



Phone Order and Delivery User Guide

Serve more customers by offering takeout.

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Introduction to Phone Orders

Manage all takeout in one place – pickup, delivery and online orders

Phone Order Management at a glance

- ✓ Fully integrated into your existing MicroSale system
- ✓ Accept orders over the phone or online for pickup or delivery
- ✓ Efficiently manage all takeout, phone and online orders on one screen
- ✓ Save customer contact information and last order for rapid reorders
- ✓ Option to set minimum order amount for delivery
- ✓ Accept prepayments or payments at time of pickup
- ✓ Send orders automatically through MicroSale to the kitchen at a desired time
- ✓ Manage delivery through MicroSale using integrated mapping and driver dispatch
- ✓ Automated delivery charges calculated on distance or time
- ✓ Use your existing reporting tools to see how your takeout business is doing

Add-on Integrations (optional)

Online Ordering

Using integrated online ordering, orders placed online directly pass into the MicroSale system. Online orders work identically as a phone order (orders send to the kitchen during the specified time, and can be set for pickup or delivery).

Available online ordering providers:

Click4AMeal

Toll Free: 888-377-1128

www.click4ameal.com

Demo website: <https://ninasbistro.click4ameal.net/>

atwareTech

<http://atwaretech.com>

contact@atwaretech.com

212-796-5040

Online Order Now

888-673-371

www.OnlineOrdersNow.com

<https://www.customer2you.com/index.html>

OLO

<https://www.olocom/>

supports large accounts, 25 locations and over

Caller ID

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

Available Caller ID box provider:

Whozz Calling

800.240.4637

<https://www.callerid.com/>

Phone Order Management



The phone order management screen allows you to easily manage takeout; orders can be entered for immediate production, set to print at a specific time or saved for a future day. Orders are taken over the phone or through an integrated online ordering provider and then dispatched for delivery (if applicable).

From the management screen, each order button provides an overview of the order (customer name, delivery or pick up, check total, and the order taker or assigned driver) and the ability to edit or close the check. Using the toolbar on the bottom of the screen, you can sort, manage deliveries, and perform various tasks. By default, the most recent orders are displayed first. The total number of open orders is listed on the top of the screen.

How phone orders send to the kitchen

Orders placed for immediate pickup or delivery automatically release to the kitchen.

Optionally, pickup/delivery can be set at a specific time (or future day).

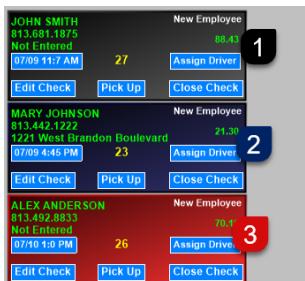
The **production time** automatically releases the order x amount of minutes prior to the scheduled pickup/delivery time. For example, with a 20 minute production time, the order releases to kitchen 20 minutes before the order is due. If the setting is 0, the order releases to kitchen as soon as order is placed (and will be up to staff to ensure proper timing).

When using the **production time**, you can enable 'Auto Release Pending Order' to automatically release the order without human intervention. Without this setting, an employee must manually release the order when 'release order' flashes on the POS screen.

With **integrated online ordering**, orders placed via the internet follow the exact functionality of standard phone orders. Online orders must be paid online during the customer's checkout process.

Order Buttons

The order buttons display in 3 colors (black, blue, or red)



1 Order is active and has been sent to the kitchen for preparation

2 Order is active but has not been sent to the kitchen. The order may be pending for a specific pickup/delivery time

3 This is a preorder. The order has been saved in the system and is set for a future day. Preorders are automatically printed the night before it is due to notify the kitchen of the upcoming order. A preorder is not an open order – do not close it at the end of the night!

Information on order buttons:

- Contact name, phone number and address (if applicable) are listed on the upper left of the order
You cannot change the contact information on this button. However, if you need to change the phone number or address, you can do so by using the Customer Order / Customer Info button located on the toolbar
- Use the blue buttons on the rectangle order button to edit the check, reassign a driver, change the destination (pickup to delivery, or vise-versa) and edit/close the check
- The employee who placed the order is listed in the upper right corner of the button
- The promised pickup time is displayed in blue under the contact information. You can change this time by selecting the button. *If the order has already been sent to the kitchen, you will need to manually tell the kitchen about this change*

Phone Order Screen Toolbar



Change Order / Customer Info

Allows you to change contact information (except for the name) on an active order, print the customer receipt (without closing the order), add a prepayment or a deposit.

Release Order

If orders are not set to auto-release (auto-release automatically releases pending orders), you must manually release the order to the kitchen.

Touch Release Order > Select desired order (blue orders not been sent to the kitchen). *When the order is released, the order turns black.* Alternatively, orders can be released on the order screen; A message prompts to release the order to the kitchen at the set production time. *Touch the message to release the order.*

Show All Orders

+ Show Unassigned, Show Todays Pending Orders, Delivery Order, Pick Up Orders

Toggle between delivery, pickup, preorders and unassigned delivery orders. Choose the desired filter. To go back to all orders, select Show All Orders.

Show Unassigned

Filters out delivery orders that have not been assigned to a driver; This is a useful function to ensure a delivery order is not overlooked. *Select Show All Orders to view all orders again*

Mark Transaction Paid

Mark Transaction Paid stops the delivery timer to more accurately determine how long it takes from the time an order is placed to the time the order is delivered.

Close All

Quickly add tips for delivery drivers and/or close multiple orders at once. At the end of each driver's shift, he or she can now enter all of the tips on individual checks in one place.

Driver Sales Report

Select the employee's name to view the sales report. The report is used to balance the drivers' sales at the end of their shift.

Find Check

After selecting a check number, you will be placed on the order screen to view the open phone order. You can add additional items or you can select "Exit" followed by "No" to keep the order open.

Select Date Pending Orders

Prompts a calendar to choose a date range; preorders (pending orders) within the date range appear on screen. To exit and go back to your regular phone orders, select Show All Orders.

List by Driver

Filters delivery orders by driver.

Option Menu

The option menu provides additional functions and a few repeat functions

- **Search By** allows you to search open phone orders
- **Sort By** re-sorts open orders by newest to oldest time or groups pick up orders and delivery
- **Transfer to Dining Room** moves an open phone order to the dining room
- **Reopen a phone order;** If the incorrect order is closed with a prepayment (with a credit card or via online ordering), you can reopen the order and place it back into active orders

Assign Driver/ Get Directions

Used to dispatch delivery orders; allows you to view open delivery orders on a visual map and get directions from stop to stop

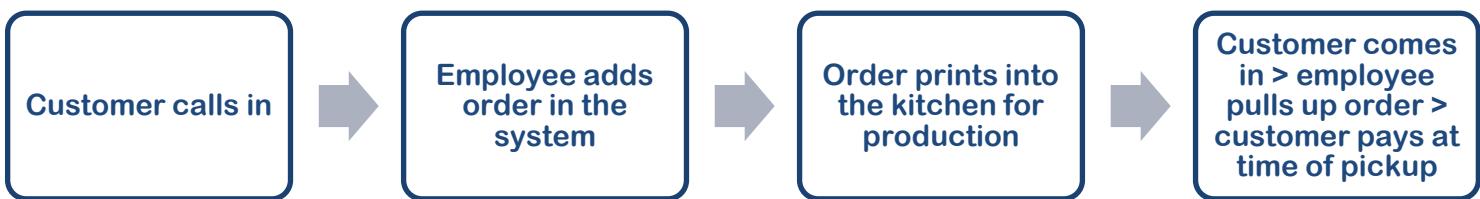
Pick Up Orders

Taking a Phone Order for Pick Up

Caller ID

When using integrated Caller ID, the POS system flashes “Ringing” in the lower corner of the screen when a call comes in. Touch the message. For repeat customers, the customer’s information auto-populates on the customer information screen. If the caller has not called before, you can go ahead and take the customer’s name and address (if applicable).

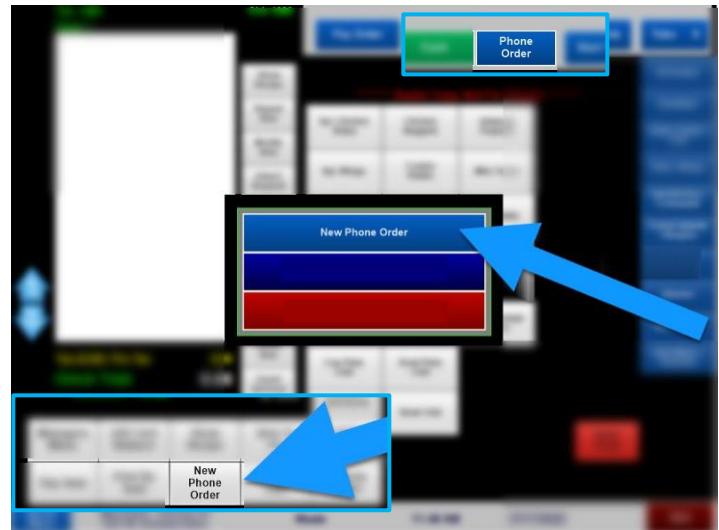
Pick Up Order Flow



Phone Orders can be accessed from multiple places.

- 1 From the order screen, Select **Phone Orders** followed by **New Phone Order**

Or, you may have a function button called **New Phone Order**. *This function bypasses the submenu to place a new order or edit an order*



- 2 If your restaurant offers delivery, you will be prompted to choose **Pick Up or Delivery**

3 Enter the customer's phone number and touch **Done**

Note

While you can enter the customer's name instead of the phone number using this keyboard, use the phone number to prevent duplicates and confusion. **You can attach a name to the phone number on the following screen.**



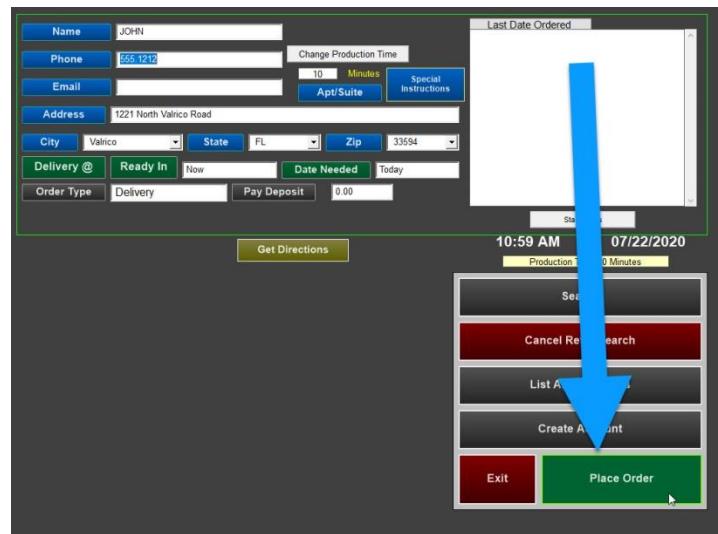
NO MATCH FOUND

If the customer has not ordered before, you will receive a quick message that says, "No Match Found". This means the customer is not matched with a saved customer in your system.

Note

For a standard pickup order, the fields on this page are not required!

However, it is a good idea to at least get the person's name.

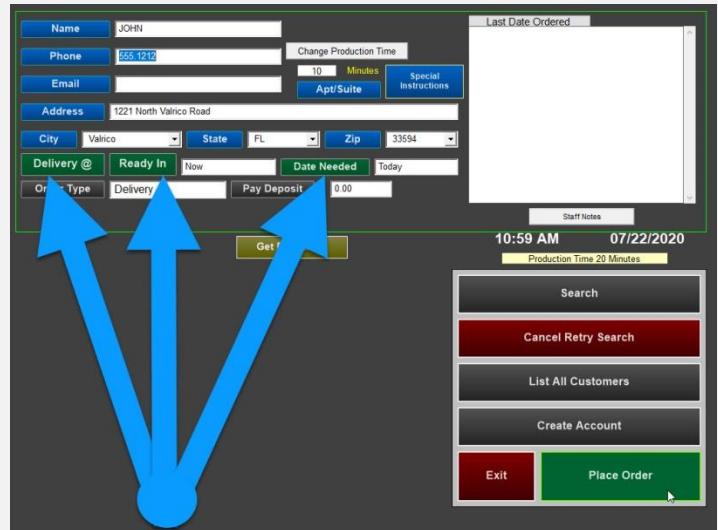


Additional Options (Optional)

- You can enter additional contact information and the customer's email address
- Add Special Instructions and Staff Notes
- Touch the appropriate button (Name, Phone, Address, etc.) to prompt an onscreen keyboard.
- If the Kitchen is behind, the **Change Production Time** can be used to increase the production time. This is only used for future orders, it will release the order x minutes before pickup/delivery is expected.

Changing the time or day of pickup

- Touch “**Pick Up @** or **Delivery @**. Enter the specific time when prompted
- Or, touch **Ready In** __ minutes.
- If this is for a future date, touch **Date Needed**



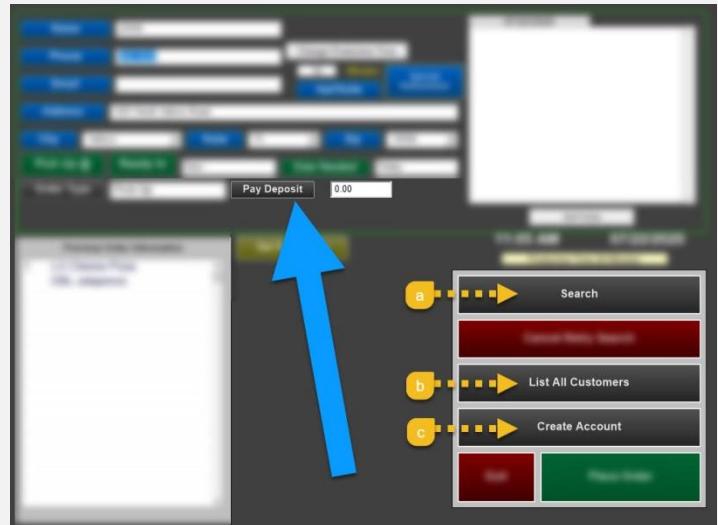
Adding a Deposit and Search Criteria

- !** You will not enter credit card information for prepayments from this screen. You will be prompted at the end of the customer’s order where you can provide the Check Total.
- !** If you want to have the customer pay a deposit (or portion of the bill) for a large order, you can use **Pay Deposit**. This option is typically only used for large preorders, where you may want to collect a portion of the check upfront to help cover the cost of items.

a **Search** and

b **List All Customers** can be used to locate previous customers by Name, Phone or Address if the customer may want to place an order on a specific account but did not provide the correct phone number originally.

