

Server Training Checklist



Overview

CLOCKING IN/ OUT

Login Screen:

- Tap **Clock In/Out** in the top-right corner
- Find your name by scrolling, searching, or filtering by work profile
- Tap appropriate **Job Function**
- Enter **User Code** or use Facial Recognition

LOGGING IN/OUT

Login Screen:

- Find your name by scrolling, searching, or filtering by work profile
- Enter **User Code** or use **Facial Recognition**

TOGGLE BETWEEN MAPS

Map Screen:

- Double tap **Map** with two fingers and select the desired **Map**
- Tap **Map Name** in the top-left corner and select appropriate **Map**

BEGINNING A TABLE

Map Screen:

- Tap an open table from the map
- **Table Screen:**
- Tap **Open Table**, enter table number and tap **OK**

ENTERING AN EXISTING TABLE

Map Screen:

- Tap an existing table from the map

Table Screen:

- Tap the existing table from the list (list is in numerical order)

EXITING A TABLE

- Press table number at the bottom-right of the screen

VIEW LIMITED STOCK/86'D ITEMS

86/Brief Screen:

- 86'D Items will be greyed out
- Limited Items will show hourglass icon and number of remaining Items

Server Training Checklist

Order/Fire

SELECTING AND CHANGING # OF GUESTS (PPA)

Order Screen:

- Tap **Head** icon within Shared Seat (top-left corner)
- Enter number of guests and tap **Apply**
- The guest count will change once the seat panels are opened or closed

ASSIGNING ITEMS TO A SEAT

Order Screen:

- Drag Item over from right panel to correct seat
- Panel on top with table # is the Shared Seat. This is for Items that will be shared and may require price to be split by guest.

TOGGLE MENUS

Order Screen:

- Tap the **Menu** icon on the bottom-right of the screen, this icon appears between the **Fire (Send)** icon and the **Magnifying Glass** icon
- A list of available menus will appear
- Tap the desired Menu

FIRING ITEMS

Order Screen:

- Tap the green **Fire** icon on the bottom-right of the screen
- Select from the available options (tap Items to Fire, Fire without sending to printers, or send to printers) and swipe to complete

Coursing Screen:

- Tap **Send** on the top-left of the screen and swipe the green **Fire** icon to send to printers OR double tap with two fingers and swipe the green **Fire** icon to send to printers

CREATING AN ADDITIONAL COURSE THRU FIRE SCREEN

Coursing Screen:

- Tap **Add Course** under the + sign on the left side of the Course that will come before the Course we want to create
- Tap a **Course**
- Move **Item(s)** to the appropriate Course

Server Training Checklist

Order/Fire - 2

FIRING HELD ITEMS

Map Screen:

- Long press on **Table**
- Tap on **Fire** to send to kitchen

Coursing Screen:

- Tap on the orange **HOLD** box to change to **Fire**
- Tap the **Fire** icon on the top-left or double tap on the screen with two (2) fingers
- On the bottom popup, swipe left to send to kitchen

Tables Screen:

- Swipe right on the appropriate Table
- Tap the **Fire** icon to send to the kitchen

REPRINTING TICKETS

Coursing Screen:

- Tap the **Reprint** icon in the top-right corner
- Tap **Course/Item** to re-fire and select appropriate printer

"TAGGING" AN ORDER

Order Screen:

- Long-press on **Shared Seat**
- Tap **Tag** or **Enter Note** and tap **OK**
- The "tag" will exist at the top of every ticket for each Order/Firing

"TAGGING" AN ITEM

Order Screen:

- Long-press on **Item**
- Tap **Tag** or **Enter Note** and press **OK**

"TAGGING" A COURSE

Coursing Screen:

- Long-press on **Kitchen Notes**
- Tap **Tag** or **Enter Note** and press **OK**

Server Training Checklist

Checks/Payments

PRINTING A CHECK

Check Screen:

- Tap the **Check** icon at the top-right of the screen and select appropriate printer

Map Screen:

- Long-press on the **Table**
- Tap the **Check** icon and select appropriate printer

ACCEPT FULL PAYMENT IN CASH

Payment Screen:

- Tap on the **Wallet** icon
- Tap the **Cash** icon
- Tap the green **Pay** button

ACCEPT FULL PAYMENT CREDIT

Payment Screen:

- Tap on the **Wallet** icon
- Tap the **Credit** icon
- Tap the green **Pay** button

SPLIT CHECKS BY GUEST

Handle all Split Check Payments from this screen

Check Screen:

- Double tap on **Check Screen** icon or tap **Wallet** icon on right
- Tap **Split Check** icon in middle of top bar and choose **Split by Guests**
- Drag and drop any Items that need to be moved between guests

SPLIT CHECK BY ITEMS

Handle all Split Check Payments from this screen

Check Screen:

- Double tap on **Check Screen** icon again or tap **Wallet** icon on right
- Drag and drop any Items that need to be moved between seats
- Double tap on any full priced Item(s) to split the cost of the Item(s)
- Double tap on any split Item(s) to unsplit the cost of the Item(s)

Server Training Checklist

Checks/Payments - 2

PRINTING CHECKS BEFORE PAYMENT

Split Check Screen:

