The Maitre’D Back Office Start-up Guide is intended primarily for restaurant owners and managers, but is equally suited for corporate IT departments. This manual provides general information on the use of the Maitre’D Back Office and introduces the reader to the many features of Maitre’D. It must be used by first time users to familiarize themselves with the Maitre’D Back Office, but can also be used by seasoned users who want to learn more on how to apply other features of the Maitre’D Back Office. The topics in this manual have been organized to closely follow the Maitre’D features as they are presented in the Point of Sale (POS) module of the Maitre’D Back-Office. This guide will provide the reader with step by step instructions to easily locate the features in the Maitre’D Back-Office application.

Chapter 1: Checking the End of Day explains the EOD process and why it is important to check it has been done.

Chapter 2 and 3: Modifying Items and Creating New Items introduces the reader to the sales items, how to modify prices and how to create new items.

Chapter 4: Divisions explains in detail what a division is, its links with the sales items, taxes and promotions.

Chapter 5 and 6: Variable Lists, Item Classes and Preferential Screens explain the options available to customise order screens.

Chapter 7: Modifiers deals with the configuration of remarks required after selecting specific sales items to ensure correct information is displayed on checks.

Chapter 8: Employee Setup and Configuration details how to add and manage employees.

Chapter 9: Promotions explains the options available for basic promotion.

Chapter 10, 11 and 12: Messages explains how to modify messages on receipts, pos terminal and how to create employee messages.

Chapter 13: Backups describes how to fully backup your system.

Chapter 14: Report Center gives an overview of the report center module.

Chapter 15: Troubleshooting will show you basic tips on how to diagnose basic system problems.
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Every day it is crucial to check the end of day has been done on your Maitre’D back office. This is to ensure your sales figures have been finalized for each accounting day and therefore you can start the new accounting day with 0.00 sales.

You can check from a) the back office and also from b) a point of sale (POS)

a) From the back office select
Point of Sale Control / View / Setup Dates
Assuming today's date is January 15th 2008; the Last Closing Date should be yesterday's date - January 14th 2008. If this is the case the end of day has been processed and you can now start a new business day.

b) From the POS, log on to FUNCTION with your manager number, or press FUNCTION and swipe your employee card or scan your finger in the biometric device, and select MANAGER MENU

The sales figures should be 0.00
What should you do if your EOD has not been done?

FINANCIAL REPORT
RESTAURANT SUMMARY

--------- SALES DATA ---------
NET SALES $1957.24
Sales tax $0.00
Inclusive tax $1957.24
Discount $0.00
SERVICE $0.00
GROSS SALES $1957.24

In the Maitre’D back office click on Server Control.

The system will start by checking if there are any tables left open or sales waiting to be cashed off.

If there are no tables or checks open, you will see the following window.

Click on OK to start the EOD.
The window below shows what happens during the EOD. It normally takes approximately 2 to 3 minutes. You cannot perform any sales or use the POS whilst the EOD is in progress.

If you have tables left open, the system will warn you and will display the tables or checks as shown in the example below. You must close all the open tables and all the open checks before you can proceed with the EOD.

After closing the open tables and open checks you will then be able to proceed with the EOD following the steps above.

**What happens if the EOD is not done**

Your Maitre’D system will continue to function as normal **BUT** your sales totals will keep on running under the current accounting day.

REMEMBER, the accounting day in Maitre’D runs from the time of the last EOD performed on the system. If your system is set up to do an automatic EOD at 05:00 every morning then your accounting day runs over 2 calendar days.

Let’s take a look at the following example:

**Today’s date**

The last closing date in Maitre’D is up to date - the next EOD will close the accounting day of the 15th - this will normally take place early morning on the 16th.

If you do not check the EOD is up to date you could end up with 2 or more calendar days in one accounting day. See below.

**Today’s date**

The last closing date in Maitre’D is up to date - the next EOD will close the accounting day of the 14th - this will normally take place early morning on the 16th.

If you do not perform an EOD, the sales from the 15th will also be part of the accounting day of the 14th (the 14th being the current accounting day in the example above.) In this case it will not be possible to separate the sales for the 14th and 15th. Your reports will show the sales for Monday and Tuesday combined on the accounting date of the 14th.

REMEMBER to always check your EOD is up to date!
Chapter 2

Modifying item prices

From the back office select **Point of Sale Control** and click on **Item Set up**

There are different ways to search for an item. First you can type the beginning of the word in the Search text box - the system will display all items containing the sequence of letters you have typed.

Type one or more letters and eventually the item you are looking for will display in the window.

You can also use the Group by option - by default it is set to Items but can be changed to either Divisions or Functions. When selecting Divisions the following window will display.

