **"Roll Price Into Menu Item".**

> **NOTE: The price rolls into the main item on the guest receipt. The software user will see the upcharge I temized next to the modifier choice.**
>
> When using this option, you also can exclude specific modifier groups from rolling the price into the item.
>
> **To exclude specific modifier groups:**
>
> **Managers Menu > Menu Maintenance > Menu Modifiers > Select your desired modifier group; enable the option "Disable Price Roll Up" > Save.**

Global Prefix Buttons

You may use prefixes as modifiers as earlier discussed, or you may turn on the Register Option for 'generic' prefixes. That will be displayed on every modifier screen. (Reference Below)
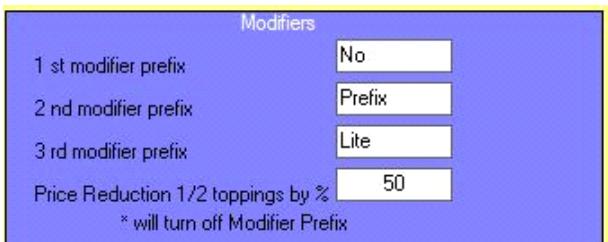
A total of three prefix buttons can appear on the modifier screen. These can be anything that you choose. Certain words will flag specific functionality. **No and Sub** will drop the price of the modifier if one is attached. **Prefix** will prompt a "prefix" box as shown above. Xtra (shortened to four characters) can, if chosen, shift the modifier to another price. For example, Xtra Chicken could charge $3.00 while Xtra Onion could charge .25 cents. Type in an asterisk (*) to disable the prefix.

Xtra Shifting to a Price Level

1. Type in a 1-4 character word such as EXTR, XTRA, etc and put a dash followed by the price level it needs to reference
2. For example, XTRA-1 will shift to price level one, XTRA-2 will shift to price level 2. **The dash and number will be masked. You will not see it on the order screen.**
3. The price level is created *BY MODIFIER*, so each price will be modifier specific and the modifier must have a price in the associated price level.

Modifier Prefix List

> 📍 ID Screen > Register Setup > Setup/Configuration > **Tenders, Paid Outs, Customer Requests**

1. Under modifier prefix, type in *Prefix* in one of the three fields.
2. In the Tenders, Paid Outs, Customer Requests area, select **Modifier Prefixes**
3. Type in prefix names
4. When you are done, select **Save** and **Exit**
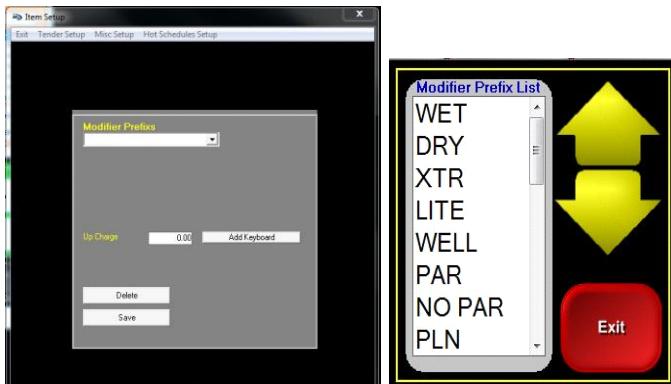
Adding in Attach Requests

📍 ID Screen > Register Setup > Setup/Configuration > **Tenders, Paid Outs, Customer Requests**

The Attach Request function offers an array of preprogrammed requests plus a Keyboard button. To add more preprogrammed requests or add in the Keyboard, if not present, follow these steps:

1. Select the drop down to see your preprogrammed requests.
   📍 **The order of entry is the order it will display on the order screen.**
2. Select the gray button under Up Charge to add in the Keyboard Option. Remember to Save, then Exit.
3. Type in all of the custom requests
4. When you are done, select **Save** and **Exit**
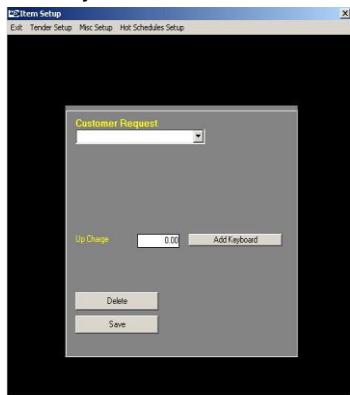
Edit Order Screen Buttons