- For All Checks: tap **Bill** icon in top-right corner and choose the appropriate printer
- For Individual Checks: tap **Bill** icon on right side for corresponding seat then select appropriate printer

PRINTING CHECKS AFTER PAYMENT

Split Check Screen:

- Tap on **Grey Bar** on the top of the screen, then tap the appropriate printer

SPLIT INTO EQUAL PAYMENTS

Payment Screen:

- Tap **Split Payments** icon under payment to add as many additional lines as needed
- Follow appropriate payment flow to complete payment
- To remove, tap **Undo**

PERFORM OTH/VOID/COMP ON INDIVIDUAL ITEMS

Check Screen:

- Swipe right on individual Item and select appropriate action
- Select appropriate reason, add comment, and tap **Send**

A manager will need to approve any Void/Comps/Discounts. All OTH/Voids/Comps should be handled PRIOR TO taking payment!

PERFORM OTH/VOID/COMP ON MULTIPLE ITEMS

Check Screen:

- Tap **List** icon from top bar and tap **OTH, Discount, or Void**
- Tap **Item(s)** to include
- Tap **Done** in top-right
- Select appropriate reason, add comment, and tap **Send**
- To undo this move, swipe to the right and tap **Undo**

A manager will need to approve any Void/Comps/Discounts. All OTH/Voids/Comps should be handled PRIOR TO taking payment!

Server Training Checklist

Checks/Payments - 3

PERFORM OTH/ VOID/COMP ON WHOLE ORDER

Check Screen:

- Tap on **Check Boxes** on top of the screen and select corresponding action
- Select appropriate reason, and comment, and tap **Submit**

A manager will need to approve any Void/Comps/Discounts. All OTH/Voids/Cancel should be handled PRIOR TO taking payment!

EXITING "THANK YOU" SCREEN

- Double tap screen with two (2) fingers

DISMISS CLIENT TIP TO PRINT TRADITIONAL SLIPS

Tip Screen Pop-Up:

- Double tap with two (2) fingers
- Tap **Bill** icon on the top-right, and choose printer

Advanced Flows

REORDER DRINKS

Order Screen:

- Tap **Fork/Knife** icon in the bottom-left corner
- Select drinks to reorder
- Swipe and send order to kitchen or add to Order

ITEM SEARCH

Order Screen:

- Tap **Magnifying Glass** on the lower-right
- Type name of Item to access search results
- Select appropriate Item
- Drag and drop Item into appropriate seat

EDITING COURSING FROM ORDER SCREEN

Order Screen:

- Long press on the **Item**
- Select updated Course
- Swipe and send to kitchen

Server Training Checklist

Advanced Flows – 2

PARTIAL FIRE

Course Screen:

- Tap on **Partial Fire** icon on the appropriate course
- Select Item(s) to fire immediately
- Swipe to send to kitchen

MERGE NEW TABLES TOGETHER

Map Screen:

- Long press on **Table** with Item(s)
- Tap **Merge/Transfer** and select which Table(s) you wish to merge
- Tap **Confirm**

MOVE A SPECIFIC ITEM(S) TO AN EXISTING TABLE OR TAB

Check Screen:

- Tap **List** icon from top bar
- Tap **Move to**
- Tap **Item(s)** to transfer by selecting the box on the left
- Enter the **Table Number**
- Tap **Submit**

REPEATING AN ITEM BEFORE ORDERING

Order Screen:

- Double tap on the **Item**
- Enter total number of Items needed
- Move Items to appropriate seat(s)

TRANSFER ACTIVE TABLE TO AN EMPTY TABLE

Order Screen:

- Tap **green box** within Shared Seat
- Enter the **Table #** to transfer to
- Tap **Transfer**

Server Training Checklist

Administration

RUN SERVER REPORT

Any Screen:

- Tap ... (**three dots**) on the upper-left side
- Tap **Server Report** and select appropriate printer

GIFT CARDS

CHECK BALANCE

LOAD (SELL) CARD

Any Screen:

- Tap ... (**three dots**) in top-left corner, then tap **Gift Cards**
- Tap **Card Balance** and swipe gift card or enter number, tap **Continue** to display or print balance
- Tap ... (**three dots**) in top-left corner, then tap **Gift Cards**
- Tap **Card Load** to load a new card, enter amount to be loaded on the card and tap **OK**, then tap **Total**
- Follow normal payment flow, then tap **Submit**, then **Load**

REPRINT CLOSED GUEST CHECK FOR RECEIPT PURPOSES

Operation Screen:

- Tap **Orders** from left Menu, then tap **Order Search**
- Find corresponding Table/Order number
- Tap the ... (**three dots**) on the right of corresponding Table/Order, tap **Print Bill**, then select the appropriate printer

CREDIT CARD TIP SETTLEMENT-TRADITIONAL SIGNATURE RECEIVED

Any Screen

- Tap ... (**three dots**) on upper-left side
- Tap **Credit Tip Settlement**
- Under **Not Settled**, select the desired transaction
- Enter **Tip Amount** or adjusted tip total and tap **OK**
- If the tip amount is over a certain % of the check, long press for authorization
- Tap **OK**
- Once the amount has been confirmed, tap the Green Play button to finalize the tip amount

This action cannot be edited or revised. Be sure you double check tip/total amount before you finalize the Tip Settlement.