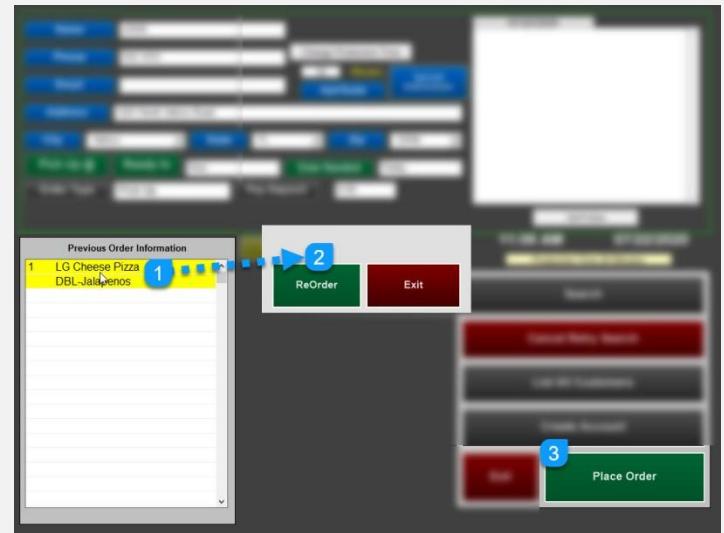
c **Create Account** is used for House Accounts, where the customer will be billed later on. Please refer to the document on House Accounts if you are interested in using this feature.



Reordering saved items

If the customer has ordered in the past, their last order appears in the lower corner of the screen.

- 1 To reorder 1 or multiple items, touch the menu item
- 2 Select **ReOrder**. The menu item(s) will disappear from this screen and be moved to the order screen
- 3 Select **Place Order**



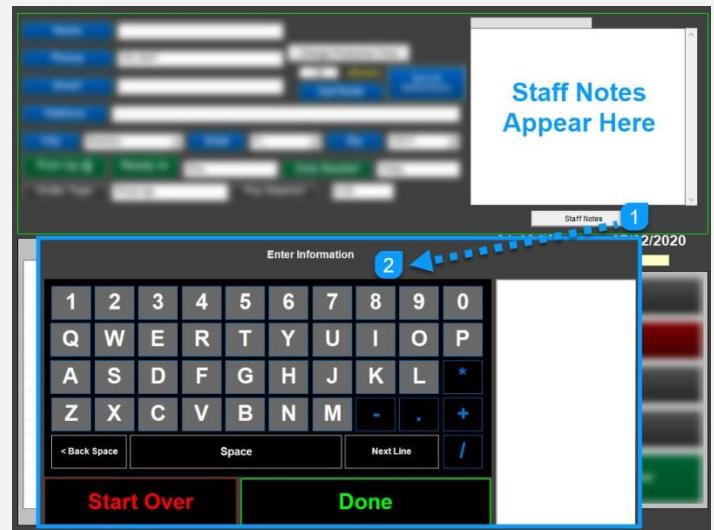
Staff Notes

Staff Notes do not print on the customer's receipt. The information can only be seen here (on the customer's profile)

Staff Notes are useful to share information on this customer prior to placing the order; such as "get prepayment – customer did not pick up last order", etc.

- 1 Select **Staff Notes**
- 2 Enter the notes and select **Done**

Staff notes are shown in the top right area of the screen

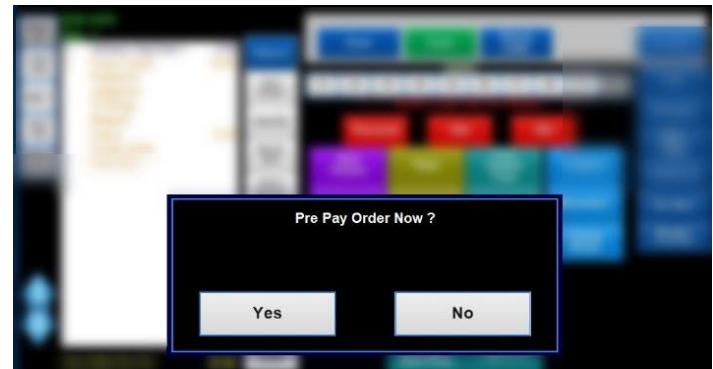


- 5 Enter the order
- 6 Select **Done** when completed

“Pre Pay Order Now?” prompts onscreen

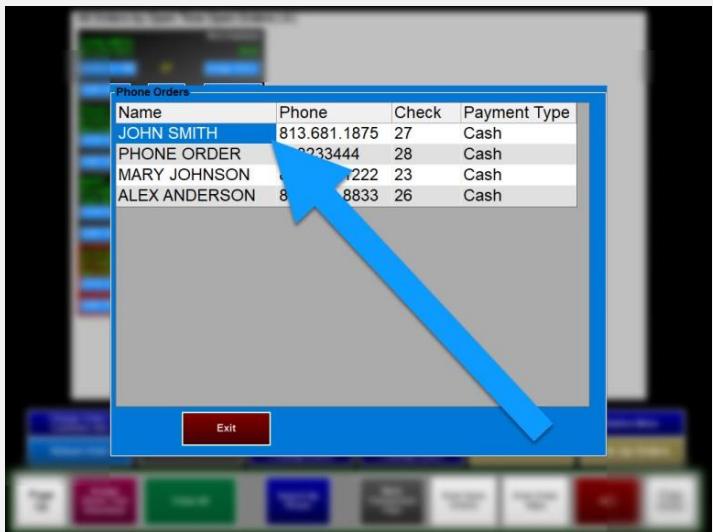
- 7** **Yes** means a credit card payment will be entered now. **No** will be paid at time of pickup.
- 8** If **Yes**, follow the prompts to enter the customer’s credit card

If you press no by accident, you can still add the card (please follow next steps)



Adding a credit card after selecting “No” to prepaying

- 1** To add a credit card after saying No, touch “Phone Orders” and then **Edit/Close Phone Order**
- 2** Select **Change Order / Customer Info**
- 3** A window opens; choose the appropriate phone order (selecting/touching anywhere in the row)



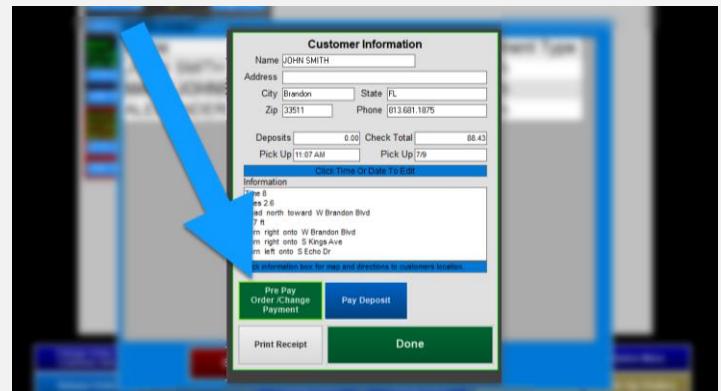
9 Select **Pre Pay Order with Credit Card** and enter in the card information. Select **Done** and **Exit** when completed (card information saves automatically).

Note

Pay Deposit allows you to pay a portion of the check.

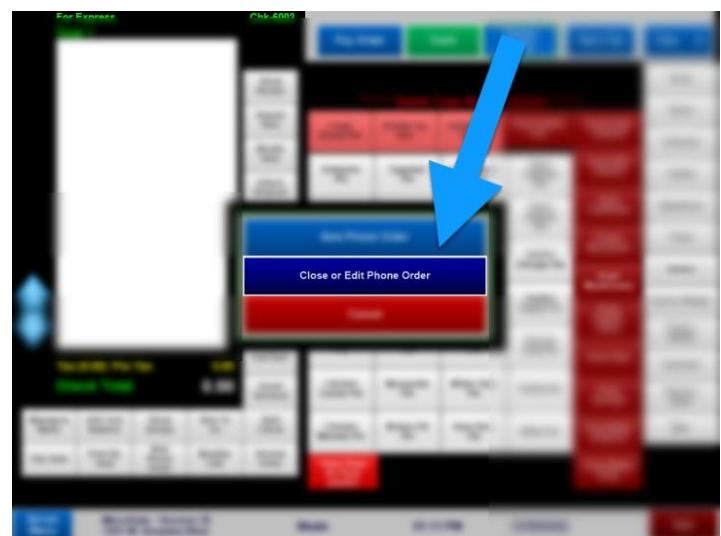
Deposits are useful for large preorders where you may want to collect a portion of the bill upfront.

Print Receipt prints the customer receipt without forcing you to pay/close the order.



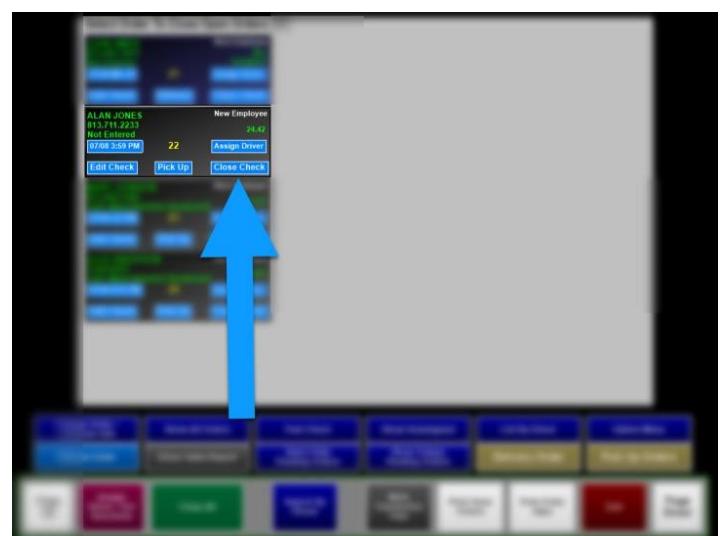
Retrieving a Phone Order to Pay or Edit (Pickup Orders)

1 From the order screen, Select **Phone Orders** followed by **Close or Edit Phone Order**

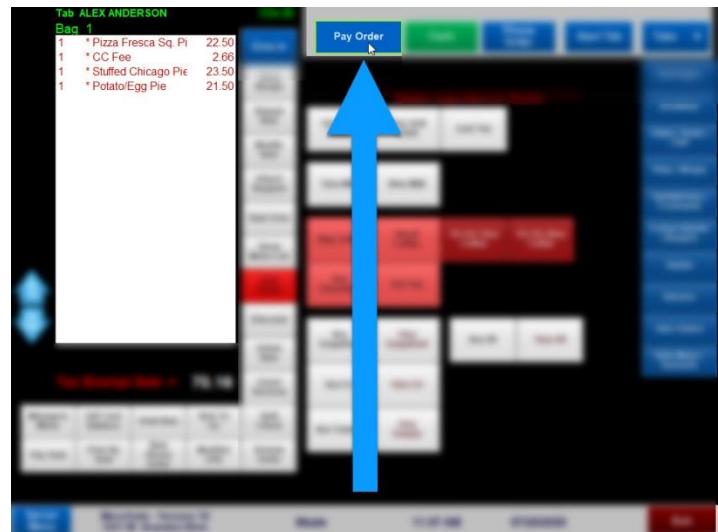


2 If you are ready to **close the check**, touch **Close Check** on the bottom right of an order.

If the customer calls back and would like to **add to the order**, select **Edit Check**

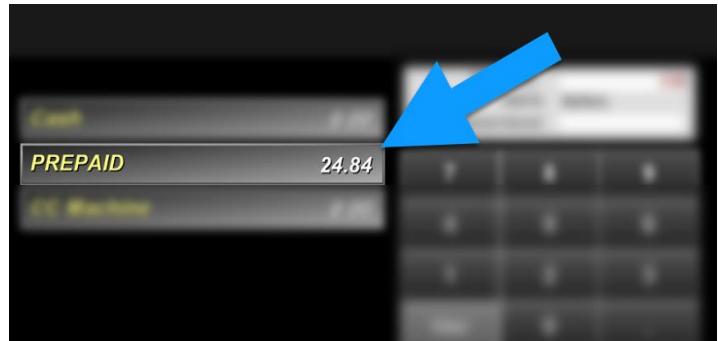


3 After selecting Close Check, you will be placed on the order screen to review the order, enter additional items and/or add a discount. When ready, select **Pay Order**



4 Take payment to close the check

- If the order was prepaid, select **PREPAID**
- Or, you can go ahead and run a card or collect cash if the prepaid tender is \$0.00



If you accidentally select Close Check, you can cancel the payment

Canceling Close Check

- 1 Select **Exit** on the order screen
- 2 Then select **No** when prompted.

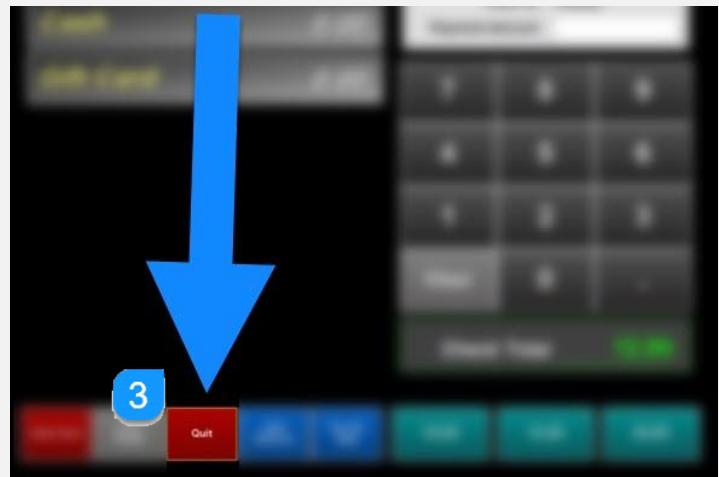
You will be exited back to the ID screen and the order will remain active.



If you accidentally select Close Check instead of Edit Check

You can either cancel (using the steps above), or add additional items to the check.

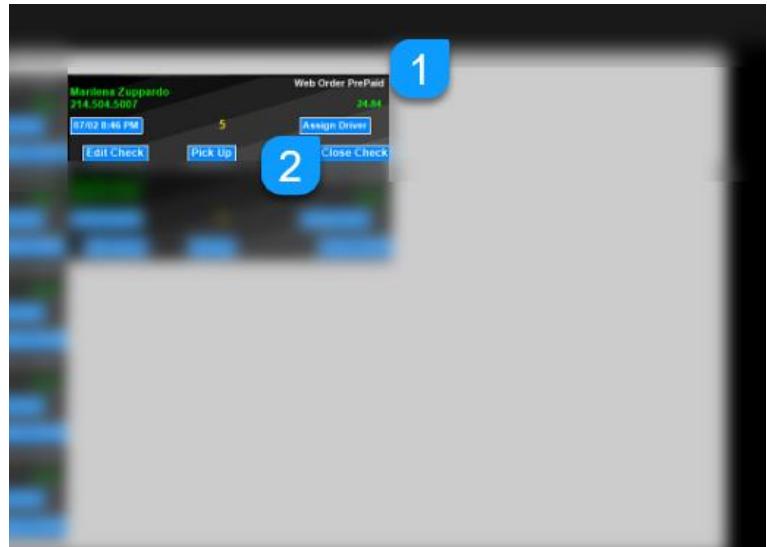
- 1 Select **Exit** on the order screen
- 2 Then select **Yes** when prompted to send the items to the kitchen. You'll then be sent to the payment screen.
- 3 To continue to keep the order open and **NOT** complete payment, select **Quit** to cancel the payment. *The order remains active with the new changes.*



Online Orders

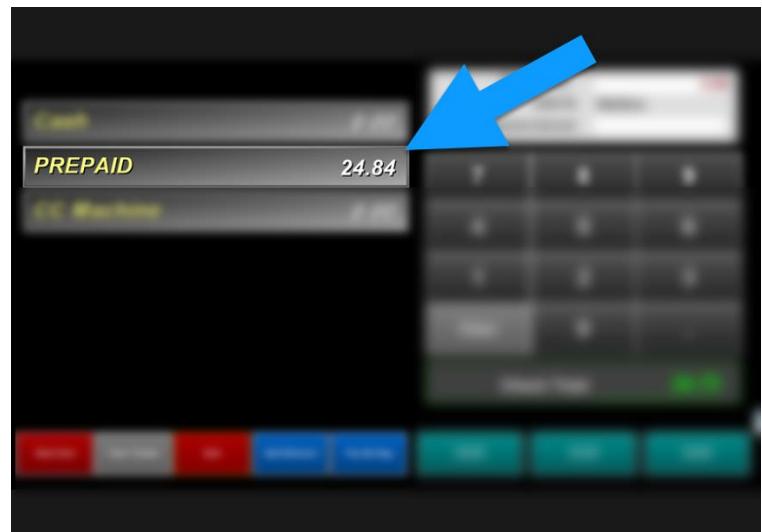
Online orders are paid immediately when the customer checks out online. Online orders pass into MicroSale as "Web Order PrePaid" (this heading is listed on the upper right corner of the order). Online Orders follow the same procedure as a typical phone order.