The Edit Order Screen Buttons area of MicroSale allows you to customize the function buttons that appear next to the virtual check on the Ordering Screen. Some of these functions are also available to be used as a Menu Item Function button.
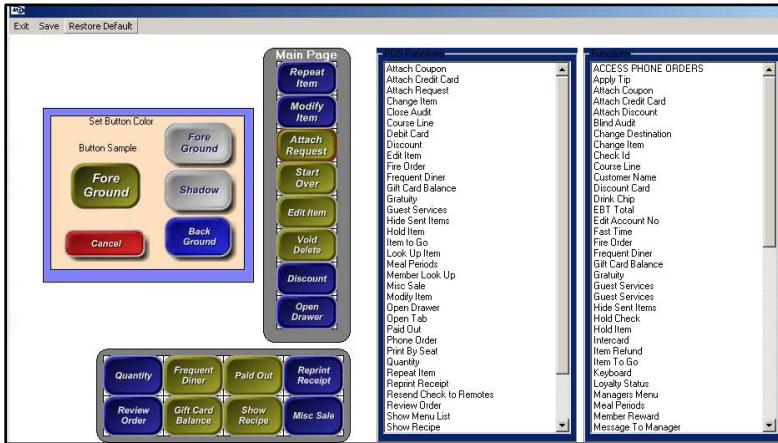
Organization of the Edit Order Screen Buttons screen

📍 ID Screen > Register Setup > Setup/Configuration > **Edit Order Screen Buttons**

1. Select "Edit Order Screen Buttons" from the second row of the toolbar at the top of the screen
2. The Edit Order Screen is organized into four parts:
3. Restore Default – Restores the default layout and button selection (Original layout).
4. Function button color customization – Allows you to change the color of any function button.
5. Two areas to assign function buttons: 1 Vertical "Main Page" column and 2 Horizontal rows.
6. Two types of function button lists: "POS Functions" and "Functions".

Question: Why are there two columns of function buttons instead of just one?

Answer: They function buttons have now been organized into two separate lists to make customization even easier. The right-most column called "Functions" is a listing of all function buttons that can also be made into a "Menu Item Function Button". What this means is that if you run out of space on the function button layout screen and need to add a few more buttons, you can remove any that are from the "Functions" list and make those into menu item function buttons instead. This frees up room to add more "POS Functions" into this area.

Tip: Create a "Manager" category within MicroSale and assign any item from the "Functions" list to a menu item function button (see document) and have it auto-restrict them to manager access only.

Adding a new function button

To add a function button simply select one from either the POS Functions or Functions column and then select a blank button from the "Main Page" vertical or horizontal rows.

1. Select a function from either list
2. Select an empty button
   Note: If you do not have an empty button, then you will need to swap out an existing one for the new one.
3. To do this, select a function from the list and then select the empty button you wish to assign it to by double-clicking the space. The first click will remove the existing button and the second click will assign the function to the, now empty, button.
4. Select Save

Changing the color of a function button

1. Select either the "Fore Ground", "Shadow", or "Background" button to modify the color
2. Select a color from the Color window that appears and then select OK
3. When you have finished your color customization, right-click on the function button(s) to change the color to the scheme you just created.

4. Select Save, from the top-left of the screen.

Product Waste

This works with the Inventory Module, when used, it will track food costs based on the menu items' recipe and current cost. There are two options available for configuring the function. Both options allow for different screen customization.

