Back Office

User’s Guide

Release 7.4.02

DIGITAL DINING

The Restaurant Solution

By Menusoft Systems Corporation
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Introduction

Overview

In this section, we’ll inform you about Digital Dining, its Back Office program, and the associated Back Office User’s Guide. We’ll also describe a) how we’ve organized the rest of the Back Office User’s Guide and b) how you can contact technical and sales support.

About Digital Dining

Digital Dining for Windows runs on the Microsoft Windows 2000 Professional, XP Professional, and 2003 Server operating systems. Digital Dining for Windows is comprised of four programs:

- Digital Dining Setup
- Digital Dining Back Office
- Digital Dining Point-of-Sale
- Digital Dining Frequent Diner/Delivery

The Digital Dining Back Office program is fully integrated with the Digital Dining POS database.

The Digital Dining Documentation Set

Release 7.4.02 of Menusoft’s Digital Dining documentation set includes the following publications.


Digital Dining Back Office User’s Guide. Informs the restaurant owner and management staff on all back office or management features and functions.
Introduction

Digital Dining POS User’s Guide. Informs end users about Digital Dining’s Point of Sale features and functions.

Digital Dining Frequent Diner/Delivery User’s Guide. Informs end users about the Frequent Diner/Delivery program and its features and functions.

Digital Dining Inventory User’s Guide. Informs end users about the Inventory program within the Digital Dining product suite.


About the Digital Dining Back Office Program

The Digital Dining for Windows Back Office program is a vital part of the Digital Dining suite that works with the Digital Dining Setup and POS programs. Using the Back Office program, you can conduct all of your back office duties such as creating or modifying menu items, adding new staff members to your records, managing your labor cost, and creating and updating A/R accounts. The Back Office program also allows you to process your credit card transactions, update your POS history files, and other end-of-day processing duties.

About the Digital Dining Back Office User’s Guide

This document represents Release 7.4.02 of the Back Office User’s Guide, which is the companion document to Release 7.4.02 of the Digital Dining Back Office program. Furthermore, we have developed the Back Office User’s Guide into distinct media: printed and online.

The documentation and online Help will describe how you can use the Back Office program. We have provided both conceptual help (a description of how we designed the program or a description of how an interface works) and practical help (step-by-step instructions for completing most tasks). Within each task, cross-references (in the hard-copy manual) and hypertext links (in the online Help) will let you quickly access the associated reference information you might need to complete each task.

When working within the Back Office program, you can access the online help file through the Help menu. Within the help system, you can look for answers with a table of contents, an index, or a find capability. Furthermore, we’ve linked many of
the topics with hypertext links ("jumps"), which make finding the right information quicker and easier.

Document Organization

Each section in this manual builds on the concepts or procedures detailed in the previous section(s). The description of the topics and procedures, therefore, become more involved as you progress through the manual.

We divided the Back Office User's Guide into the following sections:

- Digital Dining Basics
  This section describes the main concepts, windows, and functions that you will encounter in most Digital Dining programs.
- Back Office Basics
  This section describes the basic concepts of the Back Office program, as well as some suggestions on how to use the program more effectively.
- A/R Menu
  This section describes the various windows, utilities and reports involved in creating and maintaining accounts receivable.
- Menu Item Menu
  This section describes the various windows, utilities and reports involved in creating and maintaining menus and menu items.
- Staff Menu
  This section describes the various windows, utilities and reports involved in creating and maintaining staff member records and staff department records.
- Register Reports Menu
  This section describes the various register reports of the Back Office program.
- Utilities Menu
  This section describes the assorted end-of-day processing utilities.

What’s New

For the most recent information about the latest additions to any of the Digital Dining programs, click What’s New on the Help menu.
Technical Support

Your local dealer provides all technical support and sales support.

If you cannot access parts of the Digital Dining Back Office program, check with your Digital Dining System Administrator (possibly a dealer or restaurant employee). He or she can set or change the system access permissions to specific Digital Dining programs. Please check with your System Administrator for any questions regarding access permissions to the Back Office program.
Digital Dining Basics

Overview

This chapter describes the windows, functions, and features that are common to all of the Digital Dining programs. In it, you will find detailed

- Descriptions of the different maintenance windows
- Procedures for drilling through a maintenance window
- Descriptions of filters
- Descriptions of Find Windows

Maintenance Windows

Each maintenance window is designed to maintain records for specific areas for the Digital Dining program(s). For example, the Inventory Item Maintenance window maintains records about your inventory items. The Register Option Maintenance window maintains records about the password levels for accessing register options.

Maintenance Window Commands

Every maintenance window contains a group of commands. The commands that you can use depend on the type of maintenance window you are accessing, which can be either a Set Up maintenance window or a User maintenance window. In the upper right hand corner of each maintenance window, you can expect to see a pair of buttons, which will be either Sort and List or Order and Filter. Most maintenance windows will contain Find, Next, Prev, View, Add, Save, Reset, Delete, and Exit, as shown below.
This maintenance window is generic; therefore, it does not include some commands (for example, Filter, Print, Preview, Order, or Find) that you will find on other maintenance windows.

**Find**

Click **Find** (or press ALT+F) to locate a specific item. Digital Dining opens the Find window, from which you can select an item (for more information, see “Find Windows” on page 11).

**Next**

Click **Next** (or press ALT+N) to activate the next item in the sequence. Digital Dining will save any changes you make to the current item when you exit (unless you click **Reset** and then click **Exit**). If you are using a filter, Digital Dining will display only the database items that pass that filter.

**Prev**

Click **Previous** (or press ALT+P) to activate the previous item in the sequence. Digital Dining will save any changes you make to the current item when you exit (unless you click **Reset** and then click **Exit**). If you are using a filter, Digital Dining will display only the database items that pass that filter.

**View**

Click **View** (or press ALT+V) to display the details of database items. You can view records by scrolling through the database (click **Next** or **Prev**) or searching for a specific item (click **Find**).
Add

Click **Add** (or press ALT+A) to change to the Add mode. In this mode, you can add and save new items by clicking **Save** or **Exit**.

---

Save

Click **Save** (or press ALT+S) to save any changes made to the current database item and keep the active window or dialog box open.

---

Reset

Click **Reset** (or press ALT+R) to cancel any change(s) you have made to the current item in the database. You can cancel the change(s) even if you have selected and edited information on a different tab within the current window. You cannot cancel changes once you have clicked **Save** or **Exit**.

---

Delete

Click **Delete** (or press ALT+D). A message box will ask: “Are you sure you want to delete this?” Click **Yes** to delete the item or click **No** to cancel the delete operation.

---

Exit

Click **Exit** (or press ALT+X) to save changes and close the active window or dialog box.

---

Sort

Click **Sort** (or press ALT+S) to open the Reorganize List window. From the Reorganize List window, you can drag an item to change the order which the items will appear in List reports.

---

List

Click **List** (or press ALT+L) to generate a report that lists the items in the database that relate to the current window. For example, if you click **List** in the Inventory Location Maintenance window, then Digital Dining will display a report that lists all of the Inventory Locations.
Order

Click Order (or press ALT+O) to set the order that the cursor will move through the current maintenance window. In the Edit Order window, you can

- Save the new tabbing order for the current data-entry task only (click OK),
- Save the changes to the tabbing order permanently (click Save) so that the new tabbing order becomes the default tabbing order,
- Return to the maintenance window without saving any changes (click Reset), or
- Reset the tabbing order to the default (click Reset).

Digital Dining changes the tabbing order for the current maintenance window only. You might want to set the tabbing order of a maintenance window when, for example, you are creating a new inventory based on previous invoices, and the invoices follow a different order than the maintenance window. Setting the tabbing order can save you time.

Filter

Click Filter (or press ALT+L) to exclude unwanted database items from the displayed sequence (for more information, see “Filters” on page 10).

Maintenance Window Tabs

Every maintenance window also contains at least two tabs (a Main tab and a Memo tab). Each tab, in turn, contains a group of objects, such as boxes, lists, options, check boxes, and so on. These objects allow you to create and organize how you want a particular part of Digital Dining to work or look.

On the Main tab in the illustration above, you might notice that the label “Popup Button” appears twice, each time with a different control. However, if you click either control, Digital Dining will perform the same operation: open a Find window.
Types of Maintenance Windows

Digital Dining uses two types of maintenance windows: Set Up maintenance windows and the User maintenance windows. A Set Up maintenance window is self contained. That is, you do not need information from any other maintenance window to complete this type of maintenance window. A User maintenance window, on the other hand, is not self contained, and it requires that you use information from at least one other (sometimes more) maintenance window, which can be either a Set Up or User maintenance window.

Generally, a Set Up maintenance window only requires that you create an item description and short description (as shown below).

A User maintenance window, however, requires that you access (and insert) information you have created with either another User maintenance window or a Set Up maintenance window. When you select information from a list in Digital Dining, you are almost always selecting information you have created in a different maintenance window. If you cannot find the information you want in the list, you can often drill through the window to open a different maintenance window to create the information that you want. You can then select the new item from the list in the original maintenance window.

Drilling Through

The drilling through feature is available to most Digital Dining programs. When you drill through a maintenance window, another maintenance window appears. You then create new information on this maintenance window, close it, and then choose the newly created information from the list you just drilled through.

For example, let’s say you’re working with the Inventory program, and you have the Inventory Item Maintenance window active. You can drill through the “Inventory Type” label if you need to create a new inventory type for this inventory item.
However, you cannot drill through all labels on all maintenance windows. Typically, although not a rule, you can drill through the labels that have lists associated with them.

Filters

Filters let you work more efficiently by limiting the number or type of records that Digital Dining displays with the current maintenance window or for the current report. For example, if you need to modify a group of records that belong to one type, then you can exclude all the records that do not belong to that type.

You might use a filter, for example, when you are adding new menu items to an existing menu. You can filter the existing menu items so that Digital Dining displays only the correct sales or prep types of the existing menu items. Then, when you click Add (to add the new menu item), Digital Dining will automatically bring up the next available PLU number for the menu items matching that filter.

How does a Filter Work?

All filters work in essentially the same way: they allow you to limit what you view and/or edit. The process is simple. You set the filter criteria, Digital Dining checks every item based on the criteria you set, and then Digital Dining displays only those items that meet the criteria you have set.
Find Windows

Depending on the maintenance window you are working with, you have access to Find windows. Find item windows allow you to find a records quickly so that you can view or edit the record, which can save a lot of time and effort when you have a large system.

Each Find window will identify what you will be finding (the example below shows that you will find an Inventory Location), a box for you to type the name of the item you’re looking for, and a list of items you can select from.

If you can click Find on the maintenance window, if the maintenance window has a or if the maintenance window has a, you can access one of the many Find windows in Digital Dining.

Using Find Windows

Once you access a Find window, you have several options or methods for searching the list of records in the window. You can use any of the tools that allow you to scroll (for example, highlight the next item, scroll up one page, or jump to top list). You can also begin typing text in the description box. The description box coordinates with the list of records and selects the records depending on what and how much you type. For example, if you type “s”, the first record (based on the alphabet) that starts with “s” will be highlighted (let’s say it’s “salad”). If you type
“st”, salad is no longer highlighted; rather, the first record that starts with “st” is highlighted (let’s say it’s “strip steak”). You can continue to type more letters until you see the record you want or until the record is automatically selected.
Overview

The Digital Dining Back Office program is your primary tool for maintaining, updating, and reporting your sales records on a daily basis. Like the Digital Dining Setup program, the Back Office program works with the POS program. You can use the Back Office program to add or rearrange menu items in the Selection panels of the POS, as well as process or modify files created at the POS.

You (or your dealer) use the Setup program mainly to set up how the POS functions and appears, by creating such vital components as register definitions and printer definitions. However, once you (or your dealer) create those components, they will not need frequent editing. In contrast, the Back Office program allows you to access records that do require frequent editing, such as accounts receivable, menu items, and staff members. Since you need to add, remove, or modify these records regularly, we have included them in a separate program, the Back Office program, for your convenience.

In addition to maintaining accounts receivable, menu items, and staff member records, you can also perform your end-of-day processing tasks in the Back Office program, such as processing daily credit card and POS transactions. We also include a range of reports in the Back Office program, which allow you to gather and analyze data on your sales, discounts, charges, staff payroll, and security.

The Back Office program features seven menus, four of which allow you access to the principal areas of maintenance: A/R (Accounts Receivable), Menu Item, Staff, and Register Reports. The fifth menu, Utilities, allow you access to the assorted end-of-day utilities. In this chapter, we will briefly discuss each of these areas.
Accounts Receivable

The first menu of the Back Office program is the **A/R** (or Accounts Receivable) menu. With an A/R account, a customer or staff member can purchase items on credit, charge the check to the appropriate account, and then make one or more payments to the restaurant at some later date.

You can create A/R accounts for a number of reasons. You might create accounts for trusted customers or organizations that frequently use your restaurant for large gatherings. If these customers consistently use credit cards to pay their checks, then using A/R accounts can help you save money on processing fees by combining multiple checks into a single amount. Instead of processing a series of credit card charges (each with a fee), you can process a single charge per billing period for a single customer.

You can also create a special A/R account for your management, providing you a method of “purchasing” complimentary meals for whatever reason. By doing so, you can defer payment for such complimentary meals indefinitely, while tracking the associated costs. You might also create A/R accounts for your staff members, allowing them to purchase meals on credit.

The **A/R** menu allows you to access various windows and utilities that allow you to create A/R accounts, conduct transactions outside of the POS (such as accepting payments), charge finance charges to specific accounts, and print account statements that you can mail to your customers.

Menu Items

The second menu of the Back Office program is the **Menu Item** menu. This menu contains all of the windows and utilities you need to create and maintain menu items. A menu item is any item represented as a button in the Selection panel of a POS window. A menu item usually represents a food item that customers can purchase, but it can also represent a modifier for another food item, a “combo” meal that contains more than one food item, a non-food item that customers can purchase, or even a link to another POS window.

We have designed the Back Office program to simplify menu item maintenance by associating menu item records with other records, which we refer to as the menu setup records. When you create a menu item record, you can associate it with various menu setup records, such as prep types and sales types. Therefore, you can change the associations of many menu items at once by editing one of the menu setup records. For instance, by associating multiple menu items to a single prep type, you
can change the print route of the prep ticket for many menu items by editing a single prep type record. This method saves you the work of editing the print route details of many menu item records.

Some of the menu setup records are optional and some are not. We will briefly discuss the more important ones and how you can use them.

### Sales Types

A sales type is a group of similar menu items, such as appetizers or desserts. Once you create a sales type and associate menu items with it, you can use it to create reports that generate sales totals for specific sales types. For instance, if you associate all your dessert items with a “Desserts” sales type, you can then generate a report that totals the sales of the dessert menu items.

### Prep Types

A prep (preparation) type is a group of menu items that is prepared in a particular location. Many restaurants prepare different types of menu items in different locations. You can use prep types to print prep tickets for different kinds of menu items in different prep stations. For instance, your restaurant might prepare food items such as entrées in a kitchen and alcoholic drink items at a bar. If so, you would probably want to associate the alcoholic drinks to one prep type (“bar”) and the entrées to another prep type (“entrée”). By doing so, you could set the program to print prep tickets for “bar” items at a bar printer and prep tickets for “entrée” items at a kitchen printer.

### POS Windows

A POS window is a screen that appears at the POS, displaying multiple menu item buttons. You can associate several similar menu items with a single POS window, such as an “Entrées” window. After associating many menu items with a single POS window, you can rearrange the buttons within the window and then “build” the window. You can then create a link to this window in the Digital Dining Setup program. Afterwards, you and your staff members can access this window at the POS and order menu items from it. However you arrange menu items in a POS window, the program will display the menu items in the same arrangement at the POS.
**Staff**

The third menu of the Back Office program is the **Staff** menu. This menu contains all of the windows and utilities you need to create and maintain staff member records. For each staff member, you can create a record in the Back Office program. By doing so, you allow your staff members to log in at the POS, and you can control when they can log in and what actions they can perform in the POS. Using the staff member records can help you manage your payroll.

We have designed the Back Office program to simplify staff member maintenance by associating staff member records with other staff setup records, much like the menu item records. When you create a staff member record, you can associate it with various staff setup records, such as staff departments and overtime methods. Therefore, you can change the associations of many staff member records at once by editing one of the staff setup records. For instance, by associating multiple staff members to a single staff department, you can change the register timer associated with each staff member in that department by editing the appropriate staff department record. This method saves you the work of editing the register timer of many staff member records.

Some of the staff setup records are optional and some are not. We will briefly discuss the more important ones and how you can use them.

**Staff Departments**

A staff department is a group of staff members who share similar duties, such as servers, cooks, bartenders, and managers. For each staff department, you can assign characteristics that apply to all of the staff members associated with that department, such as default pay rates, register timers, and the parts of the day that they can log into the POS. You can also generate sales or payroll reports that include totals for each department.

**Day Parts**

The Back Office program allows you to divide your work day into four periods, called day parts, which help you manage the availability of your staff members. You can define the precise times of the day that each day part represents. By doing so, you can then record the day parts of each day of the week that each of your staff members can work. You can use this information to help plan upcoming work schedules.
Overtime Methods

An overtime method is a schedule that defines exactly how many minutes staff members must work within a particular time frame (weekly, biweekly, monthly) before they earn overtime or double time pay rates. You can manage the overtime method of multiple staff members by associating them with the same overtime method.

Register Reports and Utilities

The fourth menu of the Back Office program is the Register Reports menu. This menu contains a collection of reports, which you can use to gather and analyze information on different kinds of POS transactions, including sales, charges, discounts, and voids. You can also generate staff reports that feature sales, labor cost, or security information.

The fifth menu of the Back Office program is the Utilities menu. This menu includes the various end-of-day utilities, which you can use to process your credit card transaction and daily POS files each day, as well as print your assorted daily register reports.
Accounts Receivable Menu

Overview

Accounts Receivable (A/R) accounts allow individuals (such as customers, staff members, or managers) to purchase menu items and defer payment to a later time. A customer can purchase items and charge the check to an appropriate A/R account. The customer can then make a payment, in whole or in part, to the restaurant at some later date.

In this chapter, we will discuss how you can create and maintain A/R accounts in the Back Office program, which your customers can use at the POS. We will review how to set up new A/R accounts, how to perform A/R transactions in the Back Office, how to age your accounts, how to print account statements that you can mail to your customers, and how to generate A/R reports that will help you to monitor and analyze your accounts.

A/R Account Maintenance Window

You can create A/R accounts in the A/R Account Maintenance window. Here you can define your accounts, associate them with account types, and review account balances and sales histories. The A/R Account Maintenance window allows you to record any necessary information about your accounts.

The A/R Account Maintenance window includes a default A/R account record, “Bad Payments.” The “Bad Payments” account is a special A/R account used by Digital Dining to monitor bad payments. If you set a network to allow offline credit card transactions, you might get bad payments. You cannot delete or edit the “Bad Payments” A/R account record.
A/R Account Maintenance Window: Main Tab

Using the **Main** tab of the A/R Account Maintenance window, you can create up to 999,999 A/R Accounts. When you enter a name in the **Account Name** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Sort Name** box.

**Account No box**

When you add a new A/R account, the program will select the next available account number. You can use this number or enter a new one.

**Account Name box**

You should enter a name for the account, such as the name of the individual or institution that will use the account.

**Sort Name box**

When you enter an account name in the **Account Name** box, the program captures the first eight characters of the name and displays these characters in the **Sort Name** box. You can change the sort name, or you can keep the system-defined, eight-character description.
When you perform a search for this account, the program will search for the Sort Name, not the Account Name. Therefore, if the Account Name is also the name of the contact person, you might wish to edit the default Sort Name to include only the customer’s last name.

**Account Type list**

You can select an appropriate account type from the Account Type list. By doing so, you determine how the customer can make payments for this account. Any account types you have created in the Account Type Maintenance window will appear in the Account Type list. You can drill through to the Account Type Maintenance window by double-clicking the Account Type label (for more information, see “A/R Account Setup” on page 65).

**Credit Limit box**

You can enter a credit limit for the account in the Credit Limit box. If a customer tries to pay for a check at the POS with this account and exceeds this credit limit, the program will display a warning. You can accept payment from the account or cancel the operation and choose another receipt type.

You can also set the program to require a manager’s approval before accepting payment by an account that has exceeded its credit limit. You can do this by setting a security level for the Account Credit Limit function in the Misc Function Maintenance window of the Digital Dining Setup program (for more information on setting security levels, see the Digital Dining Setup User’s Guide).

**Contact area**

The Contact area features three boxes: First Name, Last Name, and Title/Position. You can enter the name of the account’s contact person (usually the person responsible for payment) in these boxes. The program will include this information on A/R account statements and reports.

**Address area**

The Address area features five boxes: Building, Street, City, State, and Zip Code. You can enter the address of the account’s contact person in these boxes. The program will include this information on A/R account statements and reports.
**Limit Use check box**

If you select the Limit Use check box, the program will require a manager’s ID and password when you try to use the account at the POS. This feature allows you to control which staff members can use the account, based on their associated security positions.

**Inactive check box**

You can select the Inactive check box for accounts that you no longer use. If you select this check box, the program will not allow you (or your staff) to use this account at the POS.

**Voice Phone No box**

You can enter the telephone number of the contact person in this box.

**Fax Phone No box**

You can enter the fax number of the contact person in this box.

### A/R Account Maintenance Window: Balances Tab

On the Balances tab, you can review an account’s balance information. The Balances tab displays the balance for the current billing period, as well as the preceding three billing periods and the total billing amount. The program updates an account’s balance information each time you post a transaction to the account and each time you run the end-of-day process. You cannot edit this information directly.
Accounts Receivable Menu

Current Balance

This box displays the amount that the customer owes the restaurant for the current billing period.

30-Day Balance

This box displays the amount that the customer owes the restaurant for the previous billing period.

60-Day Balance

This box displays the amount that the customer owes the restaurant for the period preceding the “30-Day” billing period.

90-Day Balance

This box displays the amount that the customer owes the restaurant for the billing period preceding the “60-Day” billing period. The program will add any unpaid balances from earlier billing periods into the 90-day billing period.
Note

The program does not automatically divide your billing periods into 30-day increments. You must manually change the billing period using the A/R Aging utility (for more information, see “Age A/R Account Balances” on page 63).

Opening Balance

This box displays the amount that the customer owes the restaurant for the upcoming pay period. The program will total the 30-day, 60-day, and 90-day balances and display the total in this box. Unlike the other balance information in the Balance tab, the program will not automatically update the opening balance. The program will only update the opening balance when you manually age the accounts with the A/R Aging utility (for more information, see “Age A/R Account Balances” on page 63).

Total Balance

This box displays the total balance that the customer owes the restaurant. You can calculate this value by adding (Current Balance) + (30-Day Balance) + (60-Day Balance) + (90-Day Balance).

Last Purchase Date

This box displays the date of the last purchase charged to this account.

Last Payment Date

This box displays the date of the last payment to this account.

A/R Account Maintenance Window: Sales History Tab

The Sales History tab displays a list of sales totals for the account. The report includes charges, payments, covers, checks, average number of covers, average amount of checks, and the date of the period’s end. The report lists totals for each of the past 12 months, each of the past 7 days, week to date, month to date, year to date, and the period to date.
A/R Account Maintenance Window: POS Message Tab

In the POS Message tab, you can enter a message that will display at the POS. You can enter any message regarding the account in the POS Message box. Later, if you (or your staff) try to charge a check to this A/R account at the POS, the program will display this message with the other account information in the Display Panel of the POS.

A/R Account Maintenance Window: Picture Tab

The Picture tab allows you to associate an A/R account record with a graphic file, such as an account holder’s photograph, signature, or both (perhaps a scanned image of a driver’s license). After you associate an A/R account record with a graphic file, this graphic file will display each time a server selects this A/R account at the POS. The server can use this graphic image to verify the account holder’s identity.

To associate a graphic file with an A/R account record, click Import. In the Import Picture window, select the graphic file you want to associate with the account record. (The program displays the graphic in the Picture tab.) To remove a graphic that is associated with an account record, click Clear. To export a copy of the graphic to a new location, click Export. The Back Office program will support most graphic file formats, including .bmp, .jpg, and .jpeg.
A/R Account Maintenance Window: Frequent Diner Tab

The **Frequent Diner** tab allows you to associate an A/R account with one or more frequent diner customers. In the POS, if you pay a check with an A/R account that is associated with a frequent diner customer, the POS will automatically apply the frequent diner customer to the check and that frequent diner customer will receive reward points for the items on the check (if applicable). If you pay a check with an A/R account that is associated with more than one frequent diner customer, the POS will prompt you to select the appropriate customer to apply to the check.

To move a customer from the **Available** list to the **Include** list, select the customer and click ➔. To move a customer from the **Include** box to the **Available**
list, select the customer and click <. To move all customers to the Include box, click ⇒. To move all customers to the Available list, click ⇐.

**A/R Account Maintenance Window: Memo Tab**

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

**A/R Reports**

The **A/R Reports** submenu includes various reports devoted to A/R accounts. All of these reports list A/R accounts (by name and number), but each one includes different information about your accounts. You can group, sort, or filter each of these reports in a variety of ways. Using them, you can collect lists of contact people and addresses or examine the sales history of your accounts and transactions.

**A/R Accounts Report Maintenance Window: Main Tab**

A/R Account Reports allow you to analyze information about your A/R accounts. You can use them to analyze sales information or to create lists of A/R accounts with contact information. On the **Main** tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The **Main** tab also allows you to filter A/R account information by A/R account number and/or account balance amounts.
**Accounts Receivable Menu**

**Report Format list**

You can select one of four different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact List</td>
<td>A list of A/R accounts with the first and last name of each contact person, as well as account type, credit limit, and total balance.</td>
</tr>
<tr>
<td>Address List</td>
<td>A list of A/R accounts with the contact address, including building, street, city, state, and zip code.</td>
</tr>
<tr>
<td>Aging Summary</td>
<td>The balance information of each account, including the current, 30-day, 60-day, 90-day, and total balances, as well as credit limit, date of last purchase, and date of last payment.</td>
</tr>
<tr>
<td>Sales Analysis</td>
<td>The sales history of each account, including the total sales, total number of covers and checks, average sales per cover and check, and date of last purchase.</td>
</tr>
</tbody>
</table>

**Report Sort By list**

The **Report Sort By list** allows you to sort your accounts by account name, account number, or balance. If you click **Account Name**, the program will sort your accounts by their sort name. If you click **Account Number**, the program will sort
your accounts by their account number. (You can specify a range of account numbers in the Filter Ranges area.) If you click Account Balance, the program will sort your accounts by their balances. (You can specify a range of balance amounts in the Filter Ranges area.)

### Report Group By list

The Report Group By list allows you to group the accounts in the report by account type. If you click Account Type, the program will group all the accounts in the report by their account types. If you click None, the program will not group your accounts.

### Sales History Period list

The Sales History Period list allows you to filter your accounts by a period of sales history, such as a day of the week, a month of the year, the preceding pay period, and so on. When you select a period from the Sales History Period list, the program will only include accounts that had transactions within the selected period.

### Filter Ranges area

The Filter Ranges area allows you to filter the report by A/R account numbers and balance amounts. In the Account # boxes, you can specify a range of account numbers to include in the report. For instance, if you type “2000” in the From box and “3000” in the To box, the program will only print accounts with account numbers between 2000 and 3000. In the Balance $ boxes, you can specify a range of account balances to include in the report. For instance, if you type “100.00” in the From box and “500.00” in the To box, the program will only print accounts with a total balance between $100 and $500.

### Available for Account Utilities check box

The Available for Account Utilities check box allows you to use an A/R Accounts report definition as a filter for any of the A/R utilities. If you select this check box, you can select this report in the Report lists of the various A/R utility windows (for more information, see “A/R Utilities” on page 62.)

### Include Accounts area

The Include Accounts area allows you to filter the kinds of A/R accounts that the program includes in a report. If you select the Active check box, the report will
include active accounts. If you clear the **Active** check box, the report will exclude active accounts. If you select the **Inactive** check box, the report will include inactive accounts. If you clear the **Inactive** check box, the report will exclude inactive accounts.

If you select the **Normal Use** check box, the report will include normal accounts that is, accounts that you have not set to **Limit Use** on the **Main** tab of the A/R Account Maintenance window). If you clear the **Normal Use** check box, the report will exclude normal accounts. If you select the **Limited Use** check box, the report will include Limit Use accounts (that is, accounts that you have set to **Limit Use** on the **Main** tab of the A/R Account Maintenance window). If you clear the **Limited Use** check box, the report will exclude Limit Use accounts.

If you select the **Zero Balance** check box, the report will include accounts with a balance of $0.00. If you clear the **Zero Balance** check box, the report will exclude accounts with a balance of $0.00.

### A/R Accounts Report Maintenance Window: Aged Balance Tab

The **Aged Balance** tab allows you to include or exclude accounts with balances in specific billing periods. The program will only print accounts that have some balance amount for a billing period listed in the **Include** list.

### A/R Accounts Report Maintenance Window: Account Type Tab

The **Account Type** tab allows you to include or exclude accounts of specific account types. You can set the program to include or exclude records associated with certain account types by adding account types to the **Include/Exclude** list. To move an item from the **Available** list to the **Include/Exclude** list, select that item and click **>>**. To move an item from the **Include/Exclude** box to the **Available** list, select the item and click **<<**. To move all items from the **Available** list to the **Include/Exclude** list, click **>>**. To move all items in the **Include/Exclude** list to the **Available** list, click **<<**.

### A/R Accounts Report Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing.
programs. The Memo tab will always have the number "0" as its shortcut key. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

**A/R Detailed Transaction Report Window: Sort Order Tab**

The A/R Detailed Transactions Report is an expanded version of the A/R Transaction Report, listing A/R accounts with transactions, including account name, account number, account type, date of last purchase, date of last payment, and current, 30-day, 60-day, 90-day, and total balances. Each transaction includes transaction type, date of transaction, reference number, details, and amount of transaction.

In the Sort Order tab, you can print or preview your detailed transaction report, as well as decide how the program will organize and sort transactions. The Sort Order tab also allows you to filter transactions based on account number, total balance, and activity.

**Sort By area**

In the Sort By area, you can sort your transactions by each account’s sort name, account number, or total balance. You can also filter them by account number or total balance.

If you click Name, the program will sort your transactions by the sort name of their account.

If you click Account, the program will sort your transactions by their account number. You can also filter your transactions by entering a range of account numbers in the Account Number boxes. For instance, if you enter “2000” in the first box and “3000” in the second box, the program will only print transactions for accounts with account numbers between 2000 and 3000.

If you click Total Balance, the program will sort your transactions by the total balances of each account. You can also filter your transactions by entering a range of total balances in the Balance boxes. For instance, if you type “100.00” in the first box and “500.00” in the second box, the program will only print transactions for accounts with a total balance between $100 and $500.

If you select the Include Accounts with $0.00 Balances check box, the program will include transactions from accounts with a balance of “$0.00”. If you
clear the check box, the program will not include transactions from accounts with a balance of “$0.00”.

**Date Range area**

In the **Date Range** area, you can filter your transactions by a specified period of time, such as a specific month or day of the week. To filter your report, select an appropriate period from the **Period** list. If you wish to view a report featuring data from within a specific date range, type the dates in the two **Date Range** boxes or select them from the calendar boxes. For example, if you wish to view a report for the months of June, July, and August, you would type 06/01/01 in the first box and 08/31/01 in the second box.

**Period area**

In the **Period** area, you can filter your transactions by a period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on. You can select a period from the **Sales History** list. The program will only list accounts that had transactions within the selected period.

**Group By area**

In the **Group By** area, you can set the program to group your transactions by each account’s account type, account number, transaction type, or date. If you click **Account Type** or **Account No**, the program will print all the transactions grouped by the account type or account number. If you click **Trans Type** or **Date**, the program will print all the transactions grouped by the transaction type or date of each transaction. If you click **No Groups**, the program will not group your transactions before it prints the report.

**Filter By area**

In the **Filter By** area, you can set the program to print only transactions from active or inactive accounts. Click **Active** to print only transactions from active accounts, **Inactive** to print only transactions from inactive accounts, or **Both** to print transactions from both active and inactive accounts.
Print area

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

A/R Detailed Transaction Report Window: Balance Tab

The Balance tab features a filter that allows you to include or exclude transactions from accounts with balances in specific billing periods. The program will only print transactions from accounts that have some balance amount for a billing period listed in the Include list and will not print any transactions from accounts that have some balance amount for a billing period listed in the Exclude list. If any accounts have balance amounts for billing periods in both the Include list and Exclude list, the program will include the transactions from these accounts.

A/R Detailed Transaction Report Window: Account Type Tab

The Account Type tab features a filter that allows you to include or exclude transactions of specific transaction types. The program will only print transactions associated with transaction types in the Include list and will not print any transactions associated with transaction types in the Exclude list.

A/R Detailed Transaction Report Window: Transaction Tab

The Transaction tab features a filter that allows you to include or exclude transactions of specific transaction types. The program will only print transactions associated with transaction types in the Include box and will not print any transactions associated with transaction types in the Exclude box.
A/R Transaction Report Window: Sort Order Tab

The A/R Transaction Report allows you to create a list of A/R transactions, including each transaction's account name, account number, account type, transaction type, date of transaction, amount of transaction, reference number and details.

In the Sort Order tab, you can print or preview your transaction report, as well as decide how the program will organize and sort transactions. The Sort Order tab also allows you to filter transactions based on account number, total balance, and activity.

Sort By area

In the Sort By area, you can sort your transactions by each account’s sort name, account number, or total balance. You can also filter them by account number or total balance.

If you click Name, the program will sort your transactions by the sort name of their account.

If you click Account, the program will sort your transactions by their account number. You can also filter your transactions by entering a range of account numbers in the Account Number boxes. For instance, if you enter “2000” in the first box and “3000” in the second box, the program will only print transactions for accounts with account numbers between 2000 and 3000.

If you click Total Balance, the program will sort your transactions by the total balances of each account. You can also filter your transactions by entering a range of total balances in the Balance boxes. For instance, if you type “100.00” in the first box and “500.00” in the second box, the program will only print transactions for accounts with a total balance between $100 and $500.

If you select the Include Accounts with $0.00 Balances check box, the program will include transactions from accounts with a balance of “$0.00”. If you clear the check box, the program will not include transactions from accounts with a balance of “$0.00”.

Date Range area

In the Date Range area, you can filter your transactions by a specified period of time, such as a specific month or day of the week. To filter your report, select an
appropriate period from the **Period** list. If you wish to view a report featuring data from within a specific date range, type the dates in the two **Date Range** boxes or select them from the calendar boxes. For example, if you wish to view a report for the months of June, July, and August, you would type 06/01/01 in the first box and 08/31/01 in the second box.

### Period area

In the **Period** area, you can filter your transactions by a period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on. You can select a period from the **Sales History** list. The program will only list accounts that had transactions within the selected period.

### Group By area

In the **Group By** area, you can set the program to group your transactions by each account’s account type, account number, transaction type, or date. If you click **Account Type** or **Account No.**, the program will print all the transactions grouped by the account type or account number. If you click **Trans Type** or **Date**, the program will print all the transactions grouped by the transaction type or date of each transaction. If you click **No Groups**, the program will not group your transactions before it prints the report.

### Filter By area

In the **Filter By** area, you can set the program to print only transactions from active or inactive accounts. Click **Active** to print only transactions from active accounts, **Inactive** to print only transactions from inactive accounts, or **Both** to print transactions from both active and inactive accounts.

### Print area

In the **Print** area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the **Preview** option and then click the **Print** command below, the program will display a preview of the
report as it will appear when it prints. If you click the **Print** option and then click the **Print** command below, the program will print a copy of the report.

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### A/R Transaction Report Window: Balance Tab

The **Balance** tab features a filter that allows you to include or exclude transactions from accounts with balances in specific billing periods. The program will only print transactions from accounts that have some balance amount for a billing period listed in the **Include** list and will not print any transactions from accounts that have some balance amount for a billing period listed in the **Exclude** list. If any accounts have balance amounts for billing periods in both the **Include** list and **Exclude** list, the program will include the transactions from these accounts.

### A/R Transaction Report Window: Account Type Tab

The **Account Type** tab features a filter that allows you to include or exclude transactions of specific transaction types. The program will only print transactions associated with transaction types in the **Include** list and will not print any transactions associated with transaction types in the **Exclude** list.

### A/R Transaction Report Window: Transaction Tab

The **Transaction** tab features a filter that allows you to include or exclude transactions of specific transaction types. The program will only print transactions associated with transaction types in the **Include** box and will not print any transactions associated with transaction types in the **Exclude** box.
A/R Account Statement Maintenance Window: Sort Order Tab

The A/R Account Statement Maintenance window is very similar to the other report definition windows of the Back Office program, in that it allows you to sort, group, and filter your A/R statements in a variety of ways. Also, it allows you to preview your statements before you print them.

On the Sort Order tab, you can print or preview your A/R statements, as well as decide how the program will organize and sort your statements. The Sort Order tab also allows you to filter A/R statements based on account number, total balance, and activity.

Sort By area

In the Sort By area, you can sort your statements by sort name, account number, or total balance. You can also filter them by account number or total balance.

If you click Sort Name, the program will sort your statements by the sort name of each account.

If you click Account No, the program will sort your statements by the account number of each account. You can also filter your statements by entering a range of account numbers in the Account Number boxes. For instance, if you enter “2000” in the first box and “3000” in the second box, the program will only print statements for accounts with account numbers between 2000 and 3000.
If you click **Total Balance**, the program will sort your statements by the total balance of each account. You can also filter your statements by entering a range of total balances in the **Balance** boxes. For instance, if you type “100.00” in the first box and “500.00” in the second box, the program will only print statements for accounts with a total balance between $100 and $500.

If you select the **Include Accounts with $0.00 Balances** check box, the program will print statements for accounts with a balance of “$0.00”. If you clear the check box, the program will not print statements for accounts with a balance of “$0.00”.

**Filter By area**

In the **Filter By** area, you can set the program to print statements only for active or inactive accounts. Click **Active** to print only active accounts, **Inactive** to print only inactive accounts, or **Both** to print both active and inactive accounts.

**Group By area**

In the **Group By** area, you can set the program to group your statements by account type. If you click **Account Type**, the program will print all the statements grouped by the account types of each account. If you select **No Groups**, the program will not group your statements before it prints.
Print area

In the Print area, you can set the program to print your account statements or you can preview a statement before printing. You can preview a statement by clicking the Preview Account option, typing an account number in the Preview Account box, and then clicking the Print command. The program will display a preview of the statement for the account. You can print your statements by clicking the Print option and then clicking the Print command. You can also view a sample statement by clicking the Test Page option and then clicking the Print command. The program will display the first available statement, which you can preview.
A/R Account Statement Maintenance Window: Balance Tab

The Balance tab features a filter that allows you to include or exclude statements of accounts with balances in specific billing periods. The program will only print statements for accounts that have some balance amount for a billing period listed in the Include list and will not print any statements for accounts that have some balance amount for a billing period listed in the Exclude list. If any accounts have balance amounts for billing periods in both the Include list and Exclude list, the program will include statements for these accounts.

A/R Account Statement Maintenance Window: Account Type Tab

The Account Type tab features a filter that allows you to include or exclude statements from accounts of specific account types. The program will only print statements for accounts associated with account types in the Include list and will not print any statements for accounts associated with account types in the Exclude list.

A/R Account Statement Maintenance Window: Comments Tab

The Comments tab features a large text box, within which you can enter any comments that you wish to print on the statements. Any comment that you add to the text box will appear in the lower left corner of each printed statement.
A/R Account Report Examples

Each of the following sections contains an example of each report that you can generate from the A/R Reports submenu. We used demo data to generate each report. What each column of the Sales report contains or how Digital Dining calculates the column is sometimes not self evident:

The Credit Limit column displays the amount that you have entered in the Credit Limit box on the Main tab of the A/R Account Maintenance window.

The Balance column displays the amount that appears in the Current Balance box on the Balances tab of the A/R Account Maintenance window. If the current balance has a negative value (for example, -168.39), then the customer has a credit with the restaurant (that is, the restaurant owes the customer). If the current balance has a positive value (for example, 159.06), then the customer owes the restaurant that amount.

The Current column displays the amount that appears in the Current Balance box on the Balances tab of the A/R Account Maintenance window. If the current balance has a negative value (for example, -168.39), then the customer has a credit with the restaurant (that is, the restaurant owes the customer). If the current balance has a positive value (for example, 159.06), then the customer owes the restaurant that amount.

The 30-Day column displays the amount that the customer owes the restaurant for the previous billing period.

The 60-Day column displays the amount that the customer owes the restaurant for the period preceding the “30-Day” billing period.

The 90-Day column displays the amount that the customer owes the restaurant for the billing period preceding the “60-Day” billing period. The program will add any unpaid balances from earlier billing periods into the 90-day billing period.

The Total column displays the total balance that the customer owes the restaurant. You can calculate this value by adding (Current Balance) + (30-Day Balance) + (60-Day Balance) + (90-Day Balance).

The Last Purch column displays the date that the customer last charged something to the account.

The Last Pmt column displays the date of the most recent payment to the account.

The Sales column displays the dollar amount of the sales that the customer charged to the account.
The **Checks** column displays the number of checks or transactions that were charged to the account.

The **Avg Cover** column displays the average number of covers associated with each check or transaction that the customer charged to the account.

The **Avg Check** column displays the average dollar amount for each check or transaction that the customer charged to the account. This column displays the value in the Sales column divided by the value in the Checks column (Sales column ÷ Checks column).

The **Trans Amnt** column displays the dollar amount of the transaction.

The **Reference** column displays the value that you entered in the **Reference Number** box on the **Main** tab of the **Standard Transaction Maintenance** window (for single transactions) or the value that you entered in the Reference Number column of the **Standard Transaction Maintenance** window (for multiple transactions).
A/R Accounts Report: A/R Contact List Report

The A/R Contact List is a list of the contact persons associated with each A/R account. The report includes each A/R account’s number, name, type, credit limit, and balance, and it also includes each contact person’s first name, last name, title, voice phone number, and fax phone number. You can find all of this information on the Main and Balances tabs of the A/R Account Maintenance window. For more information on what the columns of this report contain or how to calculate their values, see “Error! Reference source not found.” on page Error! Bookmark not defined.