- 1 Online orders show as "Web Order PrePaid"
- 2 When the order needs to be settled, select **Close Check**



- 1 Tender the check using the option **PREPAID**

The Prepaid amount is passed from the online ordering provider.



IMPORTANT

With integrated online ordering, you must set the system to auto release pending orders. Enable this setting on only one register in your restaurant. If this is set on multiple registers, it will cause duplicate orders to print!

Managers Menu > Register Setup > Terminal Configuration > Register Options > Phone Orders > **Auto Release Pending Orders** > **Save**

Delivery Orders

Taking a Phone Order for Delivery

Delivery Address

You only need to ask for the address if the customer is placing a delivery order. If this customer has ordered in the past, the customer name and address will populate. Confirm the address is correct before moving on and placing the order.

Caller ID

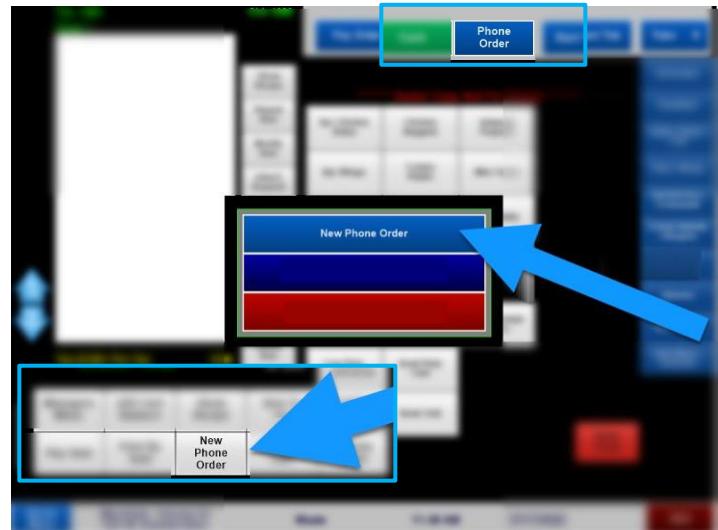
When using integrated Caller ID, the POS system flashes “Ringing” when a call comes in. Touch the message and select Pickup or Delivery. For repeat customers, the customer’s information auto-populates on the customer information screen. If the caller has not called before, you can go ahead and take the customer’s name and address (if applicable).

Delivery Flow



1 Select **Phone Order** or **New Phone Order**

Or, you may have a function button called **New Phone Order**. This function bypasses the submenu to place a new order or edit an order



2 You will be prompted to choose **Pick Up** or **Delivery**. Choose **Delivery**.

3 Enter the customer's phone number and touch **Done**

Note

While you can enter the customer's name instead of the phone number using this keyboard, use the phone number to prevent duplicates and confusion. You can attach a name to the phone number on the following screen.

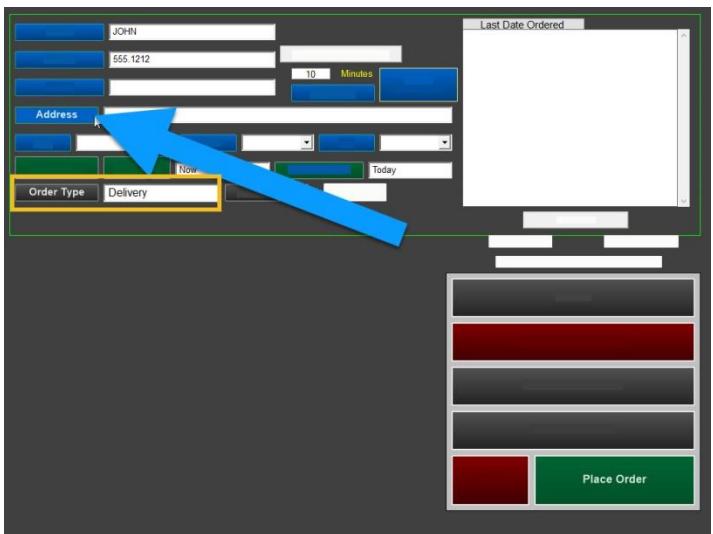


NO MATCH FOUND

If the customer has not ordered before, you will receive a quick message that says, "No Match Found". This means the customer is not matched with a saved customer in your system.

You must enter the customers address when placing a delivery order.

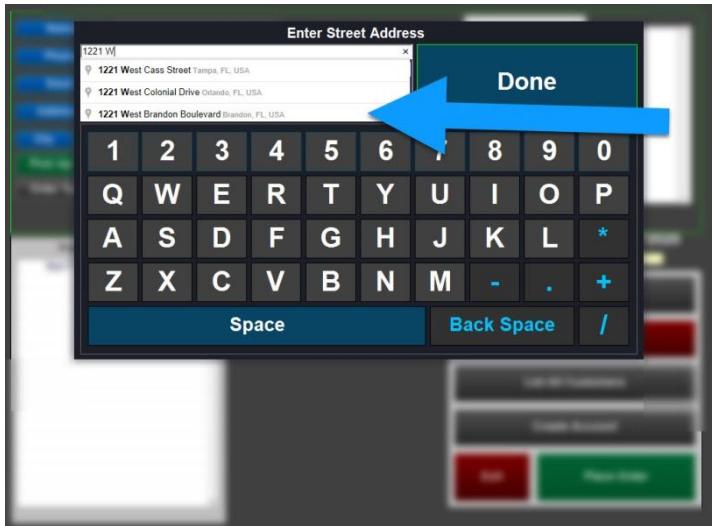
4 Touch **Address**



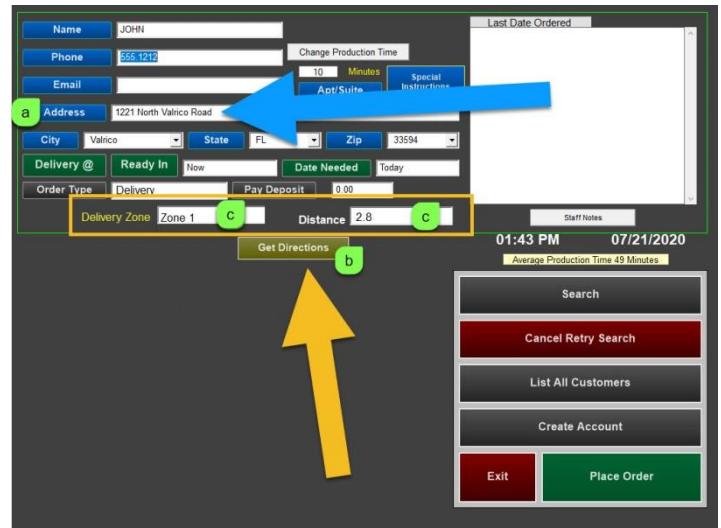
5 Begin typing in the address (using integrated mapping, addresses near your location will begin populating).
6 Touch the matching address.

Note

This order will be assigned to a driver later, after the order is placed. Please read How to Dispatch a driver after completing this section.



- a After the address is entered,
- b Select **Get Directions** to ensure the address is within your restaurants zoning. **You do not have to select “Get Directions” but it is a good way to find out if the address is within your zones before going to the order screen**
- c Get directions autopopulates the delivery zone and distance or time.



*This feature is available using the integration to Google Maps.
Available for a minimal annual subscription fee.*

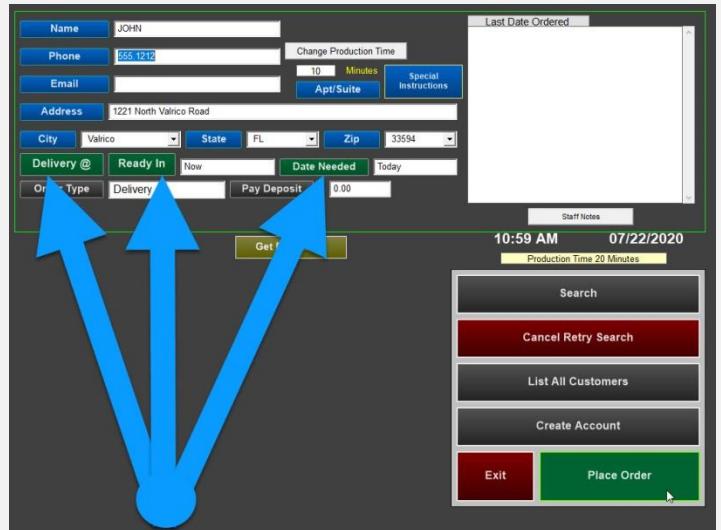
Additional Settings

From the same screen, you have the option to enter the customer's contact information, Special Instructions and Staff Notes. Touch the appropriate button (Name, Phone, Address, etc.) to prompt an onscreen keyboard.

For a standard pickup order, these fields are not required! However, it is a good idea to at least get the person's name. If the Kitchen is behind, the **Change Production Time** can be used to increase the production time. This is only used for future orders, it will release the order x minutes before pickup/delivery is expected.

Changing the time or day of pickup

- Touch “**Pick Up @** or **Delivery @**. Enter the specific time when prompted
- Or, touch **Ready In** ____ minutes
- If this is for a future date, touch **Date Needed**



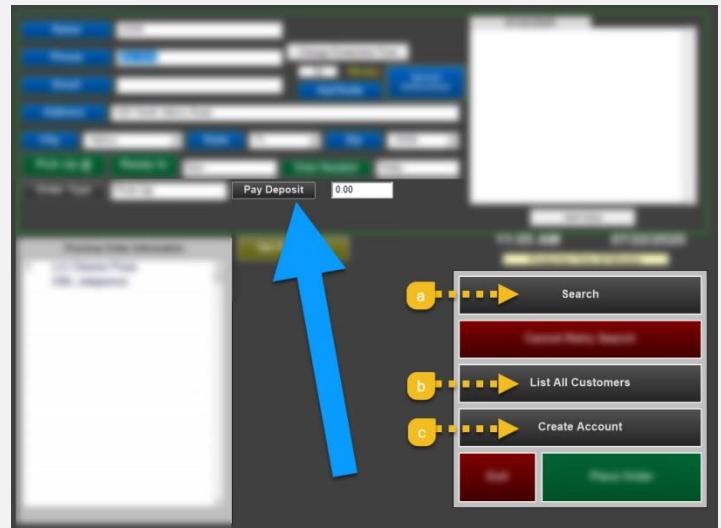
Adding a Deposit and Search Criteria

- ! You will not enter credit card information for prepayments from this screen. You will be prompted at the end of the customer's order when you can provide the Check Total.
- ! If you want to have the customer pay a deposit (or portion of the bill) for a large order, you can use **Pay Deposit**

a **Search** and

b **List All Customers** can be used to locate previous customers by Name, Phone or Address if the customer may want to place an order on a specific account

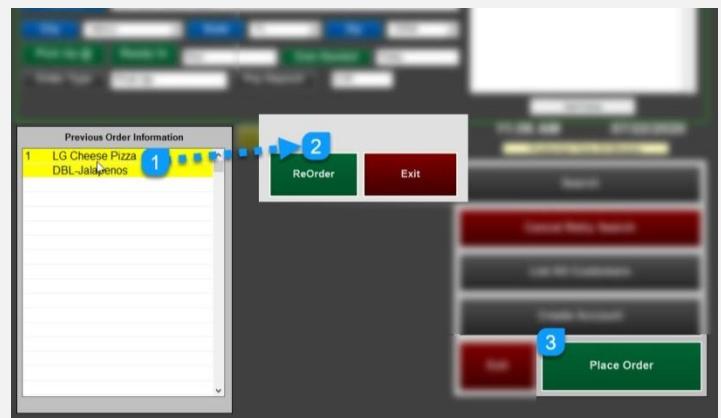
c **Create Account** is used for House Accounts, where the customer will be billed later on. Please refer to the document on House Accounts if you are interested in using this feature.



Reordering saved items

If the customer has ordered in the past, their last order appears in the lower corner of the screen.

- 1 To reorder 1 or multiple items, touch the menu item
- 2 Select **ReOrder**. The menu item(s) will disappear from this screen and be moved to the order screen
- 3 Select **Place Order**

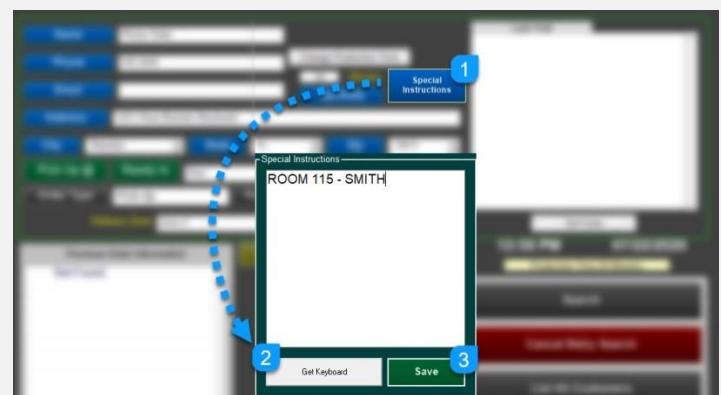


Special Instructions

Special Instructions print on the customer receipt.

Why use Special Instructions? This area is useful for hotels where the address stays the same but the room number changes or to add a note for the delivery driver such as 'apt building is blue, back of complex', etc.

- 1 Select **Special Instructions**
- 2 Select **Get Keyboard**
- 3 **Save** when finished



How to ring in hotel orders (using Special Instructions):

For Hotel orders, use the hotel name, address, and hotel phone number in the standard area.

This ensures that when you enter the phone number it always brings up the correct hotel

Do not use the apt/suite number for hotel numbers!

The apt/suite area is designed for static addresses. If you change this, it will save a new address.

- 1) Enter in the room number and customer name into the Special Instructions box. This area is easily changed and prints on the bottom of the guest check.