Configuring the system to utilize the Waste function

Option 1: Menu Item Function Button

> 📍 ID Screen > Menu Maintenance > **Menu Items and Pricing**

1. From the **Department** dropdown select *Function*
2. Select the word "**Filter**" next to the newly selected "Function" option
3. Select the dropdown for "Menu Item Name" – Only a list of available function buttons is displayed
4. Select "Waste" and then select the "Save" button at the bottom, right of the screen.
5. Select the Button Layout button
6. Select the Category to put this button within
7. Select the "All Categories" button
8. Find and select "Waste"
9. Select the blank button and then right-click to drag and drop it onto the layout
10. Position the button and when finished select Save

Option 2: Order Screen Function Button

> 📍 ID Screen > Register Setup > Setup/Configuration > **Edit Order Screen Buttons**

1. From the right-most column labeled "Functions" select **Waste**
2. Select an empty button from the "Main Page" vertical bar or either of the two horizontal bars.
   If all buttons are full, double-click an occupied space to overwrite it with the "Waste" button
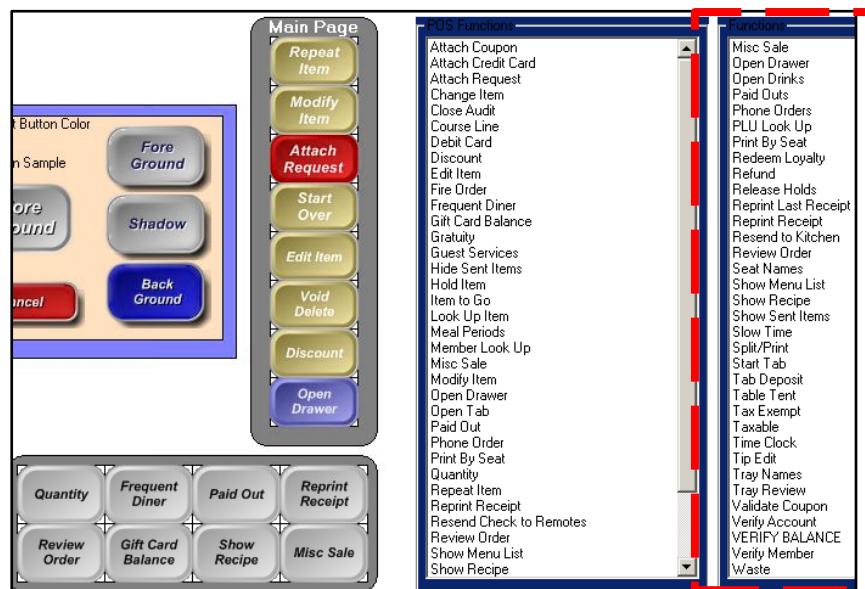
Using the Waste Function

1. Go to the Ordering Screen
2. Select the Menu Item(s) that need to be counted as waste
3. Select the **Waste** button
4. The check will automatically close and print a Waste receipt

Viewing the Product Waste report

After running the Daily Close Out, you can print or email the "Product Waste" report.

1. Go to the Managers Menu > Reports Menu > Product Waste
2. Select a specific date or date range and then select "Run Report"

```
Voided By  : Sarah Supervisor
Void Reason : Waste
Void Time  : 10:41:55 AM
Ticket  1003                    Waste
Employee: Sarah            V9TESTTERMINAL
10:41 AM                   Date 02/09/15
--------------------------------------------
1  Waste ** > WINGS              9.75
   Waste ** > BBQ
--------------------------------------------
                Sub Total :     .00
              Check Total $     .00

          Enter Your Information Here
                Store Specials
                Holiday Specials
              Change This Anytime
```

Course Line & Fire Order

Course lines are typically used within Fine Dining establishments. When configured correctly, course lines will allow for servers to select menu items to label by course. As well as, the kitchen can be notified when to prepare each course.

Adding Course Line & Fire Order buttons

In order to use course lines you must add two new function buttons to the ordering screen: Course Line and Fire Order. The "Fire Order" function button will send a "Fire Chit" to predetermined remote printers when they are ready for the next course.