Click on the of the division the product you are searching for belongs to. It will display all the items which are part of that division.

The sales items are displayed in the following window.
When selecting Functions the following window will display. You can filter by divisions. The default option is set to All Divisions.

Click on the function you are searching for - in this case Revenue. All the sales items associated to that Function will display. You can use the scroll bar to move up and down.

**NB:** The functions will be explained in more details in the next chapter.

You can also filter by Functions. The default option is set to Revenue.

Double click on the item you want to modify - the following window will display. The text box - Regular - displays the item description as printed on guest’s checks and back office reports. To modify prices select Configuration.

You can also use the filter options. If you have more than one revenue center set up you will be able to choose from the drop down list. It will only display items associated with this particular revenue center. The default option is set to All Revenue Centers.

**Revenue Center:** a revenue center is an area where sales are generated and is set up by your Maitre’D consultant from the information supplied.
The window displayed will show the prices of the item for all revenue centers and modes where applicable. In this example, the item is sold both in the Bar and Restaurant revenue centers across 3 different modes.

**Modes**: Modes define time periods for reporting and pricing purposes - such as Lunch, Happy Hour and Dinner.

Double click a revenue center and mode line, or click once and click on Modify

Highlight the price, type in the new price and click OK

You may need to modify the rest of the prices for the other modes and revenue centres. Click on Copy
Select the appropriate revenue centers and modes and don’t forget to tick Replace existing - otherwise the prices would not be modified. Click OK

Highlight the price, type in the new price and click OK

Click on OK to confirm and Exit

Click on Close to exit

As an alternative, prices can be changed line by line. This might be useful if you are modifying one price only and as a result do not need to copy to the other revenue centers and modes. Select the item and click on the to display all prices and select appropriate mode form the list - you can double click or highlight and click on Modify
From the back office select **Point of Sale Control** and click on **Item Set up**.

For example if you wanted to add a new bottle of beer just filter on the appropriate division » Btl beers.

Select one item and click on **Duplicate**.

Click on **Yes** in the prompt box.

Highlight the current description and type the new description. Alternate is used only if you want to print a different or abbreviated description on kitchen / bar printer checks.

As explained in the previous chapter, the window will display all the sales items. The easiest way to add sales items is to duplicate an existing one.
By duplicating you can go straight to Configuration and input prices. The Function, Options, Links and Counter will not need configured as you have duplicated from a similar existing item.

The Division option groups sales items on back office reports. By duplicating a similar item the new sales item will report to the correct division. The divisions will be explained in more details in the next chapter.

!! So remember, always duplicate a similar sales item to ensure revenue is correctly allocated to the appropriate division!!

Click on Options

In report compiles sales statistics for this item and will include it in the Sales Item Report. Available refers to the item being available for ordering. If the option is not enabled the item is not available for ordering on the POS screen. These options are ALWAYS enabled.

Click on Links

PLU number can link a sales item to a PLU number for easier ordering at the POS (this can be used for wines ordered by bin# etc…)

Upsize can link items of different sizes (sm coffee and lg coffee etc…)

Sales items can have different functions. In the above example it is set to Revenue. The items functions are explained below.

**Revenue**: Sales items which generates cash sales.

**Modifiers**: The most common modifier items describe how a customer wants an item cooked such as a rare or medium rare or to specify an accompanying vegetable or dressing.

**Price Rolled Up**: Use to set an item as a priced modifier. On the guest check the price of this item is automatically included in the price of the main item.

**Free**: Sales item with no price. This item is not printed on the guest check. Example: Glass and Jug of Water.

**Free on Check**: Same as a Free item but printed on the guest check.

**Point, Scale and Time**: Those are specific functions only used for certain types of operations. Point is for the Frequent Diner module. Scale and Time are very seldom used and only within specific setups.
Highlight the price line and type in the price of the new sales item. Click on OK

Proceed with copying to other revenue centers and modes as seen in the previous chapter and click on OK

It's done!!
You might have noticed when entering prices that the options on the left hand side of the window are different.

When duplicating or selecting a sales item, the options you see on the left (in the red window) do not change regardless of which option you select - only the window (in green) will change according to which option you have selected on the left. See below:

In the last window - Configuration - selecting any of the lines will bring a new set of options on the left - see next page.
These options contain additional settings for the sales item such as where the item is set to print and whether this item has a modifier.

Because the item was duplicated from a similar item, the Option, Printing and Modifier will not in most cases need to be configured. The Inventory option is valid when the Inventory Module has been purchased. Full explanation is available in a separate Inventory set up guide.

Let's briefly explain the role of the other options.