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Account Type</th>
<th>Credit Limit</th>
<th>Account Balance</th>
<th>First Name</th>
<th>Last Name</th>
<th>Title</th>
<th>Voice</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>Thomas Jones</td>
<td>House Account</td>
<td>1,000.00</td>
<td>158.39</td>
<td>Thomas</td>
<td>Jones</td>
<td>Mr.</td>
<td>111-111-111</td>
<td>111-111-111</td>
</tr>
<tr>
<td>2002</td>
<td>Lynette Johnston</td>
<td>House Account</td>
<td>1,000.00</td>
<td>307.14</td>
<td>Lynette</td>
<td>Johnston</td>
<td>Ms.</td>
<td>222-222-2222</td>
<td>222-222-2222</td>
</tr>
<tr>
<td>2003</td>
<td>Sarah Madison</td>
<td>House Account</td>
<td>1,000.00</td>
<td>1,496.06</td>
<td>Sarah</td>
<td>Madison</td>
<td>Ms.</td>
<td>333-333-3333</td>
<td>333-333-3333</td>
</tr>
<tr>
<td>2004</td>
<td>Joyce Krong</td>
<td>House Account</td>
<td>1,000.00</td>
<td>159.06</td>
<td>Joyce</td>
<td>Krong</td>
<td>Ms.</td>
<td>444-444-4444</td>
<td>444-444-4444</td>
</tr>
<tr>
<td>2005</td>
<td>Robert Jamieson</td>
<td>House Account</td>
<td>1,000.00</td>
<td>1,317.66</td>
<td>Robert</td>
<td>Jamieson</td>
<td>Mr.</td>
<td>555-555-5555</td>
<td>555-555-5555</td>
</tr>
<tr>
<td>2006</td>
<td>Peter Berigan</td>
<td>House Account</td>
<td>1,000.00</td>
<td>276.11</td>
<td>Peter</td>
<td>Berigan</td>
<td>Mr.</td>
<td>666-666-6666</td>
<td>666-666-6666</td>
</tr>
<tr>
<td>2007</td>
<td>Jose Cruz</td>
<td>House Account</td>
<td>1,000.00</td>
<td>157.74</td>
<td>Jose</td>
<td>Cruz</td>
<td>Mr.</td>
<td>777-777-7777</td>
<td>777-777-7777</td>
</tr>
<tr>
<td>2008</td>
<td>Paula Schmitz</td>
<td>House Account</td>
<td>1,000.00</td>
<td>172.27</td>
<td>Paula</td>
<td>Schmitz</td>
<td>Ms.</td>
<td>888-888-8888</td>
<td>888-888-8888</td>
</tr>
<tr>
<td>2009</td>
<td>Harry Leeds</td>
<td>House Account</td>
<td>1,000.00</td>
<td>360.29</td>
<td>Harry</td>
<td>Leeds</td>
<td>Mr.</td>
<td>999-999-9999</td>
<td>999-999-9999</td>
</tr>
<tr>
<td>2110</td>
<td>Susan Nichols</td>
<td>House Account</td>
<td>1,000.00</td>
<td>332.13</td>
<td>Susan</td>
<td>Nichols</td>
<td>Ms.</td>
<td>101-101-1010</td>
<td>101-101-1010</td>
</tr>
<tr>
<td>2011</td>
<td>Groves Foodservice Co.</td>
<td>Corporate Account</td>
<td>100.00</td>
<td>279.47</td>
<td>Don</td>
<td>Groves</td>
<td>Pres.</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>2012</td>
<td>Replacement Supply Co.</td>
<td>Corporate Account</td>
<td>100.00</td>
<td>65.32</td>
<td>Steve</td>
<td>Cooper</td>
<td>OMF</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>2013</td>
<td>ABC Manufacturing</td>
<td>Corporate Account</td>
<td>100.00</td>
<td>140.10</td>
<td>ABC</td>
<td>Manufacturing</td>
<td>Pres.</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>2014</td>
<td>John Farmer</td>
<td>House Account</td>
<td>2,000.00</td>
<td>140.00</td>
<td>John</td>
<td>Farmer</td>
<td>Mr.</td>
<td>333-333-3333</td>
<td>333-333-3333</td>
</tr>
<tr>
<td>2120</td>
<td>James Smith</td>
<td>Decking Balance</td>
<td>0.00</td>
<td>150.27</td>
<td>James</td>
<td>Smith</td>
<td>Mr.</td>
<td>111-111-1111</td>
<td>111-111-1111</td>
</tr>
<tr>
<td>2101-1</td>
<td>James Smith Personal</td>
<td>Inhldng Balance</td>
<td>250.00</td>
<td>57.41</td>
<td>James</td>
<td>Smith</td>
<td>Mr.</td>
<td>111-111-1111</td>
<td>111-111-1111</td>
</tr>
<tr>
<td>4102</td>
<td>John Dough</td>
<td>Corporate Account</td>
<td>1,000.00</td>
<td>246.19</td>
<td>John</td>
<td>Dough</td>
<td>Pres.</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

The Account Number column displays the account number of each A/R account.

The Account Name displays the account name of each A/R account.

The Account Type column displays the account type of each A/R account.

The Credit Limit column displays each account’s credit limit.

The Balance column displays the account balance. A negative amount represents credit, while a positive amount represents the amount owed to the site.

The First Name column displays the first name of each account’s contact person.

The Last Name column displays the last name of each account’s contact person.

The Title column displays the title, if any, of each account’s contact person.
The **Voice** column displays the telephone number, if any, of each account’s contact person.

The **Fax** column displays the fax number, if any, of each account’s contact person.

You can customize how and what reports show by defining reports (for more information, see “A/R Accounts Report Maintenance Window: Main Tab” on page 27).

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**A/R Accounts Report: A/R Address List Report**

The A/R Address List is a list of the contact persons associated with each A/R account and each person’s mailing address. The report includes each contact person’s account number, account name, street address, building, city, state, and zip code. You can find all of this information on the **Main** tab of the A/R Account Maintenance window. For more information on what the columns of this report contain or how to calculate their values, see “Error! Reference source not found.” on page Error! Bookmark not defined.

---

### A/R List of Addresses

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Building</th>
<th>Street</th>
<th>City</th>
<th>State</th>
<th>ZIP Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>3001</td>
<td>Thomas Jones</td>
<td>Building1</td>
<td>Street01</td>
<td>City01</td>
<td>VA</td>
<td>11111</td>
</tr>
<tr>
<td>3002</td>
<td>Lynette Johnson</td>
<td>Building2</td>
<td>Street02</td>
<td>City02</td>
<td>VA</td>
<td>222222222</td>
</tr>
<tr>
<td>3003</td>
<td>Sarah Madison</td>
<td>Building3</td>
<td>Street03</td>
<td>City03</td>
<td>VA</td>
<td>333333333</td>
</tr>
<tr>
<td>3004</td>
<td>Joyce Kneen</td>
<td>Building4</td>
<td>Street04</td>
<td>City04</td>
<td>VA</td>
<td>444444444</td>
</tr>
<tr>
<td>3005</td>
<td>Robert Jameson</td>
<td>Building5</td>
<td>Street05</td>
<td>City05</td>
<td>VA</td>
<td>555555555</td>
</tr>
<tr>
<td>3006</td>
<td>Peter Berigan</td>
<td>Building6</td>
<td>Street06</td>
<td>City06</td>
<td>MD</td>
<td>6666666666</td>
</tr>
<tr>
<td>3007</td>
<td>Jane Cruz</td>
<td>Building7</td>
<td>Street07</td>
<td>City07</td>
<td>MD</td>
<td>7777777777</td>
</tr>
<tr>
<td>3008</td>
<td>Paula Shevels</td>
<td>Building8</td>
<td>Street08</td>
<td>City08</td>
<td>MD</td>
<td>8888888888</td>
</tr>
<tr>
<td>3009</td>
<td>Harry Lawes</td>
<td>Building9</td>
<td>Street09</td>
<td>City09</td>
<td>MD</td>
<td>9999999999</td>
</tr>
<tr>
<td>3010</td>
<td>Susan Nichols</td>
<td>Building10</td>
<td>Street10</td>
<td>City10</td>
<td>MD</td>
<td>1101101101</td>
</tr>
<tr>
<td>3011</td>
<td>Graves Foodvenience Co.</td>
<td>Building11</td>
<td>Street11</td>
<td>City11</td>
<td>MD</td>
<td>1101101101</td>
</tr>
<tr>
<td>3012</td>
<td>Restaurant Supply Co.</td>
<td>Building12</td>
<td>Street12</td>
<td>City12</td>
<td>MD</td>
<td>1101101101</td>
</tr>
<tr>
<td>3013</td>
<td>Harry James</td>
<td>Building13</td>
<td>Street13</td>
<td>City13</td>
<td>GA</td>
<td>20202</td>
</tr>
<tr>
<td>3014</td>
<td>John Farmer</td>
<td>Building14</td>
<td>Street14</td>
<td>City14</td>
<td>MD</td>
<td>30303</td>
</tr>
<tr>
<td>3015</td>
<td>James Smith</td>
<td>Building15</td>
<td>Street15</td>
<td>City15</td>
<td>MD</td>
<td>40404</td>
</tr>
<tr>
<td>3016</td>
<td>James Stash Personal</td>
<td>Building16</td>
<td>Street16</td>
<td>City16</td>
<td>MD</td>
<td>50505</td>
</tr>
</tbody>
</table>

You can customize how and what reports show by defining reports (for more information, see “A/R Accounts Report Maintenance Window: Main Tab” on page 27).

The A/R Aging Summary is the balance information of each account, including the account’s number, name, credit limit, current balance, 30-day balance, 60-day balance, 90-day balance, total balance, date of last purchase, and date of last payment. You can find all of this information on the Main and Balances tabs of the A/R Account Maintenance window. For more information on what the columns of this report contain or how to calculate their values, see “Error! Reference source not found.” on page Error! Bookmark not defined.

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Credit Limit</th>
<th>Current</th>
<th>30-Day</th>
<th>60-Day</th>
<th>90-Day</th>
<th>Total</th>
<th>Last Puch</th>
<th>Last Pmt</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>Thomas Jones</td>
<td>1,000.00</td>
<td>-168.39</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>-168.39</td>
<td>9/4/02</td>
<td>7/2/02</td>
</tr>
<tr>
<td>2002</td>
<td>Lynette Johnson</td>
<td>1,000.00</td>
<td>0.00</td>
<td>367.14</td>
<td>0.00</td>
<td>0.00</td>
<td>367.14</td>
<td>8/28/02</td>
<td>7/22/02</td>
</tr>
<tr>
<td>2003</td>
<td>Sarah Madison</td>
<td>1,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1,467.49</td>
<td>0.00</td>
<td>1,467.49</td>
<td>6/13/01</td>
<td>6/14/02</td>
</tr>
<tr>
<td>2004</td>
<td>Jose Rojas</td>
<td>1,000.00</td>
<td>0.00</td>
<td>10.00</td>
<td>140.00</td>
<td>0.00</td>
<td>150.00</td>
<td>6/14/02</td>
<td>6/14/02</td>
</tr>
<tr>
<td>2005</td>
<td>Robert Ramirez</td>
<td>1,000.00</td>
<td>198.98</td>
<td>1,119.30</td>
<td>0.00</td>
<td>0.00</td>
<td>1,318.28</td>
<td>5/8/02</td>
<td>5/8/02</td>
</tr>
<tr>
<td>2006</td>
<td>Peter Bergman</td>
<td>1,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>276.11</td>
<td>0.00</td>
<td>276.11</td>
<td>10/21/09</td>
<td>12/3/07</td>
</tr>
<tr>
<td>2007</td>
<td>Joe Cruz</td>
<td>1,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>197.74</td>
<td>0.00</td>
<td>197.74</td>
<td>5/19/01</td>
<td>5/21/01</td>
</tr>
<tr>
<td>2008</td>
<td>Paula Schmitt</td>
<td>1,000.00</td>
<td>0.00</td>
<td>34.90</td>
<td>147.32</td>
<td>0.00</td>
<td>182.22</td>
<td>4/11/02</td>
<td>12/8/07</td>
</tr>
<tr>
<td>2009</td>
<td>Harry Lewis</td>
<td>1,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>200.29</td>
<td>0.00</td>
<td>200.29</td>
<td>5/11/01</td>
<td>12/8/07</td>
</tr>
<tr>
<td>2010</td>
<td>Susan Nichols</td>
<td>1,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>352.75</td>
<td>0.00</td>
<td>352.75</td>
<td>5/21/01</td>
<td>12/8/07</td>
</tr>
<tr>
<td>2011</td>
<td>Gross Foodservice Co.</td>
<td>100.00</td>
<td>0.00</td>
<td>0.00</td>
<td>278.67</td>
<td>0.00</td>
<td>278.67</td>
<td>10/23/09</td>
<td>5/3/09</td>
</tr>
<tr>
<td>2012</td>
<td>Restaurant Supply Co.</td>
<td>100.00</td>
<td>0.00</td>
<td>0.00</td>
<td>95.92</td>
<td>0.00</td>
<td>95.92</td>
<td>5/10/01</td>
<td>5/11/01</td>
</tr>
<tr>
<td>2013</td>
<td>Henry Jones</td>
<td>5,000.00</td>
<td>0.00</td>
<td>140.00</td>
<td>0.00</td>
<td>0.00</td>
<td>140.00</td>
<td>4/11/02</td>
<td>9/20/01</td>
</tr>
<tr>
<td>2014</td>
<td>John Parker</td>
<td>2,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>140.00</td>
<td>0.00</td>
<td>140.00</td>
<td>5/9/01</td>
<td>5/8/01</td>
</tr>
<tr>
<td>2015</td>
<td>Jamie Smith</td>
<td>3,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>182.27</td>
<td>0.00</td>
<td>182.27</td>
<td>6/14/02</td>
<td>6/14/02</td>
</tr>
<tr>
<td>2016</td>
<td>Jamie Smith Personal</td>
<td>3,000.00</td>
<td>0.00</td>
<td>37.41</td>
<td>0.00</td>
<td>0.00</td>
<td>37.41</td>
<td>6/12/02</td>
<td>6/12/02</td>
</tr>
<tr>
<td>2017</td>
<td>John Elough</td>
<td>1,000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>3,721.90</td>
<td>0.00</td>
<td>0.00</td>
<td>3,721.90</td>
<td>10/20/99</td>
</tr>
</tbody>
</table>

Number of Accounts 17

-168.39 1,658.75 3,721.90 0.00 5,214.39

The Account Number column displays the account number of each A/R account.

The Account Name column displays the account name of each A/R account.

The Credit Limit column displays each account’s credit limit.

The Current column displays the amount of each account’s current balance. If the current balance has a negative value (for example, -168.39), then the customer has a credit with the restaurant (that is, the restaurant owes the customer). If the current balance has a positive value (for example, 159.06), then the customer owes the restaurant that amount.

The 30-Day column displays the amount that the customer owes the restaurant for the previous billing period.

The 60-Day column displays the amount that the customer owes the restaurant for the period preceding the “30-Day” billing period.
The **90-Day** column displays the amount that the customer owes the restaurant for the billing period preceding the ‘‘60-Day’’ billing period. The program will add any unpaid balances from earlier billing periods into the 90-day billing period.

The **Total** column displays the total balance that the customer owes the restaurant. You can calculate this value by adding (Current Balance) + (30-Day Balance) + (60-Day Balance) + (90-Day Balance).

The **Last Purch** column displays the date that the customer last charged something to the account.

The **Last Pmt** column displays the date of the most recent payment to the account.

You can customize how and what reports show by defining reports (for more information, see “A/R Accounts Report Maintenance Window: Main Tab” on page 27).

---


The A/R Sales Analysis report displays the sales history of each account, including the account’s number, name, total sales, total number of covers, total number of checks, average sales per cover, average sales per check, and date of last purchase. For more information on what the columns of this report contain or how to calculate their values, see “Error! Reference source not found.” on page Error! Bookmark not defined.

---

**DD CAFE**

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Sales</th>
<th>Covers</th>
<th>Checks</th>
<th>Avg/Cover</th>
<th>Avg Check</th>
<th>Last Purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>Thomas Jones</td>
<td>110.00</td>
<td>3</td>
<td>0.00</td>
<td>0.00</td>
<td>180.00</td>
<td>8/20/06</td>
</tr>
<tr>
<td>0002</td>
<td>Lynette Johnson</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>8/20/06</td>
</tr>
<tr>
<td>0003</td>
<td>Sarah McDonald</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>9/15/06</td>
</tr>
<tr>
<td>0004</td>
<td>Joyce Kang</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>9/16/06</td>
</tr>
<tr>
<td>0005</td>
<td>Robert Johnson</td>
<td>199.30</td>
<td>6</td>
<td>0.00</td>
<td>0.00</td>
<td>99.18</td>
<td>9/20/06</td>
</tr>
<tr>
<td>0006</td>
<td>Peter Berigan</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>10/21/06</td>
</tr>
<tr>
<td>0007</td>
<td>Jane Cruz</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>5/16/06</td>
</tr>
<tr>
<td>0008</td>
<td>Paula Schultz</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>4/12/08</td>
</tr>
<tr>
<td>0009</td>
<td>Harry Lewis</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1/12/08</td>
</tr>
<tr>
<td>0010</td>
<td>Susan Nichols</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>9/21/07</td>
</tr>
<tr>
<td>0011</td>
<td>Orville Foodservice Co.</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>10/21/08</td>
</tr>
<tr>
<td>0012</td>
<td>Restaurant Supply Co.</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>8/15/08</td>
</tr>
<tr>
<td>0013</td>
<td>Mary Jones</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>4/12/08</td>
</tr>
<tr>
<td>0014</td>
<td>Jane Smith</td>
<td>5.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0015</td>
<td>Jane Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0016</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0017</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0018</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0019</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0020</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0021</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0022</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0023</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0024</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0025</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0026</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0027</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0028</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0029</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0030</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0031</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0032</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0033</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0034</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0035</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
<tr>
<td>0036</td>
<td>John Smith Personal</td>
<td>0.00</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6/14/07</td>
</tr>
</tbody>
</table>

---

The **Account Number** column displays the customer’s A/R account number either automatically or manually assigned to the account.
The **Account Name** displays the name of the account.

The **Sales** column displays the dollar amount of the sales that the customer charged to the account.

The **Covers** column displays the number of guests that a staff member enters at the POS on the check assigned to the A/R account.

The **Checks** column displays the number of checks or transactions that were charged to the account.

The **Avg Cover** column displays the average number of covers associated with each check or transaction that the customer charged to the account.

The **Avg Check** column displays the average dollar amount for each check or transaction that the customer charged to the account. This column displays the value in the Sales column divided by the value in the Checks column (Sales ÷ Checks).

The **Last Purchase** column displays the date that the customer last charged something to the account.

You can customize how and what reports show by defining reports (for more information, see “A/R Accounts Report Maintenance Window: Main Tab” on page 27).

## A/R Transaction Report

The A/R Transaction Report is a list of transactions, including the account’s name, number, type, transaction type, date of transaction, amount of transaction, reference number, and details. For more information on what the columns of this report contain or how to calculate their values, see “Error! Reference source not found.” on page Error! Bookmark not defined.

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Act Type</th>
<th>Transaction</th>
<th>Date</th>
<th>Trans Amnt</th>
<th>Reference</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>Thomas Jones</td>
<td>House Account</td>
<td>Invoice</td>
<td>6/4/08</td>
<td>110.50</td>
<td>5893</td>
<td>2001 Jones</td>
</tr>
<tr>
<td>2003</td>
<td>Robert Jameson</td>
<td>House Account</td>
<td>Invoice</td>
<td>6/4/08</td>
<td>100.00</td>
<td>5893</td>
<td>2003 Jameson</td>
</tr>
</tbody>
</table>

The **Account Number** column displays the account number of each A/R account.

The **Account Name** displays the account name of each A/R account.
The **Account Type** column displays the account type of each A/R account.

The **Transaction** column displays the type of transaction on the account.

The **Date** column displays the date of the transaction.

The **Trans Amnt** column displays the dollar amount of charges associated with the transaction.

The **Reference** column displays the check number associated with the transaction.

The **Details** column displays the account number and the account name associated with the transaction.

You can customize how and what reports show by defining reports (for more information, see “Error! Reference source not found.” on page Error! Bookmark not defined.).

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**A/R Detailed Transaction Report**

The A/R Detailed Transaction Report is an expanded version of the A/R Transaction Report, listing A/R accounts with transactions, including account name, account number, account type, date of last purchase, date of last payment, and current, 30-day, 60-day, 90-day, and total balances. Each transaction includes transaction type, date of transaction, reference number, details, and amount of transaction. For more information on what the columns of this report contain or how to calculate their values, see “Error! Reference source not found.” on page Error! Bookmark not defined..
The **Account Number** column displays the customer’s A/R account number either automatically or manually assigned to the account.

The **Account Name** displays the name of the account assigned manually.

The **Account Type** column displays the type assigned to the A/R account. You can select it in the **Account Type** list.

The **Last Purch** column displays the date that the customer last charged something to the account.

The **Last Pmt** column displays the date of the most recent payment to the account.

The **Current** column displays the amount that appears in the **Current Balance** box on the **Balances** tab of the A/R Account Maintenance window. If the current balance has a negative value (for example, -168.39), then the customer has a credit with the restaurant (that is, the restaurant owes the customer). If the current balance has a positive value (for example, 159.06), then the customer owes the restaurant that amount.

The **30-Day** column displays the amount that the customer owes the restaurant for the previous billing period.

The **60-Day** column displays the amount that the customer owes the restaurant for the period preceding the “30-Day” billing period.
The 90-Day column displays the amount that the customer owes the restaurant for the billing period preceding the “60-Day” billing period. The program will add any unpaid balances from earlier billing periods into the 90-day billing period.

The Total column displays the total balance that the customer owes the restaurant. You can calculate this value by adding (Current Balance) + (30-Day Balance) + (60-Day Balance) + (90-Day Balance).

You can customize how and what reports show by defining reports (for more information, see “Error! Reference source not found.” on page Error! Bookmark not defined.).

A/R Account Statement

An A/R account statement is a document that details a customer’s A/R account balance information. The restaurant can print and mail an A/R account statement to a customer as a request for payment. The A/R account statement includes the customer’s name and address, as well as the current, overdue, and total balance. The statement also includes a list of transactions performed during the current period.

The Date column lists the date that each transaction was performed.

The Details column lists each transaction’s details. If the transaction was performed at the POS, the program uses the A/R account number and name; if the transaction was performed in the Back Office, the program uses the transaction type you selected in the Transaction Type list of the Standard Transaction Maintenance window.

The Ref No column lists each transaction’s reference number. If the transaction was performed at the POS, the program uses the check number; if the transaction was performed in the Back Office, the program uses the reference number you typed in the Reference Number box of the Standard Transaction Maintenance window.

The Amount column lists the amount of each transaction.

The Tax column lists the amount of sales tax (if any) associated with each transaction.

The Tip column lists the amount of the tip (if any) associated with each transaction.

The Balance column lists the account balance, adjusted for each transaction.
You can set the program to print one or more A/R account statements in the A/R Account Statement Maintenance window (for more information, see “A/R Account Statement Maintenance Window: Sort Order Tab” on page 37).

### A/R Transactions

You can perform A/R transactions at the POS and in the Back Office. All of your POS transactions will be purchases by customers. However, you can perform many different types of transactions in the Back Office, including taking payments from customers, charging accounts for invoices, applying finance charges, and adjusting account balances for miscellaneous discounts, credits, or debits. You can also process transactions singularly or in batches, to help you save time.

The **A/R Transactions** submenu includes several windows to allow you to perform A/R transactions:

<table>
<thead>
<tr>
<th>Which window?</th>
<th>To do what?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Transaction</td>
<td>You can create or edit A/R transactions in this</td>
</tr>
<tr>
<td>Maintenance window</td>
<td>window.</td>
</tr>
</tbody>
</table>
### Accounts Receivable Menu

<table>
<thead>
<tr>
<th>Which window?</th>
<th>To do what?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple Transaction Maintenance window</td>
<td>You can also create and edit A/R transactions in this window. However, this window has a grid that enables you to create or edit multiple transactions within a batch.</td>
</tr>
<tr>
<td>A/R Batch Name Maintenance window</td>
<td>You can create or edit batch names for your A/R transactions in this window.</td>
</tr>
<tr>
<td>Post Batch of A/R Transactions window</td>
<td>After you create and/or edit all the transactions within a batch, you can use this window to post that batch of transactions.</td>
</tr>
<tr>
<td>Finance Charges window</td>
<td>You can use this window to add finance charges to all of your accounts with overdue balances.</td>
</tr>
</tbody>
</table>

### Single Transaction Maintenance Window: Main Tab

Using the **Main** tab of the Single Transaction Maintenance window, you can create A/R transactions in the Back Office, such as payments, discounts, credits, and debits. You can also associate a transaction with a batch name. You can create and save transactions in this window, but the program will not post any new transaction information until you post the transactions by using the Post Batch of A/R Transactions window (for more information, see “Post Batch of A/R Transactions Window” on page 61).
Note

To perform a single A/R transaction in the Back Office, you should use the Single Transactions Maintenance window. To perform multiple transactions at once, you should use the Multiple Transaction Maintenance Window (for more information, see “Multiple Transaction Maintenance Window” on page 56).

Account Name box

You should select the name of the account to which this transaction applies. Click to open the Find Account Name window, and select the desired account name. The Find Account Name window will include any account you have created in the A/R Account Maintenance window. The corresponding account number will automatically appear in the Account No box.

If you do not see an account that you want to use for a particular transaction, then you can double-click the “Account Name” label to open the A/R Account Maintenance window. With the A/R Account Maintenance window open and active, you can add or modify your A/R accounts. After you save and close the A/R Account Maintenance window, Digital Dining will make the new or modified account available in the Account Name box.
**Account No box**

You should select the number of the account to which this transaction applies. Click to open the Find Account No window, and select the desired account number. The Find Account No window will include any account you have created in the A/R Account Maintenance window. The corresponding account name will automatically appear in the **Account Name** box.

If you do not see an account that you want to use for a particular transaction, then you can double-click the “Account No” label to open the A/R Account Maintenance window. With the A/R Account Maintenance window open and active, you can add or modify your A/R accounts. After you save and close the A/R Account Maintenance window, Digital Dining will make the new or modified account available in the **Account No** box.

**Transaction Type list**

Select one of the following transaction types from the list:

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Invoice</strong></td>
<td>An invoice can be any bill you give a customer for items or services outside the POS. The program will add the invoice amount to the account’s balance.</td>
</tr>
<tr>
<td><strong>Payment</strong></td>
<td>A payment can be any money sent to you by a customer to pay an account balance, in part or in whole. The program will deduct the payment amount from the account’s balance.</td>
</tr>
<tr>
<td><strong>Credit</strong></td>
<td>You can deduct credit from an account’s balance manually, for whatever reason. The program will deduct the credit amount from the account’s balance.</td>
</tr>
<tr>
<td><strong>Debit</strong></td>
<td>You can add a debit to an account’s balance manually, for whatever reason. The program will add the debit amount to the account’s balance.</td>
</tr>
<tr>
<td><strong>Discount</strong></td>
<td>You can deduct a discount from an account’s balance manually, for whatever reason. The program will deduct the discount amount from the account’s balance.</td>
</tr>
<tr>
<td><strong>Finance Charge</strong></td>
<td>You can manually add any extra finance charges to any account. The program will add the finance charge amount to the account’s balance.</td>
</tr>
</tbody>
</table>
**Batch Name list**

You can associate the transaction with a transaction batch by clicking a batch name from the **Batch Name** list. The **Batch Name** list will include any batch names you have created in the A/R Batch Name Maintenance window.

If you do not see a batch name that you want to use for a particular transaction, then you can double-click the “Batch Name” label to open the A/R Batch Name Maintenance window. With the A/R Batch Name Maintenance window open and active, you can add or modify your batch names. After you save and close the A/R Batch Name Maintenance window, Digital Dining will make the new or modified batch name available in the **Batch Name** list.

**Transaction Age list**

You can select the billing period to which the transaction applies by clicking a transaction age from the **Transaction Age** list. If you select **Automatic Selection**, the program will apply the transaction amount based on the transaction type. If the transaction type is Credit, Payment, or Discount, the program will apply the transaction amount to the oldest balance. If the transaction type is Invoice or Debit, the program will apply the transaction amount to the current balance.

**Amount box**

Enter the amount of the transaction in the **Amount** box.

**Reference Number box**

You can enter a reference number for the transaction in the **Reference Number** box, if necessary.

**Details box**

You can enter any additional information for the transaction in the **Details** box, if necessary. If you do not enter any information in the **Details** box, the program will print the transaction type as default Details information on your A/R account statements and the A/R Detailed Transaction Report.
Accounts Receivable Menu

Single Transaction Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Multiple Transaction Maintenance Window

You can also create A/R transactions in the Multiple Transaction Maintenance window. However, this window features a grid that allows you to create and edit many A/R transactions at once. To access the Multiple Transaction Maintenance window, you must first access the Transaction Methods window. To open the Transaction Methods window, point to Transactions in the A/R menu and click Multiple Transactions.

In the Transaction Methods window, you can open either a new or existing batch of transactions. To open a new batch, click New Standard Transactions and then click OK. To open an existing batch, click Edit Existing Batch, select a batch from the Batch list, then click OK. The Multiple Transaction Maintenance window will open, listing all the transactions in that batch.

Each row of the Multiple Transaction Maintenance window represents an individual transaction, and each column of the grid corresponds with a box in the Single Transaction Maintenance window (such as Account Name, Amount, and so on). You can adjust the width of each column and the height of each row. To adjust a column’s width, move the cursor to the dividing line on the right side of the column’s heading, until the cursor changes to . Then click and drag the dividing line left or right until the column is the desired width. To adjust the height of a row, move the cursor to the dividing line between any two rows, until the cursor changes to . Then click and drag the dividing line up or down until the row is the desired height.
Accounts Receivable Menu

To add a transaction to the grid, move the cursor to the bottom empty row and click the **Account Name** or **Account Number** box. Then click **Find** to open the Find Account Name window, and select the account of the transaction you wish to add. Use the arrow keys to move the cursor from one box to another. When you have finished creating the transaction, you can add another transaction to the next empty row or click **Exit** to save the batch and close the window.

To delete a transaction, move the cursor to the left-hand margin of the transaction you wish to delete, until the cursor changes to . Click the gray button beside the transaction to select it. Then click **Delete**. When the program displays the warning message, click **Yes** to delete the transaction or **No** to cancel the operation.

You can also change the batch for every transaction in the grid. Click **Batch** and then click **Yes** when the program displays the warning to access the Find Batch Name window. When you select a new batch name from the Find Batch Name window, the program will reassign all of the transactions in the grid to the new batch.
**Account box**

Select the number of the account to which this transaction applies. Click to open the Find Account Name window, and select the desired account number. The Find Account Name window will include any account you have created in the A/R Account Maintenance window. The corresponding account name will automatically appear in the **Account Name** box.

If you do not see an account that you want to use for a particular transaction, then you can double-click the **Account** box to open the A/R Account Maintenance window. With the A/R Account Maintenance window open and active, you can add or modify your A/R accounts. After you save and close the A/R Account Maintenance window, Digital Dining will make the new or modified account available in the **Account** box.

**Account Name box**

Select the name of the account to which this transaction applies. Click to open the Find Account Name window, and select the desired account name. The Find Account Name window will include any account you have created in the A/R Account Maintenance window. The corresponding account number will automatically appear in the **Account** box.

If you do not see an account that you want to use for a particular transaction, then you can double-click the **Account Name** box to open the A/R Account Maintenance window. With the A/R Account Maintenance window open and active, you can add or modify your A/R accounts. After you save and close the A/R Account Maintenance window, Digital Dining will make the new or modified account available in the **Account Name** box.

**Amount box**

Enter the amount of the transaction in the **Amount** box.

**Transaction Date box**

You can enter a date for your transaction in the **Transaction Date** box. Type an appropriate date, or select a date from the calendar box.
### Transaction Name box

The program will use the account name as the default transaction name. You can keep this default or enter a new name for your transaction in the **Transaction Name** box.

### Reference Number box

You can enter a reference number for the transaction in the **Reference Number** box, if necessary.

### Details box

You can enter any additional information for the transaction in the **Details** box, if necessary. If you do not enter any information in the **Details** box, the program will print the transaction type as default Details information on your A/R account statements and the A/R Detailed Transaction Report.

### Transaction Type list

Select one of the following transaction types from the **Transaction Type** list:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice</td>
<td>An invoice can be any bill you give a customer for items or services outside the POS. The program will add the invoice amount to the account’s balance.</td>
</tr>
<tr>
<td>Payment</td>
<td>A payment can be any money sent to you by a customer to pay an account balance, in part or in whole. The program will deduct the payment amount from the account’s balance.</td>
</tr>
<tr>
<td>Credit</td>
<td>You can deduct credit from an account’s balance manually, for whatever reason. The program will deduct the credit amount from the account’s balance.</td>
</tr>
<tr>
<td>Debit</td>
<td>You can add a debit to an account’s balance manually, for whatever reason. The program will add the debit amount to the account’s balance.</td>
</tr>
<tr>
<td>Discount</td>
<td>You can deduct a discount from an account’s balance manually, for whatever reason. The program will deduct the discount amount from the account’s balance.</td>
</tr>
<tr>
<td>Finance Charge</td>
<td>You can manually add any extra finance charges to any account. The program will add the finance charge amount to the account’s balance.</td>
</tr>
</tbody>
</table>
**Transaction Age list**

You can select the billing period to which the transaction applies by clicking a transaction age from the **Transaction Age** list. If you select **Automatic Selection**, the program will apply the transaction amount based on the transaction type. If the transaction type is Credit, Payment, or Discount, the program will apply the transaction amount to the oldest balance. If the transaction type is Invoice or Debit, the program will apply the transaction amount to the current balance.

**Transaction Batch list**

You can associate individual transactions in your grid with different batches by selecting a batch name from the **Transaction Batch** list. The **Transaction Batch** list will include any batch names you have created in the A/R Batch Name Maintenance window.

If you do not see a batch name that you want to use for a particular transaction, then you can double-click the **Transaction Batch** list to open the A/R Batch Name Maintenance window. With the A/R Batch Name Maintenance window open and active, you can add or modify your batch names. After you save and close the A/R Batch Name Maintenance window, Digital Dining will make the new or modified batch name available in the **Transaction Batch** list.

**A/R Batch Name Maintenance Window: Main Tab**

You can use A/R batches to post multiple transactions simultaneously. You can create several transactions, in either the Single Transaction Maintenance window or the Multiple Transaction Maintenance window, and associate them with a single batch name. You can then post the batch, and the program will perform all of the transactions within the batch. However, before you can perform batch transactions, you must create the batch names in the A/R Batch Name Maintenance window.

You can add, view, edit, or delete A/R batch names from the **Main** tab. When you enter a batch name in the **Item Description** box, the program captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box. You can change the Short Description, or you can keep the system-defined, eight-character description.
A/R Batch Name Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Post Batch of A/R Transactions Window

Once you have created a batch name and associated it with one or more transactions, you can post that batch of transactions with the Post Batch of A/R Transactions window. In the Batch list, you should click the name of the batch you wish to post. The Batch list will include any batch names you’ve created in the Batch Name Maintenance window. In the Date box, you can select a posting date. This date will appear on your printed transaction statements. Click Post to post the batch, or Exit to cancel the operation.

Finance Charges Window

You can use the Finance Charges window to add finance charges to all of your accounts with overdue balances. You can post finance charges for all of your A/R accounts simultaneously.

You must associate each of your A/R accounts with one or more account types. You can assign a finance charge to an account type, which will apply to all of the accounts associated with that account type. The program will charge all accounts of
that account type with the same finance charge. The program will also add the 30-day, 60-day, and 90-day balances (if any) of each account, and calculate the finance charge from this total. The program will then add it to the account’s balance.

A/R Utilities

The A/R Utilities submenu includes four A/R Account utilities, which allow you to reset sales information for all your A/R accounts. You can use them to age your A/R billing periods, as well as reset the period-to-date, balances, and accounts.

Each A/R account utility includes a Print area and a Report list. In the Print area, you can set the utility to print or preview a report that lists the A/R accounts affected by the utility (that is, the accounts not excluded by the filter you select in the Report list). You can preview a report by clicking the Preview option and then clicking the Print command. The program will display a preview of the report, which you can then print or save (that is, export as a file). You can print the report without previewing it by clicking the Print option and then clicking the Print command. To run the utility, click the None option and then click Run.

The Report list allows you to filter the A/R accounts affected by the utility. If you select All Accounts and then click Run, the utility will run and adjust all existing A/R accounts. The Report list can also include one or more report definitions that
you have created in the A/R Accounts Maintenance window (for more information, see “A/R Accounts Report Maintenance Window: Main Tab” on page 19). If you select a report definition from the Report list and click print, the program will use the report definition to filter the accounts to age. (For instance, if you select a report definition that excludes inactive A/R accounts, the utility will not age inactive accounts.)

If you create a report definition in the A/R Account Maintenance window, you can use that report definition to filter A/R accounts in the A/R account utilities by selecting that report in the Report list.

To add a report definition to the Report list, you must make the report available by selecting the Available for Account Utilities check box on the Main tab of the A/R Account Maintenance window.

Age A/R Account Balances

By using the Age A/R Account Balances utility, you can age one or more A/R accounts by one billing period. The current balance of each of your accounts will become the 30-day balance, the 30-day balance will become the 60-day balance, and so on. The program will not remove any balances older than the 90-day billing period. Instead, it will add the former 60-day balance to the existing 90-day balance.
Accounts Receivable Menu

**Target Date box**

The **Target Date** box allows you to age A/R accounts up to a specific target date. If you select a date in the **Target Date** box and then run the utility, the program will only age accounts up to your selected target date. When the program calculates the total of all transactions in the current billing period, it will only include transactions that occurred before the target date. The program will include transactions performed on or after the target date in the balance of the new current billing period.

**Reset A/R PTD History**

By using the Reset A/R PTD History utility, you can clear the period-to-date sales totals of one or more A/R accounts. After you reset it, the program will add the PTD sales totals from that point on.

**Reset A/R Account Balances**

By using the A/R Initialize Dollars utility, you can clear the balances of all of your existing accounts. You should only use this utility if you are planning to reset all (or a group) of your accounts, or if you are setting up the A/R system for the first time. You might use this utility if you plan to clear a group of inactive accounts, to recreate all of your accounts from scratch, or to set up an A/R system for the first time.
**Accounts Receivable Menu**

**Target Date box**

The **Target Date** box allows you to reset A/R accounts up to a specific target date. If you select a date in the **Target Date** box and then run the utility, the program will only reset accounts up to your selected target date. The program will clear totals for the transactions performed before the target date, and it will retain information for transactions performed on or after the target date. The program will include the balance of the remaining transactions in the new current billing period.

**Remove A/R Account Records**

By using the A/R Initialize Accounts utility, you can delete one or more of your existing A/R accounts. You might use this utility if you plan to clear a group of inactive accounts, to recreate all (or a group) of your accounts from scratch, or to set up an A/R system for the first time.

**A/R Account Setup**

The **A/R Setup** submenu includes one window, the A/R Account Type Maintenance window. In this window, you can create A/R account types, which you can then associate with specific receipt types and finance charges. You can then associate one or more A/R accounts with the account type. Later, when you post transactions and/or finance charges for an A/R account, the program will calculate charges using the receipt and finance charge information from its account type.

The A/R Account Type Maintenance window includes two default A/R account type records, “Bad Payments” and “Store.” The “Bad Payments” account type is...
associated with the default “Bad Payment” A/R account, a special A/R account used by Digital Dining to monitor bad payments (for more information, see “A/R Account Maintenance Window” on page 19). You cannot delete or edit the “Bad Payments” account type record. However, we include it as a standard A/R account type to allow you to filter reports by that account type.

**A/R Account Type Maintenance Window: Main Tab**

Using the **Main** tab of the A/R Account Type Maintenance window, you can create up to 99 A/R account types. When you enter an account type in the **Item Description** box, the program captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box. You can change the Short Description, or you can keep the system-defined, eight-character description. The text that appears in the **Short Description** box is the description that will show on reports. If this description is not clear enough for you, specify a Short Description of your own.

![A/R Account Type Maintenance Window](image)

**Finance Charge box**

If you plan to charge interest on overdue balances, you can enter the percentage of the finance charge in the **Finance Charge** box. When you post finance charges, the program will calculate the charges using this finance charge with all accounts that you have associated with this account type.
**Receipt Type list**

You can associate this account type with a specific receipt type by selecting one from the **Receipt Type** list. Customers using an account associated with this account type can only use this receipt type when making a payment. If you want to allow customers to use any receipt type for payments, select **All**.

**Tax Exempt check box**

If the accounts in this account type are tax exempt, you should click this check box. If you click this check box, the program will not calculate taxes for any accounts associated with this account type.

**Allow Account to be Added at POS check box**

If you select the **Allow Account to be Added at POS** check box, staff members will be allowed to create new A/R accounts of this type at the POS.

**A/R Account Type Maintenance Window: POS Entries Tab**

The **POS Entries** tab allows you to set what information the POS will require when you create an A/R account of this type at the POS. The **POS Entries** tab features a list of check boxes that correspond to the various boxes for contact information in the A/R Account Maintenance window (such as **Contact First Name**, **Contact Last Name**, **Phone Number**, and so on). By selecting a check box, you set the POS program to demand this information about the customer whenever you create a new A/R account of this type at the POS. If you select a check box, the POS program will prompt staff members to enter that information when they create a new A/R account. For instance, if you select the **Contact First Name** and **Contact Last Name** check boxes, the POS program will require staff members to enter the first and last name of the customer when creating a new A/R account.
**Accounts Receivable Menu**

**Account/Company Name check box**

If you select the **Account/Company Name** check box, the POS will prompt you to enter a name for the account. The account name is not automatically the same as the first and last name of the account's contact person. Therefore, when create a new A/R account type, the program will select the **Account/Company Name** check box by default, but not the **Contact First Name** and **Contact Last Name** check boxes.

When you create a new A/R account of this type at the POS, the program requires you to enter a name in either the **Account/Company Name** prompt or the **Contact Last Name** prompt. If you skip the **Account/Company Name** prompt, the POS will display the **Contact Last Name** prompt, and it will use that name as the Account Name and the Sort Name for the new account.

**Credit Limit box**

The **Credit Limit** box allows you to assign a default credit limit to new accounts of this type. If you type an amount in this box, the program will assign that amount as the default credit limit when staff members create new accounts of this type at the POS.

**A/R Account Type Maintenance Window: Memo Tab**

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Overview

A menu item is any item that appears in a Point of Sale (POS) window, such as food items, food item modifiers, “combo meal” items, or links to other POS windows. In the Back Office program, you create all your menu items and the POS windows that display them at the POS.

To create a new menu item and make it accessible at the POS, you must perform several steps.

- Create a series of menu setup records, including prep types, sales types, and POS windows. (Your dealer will probably create most or all of the necessary setup records during your initial setup. Therefore, you probably will not need to create new prep types, sales types, or POS windows when creating new menu item.)
- Create the menu item record and associate it with a prep type, sales type, and POS window.
- Build (or rebuild) the POS window that contains the menu item.
- Add a link to the new POS window to a window of windows or a top panel. (If you add a menu item to a POS window that is already linked to a window of windows or a top panel, you can skip this step.)

You can perform these first three steps in the Menu Item menu of the Back Office program, but you (or your dealer) must perform the last step in the Digital Dining Setup program.

In this chapter, we discuss how you can create and maintain menu items in the Back Office program, as well as the different kinds of menu items you can create. We discuss how you can create and build POS windows and how you can add menu items to them, allowing you and your staff to order these items at the POS. We also discuss how to use the menu item utilities to help maintain your menu item records, and how to generate menu item reports that can help you to monitor and analyze your item sales.
Menu Item Menu

Menu Item Maintenance Window

A menu item is any item represented as a button in the Selection panel of a POS window. You should create a menu item record for any item you normally sell in your restaurant, including non-food items such as t-shirts or souvenirs. You can also create menu items to represent combinations of other menu items (such as a combo meal), as well as menu item modifiers. You can also create menu items to function as links to other POS windows.

Menu Item Maintenance Window: Main Tab

Using the **Main** tab of the Menu Item Maintenance window, you can create up to 999,999 menu items. You can create all types of menu items (such as combo meals or non-food items) in the Menu Item Maintenance window of the Back Office program. The Menu Item Maintenance window contains nine tabs to help you define your menu items.

**PLU Code box**

Every menu item record must have a PLU (“Price Look Up”) Code. You can create as many as 999,999 menu item records in the Menu Item Maintenance window. However, you cannot enter any menu items with a PLU Code outside of the Menu Item PLU Range, as set in the Options window of the Digital Dining Setup program.
(for more information on the Menu Item PLU Range, see the *Digital Dining Setup User’s Guide*).

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**Check Description box**

Enter a description for the menu item in the **Check Description** box. The Check Description will appear on guest checks, reports, and the item’s button in any POS windows.

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**Prep Description box**

Enter a description for the menu item in the **Prep Description** box. When you enter a menu item description in the **Check Description** box, the program captures the description (including spaces) and displays it in the **Prep Description** box. You can keep this default prep description, or you can enter a new description. This prep description will appear on prep tickets.

You can also enter a printer code in the **Prep Description** box, allowing you to add small graphics to a prep ticket layout. This feature enables you to include non-English text (such as Chinese and Korean characters) to an item’s prep description.

By adding a printer code to the **Prep Description** box, you can set the POS to print graphics stored in the printer. (The program uses the printer code to identify which graphic to print.) When you type a printer code in the **Prep Description** box, separate each decimal number in the printer code with a period and add “~;” (tilde semi-colon) on each side of the printer code. This will designate the text as a printer code, rather than simply a prep description. If you type any descriptive text before or after the printer code, the program will include it with the graphic in the prep ticket layout.

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**Price 1 – 5 boxes**

You can enter up to five different prices for each menu item, each corresponding to a different price level. You can set a register definition to use one of five price levels. For instance, you might sell an entrée item at a cheaper price during lunch hours than during dinner hours. So, when you create the menu item record for this entrée, you could enter the lunch price in the **Price 1** box and the dinner price in the **Price 2** box. When you create your register definitions in the Digital Dining Setup program, you can set your lunch register to **Price Level 1**, and your dinner register to **Price Level 2**. Then, when a customer orders this entrée during lunch, the lunch register will use the amount you entered in the **Price 1** box. When a customer orders this entrée during dinner, the dinner register will use the amount you entered in the **Price 2** box (for more information on register definitions, see the *Digital Dining Setup User’s Guide*).
**Cost box**

The **Cost** box allows you to record an item’s estimated cost, the amount of money the restaurant pays for the item. You can use this cost information in your menu item reports. If you do not use Digital Dining Inventory, you can enter the full cost of the item in the **Cost** box.

