tabit

Manager Functions Checklist

Actions/Flow

PERFORMING OTH (100% COMP), VOID, DISCOUNT

Handle all OTH, Voids, and Cancels PRIOR TO taking payment!

Check Screen
- Void/Comp/Discount One Item
- Swipe right on individual Item and select **Option**
- Select most appropriate reason, add comment, and select **Submit**

Void/Comp/Discount Multiple Items
- Select **List** Icon from top bar and select **Option**, Select Items to include
- Select **Done** in top right
- Select most appropriate reason, add comment, and select **Submit**

Void/Comp/Discount Entire Bill
- Swipe right on **Balance Total** near bottom center of the screen and select **Option**
- Select most appropriate reason, add comment, and select **Submit**

APPROVING OTH AND VOID (WHEN SERVER SUBMITS)

Handle all OTH, Voids, and Cancels PRIOR TO taking payment!

Check Screen
- Swipe right on specific Item(s) and select **Approve**, **Update**, or **Undo**
- Tap **M** in the top-right corner and select **Approve** or **Decline**. Select the appropriate item(s), and tap **DONE**

Tables Screen
- Swipe right on table and select **Approve**
- Select Item(s) to include in approval OR select **All** in top-right corner, and select **OK**

Map Screen
- Long-press on a table and select **Approve**
- Select Item(s) to include in approval OR select **All** in top-right corner, and select **OK**

Manager Training Checklist

Actions/Flow - 2

TRANSFER TABLE FROM ONE SERVER TO ANOTHER

Shift Mgr Screen
- Select **Tables** under the current owner of the table, and select **Move**
- Select which table(s) that need to be transferred/select **All** and select **Change**
- Select employee to transfer tables to, and **Assign** after confirming

TRANSFER ACTIVE TABLE TO AN EMPTY TABLE

Order Screen
- Select **Green Box** within Shared Seat
- Enter the table # to transfer to and select **Transfer**
- Confirm number in bottom right corner

Map Screen
- Long Press on a table with Items
- Select **Merge/ Transfer** (all active tables will disappear) Select table without Items (table will turn green)
- De-select original table (table will turn white) Select **Confirm**

TRANSFER A SPECIFIC ITEM OR GROUP OF ITEMS TO AN EXISTING TABLE

Check Screen
- Select **List** Icon from top bar
- Select **Move to** and then select item(s) to transfer by selecting the box on the left Select **Done**
- Enter the Table Number and select **OK**, verify item(s) to be moved, then select **Submit**

MERGE A NEW TABLE WITH AN EXISTING OR NEW TABLE

Map Screen
- Long Press on table with Items, then select **Merge**
- Select which table(s) need to be merged with primary table (both tables will turn green)
- Select **Confirm**

UPDATE FEES

Check Screen
- Swipe right to left at bottom box with Check Total
- Select **Update Fees**, then add Comments, and select **Update**

Manager Training Checklist

Actions/Flow - 3

REPRINT CLOSED GUEST CHECK FOR RECEIPT PURPOSES

Operation Screen
- Select **Orders** from left Menu, then select **Order Search**
- Find corresponding Table/Order number
- Tap the three dots ⋯ on the right of corresponding Table/Order, select **Print Bill**, then select the appropriate printer

CREDIT CARD REVERSAL/ CANCELLATION (BEFORE THE CHECK HAS BEEN CLOSED)

Payment Screen
- Long Press **Cancel Payment** icon on corresponding payment
- Select **Confirm** on new popup underneath original payment
- A new popup will appear for the remaining balance

CREDIT CARD REFUND/RETURN (AFTER CHECK HAS BEEN CLOSED)

Operations Screen
- Select **Orders** from left menu, then select **Refund Transaction**
- Select Date Range and enter search parameter, then select **Search**
- On **Refund Transaction** screen, select the transaction to be refunded, then select **Select a payment for refund**
- Select **Refund Reason** from drop down box and type a comment (optional)
- Select **Continue**, then enter in full or partial refund and tap **Continue**. Finally tap **Submit Refund**

OPEN CASH DRAWER

Any Screen:
- Select ⋯ in top-left corner, then select **Drawers**
- Tap on the ⋯ next to the corresponding draw, then select the appropriate action

DRAWER REPORT

Any Screen
- Select ⋯ in top-left corner, then select **Drawers**
- Select **Print Drawers Report** at top-middle of screen, then select **Printer**

Manager Training Checklist

Actions/Flow - 4

UPDATE AUTO GRATUITY

Order Screen
- Tap on the **Guest Count** icon in the Shared Seat
- Adjust Auto Gratuity as necessary

SERVER REPORT

Any Screen
- Select ... in Top Left Corner, then select **Server Report**
- Select Server Name, and appropriate printer

Shift Mgr Screen
- Select **Report** icon for corresponding server on right-hand of screen and choose printer

DAILY REPORT

Any Screen
- Select ••• in Top Left Corner
- Select **Daily X Report**
- Select appropriate printer

86 ITEMS

86/Brief Screen
- Select **Limit Item**
- Search for Item
- Select **Limit Stock** and enter amount on-hand

NOTE: Selecting **Remove Stock Limit** on EOD will remove the 86 at the end of the day. Deselecting it will keep the 86 on the Item until manually removed.

CLOCK OUT TEAM MEMBER (FOR THEM)

Shift Mgr Screen
- Find employee to clock out and select box with their current clock in hours
- Select **Clock Out**

OR
- Select **Clock In/Out in** Top Bar
- Find Employee to clock in/out and select box with either **Clock In** or their current clocked in hours
- Select role to clock Employee in with, or select **Clock Out**

APPLY TAX EXEMPTION

Check Screen
- Swipe right to left at bottom box with Check Total
- Select **Claim Tax Exemption** and enter information to capture

Manager Training Checklist

Actions/Flow - 5

CREDIT TIP SETTLEMENT

Note: This action cannot be edited/ revised, so please ensure accurate tip/total amount

Operations Screen

- Select **Orders** from left menu, then select **Credit Tip Settlement**
- Select desired transaction and input tip amount or adjusted tip total and select **OK** (if Tip amount exceeds limit, long-press on **OK** to bypass the tip MAX prompt)
- Once the amount has been confirmed, select the green play button to finalize the tip amount.

REPRINT TICKETS TO KITCHEN/BAR

Coursing Screen

- Select **Reprint** in top-right corner
- Select Course to re-fire, then choose the station/printer to reprint

GIFT CARDS:

CHECK BALANCE

Any Screen

- Select ••• in top-left corner, then select **Gift Cards**
- Select **Card Balance** and swipe gift card or enter number, select **Continue** to display or print balance

LOAD CARD

- Select ••• in top-left corner, then select **Gift Cards**
- Select **Card Load** to load a new card, enter amount to be loaded on the card and select, **OK** then select Total
- Follow normal payment flow, then select **Submit,** then **Load**

RUNNING THE DAILY Z-REPORT

Operations Screen

- Select **Reports** from the left menu, then **Daily Z-Report by date**
- Select desired date and **Continue**, then select printer

RUNNING END OF DAY

- Confirm there are no Active Orders
- Confirm all Credit Card tips are settled

Operations Screen:

- Select **End of Day**
- Select **Execute End of Day**
- Confirm the closing of the Business Day Select a printer for the Z report
- Confirm End of Day was successfully run