📍 ID Screen > Register Setup > Setup/Configuration > **Edit Order Screen Buttons**

1. Select **Edit Order Screen Buttons**
2. Locate the "Course Line" and "Fire Order" buttons from within the "POS Functions" section
3. Select an empty button from either the vertical or two horizontal function button layouts
4. Or double-click an occupied button to replace it with a new function button
5. Select **Save** when finished
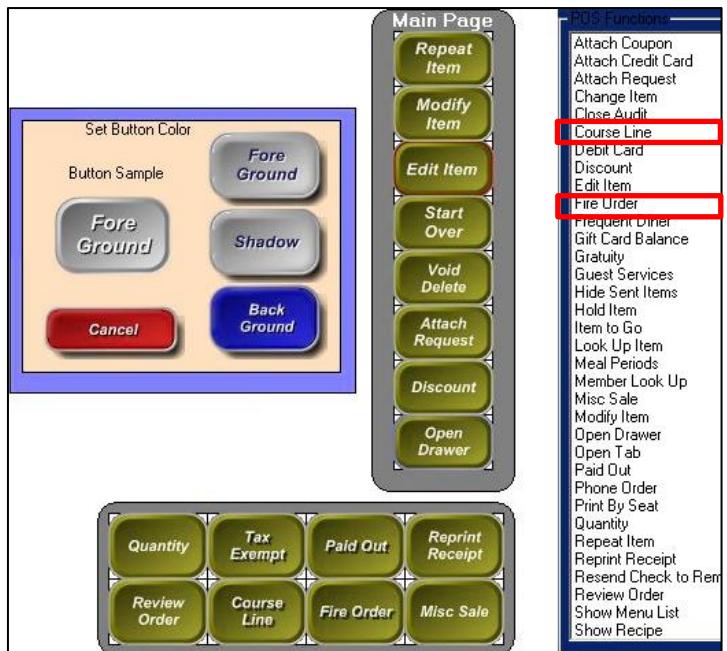
Adding a Fire Order message

The system can be configured to allow servers the ability to type a short message to print on the fire chit that is sent to the kitchen staff.

1. Go to the Managers Menu > Register Setup > Register Options by Terminal
2. Select the Printing/Cash Drawer tab
3. Enable the option for "Enable Fire Order Instruction"

Setting up a Fire Printer

1. Go to the Managers Menu > Register Setup > Printers / Devices Setup
2. Select each remote printer you need a "Fire" chit to print to and then select the "Fire Printer" checkbox
3. Select Save between each remote printer change

Using Course Lines

1. From the Ordering Screen, select Course Line
2. Select a Course Name from the list
3. Select your item(s) for that specific course
4. Repeat for each course, starting with selecting the Course Line button

Using Fire Order

The "Fire Order" function button is meant to be paired with the "Course Line" function button but is not mandatory to use. The reason this function is optional, is that it puts all of the responsibility on remembering to send the next course to the kitchen, on the server who may get busy and forget to send the second course to the kitchen. For this reason, Fire Order is optional to configure within the system.

After the menu items are entered and "Done" is selected to send those items to their respective printer(s), the server needs to decide when to "Fire" the next course line for the kitchen to start preparing (Example: 10 minutes after the Appetizer) .

It is important that the kitchen staff understands that the first ticket to print will be entire list of items, separated by course line. When the server is ready for the next course to be made, they will use the "Fire Order" button to send a fire chit to the kitchen. When the server selects this button it will send a slip to the kitchen saying "Fire Order Now For Table #" then it will list the table #, ticket #, time, date, and server's name. **It DOES NOT reprint the actual items!**

If you have also configured the system to print a "fire order message", then when the server selects the Fire Order button it will prompt them to enter a message using an on-screen keyboard. At this point, they could enter something like "Cook Entrée" or "Wait 10 extra minutes for dessert".

Example:

Table 101 would like to order Calamari for an Appetizer, two orders of Chicken Linguini for Entrées, and Key Lime Pie for Dessert.