If you use Digital Dining Inventory, the program automatically calculates the total cost of a menu item (by adding the average costs of the items in the **Recipe** tab) and displays the total cost on the **Main** tab (beside the **Cost** box). If you wish to add an additional cost to this total (such as a plate cost), you can enter it in the **Cost** box. When calculating costs for this menu item, the program will combine the cost from the items in the **Recipe** tab and the cost in the **Cost** box.

**Surcharge Tax box**

If this menu item has a surcharge tax, you can enter the amount in the **Surcharge Tax** box.

**UPC Code box**

To associate a menu item with a UPC (Universal Price Code) code, enter the code in the **UPC Code** box.

You can also associate menu items with Type 2 UPC bar codes and scan them at the POS. Type 2 bar codes are commonly used in delis and other restaurant environments where menu items are available in variable units of weight and must be measured before purchase. Typically, customers select such a menu item at a location other than a POS (such as a deli counter), where a staff member weighs the menu item and prints a price label (in the Type 2 UPC format) that identifies the item and its total price (based on its weight). The staff member attaches the label to the menu item, which the customer then takes to a POS to purchase. A staff member at the POS scans the menu item’s UPC label, and charges the appropriate price.

A Type 2 UPC bar code consists of 12 digits divided into 4 segments, and each segment represents different information:
**Segment** | **Digit** | **Information**
--- | --- | ---
Bar code type | First | The format of the bar code
PLU number | Second through sixth | The menu item’s PLU number
Total price | Seventh through eleventh | The total price of the menu item
Terminator | Twelfth | The end of the bar code

For example, if you scanned a bar code for the number “207851001884”, the first digit (“2”) identifies the bar code as a Type 2 code, the next five digits (“07851”) identifies the PLU code of the item, the next five digits (“00188”) identifies the total price of the item, and the last digit (“4”) identifies the end of the bar code.

To associate a menu item with a Type 2 UPC bar code, type the menu item’s five-digit PLU number in the UPC Code box. When staff members print UPC labels for the item, the program will add the five-digit PLU code (as the second through sixth digits) to the UPC label.

**Sales Type list**

To associate a menu item with a sales type, click a sales type from this list. Any sales types that you have created in the Sales Type Maintenance window will appear in the Sales Type list.

If you do not see a sales type that you want to use for a particular menu item, then you can double-click the “Sales Type” label to open the Sales Type Maintenance window. With the Sales Type Maintenance window open and active, you can add or modify your sales types. After you save and close the Sales Type Maintenance window, Digital Dining will make the new or modified sales type available in the Sales Type list.

**Prep Type list**

To associate a menu item with a prep type, click a prep type from this list. Any prep types that you have created in the Prep Type Maintenance window will appear in the Prep Type list.

If you do not see a prep type that you want to use for a particular menu item, then you can double-click the “Prep Type” label to open the Prep Type Maintenance window. With the Prep Type Maintenance window open and active, you can add or modify your prep types. After you save and close the Prep Type Maintenance window, Digital Dining will make the new or modified prep type available in the Prep Type list.
Price Mode list

In addition to setting an item’s price level, you can also control a menu item’s price by setting a price mode. By doing so, you can set the program to prompt you to enter a price when you order this item at the POS. You can also set the program to weigh the item and then calculate a price based on the item’s weight.

Select one of the following price modes for each menu item:

<table>
<thead>
<tr>
<th>Price Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed</td>
<td>The price level is fixed in the register definition.</td>
</tr>
<tr>
<td>Open</td>
<td>The program will prompt you for the current price at the POS. You can use this option for items with variable pricing, such as seafood.</td>
</tr>
<tr>
<td>Open Positive</td>
<td>The program will prompt you for the current price at the POS and will only accept positive amounts.</td>
</tr>
<tr>
<td>Open Negative</td>
<td>The program will prompt you for the current price at the POS and will only accept negative amounts. You can use this price mode for modifiers that reduce the cost of another menu item.</td>
</tr>
<tr>
<td>Open 999.99</td>
<td>The program will prompt you for the current price at the POS.</td>
</tr>
<tr>
<td>By Time</td>
<td>The program charges the customer a fixed hourly price. When you order a menu item with a price mode of By Time, the POS charges a price (set in the Price Level boxes) per hour.</td>
</tr>
</tbody>
</table>

Note: We have included the Open 999.99 price mode for managers who are upgrading earlier versions of the Digital Dining Back Office program. If you created “open” menu items in an earlier version of Digital Dining by giving them prices of “999.99”, each of these menu items will now have a price mode of “fixed” and a price of “999.99”. You will need to edit the price mode of these items. However, if you change their price mode to Open 999.99, you will not need to delete their prices (“999.99”). The program will automatically treat the item as open and prompt you for a price at the POS.
Sales Mode list

Select a sales mode for each menu item you create. The sales mode will determine what type of menu item this is. You can select one of the following sales modes:

<table>
<thead>
<tr>
<th>Sales Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal Menu Item</td>
<td>Click Normal Menu Item for individual items that customers can purchase at the POS.</td>
</tr>
<tr>
<td>Modifier</td>
<td>Click Modifier for menu item modifiers.</td>
</tr>
<tr>
<td>No Sale</td>
<td>Click No Sale for items that customers cannot purchase at the POS.</td>
</tr>
<tr>
<td>Link Only</td>
<td>Click Link Only (or Link &amp; Stay) for items that serve as links to other POS windows. If you set a modifier menu item’s sales mode to Link Only and select that item in the POS, the program will close the modifier menu item’s window after you select one item.</td>
</tr>
<tr>
<td>Combo Meal</td>
<td>Click Combo Meal for items that are combinations of other menu items.</td>
</tr>
<tr>
<td>Link &amp; Stay</td>
<td>Click Link &amp; Stay (or Link Only) for items that serve as links to other POS windows. The Link &amp; Stay sales mode functions identically to the Link Only sales mode, except that, when a staff member selects a Link &amp; Stay menu item in the POS, the modifier menu item’s window opens and allows you to select more than one item within it.</td>
</tr>
<tr>
<td>Button Only</td>
<td>Click Button Only for items that customers cannot purchase at the POS. (The Button Only sales mode differs from the No Sales sales mode in that, when you tap a Button Only menu item button at the POS, the program does not display a message.)</td>
</tr>
<tr>
<td>Topping</td>
<td>Click Topping for modifier menu items (such as “pepperoni”) that serve as toppings for other menu items (such as a “large pizza”). At the POS, if you add a modifier with the Topping sales mode to a parent item, the POS will use the price in the parent item’s price grid, rather than the modifier’s price, as the modifier’s primary price. (If the modifier also has a price, the POS will add it to the price in the parent item’s price grid.)</td>
</tr>
</tbody>
</table>
**Modifier Mode list**

If the menu item is a modifier, select a modifier mode. The modifier mode will determine if the modifier will retain its original prep type or if it will assume the prep type of the item it modifies. Select a modifier mode from this list:

<table>
<thead>
<tr>
<th>Modifier Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inherit Prep Type</td>
<td>The modifier will inherit the prep type of the item it modifies. The program will print the modifier on the same prep ticket as the modified item and will indent the modifier on the prep ticket.</td>
</tr>
<tr>
<td>Use Own Prep Type</td>
<td>The modifier will retain its original prep type and will print at the printer location associated with that prep type. The program will indent the modifier on the prep ticket.</td>
</tr>
<tr>
<td>Prep as Main Item</td>
<td>The modifier will retain its original prep type and will print at the printer location associated with that prep type. The program will print the modifier as a main item and will not indent it on the prep ticket.</td>
</tr>
<tr>
<td>Reverse Inherit</td>
<td>The modifier will retain its original prep type, and the main item will inherit the prep type of the modifier item.</td>
</tr>
</tbody>
</table>

**Quantity Mode list**

Select one of the following quantity modes for each menu item:

<table>
<thead>
<tr>
<th>Quantity Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>If you select <strong>Normal</strong>, the POS will not prompt for a quantity when a customer orders this item, unless you have set the register definition to do so.</td>
</tr>
<tr>
<td>Always</td>
<td>If you select <strong>Always</strong>, the POS will always prompt for a quantity when a customer orders this item.</td>
</tr>
<tr>
<td>Decimal</td>
<td>If you select <strong>Decimal</strong>, the POS will always prompt for a decimal quantity when a customer orders this item. You can use this mode if you plan to measure the item’s quantity by weight.</td>
</tr>
<tr>
<td>Optional Decimal</td>
<td>If you select <strong>Optional Decimal</strong>, the POS will not prompt for a quantity when a customer orders this item. However, if staff members select <strong>Quantity</strong> at the POS, the program allows them to enter a decimal quantity.</td>
</tr>
<tr>
<td>Scale</td>
<td>If you select <strong>Scale</strong>, the POS will automatically measure the weight of the item from an electronic scale connected to the POS. You can use this mode if you plan to measure the item’s quantity by weight.</td>
</tr>
</tbody>
</table>
**Tare Weight list**

If you plan to sell a menu item in units of weight (such as “pint of coleslaw”), you can select an appropriate tare from the Tare Weight list. The Tare Weight list includes any tares you have created in the Tare Maintenance window. If the item is available in different tares, you can click Select at POS, and the program will prompt you to choose a tare at the POS. You can drill through to the Tare Maintenance window by double-clicking the Tare Weight label (for more information, see “Tare Maintenance Window: Main Tab” on page 160).

**Tax Rate 1 – 4 check boxes**

You can select which tax rates apply to this item. The value of each tax rate depends on the tax table associated with the register definition (for more information on tax rates, see the Digital Dining Setup User’s Guide).

**Menu Item Maintenance Window: Windows Tab**

The Windows tab allows you to associate a menu item with one or more POS windows, as well as modifier windows.
### POS Windows list

The **POS Windows** list allows you to associate a menu item to one or more POS windows. The menu item will appear in any POS window that you add to the **POS Windows** list. Click **Insert** to open the Find POS Window window and select the appropriate POS window. To remove POS windows from the **POS Windows** list, double-click the unwanted POS window. To remove multiple POS windows, select the unwanted POS windows while holding the SHIFT key and then click **Remove**.

If you do not see a POS window that you want to use for a particular menu item, then close the Find POS Window window, and double-click the “POS Windows” label to open the POS Window Maintenance window. With the POS Window Maintenance window open and active, you can add or modify your POS windows. After you save and close the POS Window Maintenance window, Digital Dining will make the new or modified POS window available in the **POS Window** list of the Find POS Window window.

### Modifier Windows list

The **Modifier Windows** list allows you to associate a menu item with one or more “forced” modifier windows. A modifier window is a POS window containing several modifier menu items. A “forced” modifier window is a modifier window that automatically displays when you order the menu item at the POS. The modifier window is considered “forced” because the POS will not add the original menu item to the check unless you select a modifier from the window. For instance, if you create a menu item for a steak, you could associate the steak menu item with a modifier window that forces the server to select the steak’s temperature (“rare,” “medium,” “well done,” and so on).

To associate the menu item with a forced modifier window, add a modifier window to the **Modifier Windows** list. Click **Insert** to open the Find POS Window window and select the appropriate POS window. If you add a POS window to the **Modifier Window** list, then the POS will display that window when you order the menu item at the POS. If you add more than one POS window to the **Modifier Window** list, then the POS will open each modifier windows, one after another, when you order this menu item at the POS.

The POS will only display a menu item’s forced modifier window if the menu item is associated with a prep type that is associated with a printer. If you associate a menu item with a prep type, but you do not associate the prep type to at least one printer definition (on the **Print Rte** tabs of the Prep Type Maintenance window), the POS will not display the modifier window when you order the item at the POS (for more information, see “Menu Prep Type Maintenance Window: Printers Tab” on page 150).
Every window that you add to the **Modifier Windows** list features an accompanying **Default Toppings** list. If you add a POS window to the **Modifier Windows** list that has a Pick and Choose window type and one or more sets of default toppings defined (in the **Defaults** tab of the POS Window Maintenance window), the names of those topping sets will display in the modifier window’s **Default Toppings** list.

You can select one of the default topping sets in the list, or you can select **None**. If you want the POS to apply one of the POS window’s default topping sets to the modifiers window, select the appropriate set in the **Defaults** list. If you do not want the POS to apply a default topping set, click **None**. Later, when you order this item at the POS, the program will display each of the modifier windows, one after another, in the **Modifier Windows** list. When the POS displays a modifier window associated with a set of default toppings, the POS will automatically select the modifier items from the default toppings set.

To remove a modifier window from the **Modifier Windows** list, select the modifier window and click **Remove**. To remove multiple modifier windows, select the unwanted modifier windows while holding the SHIFT key and then click **Remove**.

If you do not see a modifier window that you want to use for a particular menu item, then close the Find POS Window window, and double-click the “Modifier Windows” label to open the POS Window Maintenance window. With the POS Window Maintenance window open and active, you can add or edit a POS window. After you save and close the POS Window Maintenance window, Digital Dining will make the new modifier window available in the **Modifier Window** list of the Find POS Window window.

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**Menu Item Maintenance Window: Sales Tab**

The **Sales** tab displays a report listing sales totals for the menu item. The report includes the total quantity of the item sold in a given period, the total value of the item in a given period, and the date that the totals for a given period were posted. The report lists totals for each of the past 12 months, each of the past 7 days, the week to date, the month to date, the year to date, and the period to date.

| Note | You can reset the period-to-date for all your menu items by using the Menu Item PTD Reset utility (for more information, see “Menu Item PTD Reset” on page 137). |
Menu Item Maintenance Window: Images Tab

In the Images tab, you can associate a menu item with a button image, which will display as the menu item’s button in the POS. The Current Image list includes all of the menu item button images you have created in the Button Image Maintenance window. (The Current Image list only includes button images designated as Menu Item or Any in the Image Category list of the Button Image Maintenance window). To associate a menu item with a button image, select an image in the Current Image list. The program will display the selected image in the tab.

You can also search for an appropriate button image by clicking Find. If you click Find, the program will display the available images as thumbnails in the Image Viewer window. You can browse these images and click the appropriate one.

To clear an associated image, select None. If you select None, then program will create a default button image using the menu item’s check description.

Menu Item Maintenance Window: Price Tab

The Price tab allows you to apply different prices to a menu item based on the number of topping modifiers you add to the item. The Price tab includes a price grid that allows you to set a separate price for each modifier.
This grid displays prices for a menu item, and each row of the grid includes adjusted prices for the item with escalating numbers of modifiers. In each row, the **Toppings** box displays the number of topping modifiers, and the subsequent price level boxes display the prices for each price level (**Price 1**, **Price 2**, and so on).

The first row (**Toppings: 0**) displays the prices for the item with no toppings. The prices displayed in the five price level boxes on the first row correspond to the prices displayed in the five price level boxes on the **Main** tab (**Price 1**, **Price 2**, and so on). You can edit these prices in either the **Main** tab or the **Price** tab. The second row (**Toppings: 1**) displays the prices for the item with one topping. The third row displays the prices for the item with two toppings, and so on.

By setting specific prices for the item when it includes a specific number of toppings, you can adjust prices with more variation. For instance, you could charge 50 cents per topping for up to two toppings, but then charge 30 cents per topping for three or more toppings.

To add a row to the grid, click **New Line**. To delete the last line in the grid, click **Delete Line**. To export the data in the price grid to a printed report (or other format), click **Export**.

### Topping Value box

The **Topping Value** box allows you to assign a topping value to a topping menu item, which can affect the price of a pizza menu item. You can use the **Topping Value** box to create a variety of special toppings. For example, if you create a special topping (such as shrimp) for which you want to charge twice as much as a regular topping, you can assign it a topping value of two (2). At the POS, if you add
the shrimp topping to a pizza, the program will count it as two toppings, rather than one. You can also enter decimal values in the Topping Value box.

You can also assign a value of zero (0) to a topping. If you add a topping with zero value to a pizza, the POS will not count it as a topping. (“Zero value” toppings can be useful to restaurants that offer free toppings, such as garlic or basil.)

You can also assign a negative value (-1) to a topping. You can use a topping with a negative value to remove a single topping from a specialty pizza with multiple default toppings. For instance, you could create a “no sausage” topping with a topping value of “-1”. At the POS, if a customer orders a meat lover’s pizza without sausage, you could select the meat lover's pizza and then add the “no sausage” topping. The “no sausage” topping would effectively remove the sausage topping from the meat lover’s pizza.

Menu Item Maintenance Window: Misc Tab

The Misc tab allows you to set various miscellaneous associations to a menu item, such as a frequent diner reward point value or an LDS (Liquor Dispensing System) code, as well as an alternative, upsize, or downsize item.

FD Points box

If you are using the Digital Dining Frequent Diner/Delivery program to offer Frequent Dining plans to your customers, you can set the program to give Frequent Diner points for particular menu items. You can also enter different Frequent Diner
point values for particular menu items by entering a point value in the **FD Points** box. For instance, if you type “10” in the **FD Points** box, then your Frequent Diners will earn ten Frequent Diner points each time they order this item (for more information, see the *Digital Dining Frequent Diner/Delivery User’s Guide*).

**LDS Code box**

To associate a menu item with a LDS (Liquor Dispensing System) code, enter the code in the **LDS Code** box.

**Item Out Alternative box**

The **Item Out Alternative** box allows you to associate a menu item with an alternative menu item. If a server tries to order your primary menu item while it’s on the Item Out List, the POS will display a prompt with a yes/no message box, offering the server to order the alternative menu item.

To associate a menu item to an alternative menu item, click  to open the Find Menu Items window. Select the appropriate menu item and click **OK**, or click **Cancel** to close the Find Menu Items window.

**Upsize Item box**

The **Upsize Item** box allows you to associate a menu item to another “upsize” menu item. Afterwards, if you order this menu item at the POS and then use the Upsize check option, the program will replace the previous menu item with its “upsize” menu item. For instance, you might create a “medium sized” combo meal menu item (which includes a medium order of french fries and a medium drink), and associate it with a “large sized” combo meal item (which includes a large order of fries and a large drink). At the POS, your server might order the “medium” combo meal and then use the Upsize check option. The POS will automatically replace the medium order with the new large order.

To associate a menu item to an upsize menu item, click  to open the Find Menu Items window. Select the appropriate menu item and click **OK**, or click **Cancel** to close the Find Menu Items window.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>For this upsize feature to function properly at the POS, you must add the Upsize check option function to a check option in your active register. For more information, see the <em>Digital Dining Setup User’s Guide</em>.</td>
</tr>
</tbody>
</table>
**Downsize Item box**

The **Downsize Item** box allows you to associate a menu item to another “downsize” menu item. Afterwards, if you order this menu item at the POS and then use the Downsize check option, the program will replace the previous menu item with its “downsize” menu item. For instance, you might create a “medium sized” combo meal menu item (which includes a medium order of fries and a medium drink), and associate it with a “small sized” combo meal item (which includes a small order of fries and a small drink). At the POS, your server might order the “medium” combo meal and then use the Downsize check option. The POS will automatically replace the medium order with the new small order.

To associate a menu item to an downsize menu item, click ![open window] to open the Find Menu Items window. Select the appropriate menu item and click **OK**, or click **Cancel** to close the Find Menu Items window.

**Note**

For this downsize feature to function properly at the POS, you must add the Downsize check option function to a check option in your active register. For more information, see the *Digital Dining Setup User’s Guide*.

**Cover Value box**

The **Cover Value** box allows you to associate a menu item with a specific cover count. For instance, if you create a menu item record for an item that feeds multiple people (such as a banquet platter), you can assign a cover value to the item itself. Later, when you order the item at the POS, the program will use the menu item’s cover value to calculate the number of covers on the check.

**Menu Course list**

The **Menu Course** list allows you to associate a menu item with a menu course. The list includes all of the courses you have created in the Coursing Maintenance window. You can select an appropriate menu course, or you can select **None** for items that you do not want to include in a menu course.

If you select **By Prep Type**, the program will associate the menu item with the menu course that is associated with the menu item’s prep type. If you select **By Sales Type**, the program will associate the menu item with the menu course that is associated with the menu item’s sales type.
Menu Item Maintenance Window: Combo Tab

If the menu item is a combo meal or if it is included in other combo meals, you can associate it with other items in the Combo tab of the Menu Item Maintenance window. If the menu item is a combo meal, you can add the other menu items within the combo meal to this grid. If the menu item is contained in other combo meals, you can add those combo meals to this grid.

To add an item to the grid, click Add Item, then select the desired item in the Find Menu Item window, and click OK. To remove an item from the grid, select the item you wish to remove and then click Delete Item. To replace an item on the grid with a different item, double-click the PLU box of the item you wish to replace, type a new PLU number, and press ENTER. You can also replace a menu item by clicking the Menu item in this combo box of the item you wish to replace and then double-clicking a new menu item in the Find Normal Menu Items window.
You can only add items to the Combo grid if the menu item’s Sales Mode is set to Normal Menu Item or Combo Meal. You can add combo meals to the grid if the item’s Sales Mode is set to Normal Menu Item. You can add normal menu items to the grid if the Sales Mode is set to Combo Meal.

**Combo Price boxes**

The Combo tab features five Combo Price boxes, one for each of the five price levels. The prices you enter in the Price 1 - 5 boxes on the Main tab will automatically appear in these Combo Price boxes. For combo meals, the combo price should equal the difference between the price of the combo meal and the total price of the individual items within the combo meal.

For instance, if you create a combo meal that contains a burger with a regular price of $1.29, a drink with a regular price of $1.09, and french fries with a regular price of $1.19, the total price of these separate items would total $3.67. But you would want to charge less for the combo meal, such as $3.29. Therefore, the meal’s combo price would be -$0.38. Later, when your staff members order this combo meal at the POS, the program will add the prices of the three individual items and then deduct $0.38 from the total.

If you modify a price in one of the Combo Price boxes (such as Combo Price 1), the Back Office program will automatically adjust the corresponding Total Price box (such as Total Price 1), as well as update the corresponding Price box on the Main tab of the Menu Item Maintenance window.

**Total Price boxes**

The Combo tab features five Total Price boxes, one for each of the five price levels. The total price of a combo meal is the price the customer actually pays for the meal. When you enter a total price in one of the Total Price boxes (such as Total Price 1), the Back Office program automatically adjusts the corresponding Combo Price box (such as Combo Price 1), as well as the corresponding Price box on the Main tab of the Menu Item Maintenance window.
Menu Item Maintenance Window: Picture Tab

The **Picture** tab allows you to associate a menu item record with a graphic file, such as a photograph of the actual menu item. After you associate a menu item record with a picture of the item, servers can view this picture at the POS and show the picture to customers who are curious about an item.

To associate a graphic file with a menu item record, click **Import**. In the Import Picture window, select the graphic file you want to associate with the menu item. (The program displays the graphic in the **Picture** tab.) To remove a graphic that is associated with a menu item, click **Clear**. To export a copy of the graphic to a new location, click **Export**. The Back Office program will support most graphic file formats, including .bmp, .gif, and .jpg.
Menu Item Maintenance Window: Recipe Tab

If you are using the Digital Dining Inventory program, you can associate menu items with inventory items in the Recipe tab of the Menu Item Maintenance window. You can add one or more inventory items to the recipe grid of the Menu Item Maintenance window, including a quantity. Afterwards, when a customer orders the menu item, the program deducts the appropriate quantity of that inventory item from your inventory. For instance, you might create a menu item for eggs. If you have already created an inventory item record for eggs, you could add this inventory item to your recipe, with a quantity of “1”. Then, when a customer orders an egg, the program will deduct one egg from your inventory records.

If your menu item includes a combination of inventory items, you can add all of them to the Recipe grid. For instance, you might create a menu item, consisting of two eggs and two slices of bacon. You could then add the inventory item for eggs in your grid, with a quantity of two, and then add the inventory item for bacon in your grid, with a quantity of two. Afterwards, each time a customer orders this item, the program will deduct two eggs and two slices of bacon from your inventory records.

To add an inventory item to the recipe grid, click New. The Find Inventory Item window will open. Select the appropriate inventory item from this window, and then click OK. The program adds the inventory item to the grid, as well as the item’s unit, average cost, and yield. By default, the program also inserts a quantity of “1” in the Quantity box, but you can edit the quantity as necessary. To edit an item’s quantity, click the Quantity box and type an appropriate quantity amount.
The program displays the total cost, including the plate cost (taken from the **Cost** box of the **Main** tab), at the bottom of the grid. To delete an inventory item from the recipe grid, select the appropriate item and click **Delete Line**.

**Menu Item Maintenance Window: User Fields Tab**

If you create any user-definable fields in the Menu Item User Definable Fields Maintenance window, those fields (and their labels) will display on the **User Fields** tab of the Menu Item Maintenance window.

In the Menu Item User Definable Fields Maintenance window, you can define up to five fields that will display on the **User Fields** tab. You can create extra fields to record additional information about menu items, such as calorie counts, sodium, and fat. (For more information, see “Menu Item User Definable Fields Maintenance Window” on page 69.)

**Menu Item Maintenance Window: Memo Tab**

The **Notes** subtab features a large multiline text box, wherein you can type and save any special notes or comments regarding the menu item. The **Prep Instructions** subtab features a large multiline text box, wherein you can type and save any information specifically about preparing this menu item. You can enter any necessary information in the **Prep Instructions** box. You can then add this information to a prep ticket layout using the `{@ALL_PREP_INSTRUCTIONS}` token. Your staff can also access these prep instructions at the POS by using a check option that features the Prep Instructions check option function.
You can also enter a printer code in the Prep Instructions box, allowing you to add small graphics (such as non-English characters) to a prep ticket layout. By adding a printer code to the Prep Instructions box, you can set the POS to print graphics stored in the printer. (The program uses the printer code to identify which graphic to print.)

When you type a printer code in the Prep Instructions box, separate each decimal number in the printer code with a period and add “~;” (tilde semi-colon) on each side of the printer code. This will designate the text as a printer code, rather than simply a prep description. If you type any descriptive text before or after the printer code, the program will include it with the graphic in the prep ticket layout.
## Menu Reports

The **Menu Item** menu includes nine reports devoted to menu items. All of these reports list menu items (by PLU code and description), but each one includes different information about your items. You can group, sort, or filter each of these reports in a variety of ways.

<table>
<thead>
<tr>
<th>Which report?</th>
<th>What does the report contain?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu Price List</td>
<td>A list of menu items with prices for each price level, as well as each item’s plate cost and tax rates.</td>
</tr>
<tr>
<td>Menu Item List</td>
<td>A list of menu items with the prep description, sales type, POS window, modifier mode, quantity, and sales mode.</td>
</tr>
<tr>
<td>Menu Modifier List</td>
<td>A list of menu items with associated POS window and all associated modifier windows.</td>
</tr>
<tr>
<td>Menu Sales Analysis</td>
<td>A list of menu items with quantity sold, sales in dollars, cost in dollars, profit in dollars, and cost as a percentage of each item’s price.</td>
</tr>
<tr>
<td>Menu Item Recipes</td>
<td>A list of menu items with recipes, including the description, quantity, and unit of each ingredient associated with a list menu item. The report also includes each menu item’s plate cost, as well as any prep instructions associated with each menu item. (This report is only available if you use the Digital Dining Inventory program.)</td>
</tr>
<tr>
<td>Menu Item Cost Percentage</td>
<td>A list of menu items with costs and cost percentages for each price level.</td>
</tr>
<tr>
<td>Menu Monthly Sales Summary</td>
<td>A list of menu items with sales information for each month of the year. You can generate a list featuring sales totals, profit totals, cost totals, cost percentages, or quantity sold.</td>
</tr>
<tr>
<td>Menu Daily Sales Summary</td>
<td>A list of menu items with sales totals for each day of the week and the entire week. You can generate a list featuring sales totals, profit totals, cost totals, cost percentages, or quantity sold.</td>
</tr>
<tr>
<td>Menu Sales Analysis Summary</td>
<td>A list of menu items with sales totals for the week to date, the month to date, the year to date, and the period to date. You can generate a list featuring sales totals, profit totals, cost totals, cost percentages, or quantity sold.</td>
</tr>
</tbody>
</table>
Menu Price List Window: Sort Order Tab

On the Sort Order tab, you can print or preview your menu item price lists, as well as decide how the program will organize and sort menu items. The Sort Order tab also allows you to filter menu items based on PLU code, quantity sold, cost percentage, and sales.

Sort By area

In the Sort By area, you can sort your menu items by PLU Code, description, quantity sold, cost percentage, and total sales. You can also filter them by PLU Code, quantity sold, cost percentage, and total sales.

If you click PLU Code, the program will sort your menu items by their PLU code. You can also filter your menu items by entering a range of PLU codes in the PLU Code boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print menu items with PLU codes between 1000 and 2000.

If you click Description, the program will sort your menu items alphabetically by their check description.

If you click Quantity Sold, the program will sort your menu items by the number of items sold within the period, from most to least. You can also filter your menu items by entering a range of quantities sold in the Quantity Sold boxes.

If you click Cost %, the program will sort your menu items by their cost percentage, from most to least. You can also filter your menu items by entering a range of cost percentages in the Cost % boxes. For instance, if you enter “10” in the first box and “20” in the second box, the program will only print menu items with costs between 10% to 20% of their sale price.

If you click Sales, the program will sort your menu items by their total sales, from most to least. You can also filter your menu items by entering a range of total sales in the Sales boxes.

Period area

In the Period area, you can filter your menu items by period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on.
You can select a period from the Sales History list. The program will only list menu items that had transactions within the selected period.

**Group By area**

In the Group By area, you can set the program to group your menu items by sales type, prep type, or POS window by clicking Sales Type, Prep Type, or POS Window. If you click No Groups, the program will not group your menu items.

**Print area**

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

**Menu Price List Window: Sales Type Tab**

The Sales Type tab features a filter that allows you to include or exclude menu items with specific sales types. The program will only print menu items that have a sales type listed in the Include list and will not print any menu items that have a sales type listed in the Exclude list.

**Menu Price List Window: Prep Type Tab**

The Prep Type tab features a filter that allows you to include or exclude menu items with specific prep types. The program will only print menu items that have a prep type listed in the Include list and will not print any menu items that have a prep type listed in the Exclude list.

**Menu Price List Window: POS Win Tab**

The POS Win (POS window) tab features a filter that allows you to include or exclude menu items of specific POS windows. If you click Include, the program will only print menu items associated with POS windows listed in the POS Window list. If you click Exclude, the program will only print menu items not associated with POS windows listed in the POS Window list.
To move a POS window from the **Available** list to the **POS Window** list, select the POS window and click \[ \rightarrow \]. To remove a POS window from the **POS Window** list, select the POS window and then click \[ \times \]. To remove all POS windows from the **POS Window** list, click \[ \rightarrow \].

![Menu Price List Window: Menu Item Tab](image)

**Menu Price List Window: Menu Item Tab**

The **Menu Item** tab features a filter that allows you to include or exclude specific menu items. If you click **Include**, the program will only print menu items listed in the **Menu Item** list. If you click **Exclude**, the program will only print menu items not listed in the **Menu Item** list.

To move a menu item from the **Available** list to the **Menu Item** list, select the menu item and click \[ \rightarrow \]. To remove a menu item from the **Menu Item** list, select the menu item and then click \[ \times \]. To remove all menu items from the **Menu Item** list, click \[ \rightarrow \].
Menu Price List Window: Course Tab

The **Course** tab features a filter that allows you to include or exclude menu items associated with specific menu courses.

You can set the program to either include or exclude menu items associated with the courses in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include items associated with the courses in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all items associated with the courses in the **Include/Exclude** list.

To move a menu course from the **Available** list to the **Include/Exclude** list, select the course and click **Add To List**. To move a course from the **Include/Exclude** list to the **Available** list, select the course and click **Remove From List**. To move all courses from the **Available** list to the **Include/Exclude** list, click **Add All To List**. To move all courses in the **Include/Exclude** list to the **Available** list, click **Remove All From List**.
Menu Item List Window: Sort Order Tab

On the **Sort Order** tab, you can print or preview your menu item lists, as well as decide how the program will organize and sort menu items. The **Sort Order** tab also allows you to filter menu items based on PLU code, quantity sold, cost percentage, and sales.

**Sort By area**

In the **Sort By** area, you can sort your menu items by PLU Code, description, quantity sold, cost percentage, and total sales. You can also filter them by PLU Code, quantity sold, cost percentage, and total sales.

If you click **PLU Code**, the program will sort your menu items by their PLU code. You can also filter your menu items by entering a range of PLU codes in the **PLU Code** boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print menu items with PLU codes between 1000 and 2000.

If you click **Description**, the program will sort your menu items alphabetically by their check description.

If you click **Quantity Sold**, the program will sort your menu items by the number of items sold within the period, from most to least. You can also filter your menu items by entering a range of quantities sold in the **Quantity Sold** boxes.

If you click **Cost %**, the program will sort your menu items by their cost percentage, from most to least. You can also filter your menu items by entering a range of cost percentages in the **Cost %** boxes. For instance, if you enter “10” in the first box and “20” in the second box, the program will only print menu items with costs between 10% to 20% of their sale price.

If you click **Sales**, the program will sort your menu items by their total sales, from most to least. You can also filter your menu items by entering a range of total sales in the **Sales** boxes.

**Period area**

In the **Period** area, you can filter your menu items by period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on. You can select a period from the **Sales History** list. The program will only list menu items that had transactions within the selected period.
**Group By area**

In the **Group By** area, you can set the program to group your menu items by sales type, prep type, or POS window by clicking **Sales Type**, **Prep Type**, or **POS Window**. If you click **No Groups**, the program will not group your menu items.

**Print area**

In the **Print** area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the **Preview** option and then click the **Print** command below, the program will display a preview of the report as it will appear when it prints. If you click the **Print** option and then click the **Print** command below, the program will print a copy of the report.

**Menu Item List Window: Sales Type Tab**

The **Sales Type** tab features a filter that allows you to include or exclude menu items with specific sales types. The program will only print menu items that have a sales type listed in the **Include** list and will not print any menu items that have a sales type listed in the **Exclude** list.

**Menu Item List Window: Prep Type Tab**

The **Prep Type** tab features a filter that allows you to include or exclude menu items with specific prep types. The program will only print menu items that have a prep type listed in the **Include** list and will not print any menu items that have a prep type listed in the **Exclude** list.

**Menu Item List Window: POS Win Tab**

The **POS Win** (POS window) tab features a filter that allows you to include or exclude menu items of specific POS windows. If you click **Include**, the program will only print menu items associated with POS windows listed in the **POS Window** list. If you click **Exclude**, the program will only print menu items not associated with POS windows listed in the **POS Window** list.

To move a POS window from the **Available** list to the **POS Window** list, select the POS window and click ➔. To remove a POS window from the **POS Window** list, select the POS window and then click ❯. To remove all POS windows from the **POS Window** list, click ❯❯.
Menu Item List Window: Menu Item Tab

The **Menu Item** tab features a filter that allows you to include or exclude specific menu items. If you click **Include**, the program will only print menu items listed in the **Menu Item** list. If you click **Exclude**, the program will only print menu items not listed in the **Menu Item** list.

To move a menu item from the **Available** list to the **Menu Item** list, select the menu item and click **>**. To remove a menu item from the **Menu Item** list, select the menu item and then click **<**. To remove all menu items from the **Menu Item** list, click **Clear**.
Menu Item List Window: Course Tab

The **Course** tab features a filter that allows you to include or exclude menu items associated with specific menu courses.

You can set the program to either include or exclude menu items associated with the courses in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include items associated with the courses in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all items associated with the courses in the **Include/Exclude** list.

To move a menu course from the **Available** list to the **Include/Exclude** list, select the course and click **>`**. To move a course from the **Include/Exclude** list to the **Available** list, select the course and click `<**. To move all courses from the **Available** list to the **Include/Exclude** list, click **>`. To move all courses in the **Include/Exclude** list to the **Available** list, click `<**.
Menu Modifer List Window: Sort Order Tab

On the Sort Order tab, you can print or preview your menu item modifier lists, as well as decide how the program will organize and sort menu items. The Sort Order tab also allows you to filter menu items based on PLU code, quantity sold, cost percentage, and sales.

Sort By area

In the Sort By area, you can sort your menu items by PLU Code, description, quantity sold, cost percentage, and total sales. You can also filter them by PLU Code, quantity sold, cost percentage, and total sales.

If you click PLU Code, the program will sort your menu items by their PLU code. You can also filter your menu items by entering a range of PLU codes in the PLU Code boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print menu items with PLU codes between 1000 and 2000.

If you click Description, the program will sort your menu items alphabetically by their check description.

If you click Quantity Sold, the program will sort your menu items by the number of items sold within the period, from most to least. You can also filter your menu items by entering a range of quantities sold in the Quantity Sold boxes.

If you click Cost %, the program will sort your menu items by their cost percentage, from most to least. You can also filter your menu items by entering a range of cost percentages in the Cost % boxes. For instance, if you enter “10” in the first box and “20” in the second box, the program will only print menu items with costs between 10% to 20% of their sale price.

If you click Sales, the program will sort your menu items by their total sales, from most to least. You can also filter your menu items by entering a range of total sales in the Sales boxes.

Period area

In the Period area, you can filter your menu items by period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on.
You can select a period from the **Sales History** list. The program will only list menu items that had transactions within the selected period.

**Group By area**

In the **Group By** area, you can set the program to group your menu items by sales type, prep type, or POS window by clicking **Sales Type**, **Prep Type**, or **POS Window**. If you click **No Groups**, the program will not group your menu items.

**Print area**

In the **Print** area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the **Preview** option and then click the **Print** command below, the program will display a preview of the report as it will appear when it prints. If you click the **Print** option and then click the **Print** command below, the program will print a copy of the report.

**Menu Modifier List Window: Sales Type Tab**

The **Sales Type** tab features a filter that allows you to include or exclude menu items with specific sales types. The program will only print menu items that have a sales type listed in the **Include** list and will not print any menu items that have a sales type listed in the **Exclude** list.

**Menu Modifier List Window: Prep Type Tab**

The **Prep Type** tab features a filter that allows you to include or exclude menu items with specific prep types. The program will only print menu items that have a prep type listed in the **Include** list and will not print any menu items that have a prep type listed in the **Exclude** list.

**Menu Modifier List Window: POS Win Tab**

The **POS Win** (POS window) tab features a filter that allows you to include or exclude menu items of specific POS windows. If you click **Include**, the program will only print menu items associated with POS windows listed in the **POS Window** list. If you click **Exclude**, the program will only print menu items not associated with POS windows listed in the **POS Window** list.
To move a POS window from the Available list to the POS Window list, select the POS window and click \( \Rightarrow \). To remove a POS window from the POS Window list, select the POS window and then click \( \Rightarrow \). To remove all POS windows from the POS Window list, click \( \Rightarrow \).

Menu Modifier List Window: Menu Item Tab

The Menu Item tab features a filter that allows you to include or exclude specific menu items. If you click Include, the program will only print menu items listed in the Menu Item list. If you click Exclude, the program will only print menu items not listed in the Menu Item list.

To move a menu item from the Available list to the Menu Item list, select the menu item and click \( \Rightarrow \). To remove a menu item from the Menu Item list, select the menu item and then click \( \Rightarrow \). To remove all menu items from the Menu Item list, click \( \Rightarrow \).
Menu Modifier List Window: Course Tab

The **Course** tab features a filter that allows you to include or exclude menu items associated with specific menu courses.

You can set the program to either include or exclude menu items associated with the courses in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include items associated with the courses in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all items associated with the courses in the **Include/Exclude** list.

To move a menu course from the **Available** list to the **Include/Exclude** list, select the course and click →. To move a course from the **Include/Exclude** list to the **Available** list, select the course and click ←. To move all courses from the **Available** list to the **Include/Exclude** list, click →. To move all courses in the **Include/Exclude** list to the **Available** list, click ←.
Menu Sales Analysis Window: Sort Order Tab

On the Sort Order tab, you can print or preview your menu item sales analysis, as well as decide how the program will organize and sort menu items. The Sort Order tab also allows you to filter menu items based on PLU code, quantity sold, cost percentage, and sales.

Sort By area

In the Sort By area, you can sort your menu items by PLU Code, description, quantity sold, cost percentage, and total sales. You can also filter them by PLU Code, quantity sold, cost percentage, and total sales.

If you click PLU Code, the program will sort your menu items by their PLU code. You can also filter your menu items by entering a range of PLU codes in the PLU Code boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print menu items with PLU codes between 1000 and 2000.

If you click Description, the program will sort your menu items alphabetically by their check description.

If you click Quantity Sold, the program will sort your menu items by the number of items sold within the period, from most to least. You can also filter your menu items by entering a range of quantities sold in the Quantity Sold boxes.

If you click Cost %, the program will sort your menu items by their cost percentage, from most to least. You can also filter your menu items by entering a range of cost percentages in the Cost % boxes. For instance, if you enter “10” in the first box and “20” in the second box, the program will only print menu items with costs between 10% to 20% of their sale price.

If you click Sales, the program will sort your menu items by their total sales, from most to least. You can also filter your menu items by entering a range of total sales in the Sales boxes.

Period area

In the Period area, you can filter your menu items by period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on.
You can select a period from the Sales History list. The program will only list menu items that had transactions within the selected period.

**Group By area**

In the Group By area, you can set the program to group your menu items by sales type, prep type, or POS window by clicking Sales Type, Prep Type, or POS Window. If you click No Groups, the program will not group your menu items.

**Print area**

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

**Menu Sales Analysis Window: Sales Type Tab**

The Sales Type tab features a filter that allows you to include or exclude menu items with specific sales types. The program will only print menu items that have a sales type listed in the Include list and will not print any menu items that have a sales type listed in the Exclude list.

**Menu Sales Analysis Window: Prep Type Tab**

The Prep Type tab features a filter that allows you to include or exclude menu items with specific prep types. The program will only print menu items that have a prep type listed in the Include list and will not print any menu items that have a prep type listed in the Exclude list.

**Menu Sales Analysis Window: POS Win Tab**

The POS Win (POS window) tab features a filter that allows you to include or exclude menu items of specific POS windows. If you click Include, the program will only print menu items associated with POS windows listed in the POS Window list. If you click Exclude, the program will only print menu items not associated with POS windows listed in the POS Window list.
To move a POS window from the Available list to the POS Window list, select the POS window and click \( \rightarrow \). To remove a POS window from the POS Window list, select the POS window and then click \( \times \). To remove all POS windows from the POS Window list, click \( \times \).

Menu Sales Analysis Window: Menu Item Tab

The Menu Item tab features a filter that allows you to include or exclude specific menu items. If you click Include, the program will only print menu items listed in the Menu Item list. If you click Exclude, the program will only print menu items not listed in the Menu Item list.

To move a menu item from the Available list to the Menu Item list, select the menu item and click \( \rightarrow \). To remove a menu item from the Menu Item list, select the menu item and then click \( \times \). To remove all menu items from the Menu Item list, click \( \times \).
Menu Sales Analysis Window: Course Tab

The Course tab features a filter that allows you to include or exclude menu items associated with specific menu courses.

You can set the program to either include or exclude menu items associated with the courses in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include items associated with the courses in the Include/Exclude list. If you click Exclude, the program will exclude all items associated with the courses in the Include/Exclude list.

To move a menu course from the Available list to the Include/Exclude list, select the course and click . To move a course from the Include/Exclude list to the Available list, select the course and click . To move all courses from the Available list to the Include/Exclude list, click . To move all courses in the Include/Exclude list to the Available list, click .
Menu Item Menu

Menu Item Recipes Window: Sort Order Tab

On the Sort Order tab, you can print or preview your menu item recipes, as well as decide how the program will organize and sort menu items. The Sort Order tab also allows you to filter menu items based on PLU code, quantity sold, cost percentage, and sales.

Sort By area

In the Sort By area, you can sort your menu items by PLU Code, description, quantity sold, cost percentage, and total sales. You can also filter them by PLU Code, quantity sold, cost percentage, and total sales.

If you click PLU Code, the program will sort your menu items by their PLU code. You can also filter your menu items by entering a range of PLU codes in the PLU Code boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print menu items with PLU codes between 1000 and 2000.

If you click Description, the program will sort your menu items alphabetically by their check description.

If you click Quantity Sold, the program will sort your menu items by the number of items sold within the period, from most to least. You can also filter your menu items by entering a range of quantities sold in the Quantity Sold boxes.

If you click Cost %, the program will sort your menu items by their cost percentage, from most to least. You can also filter your menu items by entering a range of cost percentages in the Cost % boxes. For instance, if you enter “10” in the first box and “20” in the second box, the program will only print menu items with costs between 10% to 20% of their sale price.

If you click Sales, the program will sort your menu items by their total sales, from most to least. You can also filter your menu items by entering a range of total sales in the Sales boxes.

Period area

In the Period area, you can filter your menu items by period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on.
You can select a period from the Sales History list. The program will only list menu items that had transactions within the selected period.