Click on Option

The Included Item option can be used to include one or more sales items to be ordered with the main sales item. Weight refers to modifiers. The default value should always be 1.

Click on Printing

Printout is the option which allows you to select the remote printer this item should print to. The Enlarged option will print the sales item in bold characters.

Click on Modifier

The Weight Modifier option is where to define the link to a weight modifier. The default option is set to Undefined. Regular Modifier is never used and should NEVER be ticked.

This concludes the set up of your new sales item.
To close the window click on Apply and OK

As you have seen creating a new item is straightforward and should be trouble free - providing you have duplicated from the right sales item.

Of course you may need to change or perhaps add a modifier to a new item; this will be fully explained in the chapter dedicated to modifiers.
What is a Division?

Divisions group items together and usually correspond to main sections of your menu. There is a maximum of 50 divisions available. For example: main courses, desserts and draught beer are common divisions. In the back office report module, most reports, including the employee reading, sort by division. Divisions are also where taxes, promotions and other functionalities are programmed. In addition, each division is associated with one out of 30 possible division categories for broader reporting purpose. For example, food and drinks are common division categories.

You may wish to create a new division if new sales items will not fit into your current divisions set up.

To add a division simply click on Add.

Enter a description
For type - select appropriate option. Type refers to evaluation sheets when applicable and also to the floor plan status.

Click on Conditional Printing

Conditional printing is used only in very special circumstances. Should you require more information please contact your Maitre'D consultant.

Click on Option

Evaluation Sheet - enable this option for sales items of this division to print on the Evaluation Sheet if applicable. With Service - enable this option to calculate the service charge on the items belonging to this division if required. Included in last round - enable this option to include items belonging to a division in the Last Round function of the P.O.S.

Gratuity distribution is not used.

Auto Hold is an option used in very specific circumstances and should be set up with the help of your Maitre’D consultant.

For Frequent Diner leave the option as Undefined. This refers to the frequent diner module and will be explained in a separate guide.

Select the division category this division is reporting to.

The Price change option allows modification of prices across the whole range of sales items linked to this division. MUST BE USED WITH CAUTION.
Chapter 4  Divisions

Click on Report

Ratio Report and Subscribed Sales are used with the Inventory Module and will be explained in the relevant set up guide.

Click on Tax

There are two options in Tax - Tax#1 and Tax#2.

There is only one tax in the UK, therefore we only EVER use Tax#1 which should always be set to Vat. Tax#2 SHOULD ALWAYS be set to Undefined. In specific circumstances such as Take Away cold food your Maitre’D consultant will set up the appropriate Vat rate.

Click on Apply to save and click on OK to close.

The new division will appear in the list

Remember you can always refer to the settings of a similar division if you have any doubts as to what should or shouldn’t be enabled when adding a new division.
Variable lists contain sales items which can be ordered from the POS. The following window displays the variable lists.

To add a new item to a variable list, double click on the appropriate list or click once and click on Modify.

Click on the next available space.
Click on the drop down menu and look for the sales item you wish to add to this variable list.

Note: Item is selected by default. Item Class will be explained in more details later in this chapter.

Click on OK.

The sales item has been added to the variable list and will now be available for ordering on the POS.

Use Fix Layout - enable this option so that your variable list remains in the same order on the POS screen. See the examples below:

The items are displayed exactly as the layout of the variable list.

When not enabled the items display in this order with a gap in the middle.

We recommend you add sales items without leaving blank spaces in between. The variable list will always display the items in sequence.
Variable lists are also used to group modifier items as shown below.

Select the Division from the drop down list and highlight the sales item you would like the variable list to start from. Indicate how many items from the list you would like to include. Always enable the Remove existing items option, as the variable list may contain previous sales items. Click OK to close the window.

You might wish to create a new variable list at some point. Click on Add.
Type in the variable list description and add the sales items as shown previously.

Variable lists require updating on a regular basis, as sales items are removed from menus, wine lists etc…

To remove an item from a variable list select the item and click on Delete in the item box.
NB: the sales item will NOT be deleted from the database.

Click on OK - it’s done!!

To remove the variable list, click on Delete.
Click on Yes when prompted and click on OK. Click on OK to close.

The variable list will no longer be available.
NB: the sales items will NOT be deleted.
Item classes are similar to variable lists - they contain sales items which can be ordered from the POS.

But unlike variable list the item class option is flagged in the sales items. The following window displays the item classes. See example on the right:

NB: Item classes are not the same as divisions. Item classes are only used to group items - you cannot generate sales reports by item classes.
You can link all similar sales items to an item class.

Whilst this may be desirable for some sales items, it might not always be the case. See the examples 1 and 2 below.

Example 1: creating a new sales item in the Seafood division

The new sales item will be available for ordering on the POS from the Seafood item class.