Course Line:

1. Select the "Course Line" button from within the Ordering screen
2. Select the course name "Appetizer" from the list that appears
3. Select the menu item "Calamari" from the menu to add to the Virtual Check
4. Select the "Course Line" button again and this time choose "Entrée"
   Notice: "Calamari" turns to a different color. The system will color each course to make it easier to differentiate between courses.
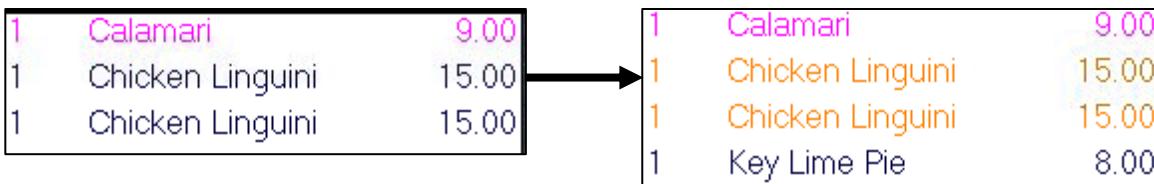
5. Select the two orders of "Chicken Linguini"
6. Select the "Course Line" button again and select "Dessert"

7. Select "Key Lime Pie"
8. Select "Done" to have the order sent to the kitchen. It will print the entire ticket separated by each course

Fire Order:

1. Recall Table 101 and select the "Fire Order" button to send a chit to the kitchen to let them know the next course is ready to be prepared.
2. Use the "Fire Order Message" and type the message "Prepare Entrée"

Drink Chips

Giving the customer a drink chip to redeem later in their meal or on a future date is a great way to ensure your customer has the best visit possible.

1. Create a department name called **Drink Chip**, Save

2.
3. Create a menu item called $3 Drink Coupon, or whatever you want it to be called. You can also do an open priced item.
4. Set the menu item to whatever category you want and assign it to the department of Drink Chip.
5. Place on a button
6. Save
7. Create a discount – you can name it anything you'd like such as "Drink Chip Redeem" with an open $, or discount % of 100.
8. Save
9. Place the attached INI file into the INI folder within Micro$ale – OR, if you already have a Functions INI file, you can simply open the INI file and find Drink Chip under "Quick Bar" and type in Drink Chip**=On** *(no spaces)*
10. A coupon will print for each drink chip purchased by a customer – the chits can be given out to fellow customers or to the bartender to hand out – example coupon

Assigning Different Menus to Terminals in the Restaurant

⚠ **To setup menus by terminal or groups of terminals, you must first create the register groups.**

## Setup Revenue Centers/Register Groups in MicroSale

📍 ID Screen > Register Setup > Misc Setup-Terminal Groups > **Revenue Center Setup**

1. Type your register group names in the box next to **Revenue Center/Groups**
   ⚠ **Do not check anything under Job Codes, Tables or Dining Areas. This means the Revenue Centers will be set up by Terminal Assignment when you do the next step.**
2. Select Save and Exit.
3. Go to Managers Menu, Register Setup, Paths-Terminal Setup, System Paths Setup.
4. Select the drop-down next to **Register Group Name** and select the appropriate Register Group for this specific terminal
5. Select Save and **Exit**
6. To execute the Revenue Center Report: Go to Managers Menu, Reports Menu, Revenue Centers. You can generate a Daily Report or Week to Date.

Menu by Register Group

📍 ID Screen > Manager Menu > Menu Maintenance > **Menu by Job / Register Group**

1. Select a register group (by using the dropdown arrow)
2. Select **Load New**
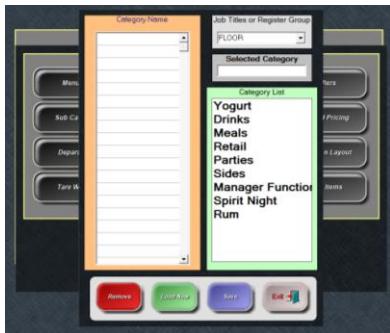
3. Begin by selecting a category – after clicking on the category name, it will appear in the "Selected Category" box.

4.

5. Left click in the first field under Category Name

6. Continue with steps 3 and 4 until completed
7. **Save**
8. Select the dropdown and select a **Register Group** to ensure the categories are saved

Chinese Characters on Printers

MicroSale Version 9.0.1057 and higher now supports printing in Chinese characters. Please ensure the printer supports Chinese characters before following this setup document.