Staff Notes

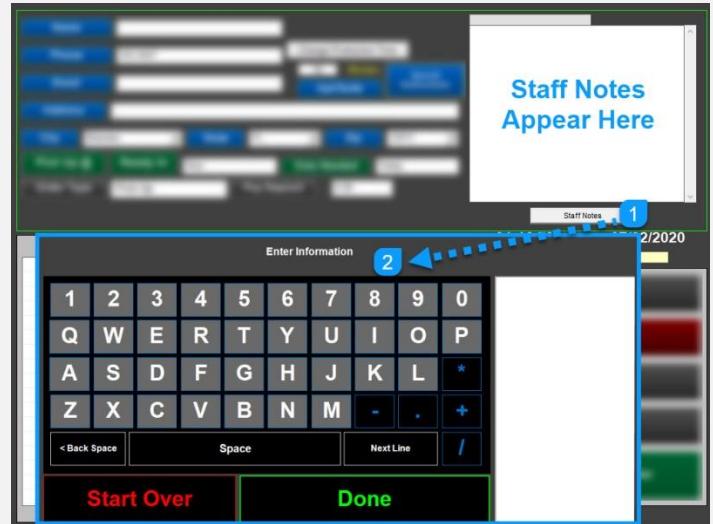
Staff Notes do not print on the customer's receipt. The information can only be seen here (on the customer's profile)

Staff Notes are useful to share information on this customer prior to placing the order; such as "get prepayment – customer did not pick up last order", etc.

- 3 Select Staff Notes

- 4 Enter the notes and select **Done**

Staff notes are shown in the top right area of the screen



Customer with multiple saved addresses

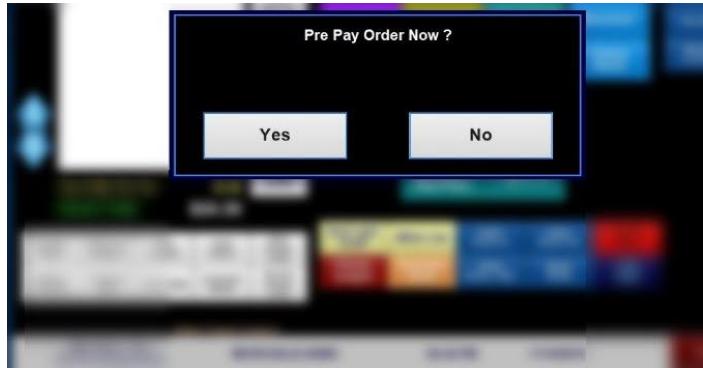
- 1 Each saved phone number can have multiple addresses assigned. If the customer has multiple addresses assigned to their phone number, it will prompt all associated locations.
- 2 Verify the address with the customer and touch the correct address.
- 3 Select the appropriate address for this delivery order by touching anywhere in the row.



- 10 Enter the order
- 11 Select **Done** when completed

A prepayment message prompts

- 12 Select **Yes** to prepay a delivery.
- 13 Follow the prompts to enter the customer's credit card
For contactless delivery, ask the customer to provide the tip over the phone otherwise, you need to take the credit card slip on the delivery run to have the customer write in the tip.



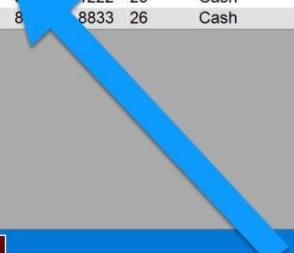
If you press **No** to the prepay order prompt, you can still add the card (please follow next steps)

Adding a credit card after selecting “No” to prepaying

- 1 To add a credit card after saying No, touch “Phone Orders” and then **Edit/Close Phone Order**
- 2 Select **Change Order / Customer Info**



1 A window opens; choose the appropriate phone order (selecting/touching anywhere in the row)



Name	Phone	Check	Payment Type
JOHN SMITH	813.681.1875	27	Cash
PHONE ORDER	333444	28	Cash
MARY JOHNSON	222	23	Cash
ALEX ANDERSON	8833	26	Cash

14 Select **Pre Pay Order with Credit Card** and enter in the card information. Select **Done** and **Exit** when completed (card information saves automatically).

Note

Pay Deposit allows you to pay a portion of the check.

Deposits are useful for large preorders where you may want to collect a portion of the bill upfront.

Print Receipt prints the customer receipt without forcing you to pay/close the order.



Customer Information

Name: JOHN SMITH

Address:

City: Brandon State: FL
Zip: 33511 Phone: 813.681.1875

Deposits: 0.00 Check Total: 88.43
Pick Up: 11:07 AM Pick Up: 79

Information: Click Time Or Date To Edit

Take 8
Get on 8
Head north toward W Brandon Blvd
7 ft.
Turn right onto W Brandon Blvd
Turn right onto S Kings Ave
Turn left onto S Echo Dr
Click information box for map and directions to customer's location.

Pre Pay Order/Change Payment Pay Deposit

Print Receipt Done

How to Dispatch a Driver

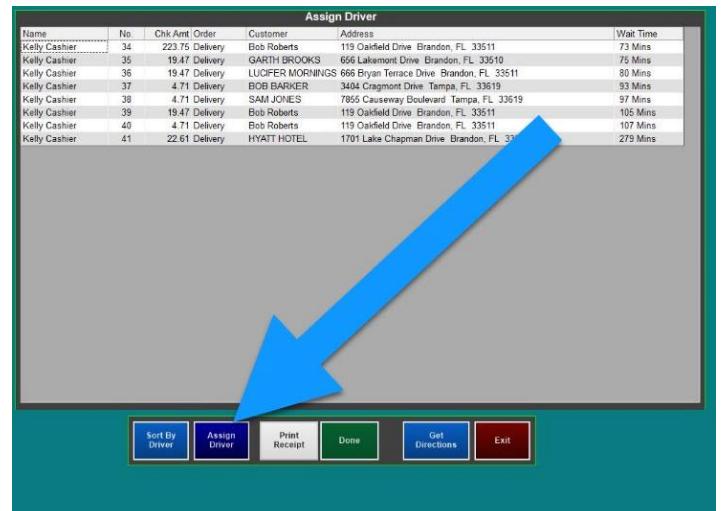
1 You can assign a driver for dispatch from multiple places; through the **Driver Access** button on the ID screen or selecting Phone Order > **Close or Edit Phone Order**

2 Select **Assign Driver / Get Directions**

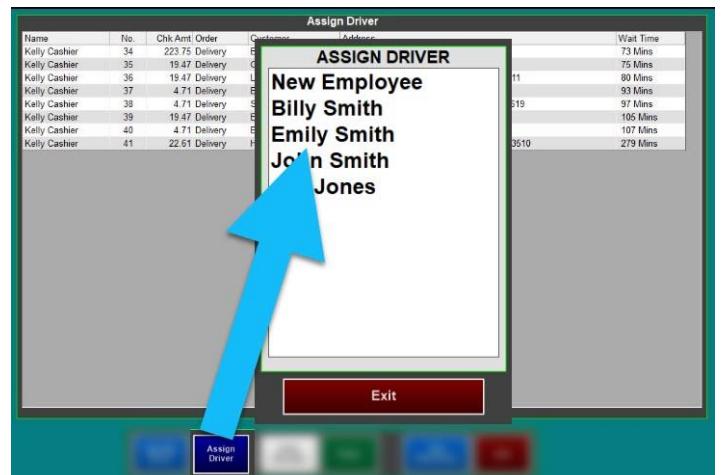


3 The screen displays all unassigned orders in a spreadsheet.

4 Touch **Assign Driver**

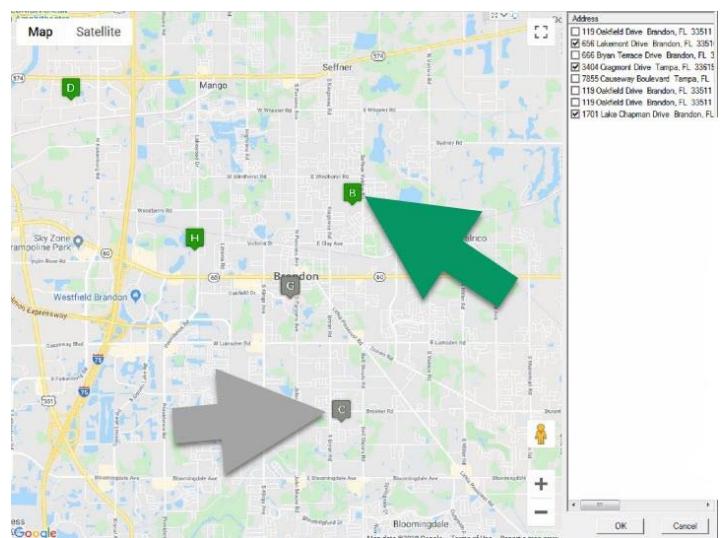


5 Select the Driver's Name



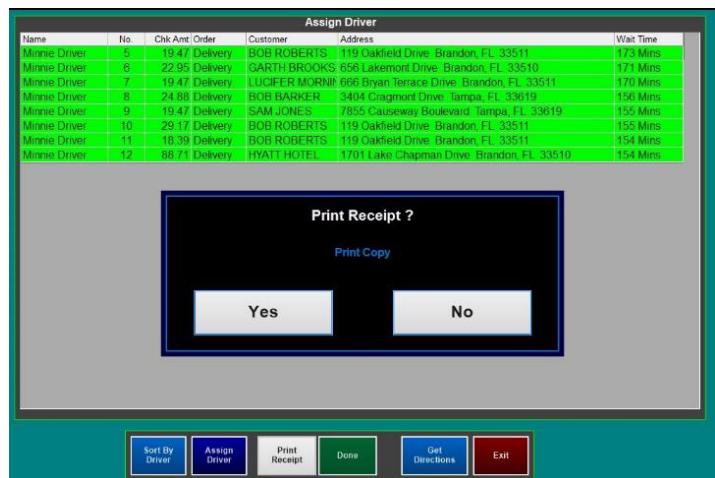
After selecting the driver's name, the map displays all the open delivery orders

- 6 Select a gray pin or place a check mark next to the address. *The pin will turn green, meaning is assigned to that driver.*
- 7 When finished, select **OK**

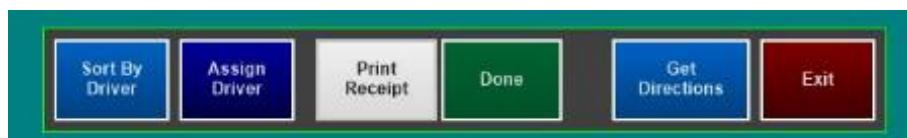


- 8 Once the addresses are selected, choose whether or not to print the customer receipts

Keep the credit card slip with the customer receipt to stay organized. Ask the customer to sign the slip and add a tip at the time of delivery.



Additional options under Assign Driver / Get Directions



Sort By Driver to see that specific driver's deliveries.

Print Receipt allows you to print a selected delivery receipt.

Done and **Exit** saves any changes you made or exit this area to go back to the Access Phone Orders screen.

Get Directions provides a turn-by-turn print out for each delivery. The directions for the first stop are from the restaurant to the customer but the preceding directions start from the last delivery address to the next. *This feature is available with the Google Maps integration.*

- 1) Select **Get Directions**
- 2) Select the driver or employee's name

- a. All current orders assigned to the driver/employee appear
- 3) Select the deliveries in the order you wish to have directions printed
 - a. *Note: Depending on the order of stops you select it will print the directions starting from your last stop.*
- 4) Each selection adds an entry to the "Stops" section
- 5) Select **Get Directions** when you are done adding stops
- 6) A separate slip prints for each delivery

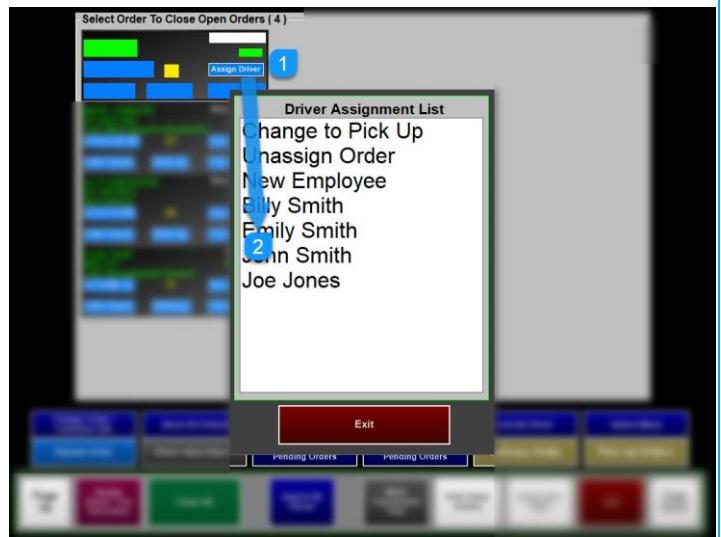
Other features of Assign Driver / Get Directions

- **Print Receipt** – To use this function, first select an order and then select “Print Receipt”. Two receipts will print:
 - An itemized customer receipt with payment delivery directions at the bottom
 - A driver receipt which includes:
 - Driver Name
 - Time & Date it was printed
 - Check No.
 - Customer’s Name, Address, and Phone Number
 - Delivery Time
 - Amount to collect
- **Close Selected** – To use this function, first select the order(s) you wish to close and then select the “Close Selected” button. All selected orders will close to exact cash (no change will be calculated). Afterwards, the message “Print Slip? Cash Amount Closed \$X.XX” will display. It is best practice to select “Yes” to print a copy of the closing receipt.
- **Save / Exit** – Allows you to save any changes you made or exit this area to go back to the Access Phone Orders screen.

Reassigning a driver or changing the order type

You can either reassign a driver or change the order to Pick Up.

- 1 On the phone order management screen, find the appropriate order and select **Assign Driver**
- 2 Choose a new driver, **Change to Pick Up** or **Unassign Order**



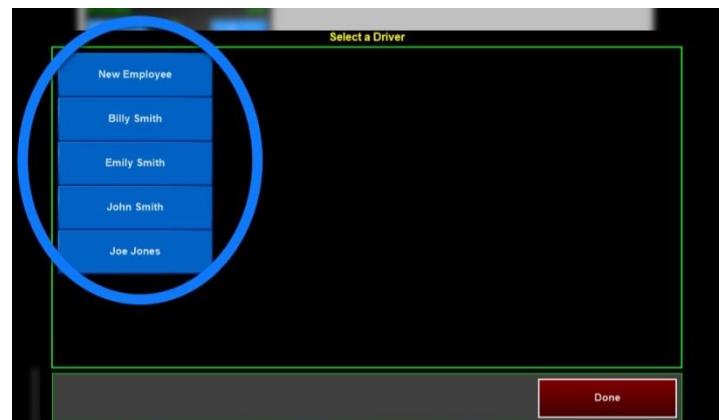
Skimming Driver of Excessive Cash

Cash Drops are useful when a driver needs to turn in extra cash on hand so that he or she is not carrying around too much money. The cash turned in is recorded on their audit.