You can create a new item class by clicking on Add

Type in the description and click OK

Type in description of the new sales item

New sales item is already linked to the Seafood item class

NB: When duplicating items remember all the options are copied to the new item - including the item class the sales items are linked to.
Example 2: creating a new sales item in the Starters division

Type in the description

New sales item is linked to the Soup item class

The new sales item will be available for ordering on the POS from the Soup item class!

When you no longer wish a sales item to belong to an item class you need to set its item class as Undefined.

Now you have seen how to modify and create variable lists and item classes, the next chapter will show you how to assign them, as well as sales items, to preferential screens.
From the back office select **Point of Sale Control**
Click on **Preferential screen setup**

The following window displays the preferential screens.
Double click on Bar Drinks or click once and click on **Modify**

Screen layout areas cannot be modified and are reserved for your Maitre'D consultant - only preferential screens can be customized.

To add a new sales item to your bar drinks screen you can right click and copy an existing button already on the screen.

Preferential Screen Setup allows you to define and customize the order area of the POS screens. You can assign sales items, variable lists and item classes to the preferential screens as well as links to other preferential screens.
The new sales item will be available for selection on the POS screen. As we have copied this button from a similar one - i.e. another bottle beer - we have the same set up and color etc...

However let’s briefly explain the other options in the set up of buttons.

**Command Setup** is the option to set the type for buttons and in turn the type selected will list the commands associated as shown below.

The most common type used in screens setup for buttons is Items, course, discount… The most often used commands are Item, Variable List, Item Class and Preferential Screen

Listed below are the available types and commands.

Other types and commands required on a preferential screen, other than those highlighted below, would need to be set up with the help of your Maitre’D consultant.
Button Layout is the option to define color, size and graphic of buttons.

Bottom and Right expand increases the button size on the preferential screen.

Text Format is the option to define font size and alignment of text. Description refers to the button description, NOT the sales item description.

Wrap text option to use 2 available lines. Bottom, Left, and Top align options, are used to display description accordingly; otherwise centre alignment is used.

The option 3D Border is set to display the button with a three dimensional border.
Icon is the option to add images to buttons. These images are predefined in the system. If you require images not available on the predefined list, you will need to contact your Maitre’D consultant.

The option Sorted will arrange the variable list in alphabetical order. The option Fixed list keeps the list on the screen to allow ordering of multiple items; un-tick it if you wish to return to the main menu after selecting only one item.

Click on Apply and OK to Close

Variable lists, item classes and preferential screens can also be assigned.

See the variable list assigned on Main screen below:

See the item class assigned on Beverages screen below:
See the preferential screen assigned on Main screen below:

The options on the right: Modify, Screen, Next, Small, Wizard and Copy to small are reserved for Maitre’D consultants.
DO NOT USE THESE OPTIONS.

Screen design requires a good deal of planning to ensure you have all the links to the right items, variable lists etc… in order to minimize the number of key strokes needed for ordering sales items on the POS.

Always proceed with a great deal of care when carrying out screen modifications.

Should you need to create new screens, or if you are unsure how you should approach preferential screens modifications, please contact your Maitre’D consultant who will be happy to provide you with additional training.

When making changes to preferential screens always remember to close the screen with the Close button.

Do NOT use the on the top right hand side of the window - this will not save the changes!
Modifiers are remarks attached to sales items to make sure the correct information is printed on the kitchen / bar printers. Modifiers are usually free but may be priced. The system does not print modifiers on the guest check unless there is a charge associated with them. The most common modifier items describe how a customer wants an item prepared, such as a steak or to specify an accompanying vegetable or sauce. These are called weight modifiers and come up for selection after the main item has been selected. Generic remarks not attached to particular sales item - such as No Salt for example - are also modifiers; but do not come up for automatic selection and are usually found under a generic variable list called Food Mods.

There are four steps to weight modifiers:
- creating modifiers
- organizing modifiers in a variable list
- creating a weight modifier
- linking weight modifier to sales item

From the back office select Point of Sale Control.

We have already seen in a previous chapter how to add new items. Creating new modifiers follows the same logic - i.e. duplicating a similar item. See example below:

Enter a description. We often precede a modifier description by inserting the following ==>
This indents the remark on the check below the main sales item for easier reading in the kitchen; however this is not necessary.

Now duplicate to create another modifier.
Enter description and click on Apply and OK

Type in description and add the modifiers to the variable list.

The modifiers have been created. The next step is to create a variable list.