**Group By area**

In the Group By area, you can set the program to group your menu items by sales type, prep type, or POS window by clicking Sales Type, Prep Type, or POS Window. If you click No Groups, the program will not group your menu items.

**Print area**

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

**Menu Item Recipes Window: Sales Type Tab**

The Sales Type tab features a filter that allows you to include or exclude menu items with specific sales types. The program will only print menu items that have a sales type listed in the Include list and will not print any menu items that have a sales type listed in the Exclude list.

**Menu Item Recipes Window: Prep Type Tab**

The Prep Type tab features a filter that allows you to include or exclude menu items with specific prep types. The program will only print menu items that have a prep type listed in the Include list and will not print any menu items that have a prep type listed in the Exclude list.

**Menu Item Recipes Window: POS Win Tab**

The POS Win (POS window) tab features a filter that allows you to include or exclude menu items of specific POS windows. If you click Include, the program will only print menu items associated with POS windows listed in the POS Window list. If you click Exclude, the program will only print menu items not associated with POS windows listed in the POS Window list.
Menu Item Menu

To move a POS window from the **Available** list to the **POS Window** list, select the POS window and click ▶️. To remove a POS window from the **POS Window** list, select the POS window and then click ⬅️. To remove all POS windows from the **POS Window** list, click ⬅️.

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Menu Item Recipes Window: Menu Item Tab

The **Menu Item** tab features a filter that allows you to include or exclude specific menu items. If you click **Include**, the program will only print menu items listed in the **Menu Item** list. If you click **Exclude**, the program will only print menu items not listed in the **Menu Item** list.

To move a menu item from the **Available** list to the **Menu Item** list, select the menu item and click ▶️. To remove a menu item from the **Menu Item** list, select the menu item and then click ⬅️. To remove all menu items from the **Menu Item** list, click ⬅️.
Menu Item Recipes Window: Course Tab

The Course tab features a filter that allows you to include or exclude menu items associated with specific menu courses.

You can set the program to either include or exclude menu items associated with the courses in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include items associated with the courses in the Include/Exclude list. If you click Exclude, the program will exclude all items associated with the courses in the Include/Exclude list.

To move a menu course from the Available list to the Include/Exclude list, select the course and click **>**. To move a course from the Include/Exclude list to the Available list, select the course and click **<**. To move all courses from the Available list to the Include/Exclude list, click ****. To move all courses in the Include/Exclude list to the Available list, click ****.
Menu Item Cost Percentage Window: Sort Order Tab

On the Sort Order tab, you can print or preview your menu item cost percentages, as well as decide how the program will organize and sort menu items. The Sort Order tab also allows you to filter menu items based on PLU code, quantity sold, cost percentage, and sales.

Sort By area

In the Sort By area, you can sort your menu items by PLU Code, description, quantity sold, cost percentage, and total sales. You can also filter them by PLU Code, quantity sold, cost percentage, and total sales.

If you click PLU Code, the program will sort your menu items by their PLU code. You can also filter your menu items by entering a range of PLU codes in the PLU Code boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print menu items with PLU codes between 1000 and 2000.

If you click Description, the program will sort your menu items alphabetically by their check description.

If you click Quantity Sold, the program will sort your menu items by the number of items sold within the period, from most to least. You can also filter your menu items by entering a range of quantities sold in the Quantity Sold boxes.

If you click Cost %, the program will sort your menu items by their cost percentage, from most to least. You can also filter your menu items by entering a range of cost percentages in the Cost % boxes. For instance, if you enter “10” in the first box and “20” in the second box, the program will only print menu items with costs between 10% to 20% of their sale price.

If you click Sales, the program will sort your menu items by their total sales, from most to least. You can also filter your menu items by entering a range of total sales in the Sales boxes.

Price Level area

The Price Level area contains the Price Level list, which allows you to filter the menu items by price level. For example, if you select a certain price level (Price
Level 1), the report will include only the items with cost percentage for price level one that fall within the specified cost percentage range.

**Group By area**

In the Group By area, you can set the program to group your menu items by sales type, prep type, or POS window by clicking Sales Type, Prep Type, or POS Window. If you click No Groups, the program will not group your menu items.

**Print area**

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

**Menu Item Cost Percentage Window: Sales Type Tab**

The Sales Type tab features a filter that allows you to include or exclude menu items with specific sales types. The program will only print menu items that have a sales type listed in the Include list and will not print any menu items that have a sales type listed in the Exclude list.

**Menu Item Cost Percentage Window: Prep Type Tab**

The Prep Type tab features a filter that allows you to include or exclude menu items with specific prep types. The program will only print menu items that have a prep type listed in the Include list and will not print any menu items that have a prep type listed in the Exclude list.

**Menu Item Cost Percentage Window: POS Win Tab**

The POS Win (POS window) tab features a filter that allows you to include or exclude menu items of specific POS windows. If you click Include, the program will only print menu items associated with POS windows listed in the POS Window list. If you click Exclude, the program will only print menu items not associated with POS windows listed in the POS Window list.
Menu Item Menu

To move a POS window from the Available list to the POS Window list, select the POS window and click \textcolor{red}{\textgreater}. To remove a POS window from the POS Window list, select the POS window and then click \textcolor{red}{\textless}. To remove all POS windows from the POS Window list, click \textcolor{red}{\textless\textless}.

Menu Item Cost Percentage Window: Menu Item Tab

The Menu Item tab features a filter that allows you to include or exclude specific menu items. If you click \textcolor{red}{Include}, the program will only print menu items listed in the Menu Item list. If you click \textcolor{red}{Exclude}, the program will only print menu items not listed in the Menu Item list.

To move a menu item from the Available list to the Menu Item list, select the menu item and click \textcolor{red}{\textgreater}. To remove a menu item from the Menu Item list, select the menu item and then click \textcolor{red}{\textless}. To remove all menu items from the Menu Item list, click \textcolor{red}{\textless\textless}. 

Menu Item Menu

Menu Item Cost Percentage Window: Course Tab

The **Course** tab features a filter that allows you to include or exclude menu items associated with specific menu courses.

You can set the program to either include or exclude menu items associated with the courses in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include items associated with the courses in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all items associated with the courses in the **Include/Exclude** list.

To move a menu course from the **Available** list to the **Include/Exclude** list, select the course and click **>**. To move a course from the **Include/Exclude** list to the **Available** list, select the course and click **<**. To move all courses from the **Available** list to the **Include/Exclude** list, click **<<**. To move all courses in the **Include/Exclude** list to the **Available** list, click **<<<**.
Menu Monthly Sales Summary Window: Sort Order Tab

On the Sort Order tab, you can print or preview your menu item monthly sales summaries, as well as decide how the program will organize and sort your menu items. The Sort Order tab also allows you to filter menu items based on PLU code.

Sort By area

In the Sort By area, you can sort your menu items by PLU code or description. You can also filter them by PLU code.

If you click PLU Code, the program will sort your menu items by their PLU code. You can also filter your menu items by entering a range of PLU codes in the PLU Code boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print menu items with PLU codes between 1000 and 2000.

If you click Description, the program will sort your menu items alphabetically by their check description.

Group By area

In the Group By area, you can set the program to group your menu items by sales type, prep type, or POS window by clicking Sales Type, Prep Type, or POS Window. If you click No Groups, the program will not group your menu items.
Report On area

In the **Report On** area, you can determine what sales information the report will feature. You can choose one of the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sales $</strong></td>
<td>The report will list sales totals for each menu item, in dollar amounts.</td>
</tr>
<tr>
<td><strong>Profit $</strong></td>
<td>The report will list profits for each menu item, in dollar amounts. The program calculates a menu item’s profit by subtracting its total cost from its total sales.</td>
</tr>
<tr>
<td><strong>Cost %</strong></td>
<td>The report will list cost percentages for each menu item. The cost percentage represents the ratio of the cost of a menu item to its sale price, as a percentage.</td>
</tr>
<tr>
<td><strong>Cost $</strong></td>
<td>The report will list cost totals for each menu item, in dollar amounts.</td>
</tr>
<tr>
<td><strong>Quantity Sold</strong></td>
<td>The report will list the total quantity of each menu item sold within the specified period.</td>
</tr>
</tbody>
</table>

Total area

In the **Total** area, you can set the program to include a total for each month or an average for each month at the bottom of the report. Click **Total** to include a total for each month, or click **Average** to include an average for each month.

Print area

In the **Print** area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the **Preview** option and then click the **Print** command below, the program will display a preview of the report as it will appear when it prints. If you click the **Print** option and then click the **Print** command below, the program will print a copy of the report.

Menu Monthly Sales Summary Window: Sales Type Tab

The **Sales Type** tab features a filter that allows you to include or exclude menu items with specific sales types. The program will only print menu items that have a sales type listed in the **Include** list and will not print any menu items that have a sales type listed in the **Exclude** list.
Menu Monthly Sales Summary Window: Prep Type Tab

The Prep Type tab features a filter that allows you to include or exclude menu items with specific prep types. The program will only print menu items that have a prep type listed in the Include list and will not print any menu items that have a prep type listed in the Exclude list.

Menu Monthly Sales Summary Window: POS Win Tab

The POS Win (POS window) tab features a filter that allows you to include or exclude menu items of specific POS windows. The program will only print menu items that you have associated with a POS window listed in the Include list and will not print any menu items that you have associated with a POS window listed in the Exclude list.

Menu Monthly Sales Summary Window: Menu Item Tab

The Menu Item tab features a filter that allows you to include or exclude specific menu items. If you click Include, the program will only print menu items listed in the Menu Item list. If you click Exclude, the program will only print menu items not listed in the Menu Item list.

To move a menu item from the Available list to the Menu Item list, select the menu item and click ➔. To remove a menu item from the Menu Item list, select the menu item and then click ✖️. To remove all menu items from the Menu Item list, click ✖️ all.
Menu Monthly Sales Summary Window: Course Tab

The **Course** tab features a filter that allows you to include or exclude menu items associated with specific menu courses.

![Course Tab Image]

You can set the program to either include or exclude menu items associated with the courses in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include items associated with the courses in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all items associated with the courses in the **Include/Exclude** list.

To move a menu course from the **Available** list to the **Include/Exclude** list, select the course and click ****. To move a course from the **Include/Exclude** list to the **Available** list, select the course and click ****. To move all courses from the **Available** list to the **Include/Exclude** list, click ****. To move all courses in the **Include/Exclude** list to the **Available** list, click ****.

Menu Daily Sales Summary Window: Sort Order Tab

On the **Sort Order** tab, you can print or preview your menu item daily sales summaries, as well as decide how the program will organize and sort your menu items. The **Sort Order** tab also allows you to filter menu items based on PLU code.

**Sort By area**

In the **Sort By** area, you can sort your menu items by PLU Code or description. You can also filter them by PLU code.
If you click **PLU Code**, the program will sort your menu items by their PLU code. You can also filter your menu items by entering a range of PLU codes in the **PLU Code** boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print menu items with PLU codes between 1000 and 2000.

If you click **Description**, the program will sort your menu items alphabetically by their check description.

### Group By area

In the **Group By** area, you can set the program to group your menu items by sales type, prep type, or POS window by clicking **Sales Type**, **Prep Type**, or **POS Window**. If you click **No Groups**, the program will not group your menu items.

### Report On area

In the **Report On** area, you can determine what sales information the report will feature. You can choose one of the following options:

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</tr>
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<tbody>
<tr>
<td><strong>Profit $</strong></td>
<td>The report will list profits for each menu item, in dollar amounts. The program calculates a menu item’s profit by subtracting its total cost from its total sales.</td>
</tr>
<tr>
<td><strong>Cost %</strong></td>
<td>The report will list cost percentages for each menu item. The cost percentage represents the ratio of the cost of a menu item to its sale price, as a percentage.</td>
</tr>
<tr>
<td><strong>Cost $</strong></td>
<td>The report will list cost totals for each menu item, in dollar amounts.</td>
</tr>
<tr>
<td><strong>Quantity Sold</strong></td>
<td>The report will list the total quantity of each menu item sold within the specified period.</td>
</tr>
</tbody>
</table>

### Total area

In the **Total** area, you can set the program to include a total for each month or an average for each month at the bottom of the report. Click **Total** to include a total for each month, or click **Average** to include an average for each month.
Print area

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

Menu Daily Sales Summary Window: Sales Type Tab

The Sales Type tab features a filter that allows you to include or exclude menu items with specific sales types. The program will only print menu items that have a sales type listed in the Include list and will not print any menu items that have a sales type listed in the Exclude list.

Menu Daily Sales Summary Window: Prep Type Tab

The Prep Type tab features a filter that allows you to include or exclude menu items with specific prep types. The program will only print menu items that have a prep type listed in the Include list and will not print any menu items that have a prep type listed in the Exclude list.

Menu Daily Sales Summary Window: POS Win Tab

The POS Win (POS window) tab features a filter that allows you to include or exclude menu items of specific POS windows. The program will only print menu items that you have associated with a POS window listed in the Include list and will not print any menu items that you have associated with a POS window listed in the Exclude list.

Menu Daily Sales Summary Window: Menu Item Tab

The Menu Item tab features a filter that allows you to include or exclude specific menu items. If you click Include, the program will only print menu items listed in the Menu Item list. If you click Exclude, the program will only print menu items not listed in the Menu Item list.

To move a menu item from the Available list to the Menu Item list, select the menu item and click . To remove a menu item from the Menu Item list,
Menu Item Menu

select the menu item and then click . To remove all menu items from the Menu Item list, click .

Menu Daily Sales Summary Window: Course Tab

The Course tab features a filter that allows you to include or exclude menu items associated with specific menu courses.

You can set the program to either include or exclude menu items associated with the courses in the Include/Exclude list by clicking include or Exclude. If you click Include, the program will only include items associated with the courses in the Include/Exclude list. If you click Exclude, the program will exclude all items associated with the courses in the Include/Exclude list.

To move a menu course from the Available list to the Include/Exclude list, select the course and click . To move a course from the Include/Exclude list to the Available list, select the course and click . To move all courses from
the **Available** list to the **Include/Exclude** list, click ➔. To move all courses in the **Include/Exclude** list to the **Available** list, click ←.

## Menu Sales Analysis Summary Window: Sort Order Tab

On the **Sort Order** tab, you can print or preview your menu item sales analysis summaries, as well as decide how the program will organize and sort your menu items. The **Sort Order** tab also allows you to filter menu items based on PLU code.

### Sort By area

In the **Sort By** area, you can sort your menu items by PLU Code or description. You can also filter them by PLU code.

If you click **PLU Code**, the program will sort your menu items by their PLU code. You can also filter your menu items by entering a range of PLU codes in the **PLU Code** boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print menu items with PLU codes between 1000 and 2000.

If you click **Description**, the program will sort your menu items alphabetically by their check description.

### Group By area

In the **Group By** area, you can set the program to group your menu items by sales type, prep type, or POS window by clicking **Sales Type**, **Prep Type**, or **POS Window**. If you click **No Groups**, the program will not group your menu items.
Report On area

In the Report On area, you can determine what sales information the report will feature. You can choose one of the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales $</td>
<td>The report will list sales totals for each menu item, in dollar amounts.</td>
</tr>
<tr>
<td>Profit $</td>
<td>The report will list profits for each menu item, in dollar amounts. The program calculates a menu item’s profit by subtracting its total cost from its total sales.</td>
</tr>
<tr>
<td>Cost %</td>
<td>The report will list cost percentages for each menu item. The cost percentage represents the ratio of the cost of a menu item to its sale price, as a percentage.</td>
</tr>
<tr>
<td>Cost $</td>
<td>The report will list cost totals for each menu item, in dollar amounts.</td>
</tr>
<tr>
<td>Quantity Sold</td>
<td>The report will list the total quantity of each menu item sold within the specified period.</td>
</tr>
</tbody>
</table>

Total area

In the Total area, you can set the program to include a total for each month or an average for each month at the bottom of the report. Click Total to include a total for each month, or click Average to include an average for each month.

Print area

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

Menu Sales Analysis Summary Window: Sales Type Tab

The Sales Type tab features a filter that allows you to include or exclude menu items with specific sales types. The program will only print menu items that have a sales type listed in the Include list and will not print any menu items that have a sales type listed in the Exclude list.
**Menu Sales Analysis Summary Window: Prep Type Tab**

The Prep Type tab features a filter that allows you to include or exclude menu items with specific prep types. The program will only print menu items that have a prep type listed in the Include list and will not print any menu items that have a prep type listed in the Exclude list.

**Menu Sales Analysis Summary Window: POS Win Tab**

The POS Win (POS window) tab features a filter that allows you to include or exclude menu items of specific POS windows. The program will only print menu items that you have associated with a POS window listed in the Include list and will not print any menu items that you have associated with a POS window listed in the Exclude list.

**Menu Sales Analysis Summary Window: Menu Item Tab**

The Menu Item tab features a filter that allows you to include or exclude specific menu items. If you click Include, the program will only print menu items listed in the Menu Item list. If you click Exclude, the program will only print menu items not listed in the Menu Item list.

To move a menu item from the Available list to the Menu Item list, select the menu item and click \( \rightarrow \). To remove a menu item from the Menu Item list, select the menu item and then click \( \leftarrow \). To remove all menu items from the Menu Item list, click \( \leftarrow \).
Menu Sales Analysis Summary Window: Course Tab

The **Course** tab features a filter that allows you to include or exclude menu items associated with specific menu courses.

You can set the program to either include or exclude menu items associated with the courses in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include items associated with the courses in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all items associated with the courses in the **Include/Exclude** list.

To move a menu course from the **Available** list to the **Include/Exclude** list, select the course and click **>**. To move a course from the **Include/Exclude** list to the **Available** list, select the course and click **<**. To move all courses from the **Available** list to the **Include/Exclude** list, click **>>**. To move all courses in the **Include/Exclude** list to the **Available** list, click **<<**.
Each of the following sections contain an example of each report that you can generate from the **Menu Reports** submenu. We used demo data to generate each report. When necessary, we have included a description of how to calculate the values that you see in each column.

The **Sales $** column displays the dollar amount of the items sold for the date range or period you provide.

The **Cost $** column displays the cost of the menu items (the value to the right of the *Cost* box on the *Main* tab of the Menu Item Maintenance window multiplied by the value in the Quantity Sold column).

The **Profit $** column displays the value of the Sales $ column minus the Cost $ column (Sales $ column - Cost $ column).

The **Cost %** column displays the value in the Cost $ column divided by the Sales $ column (Cost $ column ÷ Sales $ column).

The **Cost % 1-5** columns display (for each respective column) the value of its Price column divided by the Cost column, as in Price 1 column ÷ Cost column = Cost % 1 column or Price 2 column ÷ Cost column = Cost % 2 column, and so on.
Menu Price List Report

The Menu Price List report displays a list of each menu item’s PLU number, description, UPC bar code (if any), and Prices 1 through 5. It also identifies which tax rates each item uses. You can find all of this information on the Main tab of the Menu Item Maintenance window.

<table>
<thead>
<tr>
<th>PLU</th>
<th>Menu Item</th>
<th>UPC Code</th>
<th>Toppings</th>
<th>Prices</th>
<th>Plate Cost</th>
<th>Tax Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>2 EGGS &amp; BACON</td>
<td>854357</td>
<td>0</td>
<td>3.50</td>
<td>3.50</td>
<td>0.09</td>
</tr>
<tr>
<td>0002</td>
<td>PLAIN OMELETTE</td>
<td>756095</td>
<td>0</td>
<td>2.50</td>
<td>2.50</td>
<td>0.00</td>
</tr>
<tr>
<td>1003</td>
<td>CHEESE OMELETTE</td>
<td>154857</td>
<td>0</td>
<td>3.25</td>
<td>3.25</td>
<td>0.00</td>
</tr>
<tr>
<td>1008</td>
<td>PANCAKES</td>
<td>804786</td>
<td>0</td>
<td>3.95</td>
<td>3.95</td>
<td>0.00</td>
</tr>
</tbody>
</table>

The **PLU** column displays the menu item PLU (Price Look-Up) number.

The **Menu Item** column displays the name of the menu item (the name entered in the **Description** box of the Menu Item Maintenance window).

The **UPC Code** column displays the UPC code. You can use it for items that you sell by weight. You can scan the label to determine the appropriate charge.

The **Toppings** column displays the number of toppings for the item.

The **Prices** area displays the five (5) price levels.

The **Plate Cost** column displays the plate cost entered in the **Recipe** tab of the Menu Item Maintenance window.

The **Tax Rate** column displays which of the four (4) tax rates are applicable to the menu item.

Number of items listed: 10
Menu Item Menu

Menu Item List Report

The Menu Item List report displays a list of each menu item’s PLU number, description, preparation description, sales type, preparation type, modifier mode, quantity mode, and sales mode. You can find all of this information on the Main tab of the Menu Item Maintenance window.

<table>
<thead>
<tr>
<th>PLU</th>
<th>Menu Item</th>
<th>Prep Desc</th>
<th>Sales Type</th>
<th>Prep Type</th>
<th>Modifier</th>
<th>Quantity</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>2 EGG &amp; BACO</td>
<td>2 EGG &amp; BACO</td>
<td>BREAK</td>
<td>Kitchen</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1001</td>
<td>2 EGG AM &amp; BACO</td>
<td>1 &amp; BACON</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1002</td>
<td>2 EGG AM</td>
<td>2 EGG AM</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1003</td>
<td>CHEESE OMELE</td>
<td>CHEESE OMELE</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1004</td>
<td>HAM &amp; CHEESE</td>
<td>HAM &amp; CHEESE</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1005</td>
<td>SP WILLEM SP</td>
<td>HAM &amp; CHEESE</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1006</td>
<td>HAMY NY CM</td>
<td>HAMY NY CM</td>
<td>BREAK</td>
<td>Kitchen</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1007</td>
<td>DENVER OMELE</td>
<td>DENVER OMELE</td>
<td>BREAK</td>
<td>Kitchen</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1008</td>
<td>PANCAKES</td>
<td>PANCAKES</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1009</td>
<td>WAFLE</td>
<td>WAFLE</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1010</td>
<td>STEAK AND O</td>
<td>STEAK AND O</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1011</td>
<td>HAM STEAK &amp;</td>
<td>HAM STEAK &amp;</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1012</td>
<td>FRUIT &amp; YOGUR</td>
<td>FRUIT &amp; YOGUR</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>1013</td>
<td>FRENCH TOAST</td>
<td>FRENCH TOAST</td>
<td>BREAK</td>
<td>CAS BRNF</td>
<td>Normal</td>
<td>Normal</td>
<td></td>
</tr>
</tbody>
</table>

**DD CAFE**

Menu Item List

Sorted By: PLU Code

The PLU column displays the menu item PLU (Price Look-Up) number.

The **Menu Item** column displays the name of the menu item (the name entered in the **Description** box of the Menu Item Maintenance window).

The **Prep Desc** column displays the prep description that you enter in the Menu Item Maintenance window. The program uses the menu item name by default.

The **Sales Type** column displays the menu item sales type.

The **Prep Type** column displays the prep type associated with the menu item.

The **Modifier** column displays the modifier type you have associated with the item.

The **Quantity** column displays the quantity mode selected, how staff members enter quantity.

The **Sales** column displays the predefined sales mode selected.

Menu Modifier List Report

The Menu Modifier List report displays a list of menu items and the modifier POS windows that they are associated with. You can find this information on the Main and Windows tabs of the Menu Item Maintenance window.
### Menu Item Menu

The **PLU** column displays each menu item’s PLU (Price Look-Up) number.

The **Menu Item** column displays the name of each menu item.

The **Modifier Windows** column displays the modifier POS window associated with each menu item.

The **Quantity Sold** column displays the number of items sold.

The **Cost %** column displays the average cost percentage based on the cost of the item and prices that you sold the item for.

The **Sales** column displays the dollar value of items sold.

**Menu Sales Analysis Report**

The Menu Sales Analysis report displays a list of menu items and their sales. The report includes each menu item’s PLU number, description, quantity sold, sales in dollars, cost in dollars, profit in dollars, and cost as a percentage of each item’s price.
The **PLU** column displays each menu item PLU (Price Look-Up) number.

The **Menu Item** column displays the name of each menu item.

The **Quantity Sold** column displays the quantity of each menu item sold.

The **Sales $** column displays each menu item’s dollar amount of sales.

The **Cost $** column displays the cost of producing each menu item.

The **Profit $** column displays the amount of profit that the restaurant acquired from each item. The number in the **Profit $** column is the number in the **Sales $** column minus the number in the **Cost $** column.

The **Cost %** column displays each menu item’s percentage of cost in relation to the amount of sales.

### Menu Item Recipes Report

The Menu Item Recipes report is a list of menu items with recipes, including the PLU number, description, preparation description, plate cost, quantity of each recipe item, and unit of each ingredient associated with a menu item. (This report is only available if you use the Digital Dining Inventory program.) Digital Dining prints (or previews) each recipe on a separate page.
The **PLU** column displays each menu item’s PLU (Price Look-Up) number.

The **Menu Item** column displays the name of each menu item.

The **Prep Desc** column displays the prep description of each menu item (as entered in the **Prep Description** box in the Menu Item Maintenance window).

The **Plate Cost** column displays each menu item’s plate cost (as entered in the **Recipe** tab of the Menu Item Maintenance window).

## Menu Cost Percentage Report

The Menu Item Cost Percentage report displays a list of each menu item’s PLU number, description, cost, all five price levels (including those set to 0.00), and all five cost percentages. You can find all of this information on the **Main** tab of the Menu Item Maintenance window.

The **PLU** column displays each menu item’s PLU (Price Look-Up) number.
The **Menu Item** column displays the name of each menu item (the name entered in the **Description** box of the Menu Item Maintenance window).

The **Price 1-5** columns display each menu item’s price for each price level.

The **Cost % 1-5** columns display each menu item’s price/cost ratio for each price levels.

**Menu Monthly Sales Summary Report**

The Menu Monthly Sales Summary displays a list of each menu item’s PLU number, description, monthly sales (in dollars), and yearly sales totals (in dollars). This example shows the sales totals. By changing your choice in the **Report On** area on the **Sort Order** tab of the Menu Monthly Sales Summary window, you can also have the report show the same columns with the values for profit totals, cost totals, cost percentages, or quantity sold.

<table>
<thead>
<tr>
<th>PLU</th>
<th>Menu Item</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>2 EGG'S &amp; B</td>
<td>0.00</td>
<td>0.00</td>
<td>3.50</td>
<td>0.00</td>
<td>0.00</td>
<td>2.50</td>
<td>0.00</td>
<td>0.00</td>
<td>3.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>10.00</td>
</tr>
<tr>
<td>1001</td>
<td>1 EGG AND</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1002</td>
<td>PLAIN OME</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1003</td>
<td>CHEESE OME</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1004</td>
<td>HAM &amp; CHEESE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1005</td>
<td>BURGER WITH CHEESE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1006</td>
<td>HAM &amp; CHEESE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1007</td>
<td>DINNER &amp; BUR</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1008</td>
<td>PANCAKES</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1009</td>
<td>WRAP &amp; CAFE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1010</td>
<td>STEAK &amp; CAFE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1011</td>
<td>BURGER &amp; CAFE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1012</td>
<td>FRIT &amp; CAFE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1013</td>
<td>FRENCH &amp; CAFE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Grand Average: 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

Number of items listed: 14

The **PLU** column displays each menu item’s PLU (Price Look-Up) number.

The **Menu Item** column displays the name of each menu item.

The **Totals** column displays the total sales amount of each menu item.

**Menu Daily Sales Summary Report**

The Menu Daily Sales Summary report displays a list of each menu item’s PLU number, description, daily sales (in dollars), and weekly sales (in dollars). This example shows the sales totals. By changing your choice in the **Report On** area on
the **Sort Order** tab of the Menu Daily Sales Summary window, you can also have the report show the same columns with the values for profit totals, cost totals, cost percentages, or quantity sold.

<table>
<thead>
<tr>
<th>PLU</th>
<th>Menu Item</th>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
<th>Weekly Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>2 EGGS &amp; BACON</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>3.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>3.00</td>
</tr>
<tr>
<td>1001</td>
<td>1 EGG AND BACON</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1002</td>
<td>PLAIN OMELETTE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1003</td>
<td>CHEESE OMELETTE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1004</td>
<td>HAM &amp; OH OMELE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1005</td>
<td>SR WILLIAM SPEC</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>3.50</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>3.50</td>
</tr>
<tr>
<td>1006</td>
<td>HENRY VII OMELE</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>4.10</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>4.10</td>
</tr>
<tr>
<td>1007</td>
<td>DENVER OMELETT</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1008</td>
<td>PANCAKES$0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1009</td>
<td>WAFFLE$0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1010</td>
<td>STEAK &amp; EGGS</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1011</td>
<td>HAM STEAK &amp; EGG</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1012</td>
<td>FRUIT &amp; YOGURT</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1013</td>
<td>FRENCH TOAST</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Number of items listed 1,116

*** End of Report ***

The **PLU** column displays each menu item’s PLU (Price Look-Up) number.

The **Menu Item** column displays each menu item’s name.

The **Weekly Totals** column displays the total sales amount of each menu item.

### Menu Sales Analysis Summary Report

The Menu Sales Analysis Summary report displays a list of each menu item’s PLU number, description, week to date sales, year to date sales, and period to date sales. This example shows the sales totals. By changing your choice in the **Report On** area on the **Sort Order** tab of the Menu Sales Analysis Summary window, you can also have the report show the same columns with the values for profit totals, cost totals, cost percentages, or quantity sold.
The **PLU** column displays each menu item’s PLU (Price Look-Up) number.

The **Menu Item** column displays each menu item’s name.

The **Week To Date** column displays the dollar amount of sales from the beginning of the week to the current date.

The **Month To Date** column displays the dollar amount of sales from the beginning of the month to the current date.

The **Year To Date** column displays the dollar amount of sales from the beginning of the year to the current date.

The **Period To Date** column displays the dollar amount of sales from the beginning of the period to the current date.

### Change Item Out List

The **Change Item Out List** utility allows you to edit the Item Out List, which displays at the POS when staff members log in. You can use the Item Out List to alert staff of certain menu items that are low or unavailable.
To add an item to the Item Out List, click in the **Item** box of the **Menu Item** area. In the Find Menu Items window, click a menu item and then click **OK**. Type an appropriate quantity in the **Count** box. Click **Save** to save the change(s) and keep the current window open and active, or click **Exit** to save the change(s) and close the current window.

To remove an item from the Item Out List, double-click the item you wish to remove. This item will appear in the **Item** box. Click the **PLU** box and delete the item’s PLU number. Click **Save** to save the change(s) and keep the current window open and active, or click **Exit** to save the change(s) and close the current window.
If you cannot leave the floor to access the Back Office, you can modify the Item-Out List directly at the POS with the Change Item-Out List register option (for more information, see the POS User’s Guide).

Menu Utilities

The **Menu Item** menu includes several menu utilities, which allow you to perform various setup and maintenance tasks, such as resetting the period-to-date for all your menu items, building POS windows, and setting the default price level for the system.

**Menu Item PTD Reset**

By using the Menu Item PTD Reset utility, you can clear the period-to-date sales totals on the **Sales** tab of the Menu Item Maintenance window. After you reset it, the program will add the PTD sales totals from that point on. This utility will reset all of your menu item records simultaneously. It will not clear any of the other sales information.

**Set System Price**

The **Set System Price** utility allows you to set a default price level for the Digital Dining system. The program has five price levels, and you can associate a register definition with any of these five price levels or to the default system price. Any register definition with a price setting of **System Price** will use the default price level that you set in the Set System Price utility. For instance, if you edit the price setting of a breakfast service register definition to **System Price**, and you set the system price to **Price Level Two**, then the program will charge “Level Two” prices for menu items ordered in your breakfast register.

**Build POS Windows**

The **Build POS Windows** utility allows you to build POS windows with a build method of Manual. If you have any partially built POS windows in the POS
Windows Maintenance window, the Build POS Windows utility can automatically finish building them.

All POS windows with a build method of Manual will appear in the Build POS Windows list. To remove a single POS window from the Build POS Windows list, select the POS window and click **X**. To remove all POS windows from the Build POS Windows list, click **X**. To add a single POS window from the Don't Build list to the Build POS Windows list, select the POS window and click **>**. To add all POS windows from the Don't Build list to the Build POS Windows list, click **>>**. Click Build to build all of the POS windows listed in the Build POS Windows list. After the Back Office program builds the POS windows, they will be available at the POS.

In the POS Windows Maintenance window, if you create a POS window with a Manual build method, you can add some menu items to the Windows Layout and leave some in the Items Without a Position list.

If you add such a POS window to the Build POS Windows list (in the Build POS Window utility) and click Build, the program will automatically add the remaining menu items in the Items Without a Position list to the POS windows.
Menu Export Utility

The Menu Export utility allows you to create an .xml file containing menu item data from the Back Office data files. If you plan to use a menu board display system, or if you plan to use the Digital Dining Online Export system to receive orders from a third-party online menu service, you can use the Menu Export utility to create an export file containing the menu information necessary to set up those services.

If you are setting up a menu board display system, select Menu Board in the Menu Item menu. When you run the utility, the program will create an .xml export file containing information necessary for a menu display system, such as item description, price, POS window, sales type, and prep type.

If you are setting up an online menu service, select Menu Full in the Menu Item menu. When you run the utility, the program will create an .xml export file containing information necessary for an online menu service. The Menu Full export file contains more menu item data than the Menu Board export file, such as taxes, prep instructions, and modifiers.

In the Menu Export list, you can select a menu export definition. When you run the utility, the program uses the settings of the export definition to select the menu item data to include in the export file. If you click Define, the program will open the Menu Export Maintenance window. If you click Export, the program will create a menu export file that includes the data specified in the selected export definition.

Menu Export Maintenance Window

The Menu Export Maintenance window allows you to select which menu items to include in the menu export files and where the files should be generated. In the Menu Export Maintenance window, you can create a menu export definition that specifies one or more POS windows. Later, if you run the Menu Export utility using the export definition, the program will create a menu export file that only contains data for menu items in the specified POS windows. By creating an export definition with specific POS windows, you can set the Menu Export utility to only include data for the menu items you need for the menu display or online menu service.
Export Destination list

The Export Destination list allows you to specify the destination of the menu export file. When you run the utility, the program will create the export file and send it to the destination you specify here.

If you want the program to generate the export file in a directory on the local computer, select Directory in the Export Destination list and then type the path to the appropriate directory in the Directory box or click and select an appropriate path in the Browse for Folder window.

If you want the program to upload the export file to an FTP site, select FTP in the Export Destination list and then select an FTP location in the FTP list. The FTP list includes all of the FTP locations you have created in the FTP Location Maintenance window.

If you want the program to send the contents of the export file to an email address, select Email in the Export Destination list and then type the email address in the Email box. The program will transmit the data of the export file in the body of the email. If you want the program to send the export file as a separate XML file attached to an email, select Email Attachment in the Export Destination list and then type the email address in the Email as Attachment box.
Register Definition list

If you select a register definition in the Register Definition list, the program will add all of the POS windows associated with that register definition into the Include list. You can add or remove POS windows in the Include list afterwards, if necessary.

Price Level list

When the program creates a menu export file, it can only include one price for each menu item in the file. Therefore, before creating the export file, you must select an appropriate price level for the menu items that will be exported. The Price Level list allows you to select the price level for the menu items. If you select a price level in the Price Level list, the program will apply the price from that price level to each menu item in the export file. If you select System Price, the program will apply the price from the price level that corresponds to the system price (for more information, see “Set System Price” on page 137).

Tax Table list

If you select a tax table in the Tax Table list, the program will apply the tax rates of the selected tax table to the menu items in the menu export file. When the program exports the menu item information, it will include the tax rates from the selected tax table in the price of each menu item record. If you select None, the program will not include any tax information with the exported menu item records.

POS Window list

The POS Window list allows you to select the POS windows whose menu items will be added to the XML export file. If you add a POS window to the Include list, the utility will include the data of each menu item in that POS window to the menu export file when you run the utility.

To add a POS window to the Include list, select a POS window and click ➔. To remove a POS window from the Include list, select the POS window and then click ←. To remove all POS windows from the Include list, click «.
Menu Setup

The **Menu Item** menu includes five menu setup windows, which you can use to create various records (such as sales types, prep types, and POS windows) before creating menu items in the Menu Item Maintenance window.

<table>
<thead>
<tr>
<th>Which window?</th>
<th>Used for what?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu Main Group Maintenance window</td>
<td>In this window, you can create menu main groups, which are groups of similar menu sales types. By grouping similar sales types into main groups, you can sort and filter menu item reports in a variety of ways.</td>
</tr>
<tr>
<td>Menu Sales Type Maintenance window</td>
<td>In this window, you can create menu sales types, which are groups of similar menu items (such as “Appetizers” or “Desserts”). Once you create a sales type, you can use it to filter your menu item reports.</td>
</tr>
<tr>
<td>Menu Prep Type Maintenance window</td>
<td>In this window, you can create menu prep (preparation) types, which are groups of menu items prepared in a particular location.</td>
</tr>
<tr>
<td>POS Window Maintenance window</td>
<td>In this window, you can create POS windows, which are windows accessible at the POS listing particular groups of menu items.</td>
</tr>
<tr>
<td>Tare Maintenance window</td>
<td>In this window, you can create tares, each with an associated tare weight. A tare is a food product container, and a tare weight represents the weight of an empty tare.</td>
</tr>
<tr>
<td>Menu Item User Definable Fields Maintenance window</td>
<td>In this window, you can define up to five controls that will display on the <strong>User Fields</strong> tab of the Menu Item Maintenance window.</td>
</tr>
<tr>
<td>Coursing Maintenance window</td>
<td>In this window, you can define up to 32 courses, which allow you to group menu items in a single order into separate courses, such as appetizers, entrees, and so on. A server can enter an entire order in the POS at once, and then send each course to the prep printers manually.</td>
</tr>
</tbody>
</table>

Using these setup maintenance windows, you can create records that you will later associate with menu item records. Ideally, you would create these records before creating new menu items, but you can add or edit these records at any time.
Menu Main Group Maintenance Window: Main Tab

Menu main groups are groups of similar menu sales types. By grouping similar sales types into main groups, you can sort and filter menu item reports in a variety of ways. For instance, you might create several menu sales types (such as “Pasta Entrées,” “Meat Entrées,” and “Seafood Entrées”) that belong to the same main group (“Entrées”). Later, you can create a menu item report that can collect sales totals on separate sales types or on a main group.

Using the Main tab of the Menu Main Group Maintenance window, you can create up to nine main groups. When you enter a main group in the Item Description box, the program captures the first eight characters of the description (including spaces) and displays these characters in the Short Description box. You can change the Short Description, or you can keep the system-defined, eight-character description. The text that appears in the Short Description box is the description that will show on reports. If this description is not clear enough for you, specify a Short Description of your own.

Main Group Type list

The Main Group Type list allows you to associate each menu main group with one of three general main group types (Food, Beverage, or Other). By associating the menu main groups with group types, you can sort or group your menu item reports by group type.

Menu Main Group Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
You can create menu sales types (such as “Appetizers” or “Desserts”) in the Menu Sales Type Maintenance window, which you can then associate with your menu items. Once you have created a sales type, you can use it to create reports which generate sales totals for specific sales types. For instance, if you associate all your dessert items with a “Desserts” sales type, you can then generate a report adding sales from all of your dessert menu items.

Using the **Main** tab of the Menu Sales Type Maintenance window, you can create the bulk of the settings for each of the 24 menu sales types you can create. When you enter a menu sales type name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.

**Main Group list**

To associate the sales type with a menu main group, click the appropriate main group in the **Main Group** list. This list includes all of the main groups you have created in the Menu Main Group Maintenance window.

If you do not see a menu main group that you want to use for a particular sales type, then you can double-click the “Main Group” label to open the Menu Main Group Maintenance window. With the Menu Main Group Maintenance window open and active, you can add or modify your main groups. After you save and close the Menu Main Group Maintenance window, Digital Dining will make the new or modified main group available in the **Main Group** list.
Check Printing Mode list

Select a printing mode for each sales type to determine how menu items in this sales type will print on the check. You can select one of the following printing modes:

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Standard</strong></td>
<td>Priced menu items will appear on the check, while non-priced items will not appear on the check.</td>
</tr>
<tr>
<td><strong>Order Consolidate Price</strong></td>
<td>No modifiers will appear on the check, even if they are priced. The program will add the price of any modifiers to the price of the modified menu item. (The program will also consolidate the price in the Sales Reports.)</td>
</tr>
<tr>
<td><strong>Order Consolidate &amp; Print</strong></td>
<td>All modifiers will appear on the check, priced or non-priced. The program will add the price of any modifiers to the price of the modified menu item, but the price of individual modifiers will not appear on the check. (The program will also consolidate the price in the Sales Reports.)</td>
</tr>
<tr>
<td><strong>Print on Check</strong></td>
<td>All menu items will appear on the check, priced or non-priced.</td>
</tr>
<tr>
<td><strong>Check Consolidate Price</strong></td>
<td>No modifiers will appear on the check, even if they are priced. The program will add the price of any modifiers to the price of the modified menu item. (The program will not consolidate the price in the Sales Reports. Sales Reports will list prices of modifiers and modified items separately.)</td>
</tr>
<tr>
<td><strong>Check Consolidate &amp; Print</strong></td>
<td>All modifiers will appear on the check, priced or non-priced. The program will add the price of any modifiers to the price of the modified menu item, but the price of individual modifiers will not appear on the check. (The program will not consolidate the price in the Sales Reports. Sales Reports will list prices of modifiers and modified items separately.)</td>
</tr>
</tbody>
</table>

Beverage check box

Select the Beverage check box to designate all the menu items associated with this sales type as a beverage. You can set the program to require a password approval at the POS for checks without any beverages.
**Entrée check box**

Select the *Entrée* check box to designate all the menu items associated with this sales type as an entrée. You can use this feature to list entrée counts on your sales reports.

**Menu Course list**

The *Menu Course* list allows you to associate a sales type with a menu course. The *Menu Course* list includes all of the courses you have created in the Coursing Maintenance window. You can select an appropriate menu course, or you can select *None* for sales types that you do not want to include in a menu course.

**Menu Sales Type Maintenance Window: Image Tab**

In the *Images* tab, you can associate a sales type with a button image, which will display as the sales type’s button in the POS. The *Current Image* list includes all of the sales type button images you have created in the Button Image Maintenance window. (The *Current Image* list only includes button images designated as *Sales Type* or *Any* in the *Image Category* list of the Button Image Maintenance window). To associate a sales type with a button image, select an image in the *Current Image* list. The program will display the selected image in the tab.

You can also search for an appropriate button image by clicking *Find*. If you click *Find*, the program will display the available images as thumbnails in the Image Viewer window. You can browse these images and click the appropriate one.

To clear an associated image, select *None*. If you select *None*, then program will create a default button image using the sales type’s description.
Menu Sales Type Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Menu Prep Type Maintenance Window: Main Tab

A prep (preparation) type is a group of menu items that is prepared in a particular location. Many restaurants prepare different types of menu items in different locations. For instance, your restaurant might prepare food items such as entrées in a kitchen, while preparing alcoholic drink items at a bar. Therefore, you should associate alcoholic drinks with a different prep type than entrées.

You can associate your menu items with a prep type in the Menu Item Maintenance window, but you must first create your prep types in the Menu Prep Type Maintenance window. You can create different prep types, associate them with different printers, and then associate your menu items with particular prep types. You can use these prep types to print prep tickets for different menu items in different prep stations. For instance, if your restaurant has a bar, you can create a separate prep group for alcoholic drinks. Then, when a customer orders a food item and an alcoholic drink, the food item prep ticket will print in the kitchen while the drink item prints at the bar. You can also generate menu item reports that sort, group, and/or filter menu items by their prep type.

Using the **Main** tab of the Menu Prep Type Maintenance window, you can create the bulk of the settings for each of the 24 menu prep types you can create. When you enter a menu prep type name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.
**Prep Time (minutes) box**

You can enter a preparation time, in minutes. Your cooks should prepare any menu item of this prep group within the designated prep time. You can use this feature for groups of special items that your cooks need to prepare quickly, such as “15 minute” lunch items.

**Print Order list**

By assigning different print orders to different prep types, you can control the order in which menu items from different prep types print on the prep ticket. Items from prep types with smaller print numbers will print before items from prep types with larger print numbers. For instance, you can assign a prep type called “Entrées” a print order of “2”, and assign another prep type called “Desserts” a print order of “4”. Then, when a prep ticket prints, items from the “Entrées” prep type will print above the items from the “Desserts” prep type.