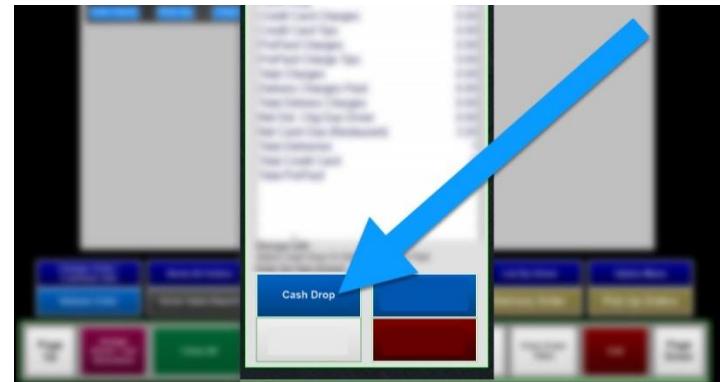
- 1 Select **Driver Sales Report**



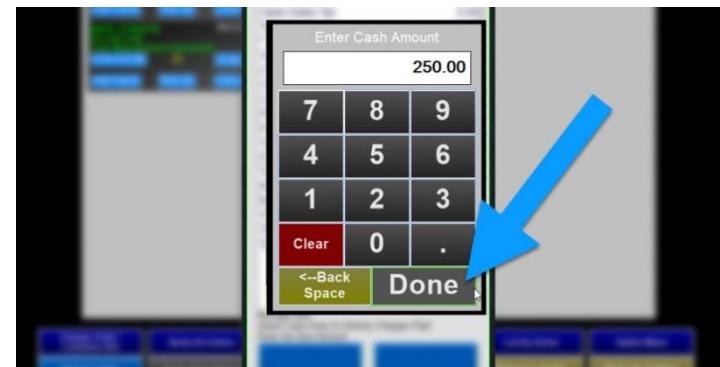
- 2 Select the **driver's name**



3 Select **Cash Drop**



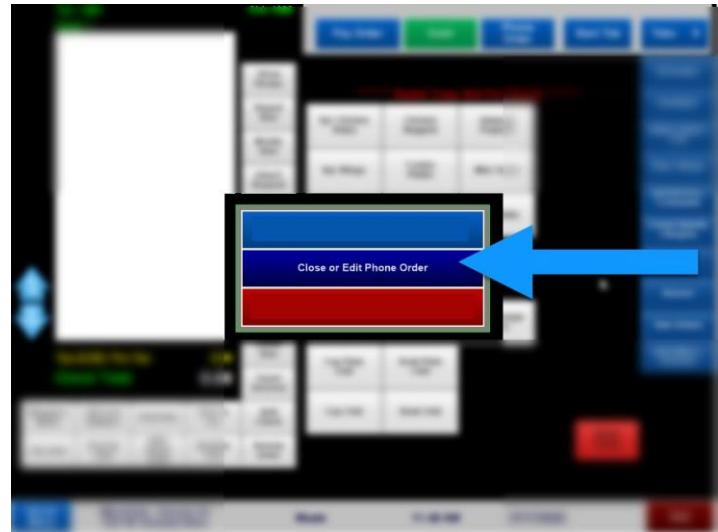
4 Enter the cash amount and select **Done**



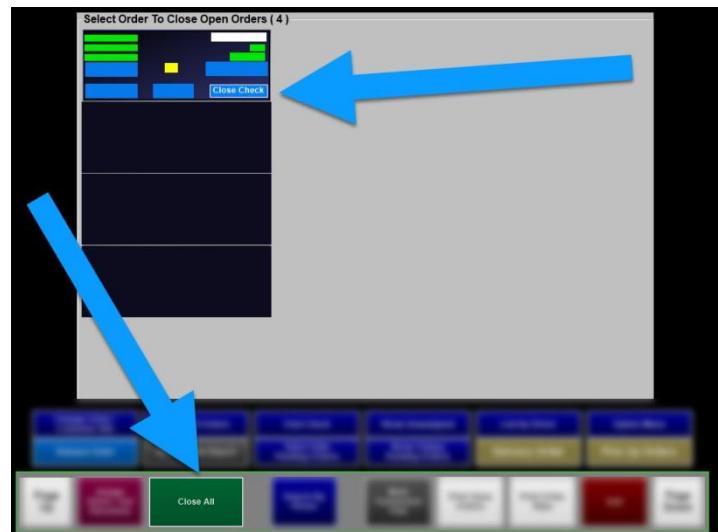
5 The cash drop amount is deducted from the Net Cash Due (Restaurant Amount) and recorded on the Driver Sales Report.

Closing Delivery Checks and Applying Tips

1. Touch Phone Order then **Close Edit Phone Order**



1. There are two options available, select **Close Check** or **Close All**. **Close All** screen can be used to apply tips and **Close All** to Cash or Uber Eats. Etc.



The Close All screen allows you to **Sort By Driver** to see that specific driver's deliveries. Touch the 0.00 under the tip field to apply the credit card tip (cash tips are entered at Punch Out).

Credit	44.85	0.00	Close Phone Orders					
Name	No.	Chk Amt	Order	Phone	Address	Tender	Payment	Tip
Minnie Driver	34	223.75	Delivery	813.222.1234	119 Oakfield Drive, Brandon, FL, 33511	Credit	223.75	0.00
Minnie Driver	36	19.47	Delivery	813.760.4089	666 Lakemont Drive, Brandon, FL, 33510	Cash	0.00	19.47
Minnie Driver	36	19.47	Delivery	813.666.6666	666 Bryan Terrace Drive, Brandon, FL, 33511	Cash	0.00	0.00
Minnie Driver	37	4.71	Delivery	813.412.4563	3404 Cragmont Drive, Tampa, FL, 33619	Cash	0.00	0.00
Minnie Driver	38	4.71	Delivery	813.123459	7855 Causeway Boulevard, Tampa, FL, 33619	Credit	4.71	0.00
Minnie Driver	39	19.47	Delivery	813.222.1234	119 Oakfield Drive, Brandon, FL, 33511	Cash	0.00	19.47
Minnie Driver	40	4.71	Delivery	813.222.1234	119 Oakfield Drive, Brandon, FL, 33511	Cash	0.00	0.00
Minnie Driver	41	22.61	Delivery	813.786.1256	1701 Lake Chapman Drive, Brandon, FL, 33510	Cash	0.00	0.00
Minnie Driver	42	19.47	Delivery	813.222.1234	119 Oakfield Drive, Brandon, FL, 33511	Cash	0.00	0.00
Minnie Driver	43	24.36	Delivery	813.888.1248	876 South Parsons Avenue, Brandon, FL, 33511	Cash	0.00	0.00
Minnie Driver	45	24.35	Delivery	813.552.2232	1208 East Brandon Boulevard, Brandon, FL, 33511	Cash	0.00	0.00
Minnie Driver	46	5.95	Delivery	813.522.3368	1240 Astor Commons Place, Brandon, FL, 33511	Cash	0.00	0.00
Minnie Driver	44	19.47	Delivery	813.6811875	540 Medical Oaks Avenue, Brandon, FL, 33511	Credit	19.47	0.00

Sort By Driver (button circled in red) **Close Selected** **Close All** **Exit**

1. Enter the tip and select **Done**

Close Phone Orders									
Name	No.	Chk Amt	Order	Phone	Address	Tender	Payment	Tip	
Minnie Driver	34	223.75	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Credit	223.75	0.00	
Minnie Driver	35	19.47	Delivery	813 760 4095	656 Lakemont Drive Brandon, FL 33510	Cash	0.00	0.00	
Minnie Driver	36	19.47	Delivery	813 656 6566	656 Bryan Terrace Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	37	4.71	Delivery	813 412 4683	3404 Cragmont Drive Tampa, FL 33619	Cash	0.00	0.00	
Minnie Driver	38	4.71	Delivery	813 123 4559	7855 Causeway Boulevard Tampa, FL 33619	Credit	4.71	0.00	
Minnie Driver	39	19.47	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	40	4.71	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	41	22.61	Delivery	813 786 1256	1701 Lake Chapman Drive Brandon, FL 33510	Cash	0.00	0.00	
Minnie Driver	42	19.47	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	43	24.35	Delivery	813 656 6566	1200 East Brandon Boulevard Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	45	24.35	Delivery	813 555 2323	1200 East Brandon Boulevard Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	46	5.95	Delivery	813 522 3365	1240 Astar Commons Place Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	44	19.47	Delivery	813 656 6566	540 Medical Oaks Avenue Brandon, FL 33511	Credit	19.47	0.00	

7	8	9
4	5	6
1	2	3
Clear	0	.
<-Back Space		Done

2. After all tips are entered select either **Close Selected** or **Close All**

Close Phone Orders									
Name	No.	Chk Amt	Order	Phone	Address	Tender	Payment	Tip	
Minnie Driver	34	223.75	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Credit	223.75	20.00	
Minnie Driver	35	19.47	Delivery	813 760 4095	656 Lakemont Drive Brandon, FL 33510	Cash	0.00	0.00	
Minnie Driver	36	19.47	Delivery	813 656 6566	656 Bryan Terrace Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	37	4.71	Delivery	813 412 4683	3404 Cragmont Drive Tampa, FL 33619	Cash	0.00	0.00	
Minnie Driver	38	4.71	Delivery	813 123 4559	7855 Causeway Boulevard Tampa, FL 33619	Credit	4.71	0.00	
Minnie Driver	39	19.47	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	40	4.71	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	41	22.61	Delivery	813 786 1256	1701 Lake Chapman Drive Brandon, FL 33510	Cash	0.00	0.00	
Minnie Driver	42	19.47	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	43	24.35	Delivery	813 888 1245	876 South Parsons Avenue Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	45	24.35	Delivery	813 555 2323	1200 East Brandon Boulevard Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	46	5.95	Delivery	813 522 3365	1240 Astar Commons Place Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	44	19.47	Delivery	813 656 6566	540 Medical Oaks Avenue Brandon, FL 33511	Credit	19.47	0.00	

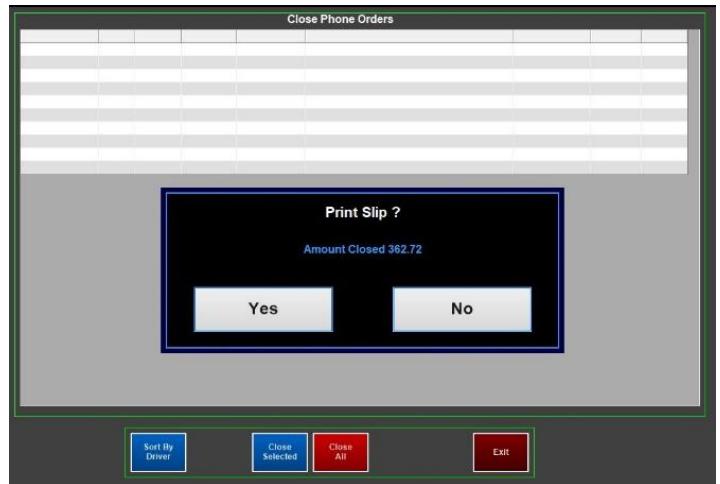
1. Select **Yes** to close all to cash, Uber Eats, Etc.

Close Phone Orders									
Name	No.	Chk Amt	Order	Phone	Address	Tender	Payment	Tip	
Minnie Driver	34	223.75	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Credit	223.75	20.00	
Minnie Driver	35	19.47	Delivery	813 760 4095	656 Lakemont Drive Brandon, FL 33510	Cash	0.00	0.00	
Minnie Driver	36	19.47	Delivery	813 656 6566	656 Bryan Terrace Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	37	4.71	Delivery	813 412 4683	3404 Cragmont Drive Tampa, FL 33619	Cash	0.00	0.00	
Minnie Driver	38	4.71	Delivery	813 123 4559	7855 Causeway Boulevard Tampa, FL 33619	Credit	4.71	0.00	
Minnie Driver	39	19.47	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	40	4.71	Delivery	813 222 1234	119 Oakfield Drive Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	41	22.61	Delivery	813 786 1256	1701 Lake Chapman Drive Brandon, FL 33510	Cash	0.00	0.00	
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Minnie Driver	46	5.95	Delivery	813 522 3365	1240 Astar Commons Place Brandon, FL 33511	Cash	0.00	0.00	
Minnie Driver	44	19.47	Delivery	813 656 6566	540 Medical Oaks Avenue Brandon, FL 33511	Credit	19.47	0.00	

Close All Orders To Cash

Are You Sure ?

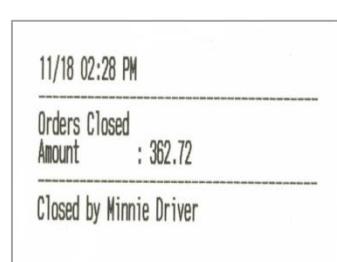
1. Select **Yes** to print the Amount Closed payment slip.



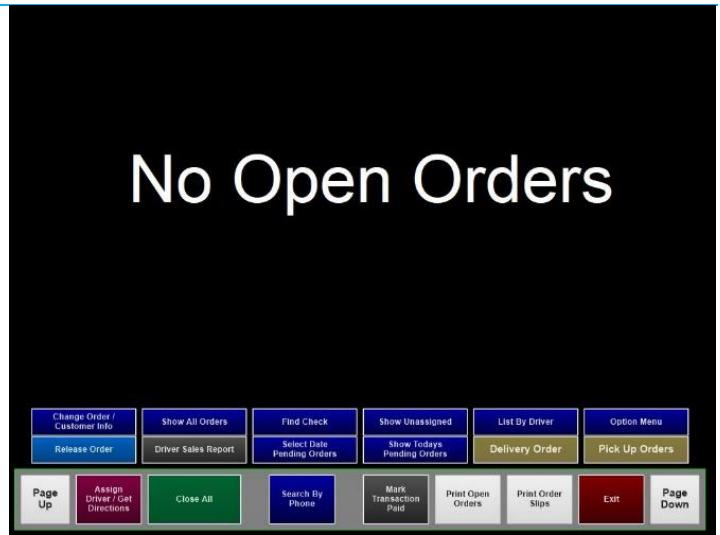
Note

Print Slip shows the total amount closed and the employee who closed the orders. Keep this slip with the printed driver report or put the slip in the cash drawer.

Example of the Amount Closed slip



2. Once all orders are closed, the screen displays **No Open Orders**

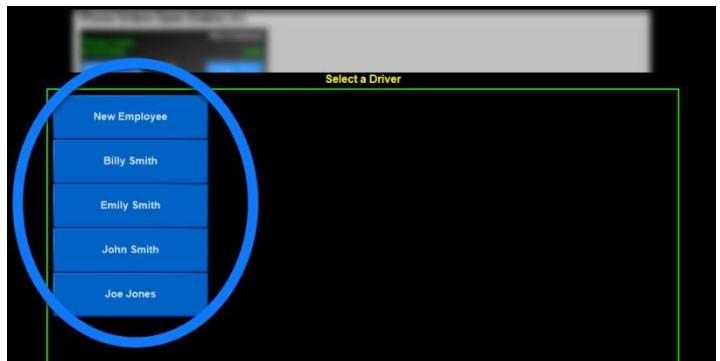


End of Shift for Delivery Driver

1 Select **Driver Sales Report**



2 Select the **Driver's Name**



3 The Driver Report can be viewed on screen or printed.

4 If open orders are set to \$0.00 and all tips are entered, select **Print Report**, staple the credit card slips to the driver report and collect the *Net Cash Due*.