Click on Screens and Variable List Set up

Click on OK to CLOSE when the list is completed (see below)

Click on CLOSE

Click on Add

The variable list has been created. The next step is to create and configure a weight modifier.
Click on Screens and Weight Modifier

The second option to set is Key - select the variable list we have created earlier

The options Minimum and Maximum are used in order to force a certain number of choices - in the example below we force a minimum of 1 and a maximum of 1. Free can be used if the modifier is priced - however if the modifier is free leave at zero.

Click on OK to Close

Click on Add

Type in a description
You can have up to 4 Modifier choices.
In our example we will only use Modifier 1.
The first option to set is Preferential - select Variable lists

Click on Close

The weight modifier has been created and configured. The final step is to link the sales item to the weight modifier.
Click on **Items Set up**

Double click on the sales item or click once and click on **Modify**

Don't forget to copy to the other revenue centers and modes and to select Replace existing.

Click on **Apply** and **OK** to close

Click on Configuration and double click on the first revenue center and mode - or click once and click on **Modify**

Click on **Close**
How does it work on the POS?

Select Seafood

Select one of the options

Select Crab Linguine

The screen comes back to the seafood list selection (because the maximum in the weight modifier is set to 1.)

Weight modifier choice - you MUST select an option (because the minimum in the weight modifier is set to 1.)
If you click on Cancel - the sales item is cancelled.
See examples below of other weight modifiers configurations.

2 modifiers are required for the Steak Cook - the first will bring the cooking options and the second the choice of side dish. Setting Min and Max to 1 will force a choice of a cooking option and a side dish. This information will print on the kitchen printer.

This is useful if the sales item does not necessarily require printing on the kitchen check with a remark (unlike the steak which will always need to print with the cooking option).

The choice of dressings displays on the screen but the option Exit is also available (in case of no dressing).

Another example of a weight modifier configuration is to set the Min to 0 - it will enable you to Exit without choosing an option.

With weight modifiers, the end user has all the necessary options at their disposal to make sure orders are sent to the kitchen with all the relevant information.
Let's briefly look at more generic modifiers.

Click on **Item Setup**

Duplicate and click on **Yes**

Add the modifier to the list

Type description and click on **Apply and OK**

Click on **Screens, Variable List Setup** and double click on **Mods** or click once and click on **Modify**
Click on OK to close the list

These generic remarks are not linked to weight modifiers but are selected from the POS screen whenever they are required.

Select MODS

Remember modifiers and weight modifiers are an essential part of the ordering process. Most weight modifiers and generic modifiers have already been configured on your system but the list might not be exhaustive and you may have to add new modifiers at a later stage.

Following the steps above will help you, but should you have any doubts please contact your Maitre’D consultant.
From the back office select **Point of Sale Control**
Click on **Employee setup**

In the first option - Setup -- the employee name is entered. This could be the first name or the full name.

⚠️ Remember, the name of the employee who has served the customer prints on the guest check!

Password and special password can be entered manually. Passwords can contain up to 5 digits. Passwords are for added protection when an employee logs on to the workstation and special passwords for added protection when using the function menu, for example readings etc.

If you are using employee swipe cards the fields will contain the codes associated with the employee’s swipe card.

Employee Record is linked to the Time and Attendance module and is explained in a separate guide.

Click on **POS Operation**

Drawer is set to Drawer #1 - this refers to the cash drawer linked to the POS. Tips Declaration is not used Workstation is set to All - it will enable the employee to work on all the POS but could be set to restrict the employee to work only on POS1 for example. This option is seldom used and we recommend you contact your Maitre’D consultant before using it.

The employee list in your system has already been programmed but you will need to maintain it by adding new employees etc…

Let’s examine the different options available with employees - such as managers, supervisors and staff.

Double click on John or click once and click on **Modify**
Click on Report - (Bar interface is not used).

Open Tables allows servers to print their financial reports with open tables.

Item Report will compile the items sold by this employee in the Item by server report.

Sales Unit Report is used with counters - contact your Maitre'D consultant about this option if you are using sales units

Click on Function

Type in the key description you want this employee to see after entering their POS employee number or swiping their server cards. For example, TABLE NO for a table service employee.

The functions selected must not be changed without contacting your Maitre'D consultant first. You risk disabling functionalities on the POS for this employee!!

The Configuration option is used to select the appropriate rights for voids, promotions and printing etc… These configurations have already been set up but can be modified by your Maitre'D consultant should you wish to restrict / un-restrict certain commands and functions.

Access enables a selection of preferential screens to be available when pressing this key. This is set up by your Maitre'D consultant and should not be changed.

Default defines where to allocate the sales generated under this key. In this example the workstation manages where to allocate revenue.

Click on Option (explanations for the options below appear on the next page)

Punch is linked to Time and Attendance and is explained in a separate guide.