**Modifier Window box**

You can associate a prep type with a window of non-forced modifiers by selecting the window in the Modifier Window box. If you order a menu item associated with this prep type at the POS and then tap Modifier in the Command Panel, this window of modifiers will open. You can create modifier windows in the POS Window Maintenance window.
**Summary Mode list**

You can set the program to include a summary of items from this prep type on the top of the prep ticket, which can help the cook gather the necessary components of the order. For instance, you might create a menu item for steak (such as “10oz sirloin”) and associate it with a prep type set to include a summary on the prep ticket. If you order three of the same steaks on a single check, the program will print a summary at the top of the prep ticket (such as “3 10oz sirloin”). When the prep ticket prints, your cook can look at the summary immediately and know how many steaks to prepare. After retrieving the steaks, the cook can then view the rest of the prep ticket to see how to prepare each of the steaks.

You can set the program to include a summary of the items from this prep type on the prep ticket by clicking **Include on Summary**. Click **Exclude from Summary** to set the program to exclude a summary on the prep ticket.

**Note**

To add an order summary to a prep ticket, add the `@{ORDER_SUMMARY}` token to the layout of the prep ticket (for more information on prep ticket layouts, see the *Digital Dining Setup User’s Guide*).

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**Include in Reorders check box**

By clicking the **Include in Reorders** check box, you can set the POS to reorder any menu items associated with this prep type when you use the **Reorder** feature in the POS. In the POS order screen, when you tap **Reorder** in the Command panel, the POS automatically reorders any menu items on the check that are associated with prep types set to include in reorders. If you set up a prep type of commonly reordered items (such as drinks) to include in reorders, a server can reorder a whole round for everyone on a check with a single tap.

**Include in Ingredients check box**

You can use the **Include in Ingredients** check box to designate certain menu items as ingredients for other menu items. If you select the **Include in Ingredients** check box, the program will recognize any menu item associated with the prep type as an ingredient menu item. In the POS, if you use the `@{INGREDIENTS}` token in a prep ticket layout that includes menu items with ingredients, the token will list the menu item and its ingredient menu items.
Delivery Label list

The **Delivery Label** list allows you to determine if Digital Dining prints delivery prep labels for menu items associated with this prep group and, if so, how many. If you click **Not Labeled**, the POS does not print prep labels for items associated with this prep type. If you click **One Per Item**, the POS prints a separate prep label for each item on the check associated with this prep type. If you click **One Per Prep Type**, the POS prints one prep label that includes all items on the check associated with this prep type. (In other words, the POS might print two or more prep labels if the check includes items from different prep types.) If you click **One Per Order**, the POS prints a single prep label that includes all the items in the order.

Defaults list

The **Defaults** list allows you to associate a POS window of non-forced modifiers with a set of default toppings. The **Defaults** list only displays if you select a POS window with a Pick and Choose window type in the **Modifier Window** list. If the POS window has one or more sets of default toppings defined (in the **Defaults** tab of the POS Window Maintenance window), the names of those topping sets will display in the **Defaults** list. You can select one of the default topping sets in the list, or you can select **None**. If you want the POS to apply one of the POS window’s default topping sets to the non-forced modifiers window, select the appropriate set in the **Defaults** list. If you do not want the POS to apply a default topping set, click **None**.

Later, at the POS, if you order an item associated with this prep type and then tap **Modifier** in the Command panel, the POS will display the modifier window that you selected in the **Modifier Window** list, and it will automatically select the modifier items from the default toppings set that you selected in the **Defaults** list.

Menu Course list

The **Menu Course** list allows you to associate a prep type with a menu course. The **Menu Course** list includes all of the courses you have created in the Coursing Maintenance window. You can select an appropriate menu course, or you can select **None** for prep types that you do not want to include in a menu course.

Menu Prep Type Maintenance Window: Printers Tab

The **Printers** tab allows you to set how the POS routes prep tickets for menu items of this prep type. For each prep type, you can assign one or more printer definitions to each prep group. At the POS, when you order a menu item associated with this
preparation type from a register definition in a specific prep group, the program will send
the menu item’s prep ticket to the printer definitions you have assigned.

For example, you might associate all of your entrée menu items with a prep type
called “Entrées.” You might also have a register in your main dining area that is
associated with a prep group called “Dining Room.” And you might want prep
tickets for all the entrées to print at a printer definition called “Kitchen.” To set the
program to print prep tickets for the entrées at the kitchen printer, you should open
the “Entrées” prep type record in the Menu Prep Type Maintenance window, click
the **Printers** tab, select the “Dining Room” prep group in the **Prep Group** list, and
then add the “Kitchen” printer definition to the **Included** list.

For some menu items, you might not want a prep ticket to print at the same location
if you order it from a different prep group. For instance, if a customer in the dining
room orders an alcoholic drink, you would probably want the prep ticket to print at
the bar. However, if a customer orders an alcoholic drink from the bar itself, you
probably won’t want a prep ticket to print at all; the bartender will take the order and
immediately prepare the drink. Therefore, the program allows you to assign separate
printer definitions for different prep groups. By doing so, you can set the program to
print a prep ticket at one location if it is ordered from one register, and print the prep
ticket in a different location (or not print at all) if it is ordered from a different
register.

The **Prep Group** list includes all of the prep groups you have created in the Prep
Group Maintenance window (in the Setup program). The **Available** list includes all
of the printer definitions you have created in the Printer Definition Maintenance
window (in the Setup program).

To assign a printer definition to a prep group, select the prep group in the **Prep
Group** list. After you select an appropriate prep group, you can add a printer
definition that you want to print prep tickets for this prep group from the **Available**
list to the **Included** list. To add a printer definition to the **Included** list, select the
printer definition and click . To add all printer definitions to the **Included**
list, click . To remove a printer definition from the **Included** list, select
the printer definition and click . To remove all printer definitions from the Included list, click .

For each prep group, you can add Phantom Printer to the Included list. The Phantom Printer record enables you to associate a menu item (with a “forced” modifier window) with a prep type that does not print a prep ticket. If you associate a menu item with a forced modifier window (on the Windows tab of the Menu Item Maintenance window), the POS will only display the modifier window if the menu item is also associated with a prep type that is associated with a printer. If you associate a menu item with a forced modifier window, but you do not want its prep type to actually print a prep ticket, you can associate the prep type with the Phantom Printer record. The POS will still display the forced modifier window, but it will not send a prep ticket to any real printer.

Menu Prep Type Maintenance Window: Image Tab

In the Images tab, you can associate a prep type with a button image, which will display as the prep type’s button in the POS. The Current Image list includes all of the prep type button images you have created in the Button Image Maintenance window. (The Current Image list only includes button images designated as Prep Type or Any in the Image Category list of the Button Image Maintenance window). To associate a prep type with a button image, select an image in the Current Image list. The program will display the selected image in the tab.

You can also search for an appropriate button image by clicking Find. If you click Find, the program will display the available images as thumbnails in the Image Viewer window. You can browse these images and click the appropriate one.

To clear an associated image, select None. If you select None, then program will create a default button image using the prep type’s description.
Menu Prep Type Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

POS Window Maintenance Window: Main Tab

The POS Window Maintenance window allows you to create POS windows, as well as add, delete, and rearrange menu items (as buttons) within them. You can create a POS window for a group of similar menu items (such as “Appetizers”), and add one or more appropriate menu items to that POS window. Later, this POS window will display at the POS as a screen containing one or more buttons, each button representing a menu item that you added. By creating POS windows for your menu items, you create a means by which your staff can access these menu items at the POS and add them to checks.

Using the Main tab of the POS Window Maintenance window, you can create up to 9,999 POS windows. When you enter a POS window name in the Item Description box, the system captures the first eight characters of the description (including spaces) and displays these characters in the Short Description box.

After you create a new POS window, you can add menu items to it by adding menu items to the Item Without a Position list. After adding one or more appropriate
menu items to the **Item Without a Position** list, you can add them to the **Window Layout** box. To add a menu item to the **Item Without a Position** list, click **Find** and select a menu item from the Find Item to Insert window. The menu item will appear in the **Item Without a Position** list. To remove a menu item from the **Item Without a Position** list, select the item and click **Remove**.

To move a menu item from the **Item Without a Position** list to the **Window Layout** box, select that item in the **Item Without a Position** list and then click **Insert**. To move an item from the **Window Layout** box to the **Item Without a Position** list, select the item in the **Window Layout** box and click [[1]]. To replace an item in the **Item Without a Position** list with an item in the **Window Layout** box, select both items and click **Replace**. To move all items in the **Item Without a Position** list to the **Window Layout** box, click [[2]]. To move all items in the **Window Layout** box to the **Item Without a Position** list, click [[3]].

Once you add menu items to the **Window Layout** box, you can modify their layout by dragging them to more preferable positions within the **Window Layout** box. You can also remove all blank spaces in the **Window Layout** box by clicking **Remove Blank Spots**. However you arrange menu items in a POS window, the program will display the menu items in the same arrangement at the POS.
The **Items Without a Position** list also includes an item labeled “BLANK”. These “BLANK” items will appear as empty spaces in the POS window, and you can add as many of them to the **Windows Layout** box as you need. If you add more than 24 menu items to a POS window, the Back Office program will create a second page to the POS window. The program will also add a “NEXT” item to the bottom right corner of the **Window Layout** box. If you double-click the “NEXT” item, the second page of the POS window will display, containing a “PREV” item in the upper left corner of the **Window Layout** box. The “NEXT” and “PREV” items will appear as buttons in the POS window, allowing your staff to access the different pages of the POS window as separate screens.
**Window Type list**

To allow you to create modifier windows specifically for toppings, we have added the **Window Type** list to the POS Window Maintenance window. The **Window Type** list allows you to set the window type, which determines how the POS operates when you access this POS window. If you select **Regular** and then access the window at the POS, the program will allow you to select one item in the POS window and then close the window. If you select **Pick and Choose** and then access the window at the POS, the program will allow you to select more than one item in the window and will not close the window until you tap the **Done** button in the Selection panel.

To create a POS window for topping modifiers, you must select **Pick and Choose** to enable staff members to select more than one topping at the POS. The **Pick and Choose** option allows you to access the **Part Type** list. If you click the **Pick and Choose** in the **Window Type** list, the **Part Type** list becomes active.

**Part Type list**

We have also added the **Part Type** list to the POS Window Maintenance window. If you plan to use this POS window as a window of modifiers, the **Part Type** list allows you to set which controls will display in the POS window’s Top panel. If you select **Whole**, the POS will not display any buttons in the POS window’s top panel. If you select **Halves**, the POS window’s top panel will display the **Whole**, **1st Half** and **2nd Half** buttons, allowing you to apply a modifier to the whole main item or to only one half of the main item. If you select **Quarters**, the POS window’s top panel will display the **Whole** button, the **1st** and **2nd Half** buttons, and the **1st Quarter**, **2nd Quarter**, **3rd Quarter**, and **4th Quarter** buttons, allowing you to add a modifier to the whole main item, a half of the main item, or a specific quarter of the main item.
If you are configuring a POS window that uses the Pick-and-Choose window type, you can use the **Number of Item Picks** boxes to specify a minimum and maximum limit to the number of modifier items that you can add to the main item. If you type a number in the **Min** box, the program will require the server to add a number of modifiers from the Pick-and-Choose list that is equal to or greater than the number in the **Min** box. (The POS will not display the **Done** button until you select the minimum required number of modifiers.) If you type a number in the **Max** box, the program will require the server to add a number of modifiers from the Pick-and-Choose list that is equal to or less than the number in the **Max** box.

The **Number of Item Picks** range boxes are only available if you select **Pick and Choose** in the Window Type list. If you enter “0” or leave the boxes empty, the POS will not apply any limit to the number of modifiers that may be ordered.
Build Method list

Click Automatic if you want the program to arrange the menu items in the POS Windows Layout box automatically. If you click Automatic, the program will arrange the menu items based on the settings in the Sort By and Group By lists. Click Manual if you want to arrange the menu items in the POS Windows Layout box manually. When you save a POS window, the Back Office program builds the POS window and makes it available at the POS immediately.

Sort By list

In the Sort By area, you can set the program to sort your menu items by PLU code or check description. If you click PLU Code, the program will list your menu items numerically by PLU code (starting with the item with the lowest PLU code), from top to bottom and left to right. If you click Description, the program will list your menu items alphabetically by check description, from top to bottom and left to right.

Group By list

In the Group By area, you can set the program to group your menu items by sales type or prep type. If you click Sales Type, the program will group your menu items by sales type, from top to bottom and left to right. If you click Prep Type, the program will group your menu items alphabetically by prep type, from top to bottom and left to right. If you click None, the program will not group your menu items.

POS Window Maintenance Window: Image Tab

In the Images tab, you can associate a POS window with a button image, which will display as the POS window’s button in the POS. The Current Image list includes all of the POS window button images you have created in the Button Image Maintenance window. (The Current Image list only includes button images designated as POS Window or Any in the Image Category list of the Button Image Maintenance window). To associate a POS window with a button image, select an image in the Current Image list. The program will display the selected image in the tab.

You can also search for an appropriate button image by clicking Find. If you click Find, the program will display the available images as thumbnails in the Image Viewer window. You can browse these images and click the appropriate one.

To clear an associated image, select None. If you select None, then program will create a default button image using the POS window’s description.
POS Window Maintenance Window: Defaults Tab

The **Defaults** tab allows you to set one or more menu items as default selections within a POS window. When a server opens this POS window, any menu items set as defaults will automatically display as selected. The server can immediately accept these default selections or change them as necessary.

For instance, you might create a POS window of modifiers for a turkey sub sandwich, and you might want to select some of the standard toppings as default modifiers (such as lettuce, tomato, and mayonnaise). You can select the lettuce, tomato, and mayonnaise menu items to display as automatically selected. Later, when a server opens the turkey sub item, the modifier window will open and the lettuce, tomato and mayonnaise menu items will automatically display as selected. The server can then remove any of these modifiers or add other modifiers to the order.
The **Defaults** list will include every menu item you add to the POS window in the **Main** tab, and each item in the list will feature a check box beside it. By clicking a menu item’s check box, you set that menu item as a default selection in the POS window.

*Note* The **Defaults** tab only appears if you click the **Pick and Choose** check box on the **Main** tab of the POS Windows Maintenance window.

**POS Window Maintenance Window: Memo Tab**

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

**Tare Maintenance Window: Main Tab**

A tare is a food product container, and tare weight represents the weight of an empty tare. If you sell any menu items in units of weight (such as “pint of coleslaw”), you can create a tare to represent the container for that item, and then record a weight for
that tare. Later, when a customer buys that item at the POS, the program will deduct the weight of the tare from the weight of the menu item before calculating the price.

Using the **Main** tab of the Tare Maintenance window, you can create up to 24 tares. When you enter a tare name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box. Enter the weight of the tare in the **Weight** box.

![Tare Maintenance Window: Memo Tab](image)

**Tare Maintenance Window: Memo Tab**

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

**Menu Item User Definable Fields Maintenance Window**

The Menu Item User Definable Fields Maintenance window allows you to define up to five controls that will display on the **User Fields** tab of the Menu Item Maintenance window. You can create extra fields to record additional information about menu items, such as calorie counts, sodium, and fat.

The Menu Item User Definable Fields Maintenance window features five **Label/Tag** boxes, with accompanying **Data Type** lists and the **Length** boxes. The **Label/Tag** boxes allow you to enter the label that will display with each field. The **Data Type** lists allow you to select the type of data (**Text** or **Numbers**) that you will enter in each new field. The **Length** boxes allow you to set the desired number of characters that can be entered in each new field.
After you finish defining the new fields, click Save to save your settings, or click Exit to save your settings and exit the window. After you define the fields, you can use them on the User Fields tab of the Menu Item Maintenance window.

Coursing Maintenance Window: Main Tab

The Coursing Maintenance window allows you to define up to 32 courses, which allow you to group menu items in a single order into separate courses, such as appetizers, entrees, salads, desserts, and so on. A server can enter an entire order at the POS at once, and then send each course to the prep printers. As the customers progress with their meal, the server can send the remaining courses to the prep printers at their appropriate times.

For each course, you must enter a description, a short description, and a two-letter symbol. The window also features the Sort button, which allows you to keep the courses in the correct order. This order also determines the order in which the program will list the courses at the POS and the prep order in the kitchen. This window also features the None option by default. It allows you to order the menu items that do not require coursing (such as drinks, and so on) normally.
The **Main** tab contains the settings that you must enter for each course. Then, the program will display the courses that you create using this window in the **Menu Course** list of the Menu Sales Type Maintenance window, Menu Prep Type Maintenance, and the Menu Item Maintenance window.

### Course Symbol box

The **Course Symbol** box allows you to enter the two-letter symbol that will designate the course at the POS. When you add menu items to an order in the POS, the program will display the course of each menu item in the check.

### Coursing Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Overview

The Staff menu of the Back Office program allows you to create and maintain staff records. Here you can create staff member records for each of your employees and define each member’s payroll and security information. You can associate each staff member record with specific staff departments, security positions, and overtime methods, as well as security passwords and payroll ID numbers.

In this chapter, we will discuss how you can create and maintain staff member records in the Back Office program, which will allow your staff to log in at the POS. We will also discuss how you can associate your staff members with one or more staff departments, how to set and maintain their payroll information, and how to generate staff reports that will help you monitor and analyze your staff information.

Staff Member Maintenance Window

You can create staff member records in the Staff Member Maintenance window. Here you can define your staff member records, associate them with staff departments, rating levels, security positions, and photographs. You can also review a staff member’s sales and receipts history. The Staff Member Maintenance window contains numerous tabs to help you record any necessary information about your staff members.

The Find Active Only check box allows you to filter inactive staff member records from the Find Staff Member window. If you click the Find Active Only check box and then click Find, the program opens the Find Staff Records window and lists only active staff member records (that is, staff members associated with an active work status). If you clear the Find Active Only check box and then click Find, the program opens the Find Staff Records window and lists both active and inactive staff member records.
Staff Member Maintenance Window: Main Tab

Using the Main tab of the Staff Member Maintenance window, you can create the bulk of the settings for each of the 9,999 staff members you can create. When you add a new staff member record, the program will use the first available staff ID number, but you can use a different staff ID number by manually typing one in the Staff ID box.

Report Name box

Enter a name for the staff member in the Report Name box. When you enter a staff member’s last name in the Last Name box, the system captures the first eight characters of the name and displays these characters in the Report Name box. You can keep this default report name, or you can enter a new report name. When staff members log into any of the Digital Dining programs (other than the POS), they should use this name as their Digital Dining Access name. The Back Office program will also display this name on staff reports.

Note

You cannot enter a report name that you have previously entered as a restricted name in the Restricted Names Maintenance window. If you try to enter a restricted name, the Back Office program will display an error message (for more information, see “Restricted Names Maintenance Window: Main Tab” on page 264).
**POS Name box**

Enter a name for the staff member in the **POS Name** box. When you enter a staff member’s first name in the **First Name** box, the system captures the first eight characters of the name and displays these characters in the **POS Name** box. You can keep this default POS name, or you can enter a new POS name. The program will display this name on the POS register screens. You can also add this name to check, receipt, and credit slip layouts.

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**Note**  
You cannot enter a POS name that you have previously entered as a restricted name in the Restricted Names Maintenance window. If you try to enter a restricted name, the Back Office program will display an error message (for more information, see “Restricted Names Maintenance Window: Main Tab” on page 264).

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**Security list**

To associate a staff member with a security position, click a security position from this list. Any security positions that you have created in the Security Position Maintenance window of the Digital Dining Setup program will appear in the **Security** list. By setting a staff member’s security position, you determine which functions the staff member can perform at the POS, as well as what records they can view and/or edit in the Back Office, Setup, Inventory, and Frequent Diner/Delivery programs (for more information on security positions, see the **Digital Dining Setup User’s Guide**).

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**Regular Password Program**

If you click **Regular Password Program**, the Staff Member Maintenance window displays the **Regular Password** area.
Staff Menu

If you click Regular Password Program ... ... the window displays the Regular Password area.

**Strong Password Program**

If you click Regular Password Program, the Staff Member Maintenance window displays the **Regular Password** area.

If you click Strong Password Program ... ... the window displays the **Strong Password** area.
**Work Status list**

You can select the staff member’s work status in the **Work Status** list. If you do not see a work status that you want to use for a particular staff member, then you can double-click the “Work Status” label to open the Work Status Maintenance window. With the Work Status Maintenance window open and active, you can add or modify your work status. After you save and close the Work Status Maintenance window, Digital Dining will make the new or modified work status available in the **Work Status** list. If you select an inactive work status, the Inactive Staff banner will display (for more information, see “Work Status Maintenance Window: Main Tab” on page 266).

![Screen shot of the Work Status Maintenance window]

If you select an “inactive” work status in the Work Status list ... ... the Inactive Staff banner will display.

**Home Street Address box**

You can type the staff member’s residential street address in the **Home Street Address** box.

**City box**

You can type the staff member’s city of residence in the **City** box.

**State box**

You can type the staff member’s state of residence in the **State** box.
**Staff Menu**

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**ZIP Code box**

You can type the staff member’s ZIP code (or postal code) in the **ZIP Code** box.

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**Home Phone box**

You can type the staff member’s home telephone number in the **Home Phone** box.

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**Other Phone box**

If a staff member has a telephone number other than a home phone (such as a cell phone or fax), you can type it in the **Other Phone** box.

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**E-mail/Web box**

If a staff member has an e-mail account or a personal website, you can type the email address or URL in the **E-mail/Web** box.

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**Staff ID Card**

If you issue staff ID swipe cards to your staff members, you can associate a swipe card’s number with a staff member by clicking **Program**. The Program Staff Card window will open, and you can enter the swipe card’s number in the **Swipe Card** box. Click **OK** to save the number or **Cancel** to cancel the operation and close the window.

![Program Staff Card window](image)

To delete a staff member’s swipe card number, click **Clear**. When you save a swipe card ID number in the Program Staff Card window, the “Staff Card” label will display as “*Staff”. When you clear a swipe card number, the “*Staff” label will reappear as “Staff Card”.

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Staff Menu

If the label displays as “Staff ID Card”, then the staff member has no swipe card number.

If the label displays as “Staff ID Card “*, then the staff member does have a swipe card number.

Regular Password area

If you use the regular passwords (rather than strong passwords), you can use the Regular Password area to set a staff member’s password. Staff members use this password to log into the Digital Dining administrative programs such as Back Office, Frequent Dining/Delivery, and Inventory. They also use this password to log into the POS, unless you use staff ID security cards or a fingerprint identification device. Staff members can also use this password to perform any password-protected POS function permitted by their security position.

To access the Regular Password area, click Regular Password Program. To set a staff member’s password, type the password into the Password box, then type the password again in the Confirm Password box. Click Save to save the password, or click Cancel to clear the password.

Strong Password area

If you use the strong passwords (rather than regular passwords), you can use the Strong Password area to set a staff member’s password. Like regular passwords, staff members use strong password to log into the Digital Dining administrative programs. (Staff members must still use regular passwords – not strong passwords – to log into the POS.) You can use strong passwords, which are more complex than regular passwords, to provide stronger security for the Digital Dining administrative programs.
To access the **Strong Password** area, click **Strong Password Program**. To set a staff member’s password, type the password into the **Password** box, then type the password again in the **Confirm Password** box.

Strong passwords are more complex than regular passwords and must meet certain criteria. They must have at least eight characters, and they must use three of these four acceptable character categories:

- Uppercase letters (A, B, C, and so on)
- Lowercase letters (a, b, c, and so on)
- Numbers (1, 2, 3, and so on)
- Symbols (@, #, $, and so on)

Click **Save** to save the password, or click **Cancel** to clear the password.

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**Staff Member Maintenance Window: Personal Tab**

The **Personal** tab allows you to record additional personal information about each staff member, such as gender, ethnicity, and various important dates. The Personal tab features a grid that lists various types of important dates (date of birth, date of hire, and so on). The grid includes a row for each date type you have created in the Date Types Maintenance window (for more information, see “Date Type Maintenance Window: Main Tab” on page 270). Each row includes a **Description** box, a **Date** box, and a **Notes** box. The **Description** box simply describes the date type represented in the row. In the **Date** box, you can type the appropriate date for the staff member. In the **Note** box, you can type any additional comments, if necessary.
Staff Menu

Gender area

The Gender area allows you to select the staff member’s gender by clicking either Male or Female.

Ethnicity list

You can select the staff member’s ethnicity from the Ethnicity list. If you do not see an ethnicity record that you want to use for a particular staff member record, then you can double-click the “Ethnicity” label to open the Ethnicity Maintenance window. With the Ethnicity Maintenance window open and active, you can add or modify ethnicity records. After you save and close the Ethnicity Maintenance window, Digital Dining will make the new or modified ethnicity record available in the Ethnicity list.

Staff Member Maintenance Window: Payroll Tab

The Payroll tab allows you to record important payroll information about each staff member, such as social security number, overtime method, federal and state tax withholding allowances, pay mode, and marital status.
Staff Menu

Social Security # box

You can type the staff member’s social security number in the Social Security # box.

When you review an existing staff record, the program does not display the actual Social Security number. The program will display the actual numbers as you type them into a new employee’s record (to help you avoid data entry errors), but as soon as you save the record and move to the next record, the program will replace the numbers in the Social Security # box with asterisks.

If you click the View SSN button, the program will display the staff member’s Social Security number (instead of asterisks) in the Social Security # box. You can then edit the number, if necessary. The View SSN button is only visible to staff members with a security position that has a “5-Add” or higher access level for staff member records. (Staff members with a lower access level for staff member records will not see the button.)

Payroll ID box

If you use an external payroll program or payroll interface, you can enter a staff member’s payroll ID number in the Payroll ID box. (Many payroll programs use a staff member’s social security number as a payroll ID number.) You can enter a number of up to ten characters, without hyphens.
Overtime Method list

To associate a staff member with an overtime method, click an overtime method from this list. Any overtime methods that you have created in the Overtime Method Maintenance window will appear in the Overtime Method list.

If you do not see an overtime method that you want to use for a particular staff member, then you can double-click the “Overtime Method” label to open the Overtime Method Maintenance window. With the Overtime Method Maintenance window open and active, you can add or modify your overtime methods. After you save and close the Overtime Method Maintenance window, Digital Dining will make the new or modified overtime method available in the Overtime Method list (for more information, see “Staff Overtime Method Maintenance Window: Main Tab” on page 261).

Withholding area

The Withholding area allows you to record tax withholding information for each staff member. In the Allowances boxes, you can type the staff member’s total number of federal and state allowances. If the staff member has any additional deductions for federal taxes, you can type the amount (per pay period) in the Fed Extra Deduct $ box. If the staff member has any additional deductions for state taxes, you can type the amount (per pay period) in the State Extra Deduct $ box.

Pay Mode area

You can select the staff member’s pay mode, either salary or hourly, in the Pay Mode area.

Marital Status area

You can select the staff member’s federal income tax filing status in the Marital Status area.

Medical Benefits area

If a staff member is enrolled in any medical insurance benefits offered by the restaurant, you can select one or more coverage classifications (Employee, Spouse, and/or Children) in the Medical Benefits area. The Medical Benefits area is only available if you’ve associated the staff member with a work status that is set as “Benefits Available.”
Staff Member Maintenance Window: Avail Tab

On the Avail tab, you can record which days and day parts each staff member can work. The Avail tab features 24 check boxes, divided by seven columns (each representing a day of the week) and four rows (each representing a day part). You can click one of these check boxes to designate that the staff member is available to work that particular day part of that particular day. For instance, if the staff member can work Monday mornings, you should click the check box in the Monday column and the Morning row. Click Set All to select all of the 24 check boxes. If you have selected all of the 24 day parts, you can click Clear All to clear all of the 24 check boxes.

If you wish to rename any of the four day parts, then you can double-click the label of any one of the day parts to open the Staff Day Part Maintenance window. With the Staff Day Part Maintenance window open and active, you can modify the Short Description of any of the four day parts. After you save and close the Staff Day Part Maintenance window, Digital Dining will display the modified day part label.

Staff Member Maintenance Window: Dept Tab

On the Dept tab, you can associate your staff members with one or more staff departments, as well as edit their hourly and overtime pay rates for each department. The Dept tab features a grid listing all of the staff departments associated with that staff member. Click New to add a new line to the grid. A new line will appear in the grid. To remove a staff department from the grid, select the line on the grid you wish to remove and then click Delete.
To protect its labor scheduling and payroll history files, Digital Dining prohibits you from deleting staff departments from the grid if the staff member has ever worked a shift in that department in the past or is scheduled to work a shift in that department in the future.

**Primary check box**

Each line in the grid features a **Primary** check box. If the staff member belongs to more than one staff department, you can designate one as the member’s primary department by clicking the **Primary** check box corresponding to the staff member’s primary department. When the staff member logs in at the POS, the program will automatically highlight the button representing his or her primary department. If the staff member belongs to only one department, the Back Office program will automatically designate it as the member’s primary department.

**Department list**

Each line in the grid features a **Department** list, which allows you to select the staff department you want to associate with the staff member. To select a staff department, click the **Department** list. The Find Staff Department window will display, listing all of the staff departments you’ve created in the Staff Department Maintenance window. Select an appropriate staff department and click **OK**.
Active check box

Each line in the grid includes an Active check box. For each staff department in which the staff member can currently work, check that staff department’s corresponding Active check box. If the staff member is no longer available to work in a staff department, you can clear the department’s corresponding Active check box. When the staff member logs in at the POS, the program will only display buttons representing the staff member’s active departments.

Rating Level list

Each line in the grid includes a Rating Level list, allowing you to select a staff rating level for each staff member per department. To associate a staff member with a rating level, click a rating level from this list. Any rating levels that you have created in the Rating Level Maintenance window will appear in the Rating list (for more information, see “Rating Level Maintenance Window: Main Tab” on page 265).

If you do not see a rating level that you want to use for a particular staff department, then you can double-click the “Rating Level” label to open the Rating Level Maintenance window. With the Rating Level Maintenance window open and active, you can add or modify your rating levels. After you save and close the Rating Level Maintenance window, Digital Dining will make the new or modified rating level available in the Rating Level list.

Changed box

Each line in the grid includes a Changed box, which displays the date that the information in the line was last changed.

Regular box

Each line in the grid includes a Regular box, allowing you to record each staff member’s pay rate for regular hours. When you click a staff department in a Department list, the program will automatically enter the default rate for regular rate associated with that staff department (as set in the Staff Department Maintenance window). You can manually edit these rates, if necessary.

Overtime box

Each line in the grid includes an Overtime box, allowing you to record each staff member’s pay rate for overtime hours. When you click a staff department in a Department list, the program will automatically enter the default rate for overtime
hours associated with that staff department (as set in the Staff Department Maintenance window). You can manually edit these rates, if necessary.

If you associate a staff member with an overtime method that calculates overtime as a percentage of the staff member’s regular rate, Digital Dining will automatically enter an overtime pay rate in the Overtime box when you enter an amount in the Regular box. Overtime rates calculated automatically based on an overtime method display in the Overtime box in blue text (for more information, see “Staff Overtime Method Maintenance Window: Main Tab” on page 261).

**On Call box**

Each line in the grid includes an On Call box, allowing you to record each staff member’s pay rate for hours spent on call. When you click a staff department in a Department list, the program will automatically enter the default rate for hours on call associated with that staff department (as set in the Staff Department Maintenance window). You can manually edit these rates, if necessary.

**Vacation Rate box**

You can set vacation pay rates for each staff member and credit them with retroactive or other payments by typing each staff member’s hourly rate of vacation pay in the Vacation Rate box.

**Staff Member Maintenance Window: Picture Tab**

The Picture tab allows you to associate a staff member record with a graphic file, such as a photograph of the staff member. After you associate a staff member record with the staff member’s picture, this picture will display each time the staff member logs in at the POS.

To associate a graphic file with a staff member record, click Import. In the Import Picture window, select the graphic file you want to associate with the staff member. (The program displays the graphic in the Picture tab.) To remove a graphic that is associated with a staff member, click Clear. To export a copy of the graphic to a new location, click Export. The Back Office program will support most graphic file formats, including .bmp, .jpg, and .jpeg.
Staff Menu

**Staff Member Maintenance Window: Sales Tab**

The *Sales* tab displays a history of sales totals for the staff member. The tab includes totals for each menu main group type (food, beverage, and other), as well as total number of covers and the date of the period’s end. The tab lists totals for each of the past 12 months, each of the past 7 days, week to date, month to date, year to date, and the period to date.

**Note**

You can reset the period-to-date for all your staff member records by using the Staff PTD Reset utility (for more information, see “Staff PTD Reset” on page 247).

**Staff Member Maintenance Window: Receipts Tab**

The *Receipts* tab displays a history of receipt totals for the staff member. The tab includes totals for cash and non-cash receipts, as well as charge tips, cash tips, and the date of the period’s end. The tab lists totals for each of the past 12 months, each of the past 7 days, week to date, month to date, year to date, and the period to date.

**Note**

You can reset the period-to-date for all your staff member records by using the Staff PTD Reset utility (for more information, see “Staff PTD Reset” on page 247).
Staff Menu

Staff Member Maintenance Window: Message Tab

On the Message tab, you can set various controls for sending messages to specific staff members. In the DDMail box, you can type a message for a specific staff member, which the POS program will display in the Display panel when the staff member logs in. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs.

POS Security Notifications area

If you set up the program to send automated security notifications to staff members, you can use the settings in the POS Security Notifications area to set the cell phone information of the staff members that will receive the notifications.

In the Cell Phone box, type the number of the staff member’s cell phone. When the program sends an automated security notification, it will send it as a text message to this number. In the Cell Provider list, select the service provider of the staff member’s cell phone.

In the When To Notify list, you can determine when staff members can receive security notifications on their cell phones. If you select While clocked in, the program will only send security notifications to the designated cell phone when the staff member is clock in. If you select Always, the program will always send security notifications to the staff member, even if the staff member is not clocked in.
Staff Member Maintenance Window: Browser Tab

The **Browser** tab allows you to set each of the Digital Dining administrative programs (Back Office, Inventory, Frequent Diner, and Labor Scheduling) to load and display a website in its background when a staff member runs the program.

The tab includes a browser box for each of the four Digital Dining programs. If you type the URL of a valid website in one of these boxes, that website will display in the background when the staff member runs the program. For instance, if you type a URL in the **Back Office Browser Page** box, the Back Office program will access that webpage and display it when the staff member logs into the Back Office program. (This feature requires that your network have access to the Internet.)

This feature can be handy for various reasons. For instance, you could set the Inventory program to access and display the webpage of a food service vendor (such as SYSCO), allowing you to quickly access an online database to search for product information. If you are a dealer, you could set the program to display your dealership’s website. You can also use these boxes to display documents on the workstation’s local drive by typing a path (such as C:\My Computer\Inventory.doc) instead of a URL.

**Back Office Browser Page box**

In the **Back Office Browser Page** box, you can type the URL of any valid website. Later, when you run the Back Office program, the program will display that website in the program’s background.
**Inventory Browser Page box**

In the **Inventory Browser Page** box, you can type the URL of any valid website. Later, when you run the Inventory program, the program will display that website in the program’s background.

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**Frequent Diner Browser Page box**

In the **Frequent Diner Browser Page** box, you can type the URL of any valid website. Later, when you run the Frequent Diner/Delivery program, the program will display that website in the program’s background.

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**Labor Scheduling Browser Page box**

In the **Labor Scheduling Browser Page** box, you can type the URL of any valid website. Later, when you run the Labor Scheduling program, the program will display that website in the program’s background.

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**Staff Member Maintenance Window: Memo Tab**

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

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**Staff Reports**

The **Staff** menu includes six reports devoted to staff member records. All of these reports list staff members (by name and staff ID), but each one includes different information about your staff. You can group, sort, or filter each of these reports in a variety of ways. Using these reports, you can collect lists of staff members and addresses or examine the sales history of your staff members.
<table>
<thead>
<tr>
<th>Report Name</th>
<th>Report Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff List Report</td>
<td>A list of staff members with home addresses, including building, street, city, state, zip code, home phone number, other phone number, and payroll ID.</td>
</tr>
<tr>
<td>Staff Phone List Report</td>
<td>A list of staff members with phone numbers (home and other).</td>
</tr>
<tr>
<td>Staff Sales Analysis Report</td>
<td>A list of staff members with their sales totals, including totals for each menu main group type (food, beverage, and other), as well as their total and average number of covers.</td>
</tr>
<tr>
<td>Staff Tip Report</td>
<td>A list of staff members with their total sales and tips, including cash sales, other sales, total sales, charge tips, cash tips, total tips, minimum tips, and variance.</td>
</tr>
<tr>
<td>Staff Department List Report</td>
<td>A list of staff members with their primary staff departments, as well as their hourly and overtime pay rates.</td>
</tr>
<tr>
<td>Staff Availability Report</td>
<td>A list of staff members with their available days and day parts.</td>
</tr>
<tr>
<td>Security Transaction Report</td>
<td>A list of changes to any record in the Digital Dining Back Office and Setup programs, including the specific actions performed, the date and time the changes were performed, and the name of the staff members who made the changes.</td>
</tr>
</tbody>
</table>

**Staff List Report Window: Sort Order Tab**

On the **Sort Order** tab, you can print or preview your staff lists, as well as decide how the program will organize and sort staff member records. The **Sort Order** tab also allows you to filter staff member records based on staff ID, payroll ID, average number of covers, total sales, activity, and primary staff department.

**Sort By area**

In the **Sort By** area, you can sort your staff members by last name, staff ID number, payroll ID number, average number of covers, or total sales. You can also filter them by staff ID number, payroll ID number, average number of covers, total sales, activity, or primary department.
If you click **Last Name**, the program will sort your staff members by their last name.

If you click **Staff ID**, the program will sort your staff members by their staff ID number. You can also filter your staff members by entering a range of staff ID numbers in the **Staff ID** boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print staff members with staff ID numbers between 100 and 200.

If you click **Payroll ID**, the program will sort your staff members by their payroll ID number. You can also filter your staff members by entering a range of payroll ID numbers in the **Payroll ID** boxes.

If you click **Avg Cover**, the program will sort your staff members by their average number of covers. You can also filter your staff members by entering a range of average covers in the **Avg Cover** boxes.

If you click **Sales**, the program will sort your staff members by their total sales. You can also filter your staff members by entering a range of total sales in the **Sales** boxes.

If you select the **Active Only** check box, the program will only include active staff members. If you clear the check box, the program will include both active and inactive staff members.

If you group the report by staff department, you can set the program to list staff member records in each of their associated staff departments or only their primary departments. If you select the **Primary Department Only** check box, the program will only list staff member records by their primary department. If you clear the check box, the program will list staff member records in each of their associated departments.

You can only click the **Primary Department Only** check box if you first click the **Department** option in the **Group By** area. If you do not set the program to group your staff members by department, then you cannot click the **Primary Department Only** check box.

### Period area

In the **Period** area, you can filter your staff members by a period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on. You can select a period from the **Sales History** list.
Staff Menu

Group By area

In the Group By area, you can set the program to group your staff members by staff department, rating level, or security position. If you click Department, the program will print all the staff members grouped by their staff departments. If you click Rating, the program will print all the staff members grouped by their staff rating levels. If you click Security, the program will print all the staff members grouped by their staff security position. If you click No Groups, the program will not group your staff members before it prints.

Print area

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

Staff List Report Window: Department Tab

The Department tab features a filter that allows you to include or exclude staff members of specific staff departments. The program will only print staff members associated with staff departments in the Include list and will not print any staff members associated with staff departments in the Exclude list. If any staff members are associated with staff departments in both the Include list and Exclude list, the program will include them.

Staff List Report Window: Rating Tab

The Rating tab features a filter that allows you to include or exclude staff members of specific rating levels. The program will only print staff members associated with rating levels in the Include list and will not print any staff members associated with rating levels in the Exclude list.

Staff List Report Window: Security Tab

The Security tab features a filter that allows you to include or exclude staff members with specific staff security positions. The program will only print staff members associated with security positions in the Include list and will not print any staff members associated with security positions in the Exclude list.
Staff List Report Window: Availability Tab

The Availability tab features a filter that allows you to include or exclude staff members by availability. The Availability tab features 24 check boxes, divided by seven columns (each representing a day of the week) and four rows (each representing a day part). You can filter your report by clicking the appropriate check boxes for the particular day parts of the days you wish to include. For instance, if you wish to include staff members who work Monday mornings, you should click the check box in the Monday column and the Morning row.

Staff Phone List Report Window: Sort Order Tab

On the Sort Order tab, you can print or preview your phone lists, as well as decide how the program will organize and sort staff member records. The Sort Order tab also allows you to filter staff member records based on staff ID, payroll ID, average number of covers, total sales, activity, and primary staff department.

Sort By area

In the Sort By area, you can sort your staff members by last name, staff ID number, payroll ID number, average number of covers, or total sales. You can also filter them by staff ID number, payroll ID number, average number of covers, total sales, activity, or primary department.

If you click Last Name, the program will sort your staff members by their last name.

If you click Staff ID, the program will sort your staff members by their staff ID number. You can also filter your staff members by entering a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print staff members with staff ID numbers between 100 and 200.

If you click Payroll ID, the program will sort your staff members by their payroll ID number. You can also filter your staff members by entering a range of payroll ID numbers in the Payroll ID boxes.

If you click Avg Cover, the program will sort your staff members by their average number of covers. You can also filter your staff members by entering a range of average covers in the Avg Cover boxes.
If you click **Sales**, the program will sort your staff members by their total sales. You can also filter your staff members by entering a range of total sales in the **Sales** boxes.

If you select the **Active Only** check box, the program will only include active staff members. If you clear the check box, the program will include both active and inactive staff members.

If you group the report by staff department, you can set the program to list staff member records in each of their associated staff departments or only their primary departments. If you select the **Primary Department Only** check box, the program will only list staff member records by their primary department. If you clear the check box, the program will list staff member records in each of their associated departments.

**Note**

You can only click the **Primary Department Only** check box if you first click the **Department** option in the **Group By** area. If you do not set the program to group your staff members by department, then you cannot click the **Primary Department Only** check box.

**Period area**

In the **Period** area, you can filter your staff members by a period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on. You can select a period from the **Sales History** list.

**Group By area**

In the **Group By** area, you can set the program to group your staff members by staff department, rating level, or security position. If you click **Department**, the program will print all the staff members grouped by their staff departments. If you click **Rating**, the program will print all the staff members grouped by their staff rating levels. If you click **Security**, the program will print all the staff members grouped by their staff security position. If you click **No Groups**, the program will not group your staff members before it prints.

**Print area**

In the **Print** area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the **Preview** option and then click the **Print** command below, the program will display a preview of the report.
Staff Menu

report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

Staff Phone List Report Window: Department Tab

The Department tab features a filter that allows you to include or exclude staff members of specific staff departments. The program will only print staff members associated with staff departments in the Include list and will not print any staff members associated with staff departments in the Exclude list. If any staff members are associated with staff departments in both the Include list and Exclude list, the program will include them.

Staff Phone List Report Window: Rating Tab

The Rating tab features a filter that allows you to include or exclude staff members of specific rating levels. The program will only print staff members associated with rating levels in the Include list and will not print any staff members associated with rating levels in the Exclude list.

Staff Phone List Report Window: Security Tab

The Security tab features a filter that allows you to include or exclude staff members with specific staff security positions. The program will only print staff members associated with security positions in the Include list and will not print any staff members associated with security positions in the Exclude list.

Staff Phone List Report Window: Availability Tab

The Availability tab features a filter that allows you to include or exclude staff members by availability. The Availability tab features 24 check boxes, divided by seven columns (each representing a day of the week) and four rows (each representing a day part). You can filter your report by clicking the appropriate check boxes for the particular day parts of the days you wish to include. For instance, if you wish to include staff members who work Monday mornings, you should click the check box in the Monday column and the Morning row.
Staff Sales Analysis Report Window: Sort Order Tab

On the Sort Order tab, you can print or preview your sales analysis reports, as well as decide how the program will organize and sort staff member records. The Sort Order tab also allows you to filter staff member records based on staff ID, payroll ID, average number of covers, total sales, activity, and primary staff department.

**Sort By area**

In the Sort By area, you can sort your staff members by last name, staff ID number, payroll ID number, average number of covers, or total sales. You can also filter them by staff ID number, payroll ID number, average number of covers, total sales, activity, or primary department.

If you click **Last Name**, the program will sort your staff members by their last name.

If you click **Staff ID**, the program will sort your staff members by their staff ID number. You can also filter your staff members by entering a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print staff members with staff ID numbers between 100 and 200.

If you click **Payroll ID**, the program will sort your staff members by their payroll ID number. You can also filter your staff members by entering a range of payroll ID numbers in the Payroll ID boxes.