Note

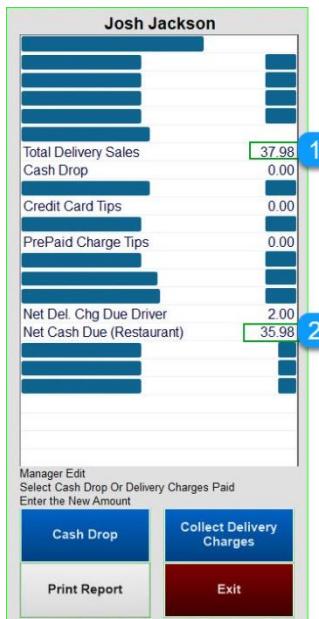
The report provides total driver sales, credit card sales and tips. Tips are deducted from cash. If delivery charges are used, that will add that total as well as any cash drops from the driver. More details below.



Driver Sales Report

Term	Description
Net Open Sales	Orders that have not been closed and are still waiting to be delivered
Open Discounts	Total discounts applied to undelivered orders
Open Sales Tax	Total tax of undelivered orders
Total Open Sales	Total sales of undelivered orders
Total Delivery Sales	<p>Total sales of delivered orders (not including tips)</p> <p>"Total Delivery Sales" will only be visible on the Driver Report when the Total Open Sales is \$0.00.</p> <p>If it is not at \$0.00, Total Delivery Sales is replaced with "Net Open Sales" and "Total Sales Open & Closed"</p>
Cash Drop	Any cash drop (skim/deposit) that was performed during the day for the driver
Credit Card Charges	Total check amount charged to credit cards (excludes charged tips)
Credit Cards Tips	Total tips that have been charged to credit card transactions
Total Charges	Credit Card Tips + Credit Card Charges
Total Delivery Charges	Total delivery fee charges
Net Del. Chg Due Driver	Total delivery charges the store owes to the driver (this amount is either a flat dollar amount or percentage of the delivery fee collected). <i>If this is not setup, please refer to Setting Up Delivery Fees, Driver Payment Amount</i>
Net Cash Due (Restaurant)	Total cash amount that the driver owes to the restaurant

Understanding the amount is owed to the restaurant



1

Total Delivery Sales

- Cash Drop (skimming the driver of excessive cash during the shift)
- Credit Card Tips
- PrePaid Charge Tips
- Net Del. Chg Due Driver

2

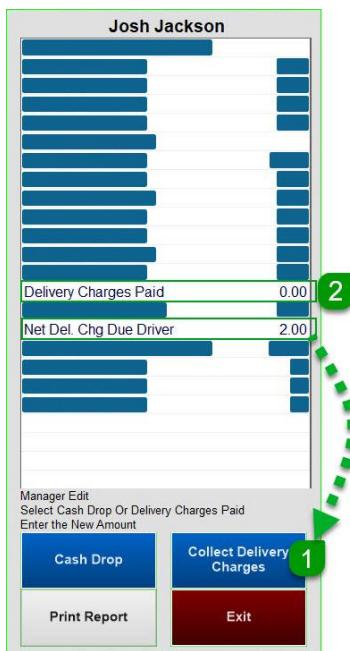
Net Cash Due (Restaurant)

When a driver wants to collect their portion of the delivery fee prior to end of shift

Collect Delivery Charges

This option is used to pay the driver their delivery payment before their shift is over. *Example, the driver is on break and wants to collect the delivery fee payment early to buy lunch.*

- 1 Select **Collect Delivery Charges** and type in the amount from **Net Del. Charge Due Driver**; the system will enter this as a paid out for the inputted amount
- 2 The amount from the **Net Del. Chg Due Driver** moves it to the **Delivery Charges Paid** field



Delivery Charges Paid

This is the amount of the delivery fees paid to driver. This is typically displayed at \$0.00 unless the driver wants their cut of the delivery fee before their shift is over. This number is affected by the Collect Delivery Charges button (works as a paid-out to balance the driver's sales)

Net Del. Chg Due Driver

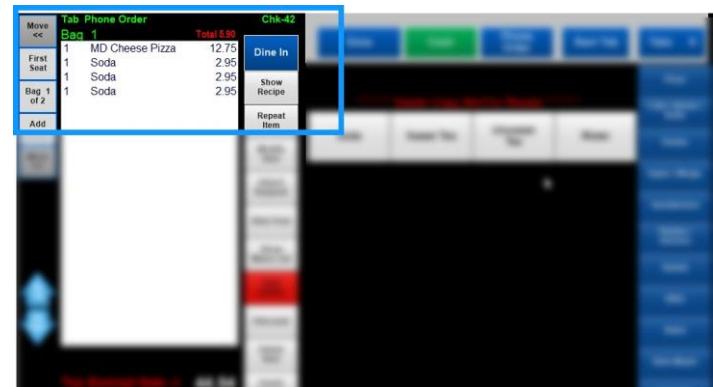
This is the amount of the delivery fees that the store owes to the driver (this amount is either a flat dollar amount or percentage of the delivery fee collected). If this is not setup, please refer to *Setting Up Delivery Fees*

Advanced Functionality

Assigning multiple checks on one phone order

Separating an order by bag (or separate seat, depending on your system's setup) allows separate orders on one ticket and paid separately.

- 1 Enter the first order normally (*automatically shows as Bag 1 – you can see this label above the virtual check*). You can Name each bag by using the **Tray Names** button.

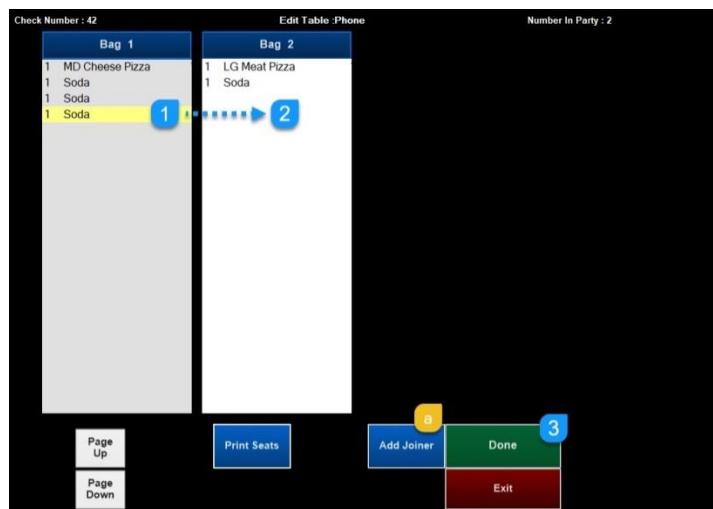


- 2 When the **Tray Names** feature is used, it will automatically advance to the next Bag. If you do not use the Tray Name, then press the **Move >>** or press **Add Tray**
- 3 Enter the orders on separate Bags until completed.
- 4 To move items around, select **Review Order**



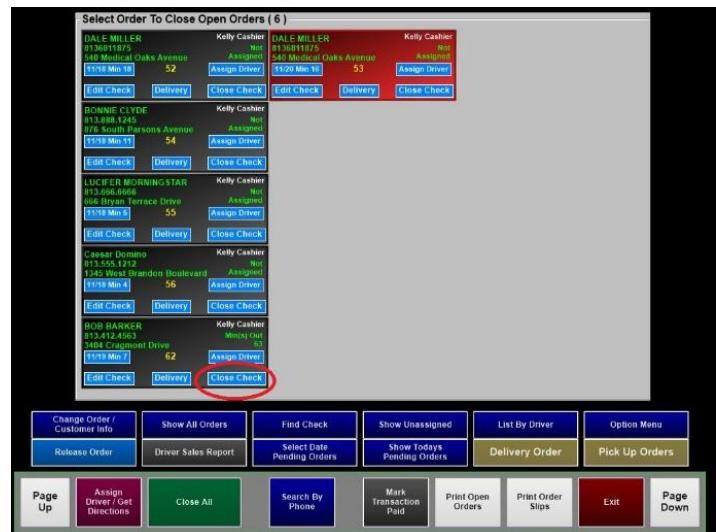
- 5 Items can be moved by highlighting the items and then touching a new 'Bag' (labeled 1 2)
- 6 Select **Done** when completed (3)

a To add a new bag, select **Add Joiner**



Closing Check with Separate Trays

- 1 Select **Close Check**



- 2 Select **Pay By Tray**



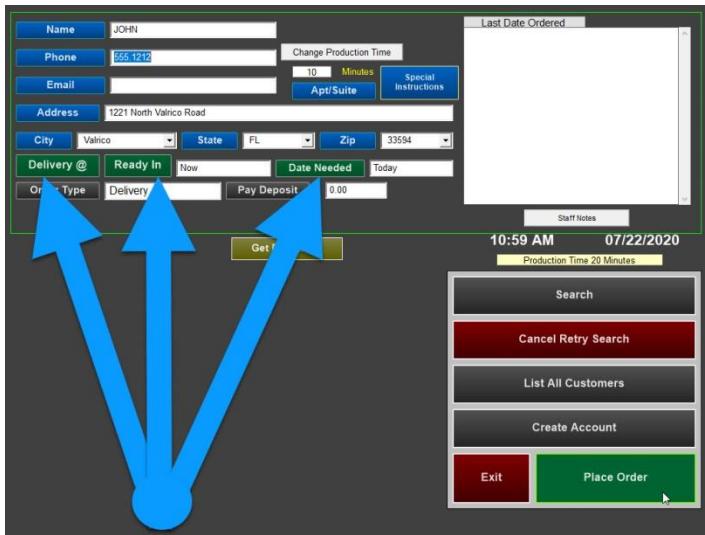
- 3 Select the **Tray** you want to close
- 4 Select the **PAYMENT TYPE**
- 5 Continue selecting additional bags until all orders are paid.



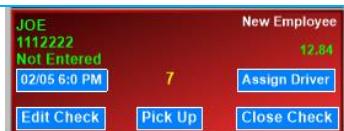
Preorders (pending orders)

Pending orders are typically used for preordering large orders (such as 200 wings for *The Big Game*). Pending orders that are due the following day print automatically after the nightly close out, the following steps go over manually printing or viewing pending orders.

A preorder is placed the same as a phone order with a future time and/or date



- 1 Select **Pick Up @** and choose the time when prompted
- 2 Select **Date Needed** and choose the date when prompted
- 3 Select **Place Order**



- 4 When accessing open orders, the pending order appears red with the date and time needed (under the customer information)

Orders automatically print x amount of minutes before the customer is scheduled to arrive to pick up the order (when using auto release pending orders – see right side of screen for setup)

If auto release is not set, the message of **Release Order** flashes red on screen when the order is within the default production time of the pickup. You must touch *Release Orders* to release the order to the kitchen.

To have preorders automatically send to the kitchen:

📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > Phone Orders > **Auto Release Pending Orders** > Save

ONLY SET RELEASE PENDING ORDERS ON ONE TERMINAL.
OTHERWISE THE ORDER MAY PRINT MULTIPLE TIMES!

Change Production Time (across all terminals):

Changing the default 20 minute production time (when the kitchen receives the ticket prior to pick up)

📍 Managers Menu > Register Setup > Terminal Configuration > Register Options > Phone Orders > change the number of minutes next to **“Minimum Amount of Minutes Required to Produce Order”** > Finished > Save

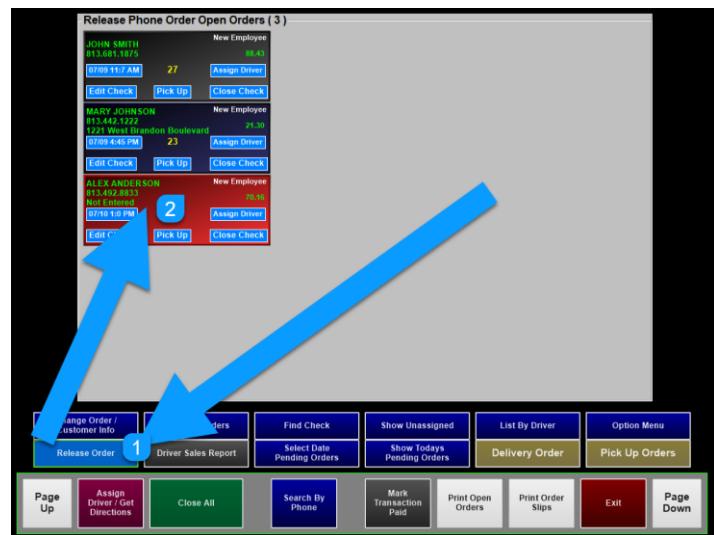
Releasing Preorders Early

If a pending order is going to be picked up earlier than the original time

- 1 Touch **Release Order**
- 2 Touch the appropriate order (anywhere in the order box)

After the order is selected, you'll be placed on the order screen

- 3 Touch **Done** to release the order or you can add a note using Attach Request or open food to send a message to the kitchen such as "MAKE ASAP!"

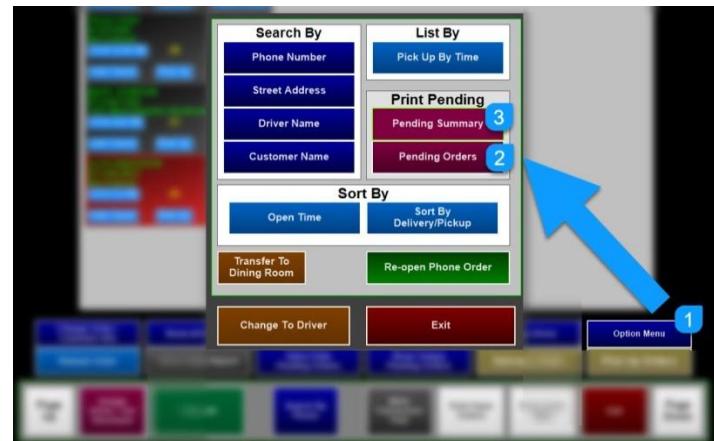


Preparing for pending orders (phone orders for a future day)

Preorders print the night before the order is due to prepare the kitchen of the upcoming day's orders.

