



## Daily Full Service Restaurant Procedures

*This document will guide you through proper daily procedures in MicroSale.*



### Getting your system ready for the day

*Before you open, you need to ensure the nightly closeout was completed*

**DO NOT take any orders until the following is verified:**

#### 1. Verify the Daily Close Out was completed

1. Go to the *Managers Menu* → *Reports Menu*, and select **Sales Report**  
The Sales figures should all be zero except for the WTD (Week-To-Date) sales totals
2. Go to the *Managers Menu* to *Reports Menu*, and select **Daily Sales Summary**  
There will be a column for each date on which a Daily Closeout was run successfully

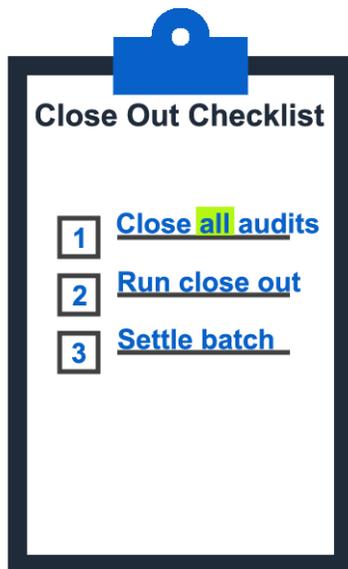
#### 2. Verify the Credit Card Batch was settled

1. Go to the *Managers Menu* and select **Credit Card Menu**
2. The onscreen spreadsheet will be empty if the batch was settled

#### 3. Verify the Weekly Close Out was completed (*Only at the end of the week*)

1. Go to the *Managers Menu* → *Reports Menu*, and press **Sales Report**  
The Sales figures should all be zero including the WTD (week-to-date) sales totals
2. If it has been longer than 7 days since the last successful Weekly Closeout, when you go to the Reports Menu, you will see a message prompt alerting you that a Weekly Closeout has not run in X amount of days

## Closing out your system at the end of the day



### 1. Closing all Audits

1. Log into the Ordering Screen
2. Select the **Server Menu** button at the bottom left side
3. (Unless you are logged into this screen already)
4. Select the **Server Reports** button at the bottom of the
5. screen
6. Select the **Server Audits** button (top left)
  - a) Select the employee whose audit you wish to close
  - b) Select **Close Server Audit**
  - c) Repeat Step a-b for each audit
  - d) When you are finished, select **Exit**

### 2 & 3. Run close out and settle batch

1. Verify there are no open orders –  
*Go to the Server Menu and verify no open tables / tabs / phone orders show open in the system  
 (Exclude future phone orders)*
2. Verify all audits are closed (See Step 1)
3. Select the **Daily Close** button (From the Managers Menu or Reports Menu)
4. Type in the deposit amount (Overall Total Cash combined)
5. Select the **Close Daily Sales** button
6. Select **Yes** if you are sure you want to run the close out
7. Select **No**, unless you would like to print a Daily Sales Mix
8. Select **Yes** to settle the credit card batch
9. *If it is the end of the week, you will be prompted to run a Weekly Close Out, select **Yes***

### Close Time Records at the end of the Pay Period (typically every week or two weeks)

Managers Menu > Reports Menu > Time Keeping Reports

1. Select Close Time Records
2. Choose the dates of the labor period and press Run Report
3. Select Yes to close the records
4. The labor period is now closed. Choose to print the report or exit