If you click **Avg Cover**, the program will sort your staff members by their average number of covers. You can also filter your staff members by entering a range of average covers in the Avg Cover boxes.

If you click **Sales**, the program will sort your staff members by their total sales. You can also filter your staff members by entering a range of total sales in the Sales boxes.

If you select the **Active Only** check box, the program will only include active staff members. If you clear the check box, the program will include both active and inactive staff members.

If you group the report by staff department, you can set the program to list staff member records in each of their associated staff departments or only their primary departments. If you select the **Primary Department Only** check box, the program will only list staff member records by their primary department. If you clear the
check box, the program will list staff member records in each of their associated departments.

| Note | You can only click the Primary Department Only check box if you first click the Department option in the Group By area. If you do not set the program to group your staff members by department, then you cannot click the Primary Department Only check box. |

**Period area**

In the Period area, you can filter your staff members by a period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on. You can select a period from the Sales History list.

**Group By area**

In the Group By area, you can set the program to group your staff members by staff department, rating level, or security position. If you click Department, the program will print all the staff members grouped by their staff departments. If you click Rating, the program will print all the staff members grouped by their staff rating levels. If you click Security, the program will print all the staff members grouped by their staff security position. If you click No Groups, the program will not group your staff members before it prints.

**Print area**

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

**Staff Sales Analysis Report Window: Department Tab**

The Department tab features a filter that allows you to include or exclude staff members of specific staff departments. The program will only print staff members associated with staff departments in the Include list and will not print any staff members associated with staff departments in the Exclude list. If any staff members
are associated with staff departments in both the Include list and Exclude list, the program will include them.

**Staff Sales Analysis Report Window: Rating Tab**

The Rating tab features a filter that allows you to include or exclude staff members of specific rating levels. The program will only print staff members associated with rating levels in the Include list and will not print any staff members associated with rating levels in the Exclude list.

**Staff Sales Analysis Report Window: Security Tab**

The Security tab features a filter that allows you to include or exclude staff members with specific staff security positions. The program will only print staff members associated with security positions in the Include list and will not print any staff members associated with security positions in the Exclude list.

**Staff Sales Analysis Report Window: Availability Tab**

The Availability tab features a filter that allows you to include or exclude staff members by availability. The Availability tab features 24 check boxes, divided by seven columns (each representing a day of the week) and four rows (each representing a day part). You can filter your report by clicking the appropriate check boxes for the particular day parts of the days you wish to include. For instance, if you wish to include staff members who work Monday mornings, you should click the check box in the Monday column and the Morning row.

**Staff Tip Report Window: Sort Order Tab**

On the Sort Order tab, you can print or preview your tip reports, as well as decide how the program will organize and sort staff member records. The Sort Order tab also allows you to filter staff member records based on staff ID, payroll ID, average number of covers, total sales, activity, and primary staff department.
Sort By area

In the Sort By area, you can sort your staff members by last name, staff ID number, total receipts, or total tips. You can also filter them by staff ID number, total receipts, total tips, or activity.

If you click Last Name, the program will sort your staff members by their last name.

If you click Staff ID, the program will sort your staff members by their staff ID number. You can also filter your staff members by entering a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print staff members with staff ID numbers between 100 and 200.

If you click Receipts, the program will sort your staff members by their total receipts. You can also filter your staff members by entering a range of total receipts in the Receipts boxes.

If you click Tips, the program will sort your staff members by their total tips. You can also filter your staff members by entering a range of total tips in the Tips boxes.

If you select the Active check box, the program will only include active staff members. If you clear the check box, the program will include both active and inactive staff members.

Period area

In the Period area, you can filter your staff members by a period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on. You can select a period from the Sales History list.

Group By area

In the Group By area, you can set the program to group your staff members by staff department, rating level, or security position. If you click Department, the program will print all the staff members grouped by their staff departments. If you click Rating, the program will print all the staff members grouped by their staff rating levels. If you click Security, the program will print all the staff members grouped by their staff security position. If you click No Groups, the program will not group your staff members before it prints.
Print area

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

Staff Tip Report Window: Department Tab

The Department tab features a filter that allows you to include or exclude staff members of specific staff departments. The program will only print staff members associated with staff departments in the Include list and will not print any staff members associated with staff departments in the Exclude list. If any staff members are associated with staff departments in both the Include list and Exclude list, the program will include them.

Staff Tip Report Window: Rating Tab

The Rating tab features a filter that allows you to include or exclude staff members of specific rating levels. The program will only print staff members associated with rating levels in the Include list and will not print any staff members associated with rating levels in the Exclude list.

Staff Tip Report Window: Security Tab

The Security tab features a filter that allows you to include or exclude staff members with specific staff security positions. The program will only print staff members associated with security positions in the Include list and will not print any staff members associated with security positions in the Exclude list.

Staff Tip Report Window: Availability Tab

The Availability tab features a filter that allows you to include or exclude staff members by availability. The Availability tab features 24 check boxes, divided by seven columns (each representing a day of the week) and four rows (each representing a day part). You can filter your report by clicking the appropriate check boxes for the particular day parts of the days you wish to include. For instance, if you wish to include staff members who work Monday mornings, you should click the check box in the Monday column and the Morning row.
Staff Menu

Staff Department List Report Window: Sort Order Tab

On the Sort Order tab, you can print or preview your department lists, as well as decide how the program will organize and sort staff member records. The Sort Order tab also allows you to filter staff member records based on staff ID, payroll ID, average number of covers, total sales, activity, and primary staff department.

Sort By area

In the Sort By area, you can sort your staff members by last name, staff ID number, payroll ID number, average number of covers, or total sales. You can also filter them by staff ID number, payroll ID number, average number of covers, total sales, activity, or primary department.

If you click Last Name, the program will sort your staff members by their last name.

If you click Staff ID, the program will sort your staff members by their staff ID number. You can also filter your staff members by entering a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print staff members with staff ID numbers between 100 and 200.

If you click Payroll ID, the program will sort your staff members by their payroll ID number. You can also filter your staff members by entering a range of payroll ID numbers in the Payroll ID boxes.

If you click Avg Cover, the program will sort your staff members by their average number of covers. You can also filter your staff members by entering a range of average covers in the Avg Cover boxes.

If you click Sales, the program will sort your staff members by their total sales. You can also filter your staff members by entering a range of total sales in the Sales boxes.

If you select the Active Only check box, the program will only include active staff members. If you clear the check box, the program will include both active and inactive staff members.

If you group the report by staff department, you can set the program to list staff member records in each of their associated staff departments or only their primary departments. If you select the Primary Department Only check box, the program will only list staff member records by their primary department. If you clear the
check box, the program will list staff member records in each of their associated departments.

**Note**

You can only click the **Primary Department Only** check box if you first click the **Department** option in the **Group By** area. If you do not set the program to group your staff members by department, then you cannot click the **Primary Department Only** check box.

**Period area**

In the **Period** area, you can filter your staff members by a period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on. You can select a period from the **Sales History** list.

**Group By area**

In the **Group By** area, you can set the program to group your staff members by staff department, rating level, or security position. If you click **Department**, the program will print all the staff members grouped by their staff departments. If you click **Rating**, the program will print all the staff members grouped by their staff rating levels. If you click **Security**, the program will print all the staff members grouped by their staff security position. If you click **No Groups**, the program will not group your staff members before it prints.

**Print area**

In the **Print** area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the **Preview** option and then click the **Print** command below, the program will display a preview of the report as it will appear when it prints. If you click the **Print** option and then click the **Print** command below, the program will print a copy of the report.

**Staff Department List Report Window: Department Tab**

The **Department** tab features a filter that allows you to include or exclude staff members of specific staff departments. The program will only print staff members associated with staff departments in the **Include** list and will not print any staff members associated with staff departments in the **Exclude** list. If any staff members
are associated with staff departments in both the **Include** list and **Exclude** list, the program will include them.

### Staff Department List Report Window: Rating Tab

The **Rating** tab features a filter that allows you to include or exclude staff members of specific rating levels. The program will only print staff members associated with rating levels in the **Include** list and will not print any staff members associated with rating levels in the **Exclude** list.

### Staff Department List Report Window: Security Tab

The **Security** tab features a filter that allows you to include or exclude staff members with specific staff security positions. The program will only print staff members associated with security positions in the **Include** list and will not print any staff members associated with security positions in the **Exclude** list.

### Staff Department List Report Window: Availability Tab

The **Availability** tab features a filter that allows you to include or exclude staff members by availability. The **Availability** tab features 24 check boxes, divided by seven columns (each representing a day of the week) and four rows (each representing a day part). You can filter your report by clicking the appropriate check boxes for the particular day parts of the days you wish to include. For instance, if you wish to include staff members that work Monday mornings, you should click the check box in the **Monday** column and the **Morning** row.

### Staff Availability Report Window: Sort Order Tab

On the **Sort Order** tab, you can print or preview your availability reports, as well as decide how the program will organize and sort staff member records. The **Sort Order** tab also allows you to filter staff member records based on staff ID, payroll ID, average number of covers, total sales, activity, and primary staff department.
**Sort By area**

In the **Sort By** area, you can sort your staff members by last name, staff ID number, payroll ID number, average number of covers, or total sales. You can also filter them by staff ID number, payroll ID number, average number of covers, total sales, activity, or primary department.

If you click **Last Name**, the program will sort your staff members by their last name.

If you click **Staff ID**, the program will sort your staff members by their staff ID number. You can also filter your staff members by entering a range of staff ID numbers in the **Staff ID** boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print staff members with staff ID numbers between 100 and 200.

If you click **Payroll ID**, the program will sort your staff members by their payroll ID number. You can also filter your staff members by entering a range of payroll ID numbers in the **Payroll ID** boxes.

If you click **Avg Cover**, the program will sort your staff members by their average number of covers. You can also filter your staff members by entering a range of average covers in the **Avg Cover** boxes.

If you click **Sales**, the program will sort your staff members by their total sales. You can also filter your staff members by entering a range of total sales in the **Sales** boxes.

If you select the **Active Only** check box, the program will only include active staff members. If you clear the check box, the program will include both active and inactive staff members.

If you group the report by staff department, you can set the program to list staff member records in each of their associated staff departments or only their primary departments. If you select the **Primary Department Only** check box, the program will only list staff member records by their primary department. If you clear the check box, the program will list staff member records in each of their associated departments.

---

**Note**

You can only click the **Primary Department Only** check box if you first click the **Department** option in the **Group By** area. If you do not set the program to group your staff members by department, then you cannot click the **Primary Department Only** check box.
**Period area**

In the Period area, you can filter your staff members by a period of sales history, such as any day of the week, any month of the year, the preceding pay period, and so on. You can select a period from the Sales History list.

**Group By area**

In the Group By area, you can set the program to group your staff members by staff department, rating level, or security position. If you click Department, the program will print all the staff members grouped by their staff departments. If you click Rating, the program will print all the staff members grouped by their staff rating levels. If you click Security, the program will print all the staff members grouped by their staff security position. If you click No Groups, the program will not group your staff members before it prints.

**Print area**

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

**Staff Availability Report Window: Department Tab**

The Department tab features a filter that allows you to include or exclude staff members of specific staff departments. The program will only print staff members associated with staff departments in the Include list and will not print any staff members associated with staff departments in the Exclude list. If any staff members are associated with staff departments in both the Include list and Exclude list, the program will include them.

**Staff Availability Report Window: Rating Tab**

The Rating tab features a filter that allows you to include or exclude staff members of specific rating levels. The program will only print staff members associated with rating levels in the Include list and will not print any staff members associated with rating levels in the Exclude list.
Staff Availability Report Window: Security Tab

The Security tab features a filter that allows you to include or exclude staff members with specific staff security positions. The program will only print staff members associated with security positions in the Include list and will not print any staff members associated with security positions in the Exclude list.

Staff Availability Report Window: Availability Tab

The Availability tab features a filter that allows you to include or exclude staff members by availability. The Availability tab features 24 check boxes, divided by seven columns (each representing a day of the week) and four rows (each representing a day part). You can filter your report by clicking the appropriate check boxes for the particular day parts of the days you wish to include. For instance, if you wish to include staff members who work Monday mornings, you should click the check box in the Monday column and the Morning row.

Security Transaction Report Window: Main Tab

On the Main tab, you can print or preview your security transaction reports and set how the program organizes and sorts the record changes. The Main tab also allows you to filter record changes based on staff ID and date range.

Filter By area

In the Filter By area, you can filter your record changes by staff ID number and date range.

You can filter your record changes by entering a range of staff ID numbers in the Staff Member boxes. For instance, if you type “100” in the From box and “200” in the To box, the program will only print changes by staff members with staff ID numbers between 100 and 200.

You can filter your record changes by entering a date range in the Date Range boxes. For instance, if you type “11/01/00” in the From box and “12/01/00” in the To box, the program will only print changes that took place between November 1st and December 1st, 2000.
**Group By area**

In the Group By area, you can set the program to group your record changes by staff member, table, action, or date. If you click Staff, the program will print the changes grouped by the names of the staff members who performed them. If you click Table, the program will print all the changes grouped by the type of records changed. If you click Action, the program will print all the changes grouped by each type of change. If you click Date, the program will print all the changes grouped by the date of each change. If you click No Groups, the program will not group your changes before it prints.

**Print area**

In the Print area, you can set the program to print the report or display a preview of the report, which you can examine before printing. If you click the Preview option and then click the Print command below, the program will display a preview of the report as it will appear when it prints. If you click the Print option and then click the Print command below, the program will print a copy of the report.

**Security Transaction Report Window: Action Tab**

The Action tab features a filter that allows you to include or exclude record changes associated with specific actions. The program will only print changes associated with actions in the Include list and will not print any changes associated with actions in the Exclude list.

**Security Transaction Report Window: Table Tab**

The Table tab features a filter that allows you to include or exclude record changes associated with specific types of records. The program will only print changes associated with records in the Include list and will not print any changes associated with records in the Exclude list.

**Staff Date Report Maintenance Window: Main Tab**

The Staff Date Maintenance window allows you to generate reports that list staff members with various important dates (such as date of birth, date of hire, and so on). The Staff Date Report includes each staff member’s name, payroll ID number, and date for each selected date type.
Staff Menu

Sort By list

The Sort By list allows you to sort the names in the report by items in different ways. If you select a sorting option in the Sort By list, the program will sort names in alphabetical and/or numerical order by whatever item you select. You can sort names by any of the following criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Click Staff ID to sort staff names by the staff ID of each staff member.</td>
</tr>
<tr>
<td>Staff Name</td>
<td>Click Staff Name to sort staff names alphabetically by the name of each staff member.</td>
</tr>
<tr>
<td>Payroll ID</td>
<td>Click Payroll ID to sort staff names by the payroll ID of each staff member.</td>
</tr>
<tr>
<td>Date Type</td>
<td>Click Date Type to sort staff names by the type of date.</td>
</tr>
<tr>
<td>Date</td>
<td>Click Date to sort staff names numerically by date.</td>
</tr>
</tbody>
</table>
**Group By 1 list**

You can control how the program organizes the staff names in your report by selecting a grouping option from the **Group By 1** list. The program will list names alphabetically by the grouping option you select. You can group staff names by any of the following criteria:

<table>
<thead>
<tr>
<th>Group By 1</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Click <strong>Staff ID</strong> to group staff names by the staff ID of each staff member.</td>
</tr>
<tr>
<td>Staff Name</td>
<td>Click <strong>Staff Name</strong> to group staff names alphabetically by the name of each staff member.</td>
</tr>
<tr>
<td>Payroll ID</td>
<td>Click <strong>Payroll ID</strong> to group staff names by the payroll ID of each staff member.</td>
</tr>
<tr>
<td>Date Type</td>
<td>Click <strong>Date Type</strong> to group staff names by the type of date.</td>
</tr>
<tr>
<td>Date</td>
<td>Click <strong>Date</strong> to group staff names numerically by date.</td>
</tr>
</tbody>
</table>

---

**Group By 2 list**

You can control how the program organizes the staff names in your report by selecting a grouping option from the **Group By 2** list. The program will list names alphabetically by the grouping option you select. You can group staff names by any of the following criteria:

<table>
<thead>
<tr>
<th>Group By 2</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Click <strong>Staff ID</strong> to group staff names by the staff ID of each staff member.</td>
</tr>
<tr>
<td>Staff Name</td>
<td>Click <strong>Staff Name</strong> to group staff names alphabetically by the name of each staff member.</td>
</tr>
<tr>
<td>Payroll ID</td>
<td>Click <strong>Payroll ID</strong> to group staff names by the payroll ID of each staff member.</td>
</tr>
<tr>
<td>Date Type</td>
<td>Click <strong>Date Type</strong> to group staff names by the type of date.</td>
</tr>
<tr>
<td>Date</td>
<td>Click <strong>Date</strong> to group staff names numerically by date.</td>
</tr>
</tbody>
</table>

---

**Default Range list**

If you select a default range from this list, this default range will appear in the **Range** list of the Staff Dates Reports window.
Staff Menu

**Staff ID boxes**

You can filter the staff names in the report by staff ID numbers by typing a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only include staff members with staff ID numbers between 100 and 200.

**Payroll ID boxes**

If you use an external payroll program or payroll interface, you can filter the staff names in the report by payroll ID numbers by typing a range of payroll ID numbers in the Payroll ID boxes.

**Active Only check box**

If you select the Active Only check box, the report will include the names of active staff members. If you clear the Active Only check box, the report will include both active and inactive staff members.

**Primary Department Only check box**

The Primary Department Only check box allows you to filter Staff Date reports to only include dates associated with primary staff departments.

**Staff Date Report Maintenance Window: Department Tab**

The Staff Department tab features a filter that allows you to include or exclude staff members associated with specific staff departments.
You can set the program to include or exclude records associated with certain staff departments by adding staff departments to the Include/Exclude list. To move a staff department from the Available list to the Include/Exclude list, select that department and click > . To move a staff department from the Include/Exclude box to the Available list, select the department and click < . To move all staff departments from the Available list to the Include/Exclude box, click >> . To move all staff departments in the Include/Exclude box to the Available list, click << .

You can set the program to include or exclude records associated with certain date types by adding date types to the Include/Exclude list. To move a date type from the Available list to the Include/Exclude list, select that date type and click > . To move a date type from the Include/Exclude box to the Available list, select the date type and click < . To move all date types from the Available list to the Include/Exclude box, click >> . To move all date types in the Include/Exclude box to the Available list, click << .

You can set the program to include or exclude records associated with certain date types by adding date types to the Include/Exclude list. To move a date type from the Available list to the Include/Exclude list, select that date type and click > . To move a date type from the Include/Exclude box to the Available list, select the date type and click < . To move all date types from the Available list to the Include/Exclude box, click >> . To move all date types in the Include/Exclude box to the Available list, click << .

You can set the program to include or exclude records associated with the date types in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include records associated with the date types in the Include/Exclude list. If you click Exclude, the program will exclude all records associated with the date types in the Include/Exclude list.
Include/Exclude list. If you click Exclude, the program will exclude all records associated with the date types in the Include/Exclude list.

Staff Date Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text automatically wraps to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Staff Report Examples

Each of the following sections contain an example of each report that you can generate from the Staff Reports submenu. We used demo data to generate each report. When necessary, we have included a description of how to calculate the values that you see in each column.

The Charge Tips column displays the dollar amount of tips that the employee recorded while paying out a check to any receipt type that your restaurant has defined with a tip mode set to Tip. You can set the tip mode by using the Tip Mode list on the Main tab of the Receipts Window Maintenance Window in Digital Dining’s Setup program.

The Cash Tips column displays the dollar amount of tips that the employee recorded while clocking out.

The Min Tips column displays the estimated minimum tips that your employees should declare, which you can calculate based on the value (which is a percent) in the Min Tip Percentage box on the Data tab of the Options window in the Digital Dining Setup program multiplied by the Cash Sales column.

The Variance column displays the difference between the staff member’s minimum tips and total tips. This column displays a value only if the minimum tips are greater than the total tips (Minimum Tips - Total Tips = Variance). If the total tips are greater than the minimum tips, the column displays no value.
The **Staff List report** displays a list of each staff member’s home address (street, city, state, and zip code), home phone number, other phone number, and payroll ID. You can find all of this information on the **Main** and **Personal** tabs of the Staff Member Maintenance window.

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Street</th>
<th>City</th>
<th>State</th>
<th>ZIP Code</th>
<th>Home Phone</th>
<th>Other Phone</th>
<th>Payroll ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Wizard, Wizard</td>
<td>7370 Beal Mill Drive</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-812-3000</td>
<td>703-812-3001</td>
<td>1111111111</td>
</tr>
<tr>
<td>2</td>
<td>Fast, Editha</td>
<td>1212 Steel Mill Dr.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-699-1245</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>3</td>
<td>Fast, Editha</td>
<td>1212 Steel Mill Dr.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-699-1245</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>4</td>
<td>Stores, Marsha</td>
<td>1212 Steel Mill Dr.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-699-1245</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>5</td>
<td>Stock, Martin</td>
<td>1212 Steel Mill Dr.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-699-1245</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>10</td>
<td>Bronson, Kay</td>
<td>1212 Steel Mill Dr.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-699-1245</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>123 Somewhere St.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-555-1324</td>
<td>703-555-5555</td>
<td>-</td>
</tr>
<tr>
<td>12</td>
<td>Gaffney, Susan</td>
<td>123 Northside St.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-555-1324</td>
<td>703-555-5555</td>
<td>-</td>
</tr>
<tr>
<td>13</td>
<td>Hum, Alan</td>
<td>123 Everywhere St.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-555-1357</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>14</td>
<td>Mor, Helen</td>
<td>123 Somewhere St.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-555-5643</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>15</td>
<td>Tolland, David</td>
<td>345 Nolnace Street</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-650-6789</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>16</td>
<td>Davis, Lisa</td>
<td>129 Xy2street St.</td>
<td>Springfield</td>
<td>VA</td>
<td>22150-</td>
<td>703-650-6789</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

The **Staff ID** column displays each staff member’s Digital Dining staff ID number.

The **Name** column displays each staff member’s first and last names.

The **Street** column displays the street where each staff member lives.

The **City** column displays the city where each staff member lives.

The **State** column displays the state in which each staff member lives.

The **ZIP Code** column displays each staff member’s zip code.

The **Home Phone** column displays each staff member’s home phone.

The **Other Phone** column displays an alternative phone number (if any) for each staff member.

The **Payroll ID** column displays each staff member’s payroll ID, which are commonly used with third-party payroll systems.
Staff Phone List Report

The Staff Phone List report displays a list of each staff member’s home and other phone number (if recorded). You can find all of this information on the Main and Personal tabs of the Staff Member Maintenance window.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Full Name</th>
<th>Sorted By: Staff ID</th>
<th>Home Phone</th>
<th>Other Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>wizard</td>
<td>Wizard, Wizard</td>
<td>703-912-2000</td>
<td>703-912-3001</td>
<td></td>
</tr>
<tr>
<td>Fast</td>
<td>Fast, Eddie</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Fast</td>
<td>Fast, Edina</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Stoess</td>
<td>Stoess, Marsh</td>
<td>703-988-1245</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Stock</td>
<td>Stock, Martin</td>
<td>703-988-1990</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Kay</td>
<td>Branson, Kay</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Miller</td>
<td>Miller, Rob</td>
<td>703-555-1234</td>
<td>703-555-555</td>
<td></td>
</tr>
<tr>
<td>Geffens</td>
<td>Geffens, Susan</td>
<td>703-555-0789</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Humz</td>
<td>Humz, Alan</td>
<td>703-555-1237</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Morris</td>
<td>Morris, Helen</td>
<td>703-555-9843</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Tolland</td>
<td>Tolland, David</td>
<td>703-555-6789</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Davis</td>
<td>Davis, Lisa</td>
<td>703-555-1111</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

Number of Staff: 12

The Report Name column displays each staff member’s name as it appears in Digital Dining reports.

The Full Name column displays each staff member’s first and last names.

The Home Phone column displays each staff member’s home phone number.

The Other Phone column displays an alternative phone number (if any) for each staff member.

Staff Sales Analysis Report

The Staff Sales Analysis report displays a list of each staff member’s Staff ID, name, food sales, beverage sales, other sales, total sales, number of covers, and average cover.
The **Staff ID** column displays each staff member’s Digital Dining staff ID number.

The **Name** column displays each staff member’s first and last names.

The **Food Sales** column displays each staff member’s total amount of sales of the menu items included in the food category.

The **Bev Sales** column displays each staff member’s total amount of sales of the menu items included in the beverage category.

The **Other Sales** column displays each staff member’s total amount of sales of the menu items included in the other category.

The **Total Sales** column displays each staff member’s total amount of sales in all categories.

The **No of Covers** column displays the total number of covers from all of the checks handled by each staff member during the reported time period.

The **Avg Cover** column displays each staff member’s average dollar amount of sales per cover. The report divides the total sales amount by the number of covers.

**Staff Tip Report**

The Staff Tip Report is a list of staff members and their tip totals. For each staff member, the report includes each staff member’s staff ID, name, and totals for cash sales, other sales, total sales, charge tips, declared tips, given tips, received tips, total tips, minimum tips, and variance.
The **Staff ID** column displays each staff member’s Digital Dining staff ID number.

The **Name** column displays each staff member’s first and last names.

The **Cash Sales** column displays each staff member’s total amount of sales paid with the cash receipt type.

The **Other Sales** column displays each staff member’s total amount of sales paid with receipt types other than cash.

The **Total Sales** column displays each staff member’s total amount of sales paid with all receipt types.

The **Charge Tips** column displays each staff member’s total amount of charge tips.

The **Cash Tips** column displays each staff member’s total amount of cash tips (that is, the tips that each staff member declares when they clock out).

The **Total Tips** column displays each staff member’s total amount of tips of all receipt types.

The **Min Tips** column displays the estimated minimum tips that each staff member should declare, which the program calculates by multiplying the staff member’s Cash Sales amount by the minimum tip percentage value (as set in the **Min Tip Percentage** box in the Options window of the Setup program).

The **Variance** column displays the difference between each staff member’s minimum tips and total tips. This column displays a value only if the minimum tips are greater than the total tips (Minimum Tips - Total Tips = Variance). If the total tips are greater than the minimum tips, the column displays no value.

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Cash Sales</th>
<th>Other Sales</th>
<th>Total Sales</th>
<th>Charge Tips</th>
<th>Cash Tips</th>
<th>Total Tips</th>
<th>Min Tips</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Wizard, Wizard</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>2</td>
<td>Fast, Eddie</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>3</td>
<td>Fast, Alaina</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>4</td>
<td>Stones, Marsha</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>5</td>
<td>Stock, Martin</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>974.94</td>
<td>198.75</td>
<td>1,173.69</td>
<td>33.19</td>
<td>160.50</td>
<td>198.69</td>
<td>77.97</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>205.89</td>
<td>0.00</td>
<td>205.89</td>
<td>0.00</td>
<td>0.00</td>
<td>53.00</td>
<td>21.51</td>
<td>3.07</td>
</tr>
<tr>
<td>12</td>
<td>Goffers, Susan</td>
<td>38.35</td>
<td>0.00</td>
<td>38.35</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Humne, Alain</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Morris, Helen</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Tolland, David</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Davis, Lisa</td>
<td>136.25</td>
<td>98.15</td>
<td>234.40</td>
<td>15.88</td>
<td>23.00</td>
<td>38.68</td>
<td>10.50</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,418.13</strong></td>
<td><strong>276.9</strong></td>
<td><strong>1,695.03</strong></td>
<td><strong>48.87</strong></td>
<td><strong>241.5</strong></td>
<td><strong>290.37</strong></td>
<td><strong>131.45</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**End of Report**
Staff Department List Report

The Staff Department List report displays a list of each staff member’s Staff ID, name, department, hourly rate, overtime rate, and rating level. You can find all of this information on the Dept tab of the Staff Member Maintenance window.

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Department</th>
<th>Hourly Rate</th>
<th>Overtime Rate</th>
<th>Rating Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Wizard, Wizard</td>
<td>Server 1</td>
<td>3.50</td>
<td>5.25</td>
<td>Top Performer</td>
</tr>
<tr>
<td>1</td>
<td>Wizard, Wizard</td>
<td>Bookkeeper</td>
<td>7.50</td>
<td>11.25</td>
<td>Top Performer</td>
</tr>
<tr>
<td>1</td>
<td>Wizard, Wizard</td>
<td>Bartender</td>
<td>6.50</td>
<td>9.75</td>
<td>Average</td>
</tr>
<tr>
<td>2</td>
<td>Fast, Eddie</td>
<td>Div 7hr</td>
<td>5.25</td>
<td>7.50</td>
<td>Top Performer</td>
</tr>
<tr>
<td>2</td>
<td>Fast, Eddie</td>
<td>Chicken DT</td>
<td>6.50</td>
<td>9.75</td>
<td>Trial Period</td>
</tr>
<tr>
<td>3</td>
<td>Fast, Edwina</td>
<td>Fast Food Counter</td>
<td>5.25</td>
<td>7.50</td>
<td>Top Performer</td>
</tr>
<tr>
<td>3</td>
<td>Fast, Edwina</td>
<td>Chicken Counter</td>
<td>6.50</td>
<td>9.75</td>
<td>Trial Period</td>
</tr>
<tr>
<td>4</td>
<td>Stora, Marsha</td>
<td>Multi-Store Staff</td>
<td>6.50</td>
<td>9.75</td>
<td>Top Performer</td>
</tr>
<tr>
<td>5</td>
<td>Stock, Martin</td>
<td>Multi-Store Staff</td>
<td>6.50</td>
<td>9.75</td>
<td>Top Performer</td>
</tr>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>Server 1</td>
<td>3.50</td>
<td>8.00</td>
<td>Top Performer</td>
</tr>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>Handheld Server</td>
<td>3.50</td>
<td>5.25</td>
<td>Top Performer</td>
</tr>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>Hilt Club Server</td>
<td>3.50</td>
<td>5.25</td>
<td>Top Performer</td>
</tr>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>Server 3</td>
<td>3.50</td>
<td>5.25</td>
<td>Trial Period</td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Server 1</td>
<td>3.50</td>
<td>5.25</td>
<td>Hard Worker</td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Club Bartender</td>
<td>0.50</td>
<td>9.75</td>
<td>Hard Worker</td>
</tr>
<tr>
<td>12</td>
<td>Geffers, Susan</td>
<td>New Server</td>
<td>3.50</td>
<td>5.25</td>
<td>Hard Worker</td>
</tr>
<tr>
<td>12</td>
<td>Geffers, Susan</td>
<td>Phone Order 1</td>
<td>0.50</td>
<td>9.75</td>
<td>Hard Worker</td>
</tr>
<tr>
<td>13</td>
<td>Hume, Alan</td>
<td>Line Cook</td>
<td>8.00</td>
<td>12.00</td>
<td>Top Performer</td>
</tr>
<tr>
<td>13</td>
<td>Hume, Alan</td>
<td>Delivery Driver</td>
<td>6.50</td>
<td>9.75</td>
<td>Hard Worker</td>
</tr>
<tr>
<td>13</td>
<td>Hume, Alan</td>
<td>Dishwasher</td>
<td>5.00</td>
<td>7.50</td>
<td>Top Performer</td>
</tr>
</tbody>
</table>

The Staff ID column displays each staff member’s staff ID number.

The Name column displays each staff member’s first and last names.

The Department column displays each staff member’s primary department.

The Hourly Rate column displays each staff member’s pay rate per hour.

The Overtime Rate displays each staff member’s pay rate per hour of overtime work.

The Rating Level column displays each staff member’s rating, evaluating how the staff member performs in the assigned department.
Staff Availability Report

The Staff Availability report displays a list of each staff member’s availability to work. For each staff member, the report lists each day of the week and the parts of each day when the staff member is available to work.

You can rename the four staff day parts in the Staff Day Part Maintenance window (for more information, see “Staff Day Part Maintenance Window: Main Tab” on page 269).
Security Transaction Report

The Security Transaction report displays a list of transactions that required a password at the POS. The report includes what the user accessed, the password level needed to access it, the date, the time, and the name of the staff member.

<table>
<thead>
<tr>
<th>Table</th>
<th>Action</th>
<th>Date</th>
<th>Time</th>
<th>Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Register Definitions</td>
<td>Edit</td>
<td>06/20/08</td>
<td>12:15</td>
<td>wizard</td>
</tr>
<tr>
<td>Register Definitions</td>
<td>Edit</td>
<td>06/17/08</td>
<td>15:00</td>
<td>wizard</td>
</tr>
<tr>
<td>Register Definitions</td>
<td>Edit</td>
<td>06/18/08</td>
<td>10:41</td>
<td>wizard</td>
</tr>
<tr>
<td>Register Definitions</td>
<td>Edit</td>
<td>06/19/08</td>
<td>10:52</td>
<td>wizard</td>
</tr>
<tr>
<td>Staff Members</td>
<td>Edit</td>
<td>06/17/08</td>
<td>11:15</td>
<td>wizard</td>
</tr>
<tr>
<td>Register Definitions</td>
<td>Edit</td>
<td>06/19/08</td>
<td>11:15</td>
<td>wizard</td>
</tr>
<tr>
<td>Staff Members</td>
<td>Edit</td>
<td>06/19/08</td>
<td>09:47</td>
<td>wizard</td>
</tr>
</tbody>
</table>

Total count: 7

The **Table** column displays the area of Digital Dining where each action was performed. For instance, “Staff Members” indicates that a change was made to a staff member record (in the Staff Member Maintenance window).

The **Action** column displays the type of action that was performed. This report lists three types of actions: Add, Delete, and Edit.

The **Date** column displays the date when each action was performed.

The **Time** column displays the time of day when each action was performed.

The **Staff** column displays the name of the staff member who performed each action.
**Staff Date Report**

The Staff Dates report displays a list of staff members with various important dates (such as date of birth, date of hire, and so on). The Staff Date Report includes each staff member’s name, payroll ID number, and date for each selected date type.

```
<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Full Name</th>
<th>Payroll ID</th>
<th>Date Type</th>
<th>Date</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>114495</td>
<td>Review</td>
<td>12/05/05</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Smith, Daniel</td>
<td>234566</td>
<td>Review</td>
<td>12/15/05</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Keller, Sharon</td>
<td>567894</td>
<td>Review</td>
<td>01/15/06</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Plein, Donald</td>
<td>666985</td>
<td>Benefits</td>
<td>01/15/06</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Johnson, Mark</td>
<td>445512</td>
<td>Benefits</td>
<td>01/22/06</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>James, Skip</td>
<td>854786</td>
<td>Hire</td>
<td>05/06/06</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Thomas, Helen</td>
<td>991498</td>
<td>Hire</td>
<td>05/14/06</td>
<td></td>
</tr>
</tbody>
</table>
```

Number of Staff: 7

***End of Report***

You can create different date types in the Date Type Maintenance window (for more information, see “Date Type Maintenance Window: Main Tab” on page 270).
Time and Attendance

To keep track of the attendance of your staff members, the Back Office program creates a time and attendance transaction record each time a staff member clocks in at the POS. A time and attendance transaction record contains the time that a staff member clocks in and clocks out of the POS, any comments he or she entered when clocking in or clocking out, and any declared tips.

You can modify these time and attendance transaction records in the Back Office, as well as print several reports that will help you analyze the time and attendance information of your staff members. The **Staff** menu includes several windows to allow you to maintain or analyze time and attendance transactions.

<table>
<thead>
<tr>
<th>Which window</th>
<th>To do what</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time and Attendance Transaction Maintenance window</td>
<td>Add or modify time and attendance transactions.</td>
</tr>
<tr>
<td>Time and Attendance Report Maintenance window</td>
<td>Define time and attendance reports, which list time and attendance transactions in various ways.</td>
</tr>
<tr>
<td>Time and Attendance Changes Report window</td>
<td>Define time and attendance changes reports, which list changes to time and attendance transactions in a variety of ways.</td>
</tr>
<tr>
<td>Staff Clocked In Report window</td>
<td>Print the staff clocked in report, which lists staff members with the dates and times of each member’s attendance.</td>
</tr>
<tr>
<td>Create Payroll File window</td>
<td>Export staff attendance information to an external file for payroll purposes.</td>
</tr>
<tr>
<td>Time and Attendance XML Export window</td>
<td>Export time and attendance data (such as hours worked, pay, and pay rates) into an XML file for a third-party payroll program.</td>
</tr>
</tbody>
</table>

**Time and Attendance Transaction Maintenance Window**

You can view, edit, or add time and attendance transactions in the Time and Attendance Transaction Maintenance window. Your staff will create most of your time and attendance transactions by regularly logging into the POS, but the Time and Attendance Transaction Maintenance window allows you to make any necessary changes to existing records. For example, if a staff member clocks in at the POS but
forgets to clock out at the end of his or her shift, you can edit that staff member’s transaction and manually enter a clock out time. By doing so, you can maintain your transactions for payroll purposes. If you edit a transaction, the program will require you to enter a reason for the change in the **Reason for Change** box. If you click **Export**, the program will allow you to export the information from the grid into either the Microsoft Word or Microsoft Excel programs.

**Date list**

Select the date whose time and attendance transaction records you wish to view or modify.

**Date Range boxes**

If you select **Custom** in the **Date** list, you should enter a specific date range in the **Date Range** boxes. You can type the dates in the **From** and **To** boxes or select them from the calendar boxes. For example, if you wish to view transaction records for the first week of June, you would type “06/01/01” in the **From** box and “06/07/01” in the **To** box. Click to select a date from each calendar box.
**Date In box**

The program will display the date that each transaction began in the **Date In** box.

**Staff ID box**

The program will display the staff ID of the staff member associated with the transaction in the **Staff ID** box. If you edit the staff ID number of an existing transaction record, the program will display a warning message to verify that you wish to associate the transaction to a different staff member.

**Staff Name box**

The program will display the name of the staff member associated with each transaction in the **Staff Name** box. To associate a transaction with a different staff member, click the **Staff Name** box, select a new staff member in the Find Staff window, and click **OK**. If you edit the staff name of an existing transaction record, the program will display a warning message to verify that you wish to associate the transaction to a different staff member.

**Time In box**

The program will display the time that the staff member clocked in at the POS in the **Time In** box. The program requires that each time and attendance transaction record have a clock in time. To edit a transaction’s clock in time, select the time in the **Time In** box and type a new clock in time (in military time).

**Time Out box**

The program will display the time that the staff member clocked out at the POS in the **Time Out** box. To edit a transaction’s clock out time, select the time in the **Time Out** box and type a new clock out time (in military time).

**Worked box**

The program will display the total hours of this transaction in the **Worked** box. If you edit the **Time In** or **Time Out** boxes, the **Worked** box will display the adjusted total hours for the transaction. However, you cannot edit the **Worked** box directly.
**Date Out box**

The program will display the date that each transaction ended in the Date Out box.

**Department list**

The program will display the staff member’s department in the Department list. If you have associated the staff member with more than one department, the program will display the staff member’s department for this particular transaction. To edit a transaction’s staff department, click a different department from the list.

*Note* The Department list will only include staff departments with which the staff member is associated. If you have associated this staff member with one staff department, you cannot edit the transaction’s department.

**Tips box**

If your staff members declare their tips when clocking out of the POS, the program will display that amount in the Declared Tips box. To edit a transaction’s declared tips, select the amount in the Declared Tips box and type a new amount (for more information, see “Declare Cash Tips check box” on page 252).

**Comments In box**

The program will display any comments that the staff member entered when clocking in. To edit these comments, select the comments in the Comments In box and type any changes.

**Comments Out box**

The program will display any comments that the staff member entered when clocking out. To edit these comments, select the comments in the Comments Out box and type any changes.

**Vac Hrs box**

If a staff member takes a paid vacation, you can enter the number of hours in the Vac Hrs box. This box only appears if you’ve set the program to display special
payment options (in the Setup program, on the Pay Periods tab of the Options window).

### Retro Amt box

If you need to pay a staff member retroactively for hours worked, you can type the dollar amount in the **Retro Amt** box. This box only appears if you’ve set the program to display special payment options (in the Setup program, on the Pay Periods tab of the Options window).

### Other Amt box

If you need to pay a staff member for some other reason, you can type the dollar amount in the **Other Amt** box. This box only appears if you’ve set the program to display special payment options (in the Setup program, on the Pay Periods tab of the Options window).

### Edited box

If you edit a time and attendance transaction, the program displays the letter “X” in that transaction’s **Edited** box to signify that it has been edited.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>When a staff member prints a time slip at the POS that features an edited transaction (whether the transaction is edited in Back Office program or at the POS), the time slip will mark that transaction with an asterisk.</td>
</tr>
</tbody>
</table>

### Reason for Change box

If you edit an existing transaction, the Back Office program will require you to explain the changes in the **Reason for Change** box, a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs.

If you are modifying many transaction records for the same reason, you can click **Same as last reason** to automatically add the text of the last reason entered to the **Reason for Change** box.
Time and Attendance Transaction Maintenance Window:
Filter Window

Unlike most of the user maintenance windows in the Digital Dining Back Office program, the Time and Attendance Transaction Maintenance window does not feature an Order command in the Command Bar. It does, however, feature a Filter command, by which you can access a filter window for the Time and Attendance Transaction Maintenance window. Here you can set the program to filter your transaction records in various ways.

**Staff Depts lists**

The Time and Attendance Transaction Maintenance filter window features a filter that allows you to include or exclude time and attendance transactions by the specific staff departments of your staff members. The Back Office program will only display transactions by staff members associated with staff departments in the Include list and will not display any transactions by staff members associated with staff departments in the Exclude list.
Staff Menu

**Staff ID Range boxes**

By entering a range of staff ID numbers in the **Staff ID Range** boxes, you can filter your transactions by specific staff members. For instance, if you type “100” in the first box and “200” in the second box, the program will only display transactions by staff members with staff ID numbers between 100 and 200.

**Clock In Range boxes**

By entering a range of clock in times (in military time) in the **Clock In Range** boxes, you can filter your transactions by clock in time. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only display transactions by staff members who clocked in between 10:00 A.M. and 2:00 P.M.

**Clock In/Clock Out options**

You can set the program to filter transactions that do not have clock in and/or clock out times. If you click **Only staff clocked in**, the program will only display transactions that are missing clock out times. If you click **Only staff clocked out**, the program will only display transactions that are missing clock in times. If you click **Both**, the program will display transactions that are missing either clock in or clock out times.

**Include Manager Overhead**

Click the **Include Manager Overhead** check box to include manager overhead information (for more information on manager overhead, see “Staff Department Maintenance Window: Main Tab” on page 250).
The Time and Attendance Report Maintenance window allows you to generate a list of staff members and their clock in times within a selected period range. The report includes their names, staff ID numbers, the times and dates they clocked in, their departments, and any comments they entered in the POS Log In screen.
## Report Format List

You can select one of six different report formats. Each format will produce a report with different information and/or arrangement.

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Detail</strong></td>
<td>Individual time and attendance transactions, with the name and staff ID of each staff member, clock in and clock out times, declared tips, regular hours, overtime hours, and double-pay hours.</td>
</tr>
<tr>
<td><strong>Summary</strong></td>
<td>Time and attendance transaction totals for each week in the date range, including regular hours, regular pay rate, total regular pay, overtime hours, overtime pay rate, total overtime pay, double-time hours, double-time pay rate, total overtime pay, and total amount of pay.</td>
</tr>
<tr>
<td><strong>Department</strong></td>
<td>Time and attendance transaction totals for each staff department and each week in the date range, including regular hours, regular pay rate, total regular pay, overtime hours, overtime pay rate, total overtime pay, double-time hours, double-time pay rate, total overtime pay, and total amount of pay.</td>
</tr>
<tr>
<td><strong>Audit</strong></td>
<td>Individual time and attendance transactions, with the name and staff ID of each staff member, staff department, date of the transaction, clock in and clock out times, hours worked, declared tips, and comments in and out.</td>
</tr>
<tr>
<td><strong>Consolidated</strong></td>
<td>Pay totals for each staff member, including the name and staff ID of each staff member, with total hours and pay rate for regular, overtime, and double-time rates. This report also includes totals for tips and sales.</td>
</tr>
<tr>
<td><strong>IRS 8027</strong></td>
<td>Sales totals for each staff member, including sales and tip totals, formatted in accordance with the IRS 8027 form.</td>
</tr>
<tr>
<td><strong>Consolidated Fraction</strong></td>
<td>Identical data as the Consolidated report format, but this format prints times as decimals. (Thus, if a staff member worked eight and one-half hours, the Consolidated report format would print this figure as 8:30, while the Consolidated Fraction format would print it as 8.5.)</td>
</tr>
<tr>
<td><strong>Time Sheet</strong></td>
<td>Digital Dining generates a list of hours worked for each staff member within the selected date range. The report includes totals for regular, overtime, and double-time hours worked.</td>
</tr>
</tbody>
</table>
**Sort By list**

You can control how the Back Office program organizes the information in a report by selecting a sorting option from **Sort By list**. The program will sort records in alphabetical and/or numerical order by whatever item you select in the **Sort By** list. You can sort your customer records by any of the following criteria:

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Click <strong>Staff ID</strong> to sort your report numerically by the staff ID of each staff member.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll ID</td>
<td>Click <strong>Payroll ID</strong> to sort your report numerically by the payroll ID of each staff member.</td>
</tr>
<tr>
<td>Name</td>
<td>Click <strong>Name</strong> to sort your report alphabetically by the name of each staff member.</td>
</tr>
</tbody>
</table>

**Group By list**

If you click **Name**, Digital Dining groups the transactions alphabetically by the name of each staff member. If you click **Department**, Digital Dining groups the transactions by staff department. If you select **None**, Digital Dining groups the transactions.