Part 1

1. Go to the Msaledealer folder on the FTP site
2. Open the Micro$ale Version 9 Release Files folder
3. Copy the Chinese.INI file
4. Paste the Chinese.INI file on your computer; *Recommended – paste the Chinese.INI file on your desktop for now, you will need to go back to it after Part 2*

Part 2

1. Open MicroSale
1. Go to Managers Menu > Menu Maintenance > Menu Items and Pricing
    a. Select a menu item
    b. Type in the menu item name or an alternate name in the Alt. Name to remote field
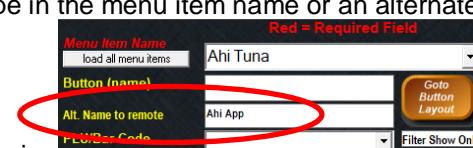
        i.
    c. Save
    d. If you use a name other than the regular menu item name, write down the alternate name; exact names are needed
    e. Repeat a-d until you are finished with the menu item names that will needed to be printed in Chinese
    f. To see a list of the menu item names- go to Reports Menu > Print Utilities > Print Store Menu
2. Once the menu is printed, exit out of MicroSale
3. Open the Chinese.INI file
4. *A few sample items are listed*. Delete the sample items.
5. Type in an item name that is used in the *Alt. Name to remote*, then "=", followed by the Chinese characters without a space after "=". Type in only one menu item name per line.
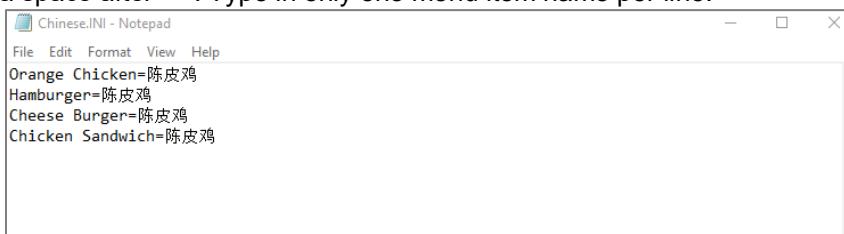
    a.
6. When you are finished, click on File > Save As > Chinese.INI and choose UTF-8 encoding *(you will see this option to the left of Save)*
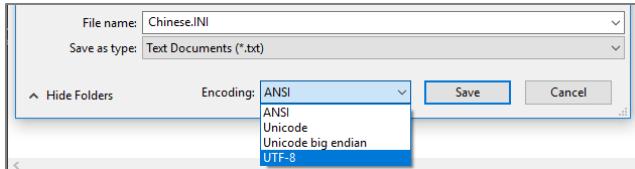
a.

7. Copy the Chinese.INI file and paste it into the **INI Files** folder located in the Micro$ale directory. Reminder, the INI Files List offers an unused, archived list of INIs.

a.

Editing an Existing Menu

Print Menu items saved in the system

📍 Manager Menu > Reports Menu > Print Utilities > Print Store Menu

Deleting Menu Items

You must take the menu item off of the button before you can delete it in the system. *This is a safety net to ensure items are not inadvertently deleted.*

Taking Menu Items off Buttons

📍 Managers Menu > Menu Maintenance > **Menu Item Button Layout**

1. Select the appropriate category (listed on left of the button layout screen)
2. Locate the menu item you would like to delete
3. Left mouse-click on the item and then left mouse-click in the Unassigned Menu Item list (the item should now be listed in the unassigned menu item list box). *The empty button will delete after you save the screen.*
4. **Save** and Exit

Deleting the Menu Item

📍 Managers Menu > Menu Maintenance > **Menu Items and Pricing**

1. Select the dropdown and find the appropriate item
2. Select **Delete**
3. **Exit**

Reassigning menu items to new categories

📍 Managers Menu > Menu Maintenance > **Menu Items and Pricing**

1. Select the menu item that you need to edit
2. Under the Category/Sub Cat. field, choose a new category name
3. Save

Changing a category name

📍 Managers Menu > Menu Maintenance > **Menu Category**

1. Choose a category under **Category Name**
2. Type in a new name in the **Change Category Name** field
3. Select **Change**
4. **Exit** when completed (screen saves automatically)