Enable the Training option for transactions entered by this employee not to affect your sales.

About Training: when new employees start it is useful to enable the Training option - but DO NOT forget to disable it when the training is complete.

Main Language displays POS screens messages in the main language selected in the general configuration. It MUST be enabled - otherwise the POS screen messages would display in another language (either French or Spanish).

Automatic Release and Release Table are two options very seldom used and are only for very specific set ups. DO NOT ENABLE EITHER OF THESE OPTIONS.

Clients Name allows the employee to open a table using the client’s name instead of using a table number - useful for bartender operations.

Modify Check Amount is only used in conjunction with a credit card interface. Not available at present in the UK.

Close Button option displays the Close button to this employee at the bottom left of the workstation screen and lists the open and printed checks of this employee.

About Training: when new employees start it is useful to enable the Training option - but DO NOT forget to disable it when the training is complete.

Main Language displays POS screens messages in the main language selected in the general configuration. It MUST be enabled - otherwise the POS screen messages would display in another language (either French or Spanish).

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Modify Check Amount is only used in conjunction with a credit card interface. Not available at present in the UK.

Close Button option displays the Close button to this employee at the bottom left of the workstation screen and lists the open and printed checks of this employee.
Screen Layout displays the appropriate screen layout for this function.

Options above should only be modified with the help of your Maitre'D consultant.

Click on OK to close
Double click on Sarah or click once and click on Modify

This employee has two functions.
See below:

The second function

All the above examples are typical employee set up within a bar and table service environment.

In quick service the fundamentals for setting up employees do not change - the main difference being the Functions assigned to employees.
Instead of Bar Server or Head Server the functions Fast Food and / or Order would be used.

There would also be configurations for managers and staff.
How do I create a new employee?

The easiest way to create a new employee is to copy from an employee template which will have been set up by your Maitre'D consultant. These templates are usually named Server template, Bar template, Manager templates etc…and are usually id’s 198 199 and 200 depending on the number of templates required by each site.

See below:

Now double click on the first available employee or click once and click on Modify

Press the Shift and Ins keys on your keyboard

To create a new Restaurant server double click on the template or click once and click on Modify

Press the Ctrl and Insert keys on your keyboard

Click on Yes when prompted to copy

Click on OK
It is possible your Maitre'D consultant might also have created a number of employee templates ready for use in addition to the generic ones. In this case just double click relevant template and type the name of new employee as described above.

See below:

Highlight and type in the server name. Click on Apply and OK.

It’s done!!
The new employee has the same set up as existing restaurant servers and you do not need to configure the options or functions.

If you do not have any templates you will need to create new employees by selecting an empty record and making sure all the options and functions are set up properly.

Remember you can always look at existing employee records and check all the options and tabs and replicate the settings on your new employee.
It is not recommended to delete or overwrite an employee record. The correct procedure for terminating employee records is to add a description such as ex or old for example.

See below

**What happens if you re-use an existing employee record**

The name of the employee will remain in the archive, detailed transactions and historical files on your Maitre’D system.

But the sales of the employee will now be attributed to the new employee. So generating employee reports will show sales which do not belong to the new employee.

Example: Employee 9 - Tony worked for 6 months from 1st June to 30th November. His total sales amount to £ 20,000

Should you overwrite the name of employee 9 to Jack - new employee - when taking an Item Report by Employee you will have sales of £ 20,000 between June and December.

However the archive and historical data of transactions remain as they should under the name of the original employee as these cannot be altered or modified.

There are a total of 900 employees in the system - the likelihood of running out of employees is therefore minimal.
Chapter 10
Promotions

The promotions in your program have already been set up by your Maitre’D consultant. However, you may wish to add promotions/discounts yourself. You can add simple promotions such as 15% off the total bill (see example below), but for more complicated promotions such as 2 for 1 or Buy 1 get 1 Free, you will need to contact your Maitre’D consultant.

Click on Add

Below is a list of promotions — there is a maximum of 50 promotions available.

Type in a description and click on the Category list to drop down the options.
The drop down menu will give you a list of options to choose from.

The options available for selection will vary in accordance to the existing configurations in your system.

For example, if the Vat rate is set to 0.00 (all your reports show gross figures) you will be able to select Gross Sales and Item.

If on the contrary the Vat rate is set to 17.5% (your reports show gross and net figures) you will ONLY be able to select Item By Division or Item.

Do not select Gross Sales for promotions if the Vat rate is turned on.

Enter the rate (for percentage) or the amount (for £). The On Total option is not used.

For Activation date you can set a date from which your promotion will become available. For Expiration date you can set a date at which your promotion will cease to be available.

NB: Leaving the dates to the default (below) sets the promotion available indefinitely.