**Default Range list**

If you select a default range from this list, this default range will appear in the **Range** list of the Time and Attendance Report window.

**Staff ID boxes**

By entering a range of staff ID numbers in the **Staff ID** boxes, you can filter your transactions by specific staff members. For instance, if you type “100” in the first box and “200” in the second box, the report will only include transactions by staff members with staff ID numbers between 100 and 200.

**Time boxes**

By entering a range of clock in times (in military time) in the **Time** boxes, you can filter your transactions by clock in time. For instance, if you type “10:00” in the first box and “14:00” in the second box, the report will only include transactions by staff members who clocked in between 10:00 A.M. and 2:00 P.M.
Include Manager Overhead check box

Click the Include Manager Overhead check box to include manager overhead information in your report (for more information on manager overhead, see “Staff Department Maintenance Window: Main Tab” on page 250).

One Staff per Page check box

If you click this check box and print a report, the program will insert a page break after each staff member’s information. The One Staff per Page check box only appears if you select Detail, Summary, or Audit report formats.

Time and Attendance Report Maintenance Window: Staff Department Tab

The Staff Department tab features a filter that allows you to include or exclude transactions by staff members of specific staff departments. The program will only print transactions by staff members associated with staff departments in the Include list and will not print any transactions by staff members associated with staff departments in the Exclude list.

Time and Attendance Report Maintenance Window: Day Tab

The Day tab features a filter that allows you to include or exclude transactions that took place on specific days of the week. The program will only print transactions that took place on days in the Include list and will not print any transactions that took place on days in the Exclude list.

Time and Attendance Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Time and Attendance Changes Report Window: Main Tab

The Time and Attendance Changes Report Maintenance window allows you to generate a list of all changes made to time and attendance transactions, including the names of the staff members who made the changes and the staff members affected by the changes. The report also includes the date each change was made and the reason for each change.

Group By area

In the Group By area, you can set the program to group your transaction changes by the staff members who made the changes, the staff members whose transactions were affected, the actions performed, the date the transactions were changed, and the date of the original transaction was made. If you click No Groups, the program will not group your staff members before it prints.

Default Range list

If you select a default range from this list, this default range will appear in the Range list of the Time and Attendance Changes Report window.

Staff ID Making Changes boxes

Using these boxes, you can set the program to filter your transaction records by the staff ID numbers of staff members who made changes to transaction records. For instance, if you type “100” in the first box and “200” in the second box, the report
will only include transactions by staff members with staff ID numbers between 100 and 200 who made changes to transaction records.

**Staff ID Affected by Changes boxes**

Using these boxes, you can set the program to filter your transaction records by the staff ID numbers of staff members who whose transaction records were affected by the change. For instance, if you type “100” in the first box and “200” in the second box, the report will only include transactions by staff members with staff ID numbers between 100 and 200 whose transaction records were affected by changes.

**Time and Attendance Changes Report Window: Action Tab**

The **Action** tab features a filter that allows you to include or exclude transactions changed by the specific type of actions your staff members performed. You can include or exclude transactions changed by certain action types by adding action types to the **Include/Exclude** list. You can include or exclude transactions changed by certain types of actions by adding action types to the **Include/Exclude** list.

You can set the program to either include or exclude transactions changed by the action types in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include transactions changed by the action types in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all transactions changed by the action types in the **Include/Exclude** list.

![Time and Attendance Changes Report Window: Action Tab](image)

To move an action type from the **Available** list to the **Include/Exclude** list, select that action type and click >. To move an action type from the **Include/Exclude** box to the **Available** list, select the action type and click . To move all action types from the **Available** list to the
Include/Exclude box, click >>. To move all action types in the Include/Exclude box to the Available list, click <<.

Time and Attendance Changes Report Window: Department Tab

The Department tab features a filter that allows you to include or exclude the sales of specific menu items in the report. If you click Include, the program will only include transaction changes associated with staff departments listed in the Department list. If you click Exclude, the program will exclude transaction changes associated with staff departments listed in the Department list.

To add a staff department to the Department list, select a department and click >. To remove a staff department from the Department list, select the department and then click <. To remove all staff departments from the Department list, click <<.

Time and Attendance Changes Report Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Staff Clocked In Report Window

The Staff Clocked In Report window allows you to generate a list of staff members and their clock in times within a selected period. The report includes each staff member’s name, staff ID, the clock in time and date, the staff member’s department, and any comments the staff member entered while clocking in at the POS.

Unlike most of the reports in the Digital Dining Back Office program, you cannot modify the definition of this report. From the Staff Clocked In Report window, you can preview or print a report covering any desired date range.

Range list

This list features a variety of general time periods, such as any day of the week, any month of the year, the preceding pay period, and so on. If you wish to set an irregular date range, you can click Custom and then type the specific date range in the Date Range boxes.

Date Range boxes

If you wish to view a report with a specific date range, you can type the dates in the two Date Range boxes or select them from the calendar boxes. For example, if you wish to view a Staff Clocked In Report for the months of June, July, and August, you would type “06/01/00” in the first box and “08/31/00” in the second box. Click to select a date from each calendar box.
Print area

In the Print area, you can set the program to print your report or preview a report before printing. You can preview a report by clicking the Preview option and then clicking the Print command. The program will display a preview of the report, which you can then print or save (that is, export as a file). You can print your report without previewing it by clicking the Print option and then clicking the Print command.

Export Payroll Information Utility

The Export Payroll Information utility allows you to export current payroll information for your staff members into a payroll file, which you can use with an external payroll program. Click Create File to export the current payroll information, or click Exit to cancel the operation.

Before exporting a payroll file, you should enter a destination and format for the file in the Digital Dining Setup program. You can set these in the Export Payroll Settings area in the Pay Periods tab of the Options window (for more information, see the Digital Dining Setup User’s Guide).

Time and Attendance XML Export Utility

The Time and Attendance XML Export utility allows you to export time and attendance transaction data (such as hours worked, pay, and pay rates) into an XML file, which you can then use with an external payroll program.
You can select a date range for the time and attendance data in the **Range** list, which features a variety of general time periods, such as any day of the week, any month of the year, the preceding pay period, and so on. To set an irregular date range, select the specific dates in the **Date Range** calendar boxes. Click **Export** to export the time and attendance data into an XML file, or click **Exit** to cancel the operation.

Before exporting a time and attendance file, you must enter a destination for the file in the Digital Dining Setup program. You can set the file destination in the **Payroll XML Export Path** box on the XML Import and Export Configuration window (for more information, see the *Digital Dining Setup User’s Guide*).

**Time and Attendance Report Examples**

Each of the following sections contains an example of each report that you can generate from the **Time and Attendance** submenu. We used demo data to generate each report. When necessary, we have included a description of how to calculate the values that you see in each column.

**Time and Attendance Reports: Detail Format**

The **Detail** format of the Time and Attendance Reports allows you to generate a report that allows you to analyze the shift details and totals for each staff member for the date range or period you provide.
The **Date** column displays the name of each staff member who worked a shift during the selected date range, the staff department in which each staff member worked, and the date of the shift. If a staff member worked in more than one staff department during the selected date range, the program will list each department subsequently.

The **Time In** column displays each staff member’s clock-in time.

The **Time Out** column displays each staff member’s clock-out time.

The **Department** column displays the department the staff member has worked in.

The **Declared Tips** column displays the dollar amount of tips that the employee recorded while clocking out.

The **Reg Hrs** column displays the number of hours the staff member was clocked in at a normal pay rate.

The **OT Hrs** column displays the number of hours the staff member was clocked in at an overtime pay rate.
The **DBL Hrs** column displays the number of hours the staff member was clocked in at a double time rate (that is twice the regular hourly pay rate).

You can customize how and what reports show by defining reports (for more information, see “Time and Attendance Report Maintenance Window: Main Tab” on page 222).
Staff Menu

Time and Attendance Reports: Summary Format

You can change the report format by using the Report Format list on the Main tab of the Time and Attendance Changes Report Window. The Summary format of the Time and Attendance Reports allows you to generate a report that allows you to analyze the pay period totals for each staff member for the date range or period you provide.

<table>
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<th>Name: Braden, Ray</th>
<th>Staff Id: 10</th>
<th>Payroll Id: 0.00</th>
<th>Overtime Method: None</th>
<th>Reg Hours</th>
<th>Reg Rate</th>
<th>Reg Amt</th>
<th>OT Hours</th>
<th>OT Rate</th>
<th>OT Amt</th>
<th>DBL Hours</th>
<th>DBL Rate</th>
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<td></td>
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</tr>
</tbody>
</table>

The Reg Hrs column displays the number of hours the staff member was clocked in at a normal pay rate.

The Reg Rate column displays the staff member’s regular hourly pay rate.

The Reg Amt column displays the dollar amount that a staff member earned while clocked in at the regular hourly rate.

The OT Hrs column displays the number of hours the staff member was clocked in at an overtime pay rate.

The OT Rate column displays the staff member’s overtime hourly pay rate.

*** Clock Out Times Are Missing ***

*** End of Report ***
The **OT Amt** column displays the dollar amount that a staff member earned while clocked in at the overtime rate.

The **DBL Hrs** column displays the number of hours the staff member was clocked in at a double time rate (that is twice the regular hourly pay rate).

The **DBL Rate** column displays the staff member’s double time hourly pay rate.

The **DBL Amt** column displays the dollar amount that a staff member earned while clocked in at the double time rate.

The **Total Amt** column displays the staff member’s total dollar amount according to the number of hours clocked in at each pay rate.

You can customize how and what reports show by defining reports (for more information, see “Time and Attendance Report Maintenance Window: Main Tab” on page 222).
Time and Attendance Reports: Department Format

The **Department** format of the Time and Attendance Reports allows you to generate a report that allows you to analyze the pay period department totals for each staff member for the date range or period you provide.

### DD CAFE

**DateRange:** 06/22/08 to 06/22/08  
**Page:** 1

#### Time Attendance

**Format:** Department  
**Filter By:** Manager Overhead

<table>
<thead>
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<th>Bussers</th>
<th>Delivery Driver</th>
<th>Host/Hostess</th>
<th>Phone Order 1</th>
<th>Server 1</th>
<th>Server 2</th>
<th>Total</th>
<th><strong>Reg Hrs</strong></th>
<th><strong>Reg Amt</strong></th>
<th><strong>Reg Hrs</strong></th>
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<td>23 Host/Hostess</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>23 Phone Order 1</td>
<td>2.27</td>
<td>14.73</td>
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<td></td>
<td></td>
<td>14.73</td>
</tr>
<tr>
<td>23 Server 1</td>
<td>6.53</td>
<td>22.87</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>22.87</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>23 Total</td>
<td>13.42</td>
<td>67.61</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>67.61</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>67.61</td>
</tr>
<tr>
<td>Grand Total</td>
<td>96.87</td>
<td>525.12</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
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<td>525.12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>525.12</td>
</tr>
</tbody>
</table>

*** Clock Out Times Are Missing ***

*** End of Report ***

The **Reg Hrs** column displays the number of hours the staff member was clocked in at a normal pay rate.

The **Reg Amt** column displays the dollar amount that a staff member earned while clocked in at the hourly rate.
The **OT Hrs** column displays the number of hours the staff member was clocked in at an overtime pay rate.

The **OT Amt** column displays the dollar amount that a staff member earned while clocked in at the overtime rate.

The **DBL Hrs** column displays the number of hours the staff member was clocked in at a double time rate (that is twice the regular hourly pay rate).

The **DBL Amt** column displays the dollar amount that a staff member earned while clocked in at the double time rate.

The **Total Amt** column displays each staff member’s total dollar amount according to the number of hours clocked in at each pay rate.

You can customize how and what reports show by defining reports (for more information, see “Time and Attendance Report Maintenance Window: Main Tab” on page 222).
Time and Attendance Reports: Audit Format

The **Audit** format of the Time and Attendance Reports allows you to generate a report that lists the details of every clock in or clock out transaction for the date range or period you provide.

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Department</th>
<th>Date</th>
<th>Time In</th>
<th>Time Out</th>
<th>Hours</th>
<th>Decl Tips</th>
<th>Comment In</th>
<th>Comment Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>Server 1</td>
<td>8/16/08</td>
<td>10:53</td>
<td>10:59</td>
<td>0.10</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>Server 1</td>
<td>8/17/08</td>
<td>09:02</td>
<td>15:12</td>
<td>6.17</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>Server 1</td>
<td>8/18/08</td>
<td>14:39</td>
<td>17:18</td>
<td>2.65</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>Server 1</td>
<td>8/19/08</td>
<td>08:55</td>
<td>17:04</td>
<td>8.15</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Branson, Kay</td>
<td>None</td>
<td>8/20/08</td>
<td>05:54</td>
<td>12:07</td>
<td>0.00</td>
<td>12.50</td>
<td>Accounting Record</td>
<td>Sales without shift</td>
</tr>
<tr>
<td>12</td>
<td>Geffers, Susan</td>
<td>Phone Order 1</td>
<td>8/16/08</td>
<td>09:31</td>
<td>10:23</td>
<td>0.87</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Geffers, Susan</td>
<td>Server 6</td>
<td>8/17/08</td>
<td>13:29</td>
<td>13:41</td>
<td>0.20</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Geffers, Susan</td>
<td>Phone Order 1</td>
<td>8/18/08</td>
<td>13:10</td>
<td>17:03</td>
<td>3.88</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Hume, Alan</td>
<td>Delivery Driver</td>
<td>8/16/08</td>
<td>09:29</td>
<td>10:23</td>
<td>0.90</td>
<td>0.01</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Hume, Alan</td>
<td>Delivery Driver</td>
<td>8/17/08</td>
<td>13:09</td>
<td>17:03</td>
<td>3.90</td>
<td>15.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Jones, Anne</td>
<td>Dev Th</td>
<td>8/19/08</td>
<td>13:54</td>
<td>14:40</td>
<td>0.77</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Jones, Anne</td>
<td>Dev Th</td>
<td>8/19/08</td>
<td>16:31</td>
<td>17:01</td>
<td>0.50</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Lewis, Samantha</td>
<td>Host/Hostess</td>
<td>8/20/08</td>
<td>03:00</td>
<td>06:00</td>
<td>16.67</td>
<td>0.00</td>
<td>System clock out</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Lewis, Samantha</td>
<td>Host/Hostess</td>
<td>8/20/08</td>
<td>10:35</td>
<td>15:00</td>
<td>4.65</td>
<td>0.00</td>
<td>Clock-Out Error</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Server 1</td>
<td>8/22/08</td>
<td>11:44</td>
<td>11:52</td>
<td>0.07</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Bartender</td>
<td>8/21/08</td>
<td>12:04</td>
<td>19:42</td>
<td>1.63</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Bartender</td>
<td>8/22/08</td>
<td>16:28</td>
<td>17:18</td>
<td>0.83</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Bartender</td>
<td>8/19/08</td>
<td>12:16</td>
<td>17:02</td>
<td>4.77</td>
<td>15.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>56.58</td>
<td>65.01</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The **Staff ID** column displays each staff member’s staff ID number.

The **Name** column displays each staff member’s name.

The **Department** column displays each staff member’s primary department.

The **Date** column displays the date of each transaction.

The **Time In** column displays the clock in time of each transaction.

The **Time Out** column displays the clock out time of each transaction.

The **Hours** column displays the amount of hours that each staff member worked in a shift.
The **Declared Tips** column displays the dollar amount of tips that each employee declared when clocking out.

The **Comment In** column displays any comments the staff member might have entered at the POS when clocking in. You can also add comments in the Time and Attendance Transaction Maintenance window.

The **Comment Out** column displays any comments the staff member might have entered at the POS when clocking out. You can also add comments in the Time and Attendance Transaction Maintenance window.

You can customize how and what reports show by defining reports (for more information, see “Time and Attendance Report Maintenance Window: Main Tab” on page 222).

In some circumstances, you might generate a report that includes a record for a “virtual shift.” The program labels “virtual shift” records with a department of “None,” with “Accounting Record” in the Comment In column, and with “Sales without shift” in the Comment Out column. These records represent shift with sales that, for whatever reason, have been dissociated from their staff members.

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Department</th>
<th>Date</th>
<th>Time In</th>
<th>Time Out</th>
<th>Hours</th>
<th>Decl Tips</th>
<th>Comment In</th>
<th>Comment Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Shorter, Wayne</td>
<td>Server 1</td>
<td>4/17/02</td>
<td>14:30</td>
<td>22:45</td>
<td>8.18</td>
<td>76.50</td>
<td>Accounting Record</td>
<td>Sales without shift</td>
</tr>
<tr>
<td>20</td>
<td>Shorter, Wayne</td>
<td>Server 1</td>
<td>4/18/02</td>
<td>08:55</td>
<td>17:04</td>
<td>8:15</td>
<td>85.25</td>
<td>Accounting Record</td>
<td>Sales without shift</td>
</tr>
<tr>
<td>20</td>
<td>Shorter, Wayne</td>
<td>None</td>
<td>4/19/02</td>
<td>09:54</td>
<td>15:07</td>
<td>0:00</td>
<td>32.50</td>
<td>Accounting Record</td>
<td>Sales without shift</td>
</tr>
</tbody>
</table>
Time and Attendance Reports: Consolidated Format

The **Consolidated** format of the Time and Attendance Reports allows you to generate a report that includes all the standard information that you need to produce payroll for the date range or period you provide.

### Time Attendance

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Payroll ID</th>
<th>Department</th>
<th>Regular Hours</th>
<th>Regular Rate</th>
<th>Overtime Hours</th>
<th>Overtime Rate</th>
<th>Double Time Hours</th>
<th>Double Time Rate</th>
<th>Tips</th>
<th>Cash Tip</th>
<th>Overtime Tip</th>
<th>Total</th>
<th>Cash Total</th>
<th>Overtime Cash Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Brennan, Kay</td>
<td>107</td>
<td>Club Ser</td>
<td>4.58</td>
<td>6.00</td>
<td>25.78</td>
<td>0.00</td>
<td>9.75</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>10.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
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<td>Brennan, Kay</td>
<td>108</td>
<td>Bar 1</td>
<td>4.09</td>
<td>3.50</td>
<td>16.50</td>
<td>0.00</td>
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<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>12</td>
<td>Brennan, Kay</td>
<td>109</td>
<td>Bar 2</td>
<td>3.30</td>
<td>2.50</td>
<td>15.50</td>
<td>0.00</td>
<td>2.50</td>
<td>0.00</td>
<td>0.00</td>
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<td>10.00</td>
<td>0.00</td>
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</tr>
<tr>
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<td>Total</td>
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<td>5.97</td>
<td>3.50</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>10.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>13</td>
<td>Lewis, Samantha</td>
<td>110</td>
<td>Host</td>
<td>61.90</td>
<td>6.00</td>
<td>391.40</td>
<td>0.00</td>
<td>9.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>12.00</td>
<td>0.00</td>
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<td></td>
<td></td>
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<td>6.00</td>
<td>391.40</td>
<td>0.00</td>
<td>9.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>12.00</td>
<td>0.00</td>
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<td>0.00</td>
</tr>
<tr>
<td>14</td>
<td>Miller, Rick</td>
<td>111</td>
<td>Bartend</td>
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<td>0.00</td>
<td>13.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
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<td>33.57</td>
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</tr>
<tr>
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<td>Bar 1</td>
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<td>0.00</td>
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</tr>
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<td>10.00</td>
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<td>0.00</td>
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<td>0.00</td>
</tr>
<tr>
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<td>Wizard, Wizard</td>
<td>115</td>
<td>Bartend</td>
<td>20.22</td>
<td>6.50</td>
<td>131.41</td>
<td>0.00</td>
<td>6.75</td>
<td>0.00</td>
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<td>0.00</td>
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</tr>
<tr>
<td>19</td>
<td>Wizard, Wizard</td>
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<td>Book</td>
<td>1.08</td>
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<td>7.56</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>20</td>
<td>Wizard, Wizard</td>
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<td>Bar 1</td>
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</tr>
<tr>
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<td>0.00</td>
<td>22.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Check Times Are Missing**

**End of Report**

You can customize how and what reports show by defining reports (for more information, see “Time and Attendance Report Maintenance Window: Main Tab” on page 222).
Time and Attendance Reports: IRS 8027 Format

The IRS 8027 format of the Time and Attendance Reports allows you to generate a report that includes all the standard information you need to complete the IRS 8027 form.

The **Staff ID** column displays each staff member’s staff ID number.

The **Name** column displays each staff member’s name.

The **Payroll ID** column displays each staff member’s payroll ID number (most commonly used for third-party payroll software).

The **Sales** area displays the sales not including the tips (the **Regular** column), the tips included in the receipts (the **Tipped** column), and the sales plus tips (the **Total** column).

The **Percent** column displays the number entered on the Main tab of the Tip Configuration Maintenance window, the **Min Tip Percentage** box.

The **Required** column displays the amount of tips that each staff member must claim.

The **Tips** area displays each staff member’s received tips, given tips, declared tips, cash tips, charged tips and the total amount of tips.

The **Allocation** column displays the commission taken out of staff tips according to receipt definitions.
The **Staff Count** column displays the total number of staff members included in the report.

You can customize how and what reports show by defining reports (for more information, see “Time and Attendance Report Maintenance Window: Main Tab” on page 222).

---

### Time and Attendance Reports: Consolidated Fraction Format

The **Consolidated** format of the Time and Attendance Reports allows you to generate a report that includes all the standard information that you need to produce payroll for the date range or period you provide.

---

**DD CAFE**

**Date:** 08/23/08  
**Date Range:** 08/23/2007 to 08/23/2008  
Page 1

#### Time Attendance

**Format:** Consolidated  
**Sorted By:** Staff Name  
**Filtered By:** Manager Overhead

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Payroll ID</th>
<th>Department</th>
<th>Regular</th>
<th>Hours</th>
<th>Rate</th>
<th>Amount</th>
<th>Overtime</th>
<th>Hours</th>
<th>Rate</th>
<th>Amount</th>
<th>Double Time</th>
<th>Hours</th>
<th>Rate</th>
<th>Amount</th>
<th>Tips</th>
<th>Hours</th>
<th>Rate</th>
<th>Amount</th>
<th>Declared</th>
<th>Charged</th>
<th>Total</th>
<th>Cash</th>
<th>Charged</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Brandon, Kay</td>
<td>Cm 1</td>
<td></td>
<td>4.62</td>
<td>3.50</td>
<td>16.20</td>
<td>0.00</td>
<td>6.75</td>
<td>0.20</td>
<td>13.00</td>
<td>0.00</td>
<td>318.75</td>
<td>0.00</td>
<td>10.00</td>
<td>0.00</td>
<td>888.75</td>
<td>10.00</td>
<td>722.54</td>
<td>0.00</td>
<td>222.26</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Brandon, Kay</td>
<td>Cm 2</td>
<td></td>
<td>7.33</td>
<td>5.00</td>
<td>36.65</td>
<td>0.00</td>
<td>7.30</td>
<td>0.00</td>
<td>10.00</td>
<td>0.00</td>
<td>318.75</td>
<td>0.00</td>
<td>10.00</td>
<td>0.00</td>
<td>888.75</td>
<td>10.00</td>
<td>722.54</td>
<td>0.00</td>
<td>222.26</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Lewis, Samantha</td>
<td>Host</td>
<td></td>
<td>117.65</td>
<td>0.00</td>
<td>709.90</td>
<td>0.00</td>
<td>9.00</td>
<td>0.00</td>
<td>12.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Bar-B-Q Bar</td>
<td></td>
<td>79.30</td>
<td>6.50</td>
<td>506.36</td>
<td>0.00</td>
<td>9.75</td>
<td>0.00</td>
<td>13.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Grill Bar</td>
<td></td>
<td>2.52</td>
<td>6.50</td>
<td>16.77</td>
<td>0.00</td>
<td>9.75</td>
<td>0.00</td>
<td>13.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Cm 2</td>
<td></td>
<td>14.27</td>
<td>3.50</td>
<td>49.93</td>
<td>0.00</td>
<td>6.25</td>
<td>0.00</td>
<td>7.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Cm 1</td>
<td></td>
<td>26.26</td>
<td>0.00</td>
<td>525.32</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Cm 1</td>
<td></td>
<td>117.65</td>
<td>0.00</td>
<td>709.90</td>
<td>0.00</td>
<td>9.00</td>
<td>0.00</td>
<td>12.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Clock Out Times Are Missing**

**End of Report**

---

You can customize how and what reports show by defining reports (for more information, see “Time and Attendance Report Maintenance Window: Main Tab” on page 222).
Time and Attendance Reports: Time Sheet Format

The Time Sheet format of the Time and Attendance Reports allows you to generate a report that includes a list of hours worked for each staff member within the selected date range. The report includes totals for regular, overtime, and double-time hours worked.

You can customize how and what reports show by defining reports (for more information, see “Time and Attendance Report Maintenance Window: Main Tab” on page 222).
**Time and Attendance Changes Report**

The Time and Attendance Changes report displays a list of change to a clock in or clock out transaction, including the date, time, and the name of the staff member who made the change, what the change affected, and why the staff member made the change for the date range or period you provide.

<table>
<thead>
<tr>
<th>Changes Made by</th>
<th>Affected</th>
<th>Action</th>
<th>Time</th>
<th>Date</th>
<th>Staff</th>
<th>Staff</th>
<th>Computer</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Jones 10/15/2011 17:50</td>
<td>4 Edit</td>
<td>Time Attendance 8/25/2002</td>
<td>12 Jones</td>
<td>BACK OFFICE</td>
<td>Reason for change: Clock out at wrong Time Time Out is changed from 11:15 to 11:30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Jones 10/15/2011 14:20</td>
<td>4 Edit</td>
<td>Time Attendance 8/25/2002</td>
<td>10 Burns</td>
<td>BACK OFFICE</td>
<td>Reason for change: Clock out at wrong Time Time Out is changed from 11:15 to 11:30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Jones 10/15/2011 16:55</td>
<td>5-Add</td>
<td>Time Attendance 8/25/2002</td>
<td>16 Davis</td>
<td>BACK OFFICE</td>
<td>Reason for change: Forgot to clock in Added security the staff member.</td>
<td>16</td>
<td>Use Date: Department is set to Server Time in is set to 10:30</td>
<td></td>
</tr>
</tbody>
</table>

Total count: 4

*** End of Report ***

**Time and Attendance Staff Clocked In Report**

The Time and Attendance Staff Clocked In report displays a list of every staff member who is not currently clocked out for the date range or period you provide.

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Date</th>
<th>Time</th>
<th>Department</th>
<th>Comments In</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Wizard</td>
<td>10/15/02</td>
<td>11:36</td>
<td>Server 1</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Blaisdale Kay</td>
<td>10/15/02</td>
<td>14:54</td>
<td>Server 1</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller Rob</td>
<td>9/23/02</td>
<td>12:13</td>
<td>Bartender</td>
<td></td>
</tr>
</tbody>
</table>

*** End of Report ***
DD-Mail Message Maintenance Window

The DD-Mail Message window enables you to send messages to staff members, which they can read at the POS. You can enter a message in the DD-Mail Message Maintenance window and send it to a single staff member or a group of staff members. (Staff members can view their messages at the POS by using the DD-Mail register option.) You can set the program to send DD-mail messages to staff members associated with specific staff departments, rating levels, security positions, or available days and day parts.

The DD-Mail Message Maintenance window allows you to create messages and save them so you can use them repeatedly. However, if you want to send a quick message just once (without saving it), you can use the Quick Message option. Select Quick Message in the Message list, type a message (in the text box on the Message tab), then click Send, the program will send the message to all appropriate staff members without saving the message. The DD-Mail Message Maintenance window also allows you to delete existing messages. If you select Clear Messages in the Message list and then click Send, the program will delete all existing DD-Mail messages that meet the parameters of the filters.

DD-Mail Message Maintenance Window: Message Tab

On the Message tab, you can type the message that you want to send to other staff members. The Message tab includes a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. The program will display the message in the Display panel immediately after this staff member logs in at the POS.
The **POS Message** check box allows you to make certain messages available at the POS when you run the DD-Mail register option. When you select this check box while creating a message, the Back Office program disables the filtering in the **Depart.**, **Security**, and **Availability** tabs.

**DD-Mail Message Maintenance Window: Department Tab**

The **Department** tab features a filter that allows you to include or exclude staff members in specific staff departments. The program will only send your DD-Mail message to staff members from staff departments in the **Include** list and will not send your DD-Mail message to staff members from staff departments in the **Exclude** list.

**DD-Mail Message Maintenance Window: Security Tab**

The **Security** tab features a filter that allows you to include or exclude staff members associated with specific staff security positions. The program will only send your DD-Mail message to staff members with security positions in the **Include** list and will not send your DD-Mail message to staff members with security positions in the **Exclude** list.

**DD-Mail Message Maintenance Window: Availability Tab**

The **Availability** tab features a filter that allows you to include or exclude staff members by availability. The **Availability** tab features 24 check boxes, divided by seven columns (each representing a day of the week) and four rows (each representing a day part). You can filter your Digital Dining-Mail message recipients by clicking the appropriate check boxes for the particular days and day parts you wish to include. For instance, if you wish to send your message to staff members who work Monday mornings, you should click the check box in the **Monday** column and the **Morning** row.
The Staff menu includes two staff utilities, Staff PTD Reset and Purge Inactive Staff, to help you maintain your staff member records. You can use the Staff PTD Reset utility to reset the period-to-date for all of your staff member records. You can use the Purge Inactive Staff utility to delete all of your inactive staff member records.

**Staff PTD Reset**

By using the Staff PTD Reset utility, you can clear the period-to-date totals on the Sales tab and Receipts tab of the Staff Member Maintenance window. After you reset it, the program will add the PTD totals from that point on. This utility will reset all of your staff member records simultaneously. It will not clear any of the other sales information.

**Purge Inactive Staff**

By using the Purge Inactive Staff utility, you can remove all of your inactive staff member records from your system. The program will remove any staff member record that does not have the Active check box selected in the Staff Member Maintenance window (for more information, see “Staff Member Maintenance Window” on page 165). The Purge Inactive Staff utility will not remove any staff member records that are associated with any existing transaction records in the daily POS files.

The Purge staff that have been inactive for box enables you to set how many days the program should keep inactive staff member records. If you enter a number in the Inactive box and then run the utility, the program will only purge staff records that are older than the number of days in the Inactive box. If you enter “0” in the Inactive box, the utility will purge all inactive staff member records, regardless of age.

If you click Set as Default, the program will use the number in the Inactive box as the default setting when you use the utility later.
Export Staff Data to XML

The Export Staff Data to XML utility allows you to create an .xml file containing staff member data from the Back Office data files. If you use an online third-party labor scheduling service (such as HotSchedules), you can use this utility to create a export file that you can then upload to the service’s website.

If you run the utility, the program will export the Back Office program’s staff member data into a single .xml file called “StaffData.xml”. The program will create the data file in the directory you set in the XML Import and Export Configuration window (in the Staff XML Export Path box).

Import Labor Schedule XML

If you use a third-party labor scheduling service (such as HotSchedules), you can use the Import Labor Schedule XML utility to import formatted schedule data from that service into Digital Dining’s staff data files.

After you finalize your schedules with the third-party service, that service should provide you with an .xml file containing the formatted schedule information. To import that schedule information into the Digital Dining labor scheduling files, copy the third-party .xml file to the directory that you specified in the XML Import and Export Configuration window (in the Schedule XML Import File box).

Then run the Import Labor Schedule XML utility. When you run the utility, the program will import the schedule data from the third-party .xml file into Digital Dining’s labor scheduling data files. Afterwards, when you access the labor schedules in the Labor Scheduling program, those schedules should feature the information provided by the third-party service.

Staff Setup

The Staff menu includes seven staff setup windows, which you can use to create various records (such as staff departments, department groups, and overtime methods) before creating staff member records in the Staff Member Maintenance window.
<table>
<thead>
<tr>
<th>Which window?</th>
<th>Used for what?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Department Maintenance window</td>
<td>In this window, you can create staff departments, which are groups of employees sharing similar job descriptions (such as servers, cooks, and bartenders).</td>
</tr>
<tr>
<td>Staff Department Group Maintenance window</td>
<td>In this window, you can create staff department groups, which are groups of similar staff departments (such as serving staff and kitchen staff). By grouping similar staff departments into department groups, you can sort and filter staff reports in a variety of ways.</td>
</tr>
<tr>
<td>Staff Overtime Method Maintenance window</td>
<td>In this window, you can create staff overtime methods, which allow you to define different methods for paying staff members for overtime work.</td>
</tr>
<tr>
<td>Staff Restricted Names Maintenance window</td>
<td>In this window, you can restrict specific staff names. If you enter a name in this window, you cannot use this name as a report name or POS name in the Staff Member Maintenance window.</td>
</tr>
<tr>
<td>Rating Level Maintenance window</td>
<td>In this window, you can create rating levels, which you can then associate with your staff member records. Rating levels allow you to rate the quality of each staff member’s performance.</td>
</tr>
<tr>
<td>Work Status Maintenance window</td>
<td>The Work Status Maintenance window allows you to create work status records that represent a staff member’s employment status, such as “Current,” “Inactive,” “Temporary Leave,” or “Fired.”</td>
</tr>
<tr>
<td>Shift Break Maintenance window</td>
<td>In this window, you can create shift breaks, allowing you to control who’s on break, how long they stay on break, and whether they are paid for the break.</td>
</tr>
<tr>
<td>Staff Day Part Maintenance window</td>
<td>In this window, you can create staff day parts. You can divide a single work day into four separate periods (such as “Breakfast,” “Lunch,” and so on). By defining your day parts, you can organize your staff members’ availability to work.</td>
</tr>
<tr>
<td>Ethnicity Maintenance window</td>
<td>In this window, you can create ethnicity files, which you can then associate with staff member records in the Staff Member Maintenance window.</td>
</tr>
<tr>
<td>Date Type Maintenance window</td>
<td>In this window, you can create new date types that will appear in the Staff Member Maintenance window, allowing you to store important dates for each staff member record.</td>
</tr>
</tbody>
</table>
Staff Menu

Staff Department Maintenance Window: Main Tab

Using the **Main** tab of the Staff Department Maintenance window, you can create the bulk of the settings for each of the 99 staff departments you can create. When you enter a staff department name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.

**Department Group list**

To associate a staff department with a department group, click a department group from this list. Any department groups that you have created in the Department Group Maintenance window will appear in the **Department Group** list.

If you do not see a department group that you want to use for a particular staff department, then you can double-click the “Department Group” label to open the Department Group Maintenance window. With the Department Group Maintenance window open and active, you can add or modify your department groups. After you save and close the Department Group Maintenance window, Digital Dining will make the new or modified department group available in the **Department Group** list.

**Register Timer list**

To associate a staff department with a register timer, click a register timer from this list. Any register timers that you have created in the Timer Maintenance window of the Digital Dining Setup program will appear in the **Register Timer** list. When
Staff Menu

staff members associated with this staff department log into the POS, this register timer will determine which register settings the program will load (for more information on register timers, see the Digital Dining Setup User’s Guide).

Meal Discount list

You can associate a staff department with a discount by selecting a discount from the Meal Discount list. By associating a staff department to a discount, you allow every staff member in this staff department to use this discount at the POS. The Meal Discount list will include all of the discounts you’ve created in the Discounts Window Maintenance window (for more information, see the Digital Dining Setup User’s Guide).

If your staff members belong to more than one staff department, they can only use a discount associated with the department they are currently working in. For instance, you might have two staff departments, “Server” and “Bartender.” You might associate the “Bartender” staff department with a discount, but not the “Server” staff department. If you have staff members associated with both staff departments, they can only use the discount associated with the “Bartender” staff department while working within the “Bartender” staff department. If they are logged in as servers, they cannot use the “Bartender” discount.

Meal Qualification box

You can set a minimum time qualification for a meal discount by using the Meal Qualification box. You can type the number of minutes a staff member must work before qualifying for the meal discount. For instance, if you associate a staff department with a discount (using the Meal Discount box) and then type “120” in the Meal Qualification box, staff members working in this staff department can only use the meal discount after working at least 120 minutes of their shift. Once they use the discount, they must wait another 120 minutes before using it again.

Department ID box

The Department ID box allows you to associate staff departments with special department ID codes. Some third-party payroll systems (such as Heartland) require you to identify staff departments with special department ID “identifier” codes, and they require clients to include these department ID numbers in their payroll exports. If you use a third-party payroll system that requires you to associate staff departments with unique department ID codes, you can type an appropriate department ID for each department in the Department ID box.
**Default Labor Rates area**

You can type the default pay rates for regular and on-call hours for staff members in this department. Type the default rate for regular hours in the **Regular** box, and type the default rate for hours spent on call in the **On Call** box. The program will use these default rates when you add new staff members in the Staff Member Maintenance window, but you can edit these rates as necessary (for more information, see “Staff Member Maintenance Window: Dept Tab” on page 176).

**Driver Department check box**

If you are using the Digital Dining Frequent Diner/Delivery program to manage delivery orders, you can click the **Driver Department** check box to designate a department as a driver department. You can then assign delivery orders to staff members associated with this department. At the POS, if you use the Driver Select, Driver Single, or Change Driver Assignment register options, the program will display staff members in this department as delivery drivers (for more information, see the Digital Dining Frequent Diner/Delivery User’s Guide).

**Declare Cash Tips check box**

Click this check box if you want staff members in this department to declare their tips when clocking out of the POS. When staff members clock out at the POS the program will prompt them to enter their total amount of tips.

**Exclude Payroll Export check box**

If you use an external payroll system to manage your payroll, you can use this check box to include or exclude specific staff departments in your payroll export file. If you click the **Exclude Payroll Export** check box, the Back Office program will exclude this staff department from your payroll export files.

**Staff Department Maintenance Window: Day Parts Tab**

The **Day Parts** tab allows you to define the times of the day that each day part begins and ends for each staff department. The **Day Part** tab contains four **Day Part** areas (one for each day part), and each **Day Part** area contains three boxes: **Start**, **End**, and **Mgr**. You can type the time of the day (in military time) that a day part begins in the **Start** box, and the time of the day that the day part ends in the **End** box.
You can use the **Day Part** tab to restrict when your staff members can clock into the POS. You can determine which day parts of which days a particular staff member is available to work in the Staff Member Maintenance window. If a staff member tries to clock in during a time of the day that does not fall within the range of any of his or her available day parts, the POS program will require a manager’s authorization. For instance, you might have a staff member set as available for a lunch shift (11:00 to 14:00) but not an evening shift (16:00 to 22:00). If the staff member tries to clock into the POS after 2:00 P.M. (14:00), the POS program will require a manager’s password.

If you do not have a department for managers and your managers do not clock in and out, you can enter an amount for manager overhead for each day part. You can type the average pay per hour for your managers in the **Mngr** box of each **Day Part** area. The program can then use this amount when calculating labor reports.

### Staff Department Maintenance Window: Breaks Tab

The **Breaks** tab allows you to associate staff breaks with staff departments. The **Breaks** tab features a grid listing all of the breaks associated with that staff department. The POS program will make all of these breaks available to staff members in this staff department.
To add a staff break to the grid, click **New Line**. A new line will appear in the grid. Click the **Break Description** box of the new line to open the Find Staff Breaks window. The Find Staff Breaks window will include any staff breaks you’ve created in the Staff Breaks Maintenance window. Select an appropriate staff break and click **OK**. That staff break will appear in the new line. To change a staff break on the grid, click its **Break Description** box and select a different staff break from the Find Staff Breaks window. To remove a staff break from the grid, select the line on the grid you wish to remove and then click **Delete Line**.

If you use the Digital Dining Labor Scheduling program, then each staff break you add to the grid will feature a corresponding **Sched** (Schedule) check box. If you add a paid staff break to the grid and then select this check box, the Labor Scheduling program will include this paid break when generating Expected Labor reports.
Staff Menu

Staff Department Maintenance Window: Image Tab

In the Images tab, you can associate a staff department with a button image, which will display as the staff department’s button in the POS. The Current Image list includes all of the staff department button images you have created in the Button Image Maintenance window. (The Current Image list only includes button images designated as Staff Department or Any in the Image Category list of the Button Image Maintenance window). To associate a staff department with a button image, select an image in the Current Image list. The program will display the selected image in the tab.

You can also search for an appropriate button image by clicking Find. If you click Find, the program will display the available images as thumbnails in the Image Viewer window. You can browse these images and click the appropriate one.

To clear an associated image, select None. If you select None, then program will create a default button image using the staff department’s description.

Staff Department Maintenance Window: Password Tab

The Password tab allows you to set password levels to certain POS functions (such as opening new checks, accessing existing checks, and so on). The password levels you set on this tab apply to every staff member in the department. You can use this tab to control what functions staff member can perform for their own checks or checks associated with other staff members.
When a staff member attempts to perform one of these functions at the POS, Digital Dining compares that staff member’s password level with the level you set for the function in the **Password** tab. If the staff member has a password level equal to or greater than the password for the function, then Digital Dining performs the function. If the staff member’s password level is lower than the function’s password, then Digital Dining prompts the staff member for a manager’s approval. The password levels you set in the **Your Check** column apply to a staff member’s own checks. The password levels you set in the **Others Check** column apply to checks associated with other staff members.

On the **Password** tab, you can apply password security to the following functions:

- Opening a new check
- Accessing an existing check
- Adding items to a check
- Printing a check
- Verifying a credit card
- Paying a check

### Staff Department Maintenance Window: Req Dates Tab

The **Req Dates** tab allows you to set the program to require certain dates when you create new staff member records. In the Staff Member Maintenance window, on the **Personal** tab, you can record various important dates about a staff member. By default, the program does not require you to enter dates for any the date types when you create staff member records. However, if you want the program to require one or more of those dates, you can set them as required in the **Req Dates** tab.
You can set the program to require a type of date by adding the date types to the Include/Exclude list. To move a date type from the Available list to the Include/Exclude list, select that date type and click \( \rightarrow \). To move a date type from the Include/Exclude box to the Available list, select the date type and click \( \leftarrow \). To move all date types from the Available list to the Include/Exclude box, click \( \rightarrow \). To move all date types in the Include/Exclude box to the Available list, click \( \leftarrow \).

You can set the program to require dates for the date types in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only require dates for the date types in the Include/Exclude list. If you click Exclude, the program will not require dates for the date types in the Include/Exclude list.

Staff Department Maintenance Window: Give Tips Tab

The Give Tips tab enables you to set the POS program to automatically display staff members from certain staff departments when you run the Tip Sharing register option. If you add a staff department to the Give To list, the POS will automatically display members of that staff department when a member of this department runs the Tip Sharing register option. For instance, you could set the Server staff department to give tips to the Bartender staff department. In the POS, if a server runs the Tip Sharing register option, the POS will automatically display all of the staff members from the Bartender staff department in the Selection panel.
Staff Menu

To add a staff department to the **Give To** list, double-click the staff department in the **Available** list or select the staff department and then click **Add**. To remove a staff department from the **Give To** list, double-click the staff department or select the staff department and then click **Delete**. To remove all staff departments from the **Give To** list, click **Clear**.

### Staff Department Maintenance Window: Receive Tips Tab

The **Receive Tips** tab enables you to set the POS program to automatically display staff members from certain staff departments when you run the Tip Sharing register option. If you add a staff department to the **Receive From** list, the POS will automatically display members of this staff department when a member of the “Receive From” department runs the Tip Sharing register option. For instance, you could set the Bartender staff department to receive tips from the Server staff department. In the POS, if a server runs the Tip Sharing register option, the POS will automatically display all of the staff members from the Bartender staff department in the Selection panel.
To add a staff department to the **Receive From** list, double-click the staff department in the **Available** list or select the staff department and click ![Add Button]

To remove a staff department from the **Receive From** list, double-click the staff department or select the staff department and then click ![Remove Button]. To remove all staff departments from the **Receive From** list, click ![Remove All Button]

**Staff Department Maintenance Window: Memo Tab**

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

**Staff Department Group Maintenance Window: Main Tab**

Using the **Main** tab of the Staff Department Group Maintenance window, you can create up to 24 staff department groups. When you enter a staff department group name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.
**Department Type list**

The **Department Type** list allows you to associate a department group with a department type. Click **Front of House** for department groups involving work in the serving area, such as servers and hosts. Click **Back of House** for department groups involving work outside of the serving area, such as cooks or bookkeepers. Click **Management** for department groups involving management duties.