To manually print pending orders

- 1 Select **Option Menu**
- 2 Under Print Pending, choose **Pending Summary** or **Pending Orders**



Pending Orders

Tomorrow's pending orders automatically print out after the nightly close out, however, if you want to manually view or print pending orders;

- 1 Choose a date range or a specific date to view the orders due within the dates chosen
- 2 For example, to view tomorrow's orders, select the date for tomorrow on the Starting and Ending Date. The order details print on the receipt printer

Pending Summary

The pending summary prints a summary of all menu items ordered within the date range selected. This report is used as a product mix to ensure you have enough inventories on hand to fill the orders

Adding a deposit (partial prepayment) on a phone order

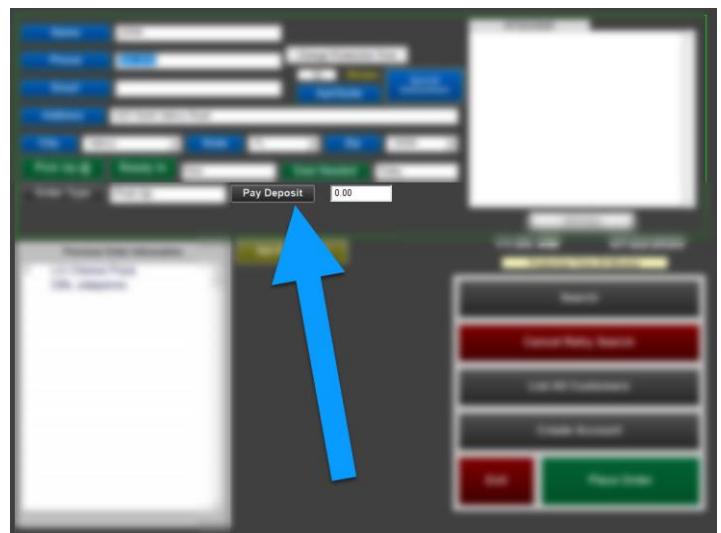
A deposit (or portion of the total check) can be taken during the order process. A deposit can be taken before the order is placed or added later (using Change Order / Customer Information).

Adding a deposit (partial amount) before the order is placed

1 Select **Pay Deposit**

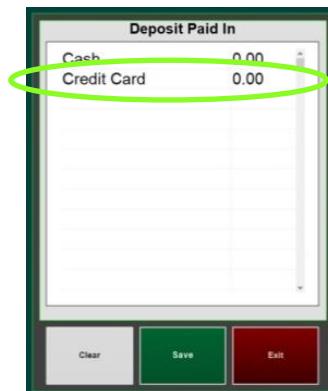
Note

This option is typically only used for large preorders, where you may want to collect a portion of the check upfront to help cover the cost of items.



Available payment medias appear;

2 Touch the desired payment type. For credit card, touch anywhere in the credit card row.



3 Enter the payment amount and use the decimal to finalize the amount before selecting **Done**.

4 After you select Done, it leads to you to the EMV payment screen. Confirm the deposit amount by selecting **Done**

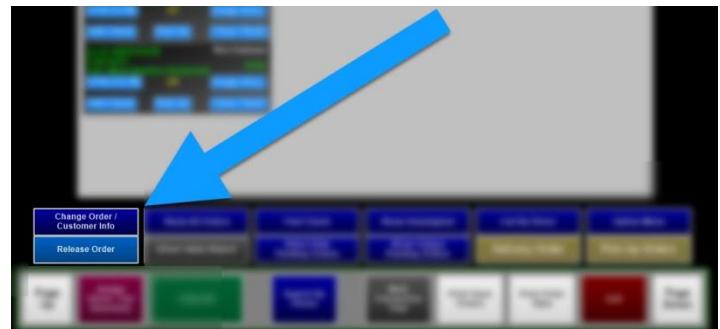
5 You can insert the card (if available) or manually enter the card information. Follow the prompts on the payment device.

The deposit has been entered and automatically saves

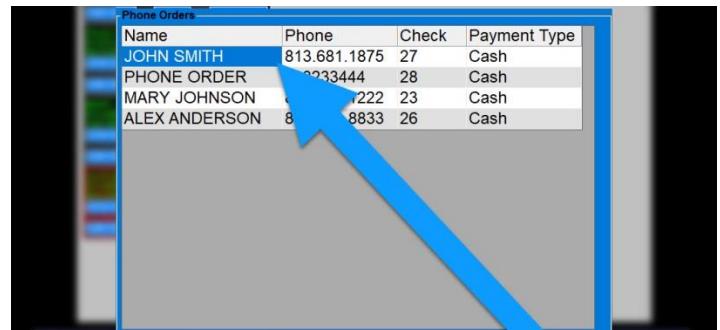
6 Select **Place Order**

Adding a deposit after the order is placed

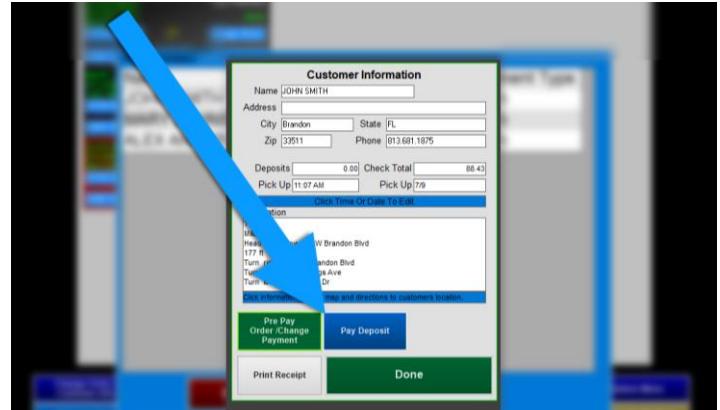
- 1 Select Close or Edit Phone Order
- 2 Select Change Order / Customer Info



- 3 A window opens; choose the appropriate phone order (selecting/touching anywhere in the row)



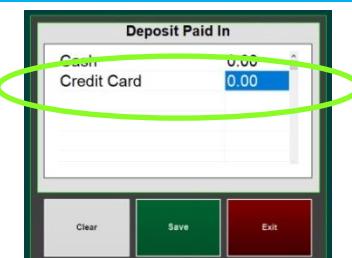
- 4 On the Customer Information window, select Pay Deposit



Available payment medias appear;

- 5 Touch the desired payment type

For credit card, touch/select anywhere in the *Credit Card* row



- 6 Enter the payment amount and use the decimal to finalize the amount before selecting Done.
- 7 Now on the EMV payment screen, confirm the deposit amount by selecting Done
- 8 You can insert the card (if available) or manually enter the card information. Follow the prompts on the payment device.
The deposit has now been entered and saves automatically.
- 9 Select Place Order

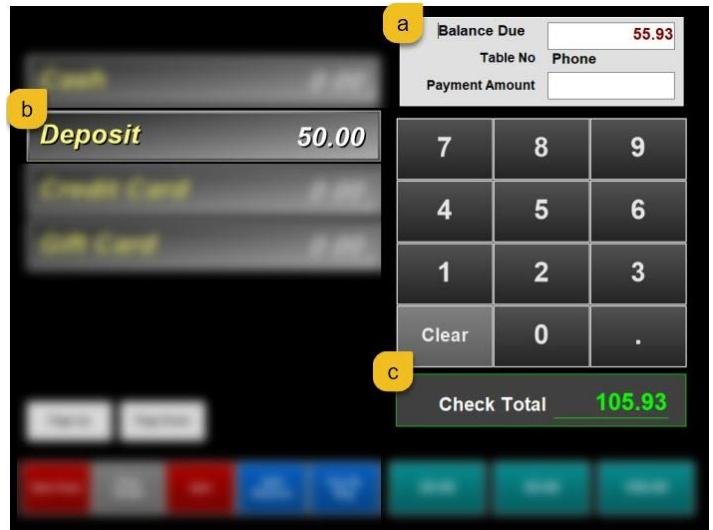
Closing a phone order with a deposit

When a deposit is on a phone order, a credit is placed on the check.

- 1 Access the phone order regularly and select **Close Check**

- a The **Balance Due** (or Refund Due) is in the upper right corner and the check total is on the bottom of the screen
- b A **Deposit** button appears as a payment media with the deposit amount
- c The **Check Total** is shown in large green numbers on the bottom of the screen.

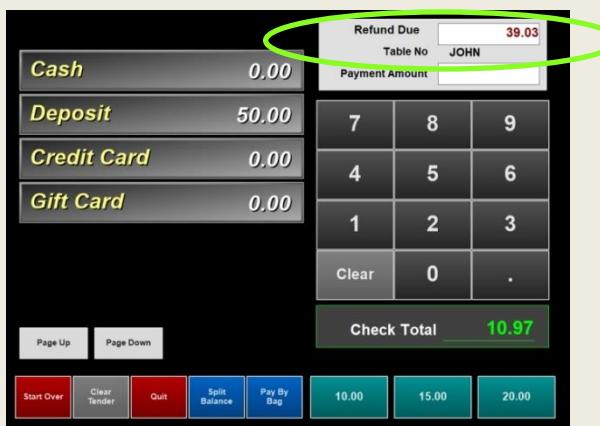
- 2 If there is a Balance Due, touch the appropriate payment media to complete the order. (Example, if a customer hands you a credit card, select **Credit Card** and complete the payment)



WARNING

If the deposit was higher than the check total, you owe the customer money! If you see Refund Due instead of Balance Due, you must refund the customer with cash.

- 1 To refund the customer with cash, select the button **Deposit**



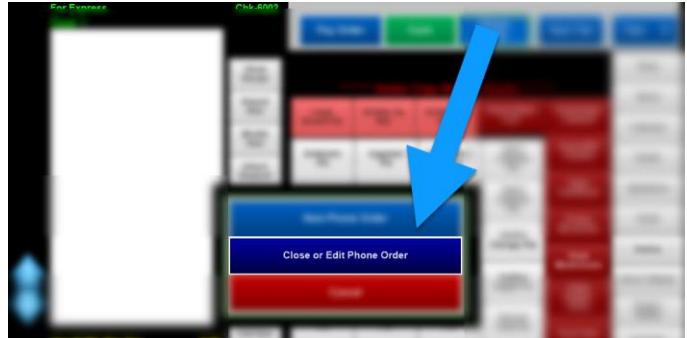
- 2 It will prompt the refund amount. Select **Accept Amount** after the money is taken from the drawer



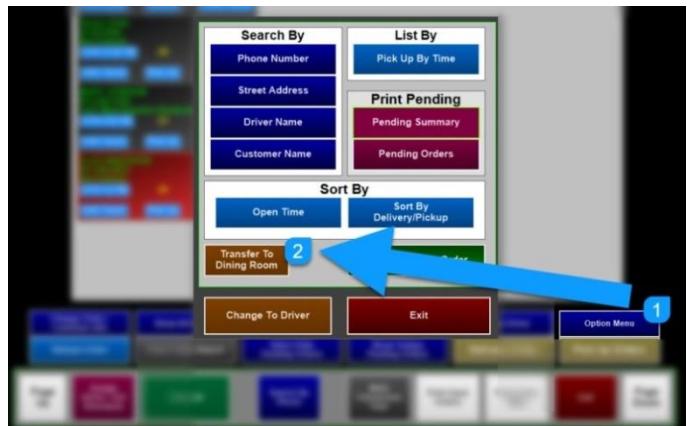
Transferring a phone order to the dining room

The employee who is performing this function will also be the one who receives this order within their table layout or open tabs

- 1 From the ordering screen select Phone Orders and then **Close or Edit Phone Order**



- 1 Select **Option Menu**
- 2 Select **Transfer to Dining Room**

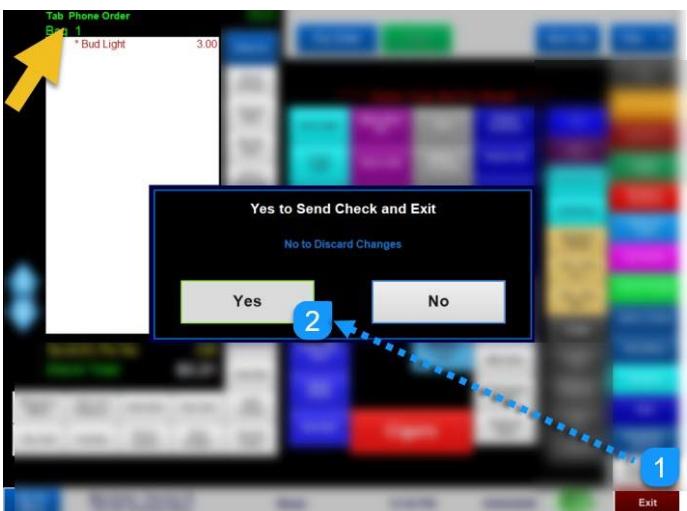


- 3 Select the order you wish to transfer. The message at the top changes to *Transfer to Dining Room*



After you select the order, you'll be placed on the order screen to verify the order and/or add additional items to the check. The table name or tab name is named "Phone Order" or the customer's name used when the order was placed.

- 1 Select **Exit**
- 2 Select **Yes**



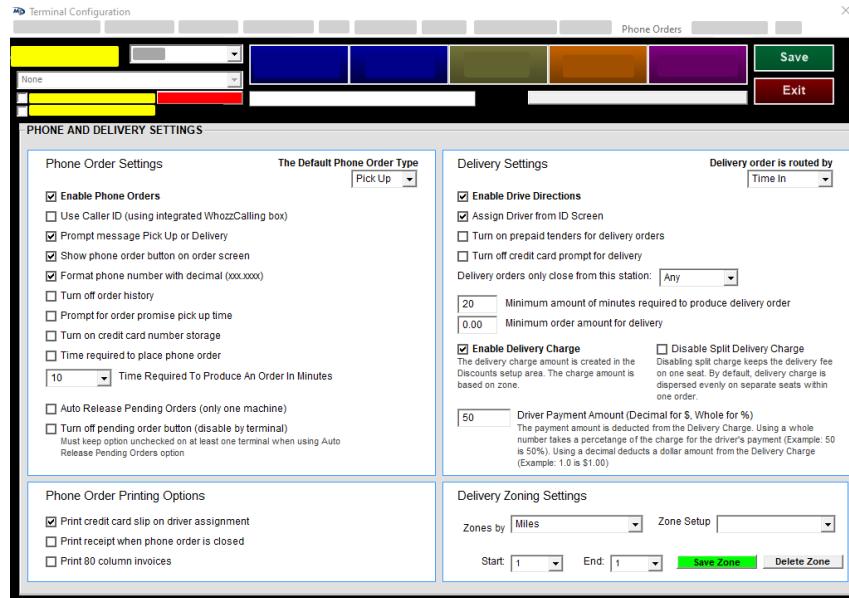
The order is now placed within your open checks

Setting up your system to take Phone Orders

Register Options are configured per terminal. This allows the restaurant to use different functionality based on individual terminal (or register).

Configuring Register Options for Phone Orders

- Managers Menu > Register Setup > Terminal Configuration > Register Options > **Phone Orders** (on top toolbar)



Phone Order Settings	
Term	Description
Enable Phone Orders	Activates the "Phone Order" button on this terminal only. Set this option on all terminals that need the ability to accept/enter phone orders
Use Caller ID	This option enables the Caller ID. <i>Must use Whozzcalling caller ID box</i>
Prompt message Pick Up or Delivery	This option forces the server/cashier to select whether the call in order is pick up or delivery before the order can be placed.
Show phone order button on order screen	Places the "Phone Order" button on the Order Screen. Note: This is only available for Quick Service or Quick Bar environments
Format phone number with decimal	Reformat phone numbers entered with a period between number sets. Example: 5551111 to 555.1111 (keeps consistency on entered phone numbers)
Turn off order history	Disables storing the last order of a phone customer.
Prompt for order promise pick up time	When this option is enabled then when a phone order is placed it will prompt the cashier to enter in the number of minutes that the order is expected to be completed by so that an accurate quote time can be given to the customer.
Time required to place phone order	When this is enabled a specific "Pickup @" time has to be selected on the customer information screen before the phone order can be completed.
Time Required to produce an order in minutes	This option sets the minimum production time for call in orders. If entering an order for a future time/date then the order will print to the remote printers "X" minutes prior to the pick up time (X= time Required to Produce Order).
Auto Release Pending Orders (only one machine)	If this option is set then call ahead phone orders will be automatically sent to the remotes 20 minutes (or whatever time is set) prior to the scheduled pick up/delivery time.