Circled below are options which may require to be enabled.

Select Automatic to automatically apply a discount whenever you print a check.

The Auto item select option is only used when Item by Division is also selected. It will automatically select all discountable items, bypassing the item selection on the workstation. This option is often used for percentage discounts on the check total.

Select Multiple to use the discount in conjunction with other discounts.

Select Print Coupon to print a receipt each time this discount is applied.
Chapter 10
Promotions

The new promotion is done!!

Click on Schedule.
Select the days and times of discount availability by clicking on relevant squares, days or hours.

Click on the first revenue center.
Select the division/s to be discounted.
To configure a food only discount simply unselect all the drinks divisions. Click on Select All to include all divisions or Clear All to unselect all divisions.

You MUST enable the Available option.

Double click on the relevant configuration/s - or click once and click on Modify - to make the discount available.

When the above is completed for all the revenue centers, click on Apply and OK.

The next step in setting up promotions is to make them available in the employee general configurations.

Configuration is the area where all access rights are configured.

In Pos Control click on Employees
Click on Configuration
Click on Discount

Select the discount and click on Apply and OK

All other options highlighted in the red boxes have already been setup and should under NO circumstances be modified without first contacting your Maitre’D consultant.

Modifying these options could significantly alter the POS options of employees.

Select other configuration/s for which the discount is also to be made available and follow steps above.

Remember you can always look at existing promotions to check how they are set up, if in doubt please contact your Maitre’D consultant who will be happy to provide the answers to your queries.
Chapter 11
Modifying the Message on Customers Receipts

Click on Invoice and type the message you would like to appear at the bottom of customers checks after the general message. There is a maximum of 6 lines.

NB: the general message is configured by your Maitre’D consultant and is followed on the guest check by - You have been served by.

Click on Apply and OK

The list below displays the number of workstations also called POS (the list in your system may contain a greater or lesser number of workstations).

Double click on Pos 1 or click once and click on Modify

Now select POS 2

You can type a new message or you can click on Same as and select a message from another POS.

In Pos Control click on Workstation Options
The Pos message area on the workstation default screen allows you to display a general information message.

In Pos Control click on Workstation Options.

Double click on POS 1 or click once and click on Modify.

Click on Message and type in message. There is a maximum of 5 lines.

For the other POS you can type a new message or you can click on Same as and select a message from another POS.
In Pos Control click on Employees and click on Messages Center.

Click on To... and click on besides Employee Point of Sale to open the list of employees.

Double click on All to include all the employees or ...

Type the message name and select the date you would like the message to be activated. By default, the date shown here is today's date.

Select individual employee by double clicking on individual names.

Click on OK to close.
Select the Sign In option - the employees will see the message at first sign in on the POS terminal.

Other options available are Reading - the employees will see the message when taking a server reading. The Punch option is for employees who Clock in and Out when the Time and Attendance module has been installed.

The option Add Schedule to this Message is only available with the Time and Attendance module. If the option Continuous is enabled it will display the message every time an employee signs in, punches in, or prints a reading.

Type the message you wish to appear on the POS terminal and click OK.

When John enters his number, the message will display on the POS terminal - he must press OK to acknowledge the message. The message can also be printed.

Once it has been acknowledged the message will not display again. If Cancel is pressed the message will display again the next time John enters his number on the POS terminal.

You can check from the back office the employees who have seen the message.

In the message centre, click on the relevant message and click on Modify.
You can now modify the message. Click on OK to close.

The employee highlighted in the red box has read the message. Click on Close.

The option Reset will cancel the message status to allow for modification of the message and the employee list.

You can now modify the message. Click on OK to close.
We recommend taking a backup at least once a month. Backups should be taken on removable media such as data disk or compact disks if your back office computer is equipped with a compact disk writer.

Sites with backup servers have automated data backup of all the data on the system as well as the archive folder (transactions file). Even with the presence of a backup server we recommend taking backups (of both the data and the archive) at regular intervals on an external media source.

From the back office select **System Configuration**

Select where you want the program backed up. We suggest creating a folder with the date as shown below. Click on **OK**

Click on **Backup** and click on **Archiving Setup**

Click on **OK**

Select **Alternate Media**

Click on **Save the full system**
The complete data and sales information is now saved. However, the transactions are not saved from this operation. To save every transaction from the archive folder proceed as follows:

In POS Control click on File and click on Save checks to disk.

The following message will be displayed on the screen - click on Yes.

This is to remind you the data saved will not include programming changes carried out after the last end of day.

We recommend taking backups first thing in the morning before opening time.

From the calendar select the date you want to start the archiving from. Example below: last backup taken on the 31st December 2007.