Turn off pending order button (disable by terminal)	When a call ahead phone order is placed, a notification will appear on the screen when the order is ready to be released to the remote printer. This option will disable the notification on this specific register.
--	--

Phone Order Printing Options

Term	Description
Print credit card slip on driver assignment	When this option is enabled the credit card slip for a delivery call in order will print once the order is assigned to a driver.
Print receipt when phone order is closed	By default, when a phone order is placed the customer receipt prints immediately after the "done" button is touched. When this option is enabled the receipt does not print until the order is closed.
Print 80 column invoices	This allows phone order receipts to be printed on a connected report printer instead of the standard POS receipt printer.

Delivery Settings

Term	Description
Enable Drive Directions	When this is selected the integrated use of Google Maps will populate drive directions automatically *integration to Google Maps is available with an annual subscription
Assign Driver from ID Screen	When this option is checked an "Assign Driver" button is available on MicroSale's ID screen. This button allows you to assign a driver to any available phone orders without having to do this from the "Edit/Close Order" screen.
Turn on prepaid tenders for delivery orders	Uber eats
Turn off credit card prompt for delivery	This prevents the POS from prompting for credit card payment when a delivery phone order is placed. Credit card payment can still be applied through the edit phone order screen.
Delivery orders only close from this station	This forces the user to only close delivery orders from a designated terminal
Minimum amount of minutes required to produce delivery order	This option sets the minimum production time for delivery orders. If entering an order for a future time/date then the order will print to the remote printers "X" minutes prior to delivery time (X= time Required to Produce Order).
Minimum order amount for delivery	This field sets the minimum amount a sale must be in order to be eligible for delivery.
Enable Delivery Charge	By checking this box an automatic delivery charge will be applied to any orders specified as "delivery". For setup, refer to the section, "Creating a delivery fee (Part 1)"
Disable Split Delivery Charge	By default, a delivery fee (or delivery charge) is dispersed evenly on all separate seats. Ticking this option keeps the delivery fee on one seat.
Driver Payment Amount	This option sets the amount a delivery driver gets paid by the restaurant for each delivery that he/she makes. This is deducted from the "delivery fee or delivery charge" a restaurant adds to a check when an order is placed for delivery. This is not a tip.

Delivery Zoning Settings

Term	Description
Zoned by	Zones are setup by miles or minutes from the restaurant's location. This setting uses the Google Maps integration.
Zone Setup	The Zone Setup assigns a Zone Name (created in "Creating a delivery zone (Part 2)") to Miles or Minutes from the restaurant's location.
Start / End	Select the dropdown next to Start and End Choose the appropriate starting number and ending number. For your first zone, start at 0. You may have customers less than 1 mile (or 1 minute) from your location.

Setting up your system to take delivery orders

Typically your MicroSale representative sets the system up for you.

If you are interested in setting up delivery yourself, please complete all subsequent sections.

Setting delivery fees and delivery zones

- A delivery zone helps keep your delivery service profitable and prevents out-of-area customers from ordering.
- Delivery zones are set by miles or drive time (in minutes) from the restaurant's location. Decide if you want to charge a fixed dollar amount for each delivery or a percentage of the total check. Also decide if you want to pay the driver a portion of the delivery charge. You can share the fee by a flat amount or a percentage of the delivery fee.
- A delivery zone must be set for each of your delivery boundaries. If a zone is not set, the system will not allow you to place an order, as it thinks it is outside your restaurant's area of delivery.
- You must first create the delivery fee and assign the delivery fee to a zone. After the zone is named, you will set up the mileage and/or drive time for each of the zones.
- Delivery fees automatically add when the order is placed. If the customer's address is outside your saved zones, the software will prompt 'out of area'.

! Please complete Part 1-3 in order.

Creating a delivery fee (Part 1)

Managers Menu > Discounts Gratuity Maintenance

- 1 Create a name for a delivery fee. This will appear on the customer's receipt. Keep your name logical so it is easy for your customer to understand what the fee is. For example, you can call it **Zone 1**
- 2 Select **Charge Amount** or **Charge Percentage**. Charge Amount charges a set price while Charge Percentage will charge a percentage of the check total
- 3 Type in the Amount. In the example, we are charging **\$2.00** for **Zone 1**. *Zone 1's parameters will be defined in the following section*
- 4 Set the Access Level LOW so that the fee automatically adds to delivery orders. Set this to **Cashier** or **Cook**.
- 5 Set the Category to **Service Charge**
- 6 All other areas on this screen should be left as is (at the default settings)
- 7 **Save** when complete

Name	Zone 1
Name will appear on customer receipt and reports	
Type	Charge Amount
Amount	2.00
Access Level	Cashier
Category	Service Charge
Discount Id	0

Assigning the delivery fee to a zone name (Part 2)

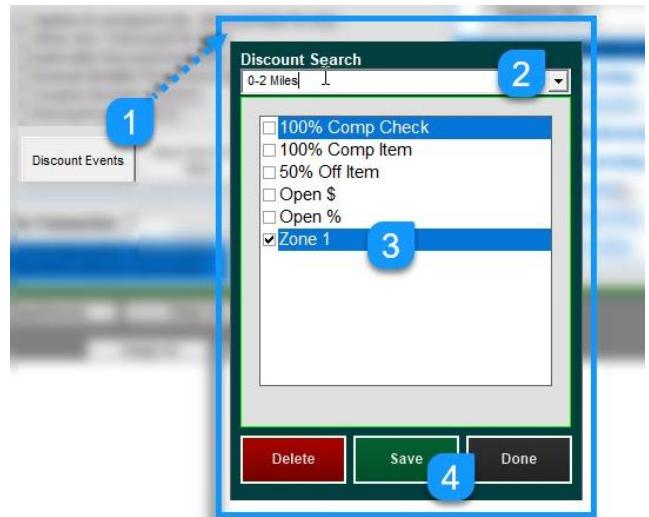
Managers Menu > Discounts Gratuity Maintenance

1 Select Discount Events

2 Under *Discount Search*, type in a descriptive name that will be assigned to the "Zone 1" \$2.00 delivery fee. For example, you can type in **0-2 Miles** if the \$2.00 Zone 1 covers 0-2 miles from your restaurant (or 0-5 minutes, etc)

3 Select the service charge name **Zone 1**

4 Save



Setting the parameters for the zone name (Part 3)

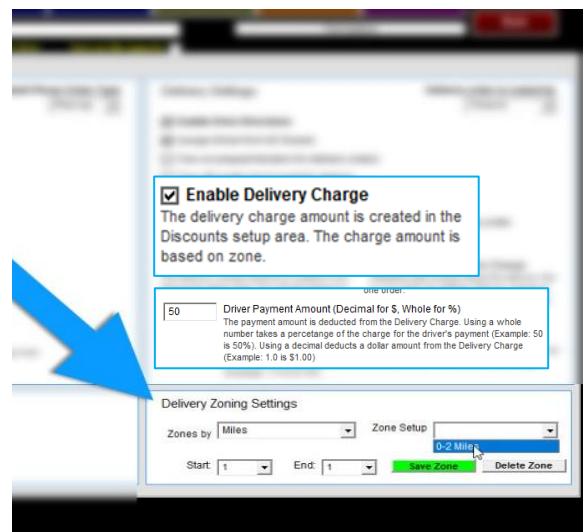
Managers Menu > Register Setup > Terminal Configuration > Register Options > **Phone Orders** (on toolbar)

In the Delivery Zone Settings area,

1 Tick the checkbox next to **Enable Delivery Charge**

2 If you share a portion of the delivery charge with the driver, type in an amount in the Driver Payment Amount area (under **Enable Delivery Charge**)
This amount is deducted from the automated "delivery fee" or "delivery charge". **This is not a tip!**
If you share a percentage, such as 50% of the fee with the driver, type in **50**. If you share a dollar amount, type in a number with a decimal such as **2.00** or **2.25**. **Without the decimal, the system thinks it's a percentage so 2 is 2% or 50.00 is \$50.00**

3 Select the dropdown next to **Zone Setup** and choose your newly created discount event named **0-2 Miles**



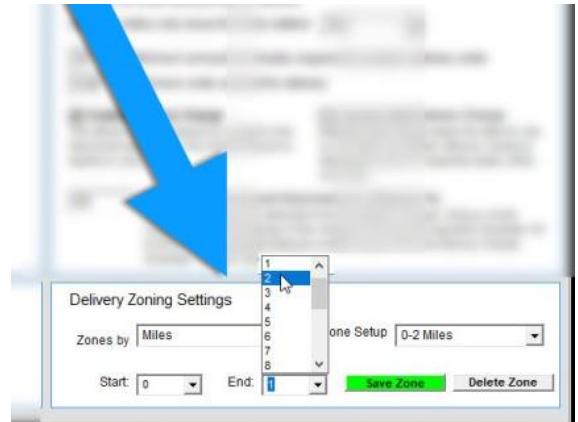
- 4 Choose **Zoned by Miles or Minutes**
- 5 Select the dropdown next to **Start** and **End** Choose the appropriate starting number and ending number.

IMPORTANT!

For your first zone, start at 0.

You may have customers less than 1 mile (or 1 minute) from your location.

- 1 Select **Save Zone**
- 2 **Exit** (upper right corner)



How to properly tier the zones:

Zone 1= 0-2 is time/distance from 0 up to 2 miles/minutes. For your next tier, start at 3. The Zone 1's cutoff is 2, a value exceeding 2 groups into the next zone.

Zone 2= 3-5 is time/distance up to 5 miles/minutes starting at Zone 1's cutoff.

Creating a Driver

IMPORTANT! Using the 'Driver' employee functionality is different in Full Service than Quick Service

In MicroSale you can configure the system to track hours worked by specific job codes. The "Driver" job code is only required for Quick Service environments in order for deliveries to be assigned to non-managers. In Full Service environments the only requirement is to have an Audit started in order for deliveries to be assigned to non-managers. However, it is a good idea to create a job code of driver anyways to properly track pay rates and employees' shifts.

Quick Service environment: a driver needs to be clocked-in *and* have the job title of "Driver" or "Manager" in order to be assigned to a delivery. Each Driver or Manager will have a "Driver Sales Report" to print. The default access level of this report is set to a level 4 or "Assistant Manager". You can modify this level within the "System Access Configuration" area of the Managers Menu.

Full Service environment: anyone with an open audit can be assigned to a delivery. Thus, the "Driver Sales Report" is **NOT** available to any employee within this configuration regardless of job title or access level. The regular sales audit will breakdown delivery assignments as well as other types of orders such as tabs, tables, express, and pick up.

! Please complete Part 1-3 in order

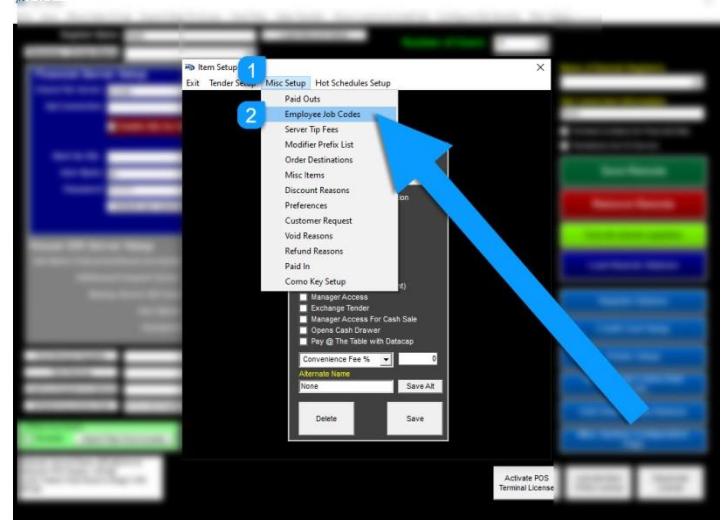
How to create a Driver job title (Part 1)

Create a new job title of "Driver" which will be assigned to each employee that will be assigned to delivery orders.

📍 Managers Menu > Register Setup > Terminal Configuration > **Tenders-Job Codes-Paid Outs-etc.**

1 Select **Misc Setup**

2 Select **Employee Job Codes**



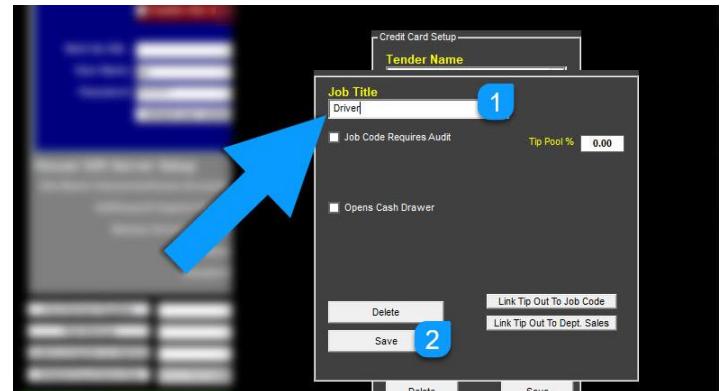
1 Type in *Driver*

OPTIONAL

Select the checkbox for "Job Code Requires Audit" only if your delivery driver will be placing orders into the system. Most drivers do not do order entry.

2 Select **Save**

Exit when finished



How to assign a Driver job title to an employee (Part 3)

📍 Managers Menu > Employee Maintenance > **Employee Maintenance (on submenu)**

Assign the newly created job title to an employee:

- 1 Select the employee from the “Last Name” dropdown menu OR create a new employee
- 2 Type in the employee’s first name (if creating a new employee)

3 Select a **Base Access Level**. The Access Level is the security clearance in the system; *it is not the job title!* **Choose Server, Bartender or Cook**

4 Type in the primary access number. This is how the employee logs in. Typically this is the last four digits of the employee's social.

If you use swipe cards, place the cursor in the Secondary Access Number field and swipe the card. This will allow the employee to login with either their number or the swipe card.

5 Select “Driver” from the list that display upon selecting the “Job Titles” field on the next available row

If the employee is paid hourly, make sure Hourly is ticked

6 If this employee can accept tips, tick the checkbox, "Tipped"

7 Select Save

8 **Exit** when finished (Repeat the steps above for each driver)



5 Select “Driver” from the list that display upon selecting the “Job Titles” field on the next available row

If the employee is paid hourly, make sure Hourly is ticked

6 If this employee can accept tips, tick the checkbox, "Tipped"

OPTIONAL

- 9** Fill in a Pay Rate
- 10** If the state you reside in uses daily overtime, select the checkbox for "Day OT"
- 11** Fill in other contact information if desired