Click on Yes.

Click on OK.

Copying the transaction files …
Backups

Process is completed - click OK to Close

Complete data, sales and transactions are now saved to the folder on the removable disk.

Double click on the removable disk

Double click on the folder

Double click on Archive - the archive folder contains all daily transactions

Double click on FULL0001 - this folder contains all configuration and sales data

Now you have all the information don't forget to store it in a safe place!!
Chapter 15
Report Center

The Report Center option from the Maitre’D back office allows you to access the report template menu of the Report Center module. Every report template is available under its category tab / section.

From the back office select Report Centre

Select Last day to view yesterday’s sales
You can also select weekly, monthly etc…
Custom lets you choose a start and finish date

Example: Custom date
You can enlarge the window to view the report

For more information please refer to the Report Center

In the Sales section the most commonly used report is the Sales Consolidated

Manual. This manual is available on PDF format and should be kept on your back office hard drive. Ask your Maitre’D consultant to point its location.
Before calling the support department please check the following:

**My system is down:**
In the first instance please check the Maitre’D server is running.

**What is the Maitre’D server**
The Maitre’D server ensures communication and transfer of data between the back office and the POS terminals.

It is located on the toolbar of your back office computer on the right hand side of the screen. See below:

![Maitre’D server toolbar icon](image)

**What should you do if you do not see this icon?**
From the back office select **Server Control**

Click on File and click on Start Server - the icon will reappear first with a red cross followed by a change of status (green and yellow) and finally back to normal status in its usual place.

This process should take no longer than a few seconds - depending on the number of POS terminals.

You may sometimes notice a change of status to green and yellow during the day or night - the Maitre’D server will fluctuate between green and red and green and yellow.

This is normal and indicates a large amount of network traffic between the POS terminals and the back office - noticeable during peak time of service.

As an alternative to starting the Maitre’D server from the back office as illustrated above you can also restart the main back office computer. The Maitre’D server is part of the start up process and will resume its usual position and status on the toolbar after restarting your computer.

If the Maitre’D server is staying on the following status for longer than a few minutes then it is possible you might need to recreate Workstation Data (explained later in this section).

The Maitre’D server should never stay on the following status for longer than a few seconds.

Should the server remain in this status please call the support line.

**One of my POS terminals is down:**
If one of the POS terminals is not responding the network cable may be unplugged.

In the first instance check and verify all the cables are properly connected.

If all cables appear to be connected but the POS terminal is still frozen then proceed to restart the POS terminal. It will restart the POS network services.

You may also need to check the status of printers, if the POS terminal has one or more printers attached as devices. Make sure the printers are switched on and operational.

**Please note:**
During the installation of your Maitre’D system please make sure you keep a note of the location of the network switch.

This is the nerve centre which connects all the POS terminals with the back office and manages all the data transfer.

**THIS NETWORK SWITCH MUST ALWAYS BE SWITCHED ON**

Your Maitre’D consultant will have pointed out during the installation the location of all hardware, cables, network points, network hub/switch as well as demonstrating operations such as printer resets, closing and restarting a POS terminal and rebooting the main server.

This is extremely important to ensure the reliability of your Epos system.
WHAT I MUST KNOW ABOUT MY EPOS SYSTEM:

- Location of network hub / switch
- Connection of Back Office computer to network
- Connections of all POS terminals to network sockets
- Connections of all printers (both receipts and kitchen / bar)
- Connections of all cash drawers
- Location of back up server (if applicable)
- How to reset a printer (both receipts and kitchen / bar)
- How to restart a POS terminal
- How to re-boot the main Back Office Computer
- How to make workstation data (documented on next page)

Should you require additional information please contact your Maitre’D consultant who will be happy to help you.

How to create workstation data:

Sometimes it may be necessary to update / refresh the POS terminals - after programming screen changes for example, or if you notice the POS terminals running slower than usual.

This can also be done in the case of the Maitre’D server status.

Creating workstation data will update the POS terminals with the new data.

Please note:
Creating workstation data will restart the POS - this process is usually very fast (10-15 seconds) but can take longer if you have many POS terminals.

Do bear in mind the POS terminals would therefore not be accessible during this time - so avoid creating workstation data during service unless it’s strictly necessary for the reasons outlined above.

From the back office select Server Control

Click on Make workstation data

The process starts and finishes automatically; you do not need to click on any options. It will take between 15 - 30 seconds depending on the number of POS terminals
Maitre'D tip:
Whenever you are making changes in the back office you have access to a contextual help menu. Click on  and click on the area you want help with - see below.

For general information on Maitre'D and other products and services from Posera Software Inc; please visit our websites at www.posera.com and www.maitredpos.com.