**Staff Department Group Maintenance Window: Memo Tab**

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Staff Overtime Method Maintenance Window: Main Tab

Using the **Main** tab, you can create the bulk of the settings for each of the 99 staff overtime methods you can create. When you enter a staff overtime method name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.

---

**Overtime as a percentage of standard rate box**

The **Overtime as a percentage of standard rate box** allows you to specify an overtime pay rate as a percentage of a standard pay rate. For instance, if you wanted to create an overtime method for “time-and-a-half” (where staff members earn their standard pay rate plus half of their standard rate per hour), you could type “150.00” in the **Overtime as a percentage of standard rate box**.
Minutes worked before overtime is assigned area

The Minutes worked… area allows you to define how many hours a staff member must work before earning an overtime pay rate. You can define overtime periods based on the number of minutes worked per shift, day, week, every two weeks, and seventh day.

<table>
<thead>
<tr>
<th></th>
<th>Overtime Rate</th>
<th>Double-time Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift</td>
<td>Type the number of minutes staff members must work within a single shift before earning their time-and-a-half pay rate.</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>Daily</td>
<td>Type the number of minutes staff members must work within a single day before earning their time-and-a-half pay rate.</td>
<td>Type the number of minutes staff members must work within a single day before earning their double-time pay rate.</td>
</tr>
<tr>
<td>Weekly</td>
<td>Type the number of minutes staff members must work within a single week before earning their time-and-a-half pay rate.</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>Biweekly</td>
<td>Type the number of minutes staff members must work within a single biweekly period before earning their time-and-a-half pay rate.</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>Seventh Day</td>
<td>Click the Seventh Day check box if your staff members earn a time-and-a-half pay rate for working a seventh day in a single work week.</td>
<td>Type the number of minutes staff members must work within a seventh day before earning their double-time pay rate.</td>
</tr>
</tbody>
</table>

Calculate by Total Hr check box

We have also added the Calculate by Total Hr check box to the Staff Overtime Method Maintenance window, allowing you to calculate overtime based on total minutes worked per day or per week. If you select the Calculate by Total Hr check box, the program will calculate overtime based on the total minutes worked each week (as set in the Weekly/Overtime box). If you clear the Calculate by
Total Hr check box, the program will calculate overtime based on the total minutes worked each day (as set in the Daily/Overtime box).

For instance, you might want to create an overtime method that calculates any time over eight hours on a single day as overtime. You could type “480” in the Daily/Overtime box and clear the Calculate by Total Hr box. If a staff member associated with this overtime method worked three days in one week, 10 hours each day, Digital Dining would calculate that staff member’s regular hours as “24” and overtime as “6.”

<table>
<thead>
<tr>
<th>Day 1</th>
<th>10 hours total</th>
<th>8 regular hours</th>
<th>2 overtime hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 2</td>
<td>10 hours total</td>
<td>8 regular hours</td>
<td>2 overtime hours</td>
</tr>
<tr>
<td>Day 3</td>
<td>10 hours total</td>
<td>8 regular hours</td>
<td>2 overtime hours</td>
</tr>
<tr>
<td>Week</td>
<td>30 hours total</td>
<td>24 regular hours</td>
<td>6 overtime hours</td>
</tr>
</tbody>
</table>

However, you might want to create an overtime method that calculates any time over 40 hours in a single week as overtime. You could type “2400” in the Weekly/Overtime box and select the Calculate by Total Hr box. If a staff member associated with this overtime method worked three days in one week, 10 hours each day, Digital Dining would calculate that staff member’s regular hours as “30” and overtime as “0.”

<table>
<thead>
<tr>
<th>Day 1</th>
<th>10 hours total</th>
<th>10 regular hours</th>
<th>0 overtime hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 2</td>
<td>10 hours total</td>
<td>10 regular hours</td>
<td>0 overtime hours</td>
</tr>
<tr>
<td>Day 3</td>
<td>10 hours total</td>
<td>10 regular hours</td>
<td>0 overtime hours</td>
</tr>
<tr>
<td>Week</td>
<td>30 hours total</td>
<td>30 regular hours</td>
<td>0 overtime hours</td>
</tr>
</tbody>
</table>

Maximum time between shifts… box

If your staff members sometimes work two shifts in a single day, you can define how many minutes must pass between a staff member’s clock out time and clock in time (on a single day) before the program considers the second clock in time as the beginning of a new shift. You can define this time period by typing the appropriate number of minutes in the Maximum time between shifts … box.

For instance, you might create an overtime method and type “180” in the Maximum time between shifts… box. Afterwards, if a staff member with this overtime method should clock out and then clock back in within three hours (180 minutes), the
program will calculate that as a single shift. If the staff member clocks out and then clocks back in after three hours, the program will calculate this as a second shift.

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**Staff Overtime Method Maintenance Window: Definitions Tab**

The **Definitions** tab lists definitions of each of the five overtime breakdowns on the **Main** tab.

---

**Staff Overtime Method Maintenance Window: Memo Tab**

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

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**Restricted Names Maintenance Window: Main Tab**

Using the **Main** tab of the Restricted Names Maintenance window, you can create up to 99 restricted staff name records. If you enter a name in this window, the program will not allow you to use this name later as a report name or POS name when creating new staff member records. This window allows you to restrict the use of specific inappropriate staff names.

When you enter a restricted name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.
Restricted Names Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Rating Level Maintenance Window: Main Tab

Using the **Main** tab of the Rating Level Maintenance window, you can create up to nine staff rating levels, which you can then associate with specific staff members. When you enter a staff rating level name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.

![Rating Level Maintenance Window](image)

Rating Level Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Work Status Maintenance Window: Main Tab

The Work Status Maintenance window allows you to create work status records that you can then associate with staff members. Each work status record can represent a staff member’s employment status, such as “Current,” “Inactive,” “Temporary Leave,” or “Fired.” The Work Status Maintenance window includes two default records, named “Current Employee” and “Inactive.” You can edit and rename these records, but you cannot delete them (because every staff member record must be associated with a work status record, either active or inactive).

Using the Main tab of the Work Status Maintenance window, you can create up to 97 additional work status records. When you enter a work status name in the Item Description box, the system captures the first eight characters of the description (including spaces) and displays these characters in the Short Description box.

Work Status Code box

If you use a separate application to manage your payroll, you can assign each work status record a work status code by typing appropriate code in the Work Status Code box.

Benefits Available check box

If you plan to associate the work status with staff members (either active or inactive) who are eligible to receive benefits, click the Benefits Available check box.
Staff Menu

**Inactive Staff check box**

If you plan to associate the work status to associate with staff members who are unavailable to work (for whatever reason), click the **Inactive Staff** check box.

**Work Status Maintenance Window: Memo Tab**

Every maintenance window has a **Memo** tab, which is a large multiline, editable box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

**Shift Break Maintenance Window: Main Tab**

The Shift Break Maintenance window allows you to create staff breaks that are either paid or unpaid. With shift breaks, you can better control who’s on break, how long they stay on break, and whether they are paid for the break. In this way, you can better organize how your staff members take breaks during working hours.

Using the **Main** tab of the Shift Break Maintenance window, you can create the bulk of the settings for each of the 24 staff breaks you can create. When you enter a shift break name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.

In the **Minutes Allowed** box, type the number of minutes that you want to allow for this break. In the **Minutes to Qualify** box, type the number of minutes that a staff member must work within a single shift before qualifying for the break. In the **Minimum Shift** box, type the minimum number of minutes that a shift must last to
qualify for this break. If you want to pay your staff while they are on break, then click the **Employer Paid** check box.

If you select the **Staff must clock in after break** check box, the POS will require staff members to clock back in manually when returning from a break. If you clear it, the POS will clock in staff members automatically, based on the break definition.

### Shift Break Maintenance Window: Dept Tab

The **Dept** tab allows you to associate a shift break with one or more staff departments. The **Dept** tab features a grid listing all of the staff departments associated with that shift break. The POS will make this break available to staff members in all of the staff departments listed on this grid.

To add a staff department to the grid, click **New Line**. The Find Staff Department window will display, listing all of the staff departments you’ve created in the Staff Department Maintenance window. Select an appropriate staff break and click **OK**. That staff department will appear in the new line. To change a staff department on the grid, click its **Department** box and select a different staff break from the Find Staff Departments window. To remove a staff department from the grid, select the line on the grid you wish to remove and then click **Delete Line**.

If you use the Digital Dining Labor Scheduling program, then each staff department you add to the grid will feature a corresponding **Sched** (Schedule) check box. If you add a staff department to a paid break and then select its **Sched** check box, the Labor Scheduling program will include this paid break when generating Expected Labor Reports.
Shift Break Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Staff Day Part Maintenance Window: Main Tab

The Back Office program automatically divides a work day into four separate periods, called day parts, which you can use to coordinate when your staff members are available to work. You cannot add or delete these four day parts, but you can rename them. By modifying a description of a day part, you can change how that day part’s label displays in the Staff Member Maintenance Window and Staff Department Maintenance windows, as well as the various staff reports and report maintenance windows. You can rename a day part by typing a new Item Description in the Item Description box.
Staff Day Part Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Ethnicity Maintenance Window: Main Tab

Using the Main tab of the Ethnicity Maintenance window, you can create up to 99 ethnicity files. When you enter an ethnicity name in the Item Description box, the system captures the first eight characters of the description (including spaces) and displays these characters in the Short Description box.

Ethnicity Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Date Type Maintenance Window: Main Tab

The Date Type Maintenance window allows you to add date types to the Date grid on the Personal tab of the Staff Maintenance window. (The Date grid contains a list of date types, allowing you to store important dates for each staff member record.) Each date type record in the Date Type Maintenance window appears as a row in the
Date grid. Thus, by creating new date type records, you can add new rows to the Date grid, each representing a different type of date.

We include many default date type records representing dates that are commonly used by most restaurants. You cannot delete these default dates: Birth, Hire, Inactive, Review, and Benefits. However, you might need to add additional date types to the Staff Member Maintenance window, such as a license expiration date or an insurance expiration date. To create a customized date type, click Add and type a name for the new date type in the **Item Description** box. When you enter a name in the **Item Description** box, the system captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box.

Later, when you view the **Personal** tab on the Staff Member Maintenance window, the Date grid will include a new row representing the new date type, featuring the same description as the date type record’s item description.
The **Password Level** box allows you to associate a date type with a password level. You can use the **Password Level** box to enforce important scheduled dates, such as a job review, a delivery driver’s license expiration, or a drug test.

When a staff member clocks in at the POS, the program will review the staff member’s date for each date type. If any of the dates have expired, the POS will prompt the staff member for a password. If the staff member has a password level equal to or greater than the password for the date type, then the POS will allow the staff member to clock in. If not, then the POS prompts the staff member for a manager’s approval. If you set a date type with a password level of “X”, the POS will not allow the staff member to clock in under any circumstances. The program will display a message with the expired date’s description.
Date Type Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Register Reports Menu

Overview

The Register Reports menu of the Back Office program contains a wide selection of reports, which you can use to gather and analyze information regarding sales, receipts, taxes, staff payroll, and security. The Register Reports menu also includes the Process Reports utility, which allows you to print all of your end-of-day register reports.

Process Reports Utility

By using the Process Reports utility, you can run all of the reports that you have included in your end-of-day processing without processing your registers. When you click Process Reports on the Register Reports menu, the Report Date window opens. You can click a specific date from the Date box and click OK. The program will generate all of the end-of-day reports using data from the daily POS files of the selected date. To include a report in the end-of-day processing cycle, go to the Process Register Reports Maintenance window of the Digital Dining Setup program (for more information, see Digital Dining Setup User’s Guide).

Using Reports

Every report in the Register Reports menu has two windows: a Reports window and a Report Maintenance window. Most of the Reports windows are identical, but their Report Maintenance windows are quite different. You will create and define your reports in the Report Maintenance windows.
Reports Windows

You can preview and print a report from its Reports window, and you can preview all of your reports of a particular type from the Reports window of that particular type. For instance, you can preview or print any of your receipts reports from the Receipts Reports window.

Click **Define** to access the Report Maintenance window for this particular report, where you can create new report definitions or edit existing report definitions. Click **Print** to generate either a preview or a printed copy of the report, or click **Exit** to close the Report window.

Most of the Reports windows have identical options and functions, but the Sales Reports window includes some additional features (for more information, see “Sales Reports Window” on page 313).

**Report list**

This list displays all of the reports you have created for that particular group (for example, the Report list of the Receipts Reports window will list all of your different receipts reports). You can select the one you want to view, print, or edit.

**Range list**

This list includes a variety of time range options, including general time periods (such as **Today**, **Yesterday**, **This Week**, **This Month**), specific days of the week, specific months of the year, the preceding pay period, the pay period to date, the year to date, and so on. If you want to set an irregular date range, you can click **Custom** and then select the specific dates of the data range in the **Date Range** boxes.

**Date Range boxes**

If you want to view a report with a specific date range, you can type the dates in the two **Date Range** boxes or select them from the calendar boxes. For example, if you want to view a Receipts Report for the months of June, July, and August, you would
type “06/01/00” in the first box and “08/31/00” in the second box. Click \( \square \) to select a date from each calendar box.

**Print area**

In the **Print** area, you can set the program to print your report or preview a report before printing. You can preview a report by clicking the **Preview** option and then clicking the **Print** command. The program will display a preview of the report, which you can then print or save (that is, export as a file). You can print your report without previewing it by clicking the **Print** option and then clicking the **Print** command.

---

**Report Maintenance Windows**

Every type of report (such as a sales report) also has a Report Maintenance window. You can define (that is, create) new reports from the Reports Maintenance window. In a Report Maintenance window, you decide the format of a new report. You also decide which records to include or exclude from the report and how to organize the information. You must define all of your reports of a particular type from the Reports Maintenance window of that particular type. For instance, you must define all of your sales reports in the Sales Report Maintenance window.
Report Format list

Some of the register reports are available in different formats, each producing a report with different information and/or arrangement. Different reports feature different kinds of formats, so you should review the formats specific to the report you define.

Group By 1 list

You can control how the program organizes the information in a report by selecting a grouping option from the Group By 1 list. The program will list each group alphabetically and list all the items in that group together. For instance, if you are defining a sales report and you select a grouping of Profit Center, the report will alphabetically list all the menu items sold in the first profit center together. After that group, the program will list all of the menu items in the next profit center:

Profit Center A
   Menu Item A
   Menu Item D

Profit Center B
   Menu Item B
   Menu Item C
**Group By 2 list**

Some of the Report Maintenance windows feature two Group By lists (usually labeled as Group By 1 and Group By 2). You can use the Group By 2 list to group the data in a report by a second level. This list allows you to create subgroups of items within groups. For instance, if you are defining a sales report and you select a grouping of Profit Center and a subgrouping of Prep Type, the report will group all the menu items sold in the same profit center together and then list those items in subgroups by prep type:

Profit Center A  
  Prep Type A  
      Menu Item A  
      Menu Item D  
  Prep Type B  
      Menu Item B  
      Menu Item C  

Profit Center B  
  Prep Type A  
      Menu Item E  
      Menu Item G  
  Prep Type B  
      Menu Item F  
      Menu Item H  

If you set the Group By 1 list to None, the Group By 2 list will not appear.

**Sort By list**

You can also control how the program organizes the information in a report by selecting a sorting option from the Sort By list. The program will sort records in alphabetical and/or numerical order by whatever item you select in the sorting list. For instance, you can create a receipt report and select Server ID in the Sort By list. When the program prints the report, it will list staff records in numerical order by each server’s staff ID number.
**Optional Input list**

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Reports window. For instance, if you were defining a Receipts Report, you could select an optional input of **Profit Center**. The next time you print this Receipts Report at the Receipts Reports window, a filter window will open, allowing you to include or exclude receipts from particular profit centers.

You can also use some of the optional input settings to generate a report for a single record. For instance, if you defined a Receipts Report, you might select an optional input of **Staff ID**. The next time you print this Receipts Report at the Receipts Reports window, a filter window will open, prompting you for a staff ID number. You could then type the staff ID number of the staff member whose receipts information you wanted to view.

**Default Range list**

If you select a default range from this list, this default range will appear in the **Range** list of the Report window. For instance, you could define a Receipts Report and select a default range of **This Quarter**. From then on, whenever you open the Receipts Record window and select that report, the **Range** list will default to **This Quarter**. You can still select a new range, if necessary.
Report Preview

You can preview any report by opening its Report window, selecting the report in the Report list, clicking Preview, and then clicking Print. In the preview window, you can choose to print or export (that is, save) the report. You can also choose to enclose the report in an email message.

Report Preview Window

What can you expect to see in the preview report window? In the upper left hand corner, you will see the date and time you previewed the report and the name of the current operator; in the upper right hand corner, you will see the current page; in the middle of the page under the report’s title, you will see the sort by option (for example, Server ID or Profit Center) that you chose for this report. Below this, is the actual report, which gathers the information based on the definition you have created.

Report Preview Toolbar

When you click Preview, the program displays the report with a Print Preview toolbar. The Print Preview toolbar allows you to manipulate the report: you can view different pages, print, export, or enlarge the details of the report.

Note

When you first open any multipage report, the “Page of Page area” will display “1 of 1+”. If you move forward one page at a time, this area will change to “2 of 2+” or “3 of 3+” and so on. You can quickly see how many pages are in your report by clicking Go to Last Page.
Receipts Report Maintenance Window

Receipts Reports allow you to analyze information about your receipts. You can use them to compare and analyze receipt information regarding specific transactions, receipt types, profit centers, and staff members.

Receipts Report Maintenance Window: Main Tab

On the Main tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The Main tab also allows you to filter receipt information by server ID, cashier ID, and the time of day.
**Report Format list**

You can select one of the following report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary</strong></td>
<td>A report that shows the debits and credits for all the transactions for the entire restaurant or the optional input that you provide for the date range or period you provide.</td>
</tr>
<tr>
<td><strong>Summary II</strong></td>
<td>A report that lists the total receipts for a given period, including the debits and credits for all the transactions for the entire restaurant within a given data range. The Summary II report format is designed to help you reconcile your daily receipts. The Summary II format differs from the Summary format in that it includes separate totals for cash on hand and net cash. The Summary II format is less condensed and more detailed than the original Summary format.</td>
</tr>
<tr>
<td><strong>Audit</strong></td>
<td>A list of all receipts (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently.</td>
</tr>
<tr>
<td><strong>Server</strong></td>
<td>A report that summarizes the total sales and receipts for each staff member for the date range or period you provide.</td>
</tr>
<tr>
<td><strong>Profit Center</strong></td>
<td>A report that summarizes the debits and credits generated by each profit center so that you can start to identify sales trends that you might want to manipulate (for example, you might plan a sales competition among the staff to increase the average check price in a certain profit center).</td>
</tr>
<tr>
<td><strong>Server Details</strong></td>
<td>A report that shows, for each server, the credits and debits of sales, receipts, and totals for the date range or period you provide.</td>
</tr>
<tr>
<td><strong>Cashier Details</strong></td>
<td>A report that shows, for each server, the credits and debits of sales, receipts, and totals for the date range or period you provide.</td>
</tr>
<tr>
<td><strong>Date</strong></td>
<td>A list of receipt totals for each date within the selected date range, including totals for each main group type, discounts, charges, and each receipt type. Each column in the report includes totals for a single date.</td>
</tr>
<tr>
<td><strong>Deposit</strong></td>
<td>A list of totals for deposits performed within the specified date range. The report includes totals for payments (sales), deposits, and the remaining difference. You can also set the report to group totals by server ID, deposit type, or receipt type.</td>
</tr>
</tbody>
</table>
Sort By list

You can control how the program organizes the information in a report by selecting a sorting option from the Sort By list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the Sort By list. You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th>Server ID</th>
<th>Sorts your report by the staff ID number of each server who performed the transaction.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt Type</td>
<td>Sorts your report by the receipt type of each transaction.</td>
</tr>
<tr>
<td>Casheir ID</td>
<td>Sorts your report by the staff ID number of each cashier who handled the transaction.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Sorts your report by the profit center of each transaction.</td>
</tr>
<tr>
<td>Check</td>
<td>Sorts your report by the check number of each transaction.</td>
</tr>
<tr>
<td>Record Type</td>
<td>Sorts your report by the record type of each transaction.</td>
</tr>
<tr>
<td>Verification Mode</td>
<td>Sorts your report by the verification mode used to verify each transaction.</td>
</tr>
</tbody>
</table>

Group By list

You can control how the program organizes the information in your report by selecting a grouping option from the Group By list. The program will list data alphabetically by the grouping option you select. You can group your data by any of the following criteria:

<table>
<thead>
<tr>
<th>Server ID</th>
<th>Groups the items in the report by the staff ID number of each server who performed the transaction.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt Type</td>
<td>Groups the items in the report by the receipt type of each transaction.</td>
</tr>
<tr>
<td>Casheir ID</td>
<td>Groups the items in the report by the staff ID number of each cashier who handled the transaction.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Groups the report by the profit center of each transaction.</td>
</tr>
<tr>
<td>Check</td>
<td>Groups the report by the check number of each transaction.</td>
</tr>
<tr>
<td>Record Type</td>
<td>Groups the report by the record type of each transaction.</td>
</tr>
<tr>
<td>Verification Mode</td>
<td>Groups the items in the report by the verification mode used to verify each transaction.</td>
</tr>
</tbody>
</table>
Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Receipts Reports window. You can select one of the following optional input criteria:

<table>
<thead>
<tr>
<th>Input</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server ID</td>
<td>Filters the report by the staff ID number of each server who performed the transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Receipt Type</td>
<td>Filters the report by the staff ID number of each manager who handled the transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Cashier ID</td>
<td>Filters the report by the discount type of each menu item.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Filters the report by the profit center within which each transaction was performed.</td>
</tr>
<tr>
<td>Register Type</td>
<td>Filters the report by the register types where each transaction was performed.</td>
</tr>
<tr>
<td>Verification Mode</td>
<td>Filters the report by the verification mode used to verify each transaction.</td>
</tr>
</tbody>
</table>

Default Range list

If you select a default range from this list, this default range will appear in the Range list of the Receipts Report window.

Show tips paid out check box

The Show tips paid out check box allows you to include or exclude totals for tips paid and tips owed in the report. If you select the Show tips paid out check box, the report includes totals for tips paid and tips owed and adjusts the other totals (such as Net Cash and Estimated Deposit) on the report accordingly. If you clear the Show tips paid out check box, the report excludes totals for tips paid and tips owed and does not adjust the other totals (such as Net Cash and Estimated Deposit) on the report. (The Show tips paid out check box only appears if you select Profit Center in the Report Format list.)

Server ID boxes

You can filter your records by typing a range of staff ID numbers in the Server ID boxes. For instance, if you type “100” in the first box and “200” in the second box,
the program will only print receipt information regarding transactions by servers with staff ID numbers between 100 and 200.

### Cashier ID boxes

You can filter your records by typing a range of staff ID numbers in the Cashier ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print receipt information regarding transactions by cashiers with staff ID numbers between 100 and 200.

### Time boxes

You can filter your records by typing a range in the Time boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print receipt information regarding transactions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

### Show Credit Card Numbers check box

This check box allows you to include credit card numbers and credit card customer names on the report. If you click the Show Credit Card Numbers check box, the report will list credit card numbers in the Account Number column and the credit card holder’s name in the Account Name column. If a transaction’s credit card number was manually entered at the POS, the report will list “Manual Entry” in the Account Number column.

*Note* The Show Credit Card Numbers check box is only available if you have selected Audit as the Report Format.

### Show tips paid out check box

The Show tips paid out check box allows you to include or exclude totals for tips paid and tips owed in the Receipts Report. If you select the Show tips paid out check box, the report includes totals for tips paid and tips owed and adjusts the other totals (such as Net Cash and Estimated Deposit) on the report accordingly. If you clear the Show tips paid out check box, the report excludes totals for tips paid and tips owed and does not adjust the other totals (such as Net Cash and Estimated Deposit) on the report. The Show tips paid out check box only appears if you select Profit Center in the Report Format list.
Consolidate Cash to Net Amount check box

Click this check box if you want the program to include the net amount (the total amount after any adjustments) in the report.

Show Paid Ins check box

Click this check box if you want to include paid in transactions in the report.
Receipts Report Maintenance Window: Receipt Tab

The Receipt tab allows you to filter the report to include or exclude transactions paid with specific receipt types. You can include or exclude transactions paid with certain receipt types by adding receipt types to the Include/Exclude list.

You can set the program to either include or exclude transactions paid with the receipt types in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include transactions paid with the receipt types in the Include/Exclude list. If you click Exclude, the program will exclude all transactions paid with the receipt types in the Include/Exclude list.

To move a receipt type from the Available list to the Include/Exclude list, select that receipt type and click \( \rightarrow \). To move a receipt type from the Include/Exclude box to the Available list, select the receipt type and click \( \leftarrow \). To move all receipt types from the Available list to the Include/Exclude box, click \( \Rightarrow \). To move all receipt types in the Include/Exclude box to the Available list, click \( \Leftarrow \).
Receipts Report Maintenance Window: Register Tab

The Register tab allows you to filter the report to include or exclude transactions performed with specific register definitions. You can include or exclude transactions performed with certain register definitions by adding register types to the Include/Exclude list.

You can set the program to either include or exclude transactions associated with the register definitions in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include transactions associated with the register definitions in the Include/Exclude list. If you click Exclude, the program will exclude all transactions associated with the register definitions in the Include/Exclude list.

To move an item from the Available list to the Include/Exclude list, select that item and click Include. To move an transaction from the Include/Exclude list to the Available list, select the item and click Exclude. To move all transactions from the Available list to the Include/Exclude list, click Include. To move all transactions in the Include/Exclude box to the Available list, click Exclude.

Receipts Report Maintenance Window: Profit Cnt Tab

The Profit Cnt tab features a filter that allows you to include or exclude transactions associated with specific profit centers. The program will only print transactions performed within profit centers in the Include list and will not print any transactions performed within profit centers in the Exclude list.
Receipts Report Maintenance Window: Rec Type Tab

The Rec Type tab features a filter that allows you to include or exclude specific types of transactions records. The program will only print transaction types in the Include list and will not print any transaction types in the Exclude list.

Receipts Report Maintenance Window: Day Tab

The Day tab features a filter that allows you to include or exclude transactions associated with specific days of the weeks. The program will only print transactions performed on days in the Include list and will not print any transactions performed on days in the Exclude list.

Receipts Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Receipts Report Examples

You can use Receipts reports to summarize receipts by profit center, to review receipt details for a selected staff member, or to generate an audit trail for credit card receipts. Digital Dining provides six end-of-day (EOD) reports (you cannot modify the report definition for EOD reports) and six report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Receipts Report Maintenance Window: Main Tab” on page 282).

What each column of the Receipts report contains or how Digital Dining calculates the column is some times not self evident:

The Check Amt column displays the sum of all checks for each staff member.

The Discounts column displays the sum of all discounts applied by each staff member.

The Charges column displays the sum of all charges applied by each staff member.
The **Total** column displays the sum of the values in the Check Amt, Discounts, and Charges column (Check Amt – Discounts + Charges).

The **Tax** column displays the sum of all taxes applied at the POS.

The **Tips** column displays the sum of all declared tips.

The **Paid Ins** column displays the sum of receipts from sales of debitek cards, sales of gift certificates, and payments to A/R accounts.

The **Receipts** column displays the sum of the Total, Tax, Tips, and Paid Ins columns (Total column + Tax column + Tips column + Paid Ins column).

The **Adj** column displays the sum of all receipts, excluding receipts for Payment and A/R Paid ins.

The **Amount** column (EOD Receipts Audit report) displays the total amount of each payment for each check.

The **Amount** column (EOD Server Drop report) displays the total amount of each drop for each check.

The **Expected Amount** column displays the total amount for each receipt type that the restaurant expects to receive.

The **Actual Amount** column is a column that the restaurant completes. You can easily compare the actual amounts with the expected amounts.

The **Over/Short** column is a column that the restaurant completes. You can enter the difference between the Expected Amount and the Actual Amount in this column.
Receipts Report: EOD Server Drop

The EOD Server Drop report provides a list of each server drop transaction that a staff member performed during a time range that you provide. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

- The **Table** column displays the number of the table of each transaction.
- The **Check** column displays the check number of each transaction.
- The **ID** column displays the staff member’s Digital Dining ID number.
- The **Server Name** column displays the name of the server who served each table.
- The **Cashier Name** column displays the name of the cashier, who received the payment.
- The **Receipt Type** column displays the receipt type used to pay each check.
- The **Register** column displays the register where each check was paid.
- The **Account Number** column displays the A/R account number, if the customer charged the check to an A/R account.
- The **Account Name** column displays the A/R account name, if the customer charged the check to the A/R account.
- The **Tips** column displays the amount of charged tips received by the server.
- The **Amount** column displays the total amount of each payment for each check. A positive number indicates that the staff member received the drop, whereas a negative number indicates a staff member, who performed the drop (such as server drop, or implied drop transactions).
The **Details** column displays any details associated with the transaction type (such as server drop or implied drop transactions).

- The **Date** column displays the date of the transaction.
- The **Time** column displays the time when the staff member closed the check.
Receipts Report: EOD Server Sales

The EOD Server Sales report summarizes the sales totals for each server. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Check Amt</th>
<th>Discounts</th>
<th>Charges</th>
<th>Total</th>
<th>Tax</th>
<th>Tips</th>
<th>Paid Ins</th>
<th>Receipts</th>
<th>Adj</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>wizard</td>
<td>701.86</td>
<td>-3.29</td>
<td>0.00</td>
<td>698.57</td>
<td>48.56</td>
<td>56.83</td>
<td>0.00</td>
<td>903.96</td>
<td>75.00</td>
</tr>
<tr>
<td>10</td>
<td>Kay</td>
<td>1,582.76</td>
<td>-84.56</td>
<td>80.00</td>
<td>1,578.20</td>
<td>108.90</td>
<td>315.11</td>
<td>0.00</td>
<td>2022.21</td>
<td>-115.40</td>
</tr>
<tr>
<td>11</td>
<td>Miller</td>
<td>1,704.72</td>
<td>0.00</td>
<td>13.56</td>
<td>1,718.28</td>
<td>129.72</td>
<td>31.64</td>
<td>0.00</td>
<td>1,879.44</td>
<td>-50.00</td>
</tr>
<tr>
<td>12</td>
<td>Guflers</td>
<td>846.90</td>
<td>-36.03</td>
<td>0.00</td>
<td>810.87</td>
<td>57.14</td>
<td>0.00</td>
<td>0.00</td>
<td>871.01</td>
<td>0.00</td>
</tr>
<tr>
<td>13</td>
<td>Nurse</td>
<td>643.77</td>
<td>-5.61</td>
<td>0.00</td>
<td>638.16</td>
<td>44.69</td>
<td>5.00</td>
<td>0.00</td>
<td>687.85</td>
<td>0.00</td>
</tr>
<tr>
<td>14</td>
<td>Moms</td>
<td>512.04</td>
<td>0.00</td>
<td>0.00</td>
<td>512.04</td>
<td>35.83</td>
<td>0.00</td>
<td>0.00</td>
<td>547.87</td>
<td>0.00</td>
</tr>
<tr>
<td>15</td>
<td>Tolland</td>
<td>107.97</td>
<td>0.00</td>
<td>0.00</td>
<td>107.97</td>
<td>7.57</td>
<td>0.00</td>
<td>0.00</td>
<td>115.54</td>
<td>0.00</td>
</tr>
<tr>
<td>16</td>
<td>Dave</td>
<td>1,286.20</td>
<td>0.00</td>
<td>0.00</td>
<td>1,286.20</td>
<td>80.74</td>
<td>305.69</td>
<td>0.00</td>
<td>1,692.84</td>
<td>0.00</td>
</tr>
<tr>
<td>41</td>
<td>Oliver</td>
<td>1,079.55</td>
<td>-9.50</td>
<td>0.00</td>
<td>1,070.05</td>
<td>72.53</td>
<td>0.00</td>
<td>0.00</td>
<td>1,132.58</td>
<td>0.00</td>
</tr>
<tr>
<td>42</td>
<td>Jones</td>
<td>412.34</td>
<td>0.00</td>
<td>0.00</td>
<td>412.34</td>
<td>28.93</td>
<td>0.00</td>
<td>0.00</td>
<td>441.27</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td>5,880.11</td>
<td>-129.99</td>
<td>93.36</td>
<td>5,843.50</td>
<td>625.61</td>
<td>709.47</td>
<td>0.00</td>
<td>10,253.07</td>
<td>-90.40</td>
</tr>
</tbody>
</table>

- The **Staff ID** column displays each staff member’s ID number.
- The **Name** column displays the name of each staff member.
- The **Check Amt** column displays the sum of all checks for each staff member.
- The **Discounts** column displays the sum of all discounts applied by each staff member.
- The **Charges** column displays the sum of all charges applied by each staff member.
- The **Total** column displays the sum of the values in the Check Amt, Discounts, and Charges column (Check Amt – Discounts + Charges).
- The **Tax** column displays the sum of all taxes applied at the POS.
- The **Tips** column displays the sum of all tips declared by each staff member.
- The **Paid Ins** column displays the sum of receipts from sales of debitek cards, gift certificates, and payments to A/R accounts.
- The **Receipts** column displays the sum of the Total, Tax, Tips, and Paid Ins columns (Total + Tax + Tips + Paid Ins).
- The **Adj** column displays any changes in the receipts total not included in the previous columns (such as drops made or received).
Receipts Report: EOD Receipts Summary

The EOD Receipts Summary provides a summarized list of the credits and debits for the restaurant over a time period that you specify. The EOD Receipts Summary report provides a worksheet so that you can enter the actual amount of receipts that the restaurant received, compared that value with the amount the restaurant expected to receive, and enter the amount that the two differ (the over/short), if any. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

- The **Receipt Type** column displays the name of each receipt type.
- The **Count** column displays the number of payments made using each receipt type.
- The **Tip** column displays the amount of charged tips collected for each receipt type.
The Expected Amount column displays the total amount for each receipt type that the restaurant expects to receive.

The Actual Amount column is a column that the restaurant completes. You can easily compare the actual amounts with the expected amounts.

The Over/Short column is a column that the restaurant completes. You can enter the difference between the Expected Amount and the Actual Amount in this column.

Receipts Report: EOD Receipts Audit

The EOD Receipts Audit report shows each payment for each check including the date and time of the payment, which allows you to track the check efficiently. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

<table>
<thead>
<tr>
<th>Table</th>
<th>Check</th>
<th>ID</th>
<th>Server</th>
<th>ID</th>
<th>Cashier</th>
<th>Receipt Type</th>
<th>Register</th>
<th>Account No</th>
<th>Account Type</th>
<th>Tips</th>
<th>Amount</th>
<th>Details</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>11</td>
<td>Miller</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Table Serve.</td>
<td>0.00</td>
<td>-30.95</td>
<td>Implied Drop</td>
<td>08/01/08</td>
<td>11:28</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>12</td>
<td>Geffes</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Table Serve.</td>
<td>0.00</td>
<td>-30.95</td>
<td>Charge Tips</td>
<td>08/01/08</td>
<td>11:28</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4748</td>
<td>15030</td>
<td>Miller</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Table Serve.</td>
<td>0.00</td>
<td>10.44</td>
<td>Implied Drop</td>
<td>08/01/08</td>
<td>12:48</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4749</td>
<td>15031</td>
<td>Miller</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Table Serve.</td>
<td>0.00</td>
<td>10.50</td>
<td></td>
<td>08/01/08</td>
<td>12:51</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4750</td>
<td>15032</td>
<td>Miller</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Table Serve.</td>
<td>0.00</td>
<td>9.45</td>
<td></td>
<td>08/01/08</td>
<td>12:52</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4751</td>
<td>15033</td>
<td>Miller</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Table Serve.</td>
<td>0.00</td>
<td>20.82</td>
<td></td>
<td>08/01/08</td>
<td>12:52</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4752</td>
<td>15034</td>
<td>Miller</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Table Serve.</td>
<td>0.00</td>
<td>12.60</td>
<td></td>
<td>08/01/08</td>
<td>12:55</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4753</td>
<td>15035</td>
<td>Miller</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Table Serve.</td>
<td>0.00</td>
<td>68.77</td>
<td></td>
<td>08/01/08</td>
<td>11:22</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4754</td>
<td>15042</td>
<td>Miller</td>
<td>11</td>
<td>Miller</td>
<td>Account</td>
<td>Table Serve</td>
<td>2013</td>
<td>Harry Jones</td>
<td>6.42</td>
<td>60.00</td>
<td>2013 Jones</td>
<td>08/01/08</td>
<td>11:22</td>
<td></td>
</tr>
<tr>
<td>140</td>
<td>15044</td>
<td>Morris</td>
<td>14</td>
<td>Morris</td>
<td>Account</td>
<td>Table Serve</td>
<td>2009</td>
<td>Harry Lewis</td>
<td>5.31</td>
<td>20.00</td>
<td>2009 Lewis</td>
<td>08/01/08</td>
<td>11:25</td>
<td></td>
</tr>
<tr>
<td>122</td>
<td>15047</td>
<td>Branson</td>
<td>10</td>
<td>Branson</td>
<td>Account</td>
<td>Table Serve</td>
<td>2005</td>
<td>Robert Jameson</td>
<td>14.16</td>
<td>95.00</td>
<td>2005 Jameson</td>
<td>08/01/08</td>
<td>11:25</td>
<td></td>
</tr>
</tbody>
</table>

The Table column displays the number of the table where a staff member opened a check.

The Check column displays the check number.

The ID column displays the staff member’s Digital Dining ID number.

The Server Name column displays the name of the server who served the table.

The Cashier Name column displays the name of the cashier, who received the payment.

The Receipt Type column displays the name of the cashier, who received the payment.
The **Register** column displays the register where the check was paid.

- The **Account Number** column displays the A/R account number, if the customer charged the check to the A/R account.
- The **Account Name** column displays the A/R account name, if the customer charged the check to the A/R account.
- The **Tips** column displays the amount of charged tips received by the server.
- The **Amount** column displays the total amount of each payment for each check.
- The **Details** column displays any details associated with the receipt that the staff member may have entered.
- The **Date** column displays the date of the transaction.
- The **Time** column displays the time when the staff member closed the check.

## Receipts Report: EOD Profit Center

The EOD Profit Center report summarizes the debits and credits generated by each profit center so that you can start to identify sales trends that you might want to manipulate (for example, you might plan a sales competition among the staff to increase the average check price in a certain profit center). For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.
### EOD Profit Center

**Filtered By: Days, Receipt Trans Types, Implied Drops**

#### Register Reports Menu

**DD CAFE**

**Date:** 12/08/98  13:46:19  **Date Range:** 12/08/98 to 12/09/98

**Operator:** wizard

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<table>
<thead>
<tr>
<th>Main Dining</th>
<th>Main Bar</th>
<th>Delivery</th>
<th>Counter</th>
<th>Club Dining</th>
<th>Club Bar</th>
<th>Page Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>9714.48</td>
<td>485.09</td>
<td>1395.36</td>
<td>1023.18</td>
<td>206.81</td>
<td>0.00</td>
</tr>
<tr>
<td>Beverages</td>
<td>3688.05</td>
<td>1089.12</td>
<td>27.46</td>
<td>65.47</td>
<td>102.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Other</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Sales Subtotal</td>
<td>13633.43</td>
<td>1569.10</td>
<td>1332.83</td>
<td>1277.65</td>
<td>309.51</td>
<td>0.00</td>
</tr>
<tr>
<td>Discount</td>
<td>-113.88</td>
<td>0.00</td>
<td>-15.61</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Charge</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total before tax</td>
<td>13519.55</td>
<td>1584.46</td>
<td>1317.22</td>
<td>1262.05</td>
<td>329.51</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax 1</td>
<td>916.73</td>
<td>1099.89</td>
<td>90.25</td>
<td>75.47</td>
<td>21.26</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax 2</td>
<td>0.00</td>
<td>9.42</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>9.42</td>
</tr>
<tr>
<td>Tax 3</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax 4</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax Subtotal</td>
<td>916.73</td>
<td>1109.31</td>
<td>90.25</td>
<td>75.47</td>
<td>21.26</td>
<td>0.00</td>
</tr>
<tr>
<td>Total of check</td>
<td>14075.36</td>
<td>1693.76</td>
<td>1405.73</td>
<td>1341.52</td>
<td>350.78</td>
<td>31.50</td>
</tr>
</tbody>
</table>

**Tip collected** | 475.91  | 19.89   | 5.00    | 0.00        | 57.00    | 5.67       |

**Paid In - JAR** | 1500.00 | 0.00    | 0.00    | 0.00        | 0.00     | 0.00       |

**Cashiers:**

- 100.00
- 80.00
- 60.00
- 40.00
- 20.00

**Total receipts** | 16152.19 | 1799.65  | 1414.47 | 1515.62     | 397.07   | 37.17       |

**Anti-Implied:**

| No of Sales | 592.00 |
| No of Checks | 294.00 |
| Avg order | 23.88  |
| Avg check | 44.43  |

**Cash:**

- 1183.15
- 1691.35
- 1356.82
- 1512.62
- 0.00
- 0.00

**Check:**

- 1460.67
- 27.75
- 0.00
- 0.00
- 0.00
- 0.00

**American Express** | 327.00  | 3.00    | 97.00   | 0.00        | 0.00     |

**Molder Card** | 0.00    |

**Visa** | 38.78 |

**Diners** | 0.00    |

**House Account** | 1937.44 |

**Gift Certificate** | 190.00  |

**Frequent Diner** | 175.00  |

**Manager Promo** | 0.00    |

**Smyth** | 0.00    |

**Total receipts** | 16171.07 | 1799.65  | 1414.47 | 1515.62     | 397.07   | 37.17       |

**Net Sales** | 1183.15 |

**Server commission** | 5.07    |

**Net tip** | 470.84  |

**Net sales** | 15294.18 |

**Other receipts turned** | 4538.89  |

**Server Drops** | 0.00    |

**Turned in** | 15743.17 |

**Returned commissions** | 24.05   |

**Tips Paid** | 0.00    |

**Tips Owned** | 470.84  |

**Estimated deposit** | 15247.27 |

**Beginning NRS Total** | 0.00    |

**Total Receipts** | 0.00    |

**Discs** | 0.00    |

**Gross Total** | 0.00    |

**NRS Total** | 0.00    |

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***End of Report***
Receipts Report: EOD Cashier Sales

The EOD Cashier Sales report displays the totals for each staff member who closed checks. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Check Amt</th>
<th>Discounts</th>
<th>Charges</th>
<th>Total</th>
<th>Tax</th>
<th>Tips</th>
<th>Paid Ins</th>
<th>Receipts</th>
<th>Adj</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Branson</td>
<td>$250.89</td>
<td>-$7.00</td>
<td>0.00</td>
<td>243.89</td>
<td>12.60</td>
<td>31.08</td>
<td>0.00</td>
<td>257.83</td>
<td>-47.00</td>
</tr>
<tr>
<td>11</td>
<td>Miller</td>
<td>$466.19</td>
<td>-$4.80</td>
<td>0.00</td>
<td>451.39</td>
<td>24.41</td>
<td>48.12</td>
<td>0.00</td>
<td>523.92</td>
<td>16.05</td>
</tr>
<tr>
<td>12</td>
<td>Gaffers</td>
<td>$161.30</td>
<td>-$6.00</td>
<td>0.00</td>
<td>161.30</td>
<td>8.59</td>
<td>31.11</td>
<td>0.00</td>
<td>201.00</td>
<td>0.00</td>
</tr>
<tr>
<td>14</td>
<td>Morris</td>
<td>$188.44</td>
<td>0.00</td>
<td>0.00</td>
<td>188.44</td>
<td>11.02</td>
<td>21.94</td>
<td>0.00</td>
<td>250.50</td>
<td>0.00</td>
</tr>
<tr>
<td>15</td>
<td>Tolland</td>
<td>$0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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</tr>
<tr>
<td>Totals</td>
<td>$1,056.82</td>
<td>-$11.80</td>
<td>0.00</td>
<td>0.00</td>
<td>1,045.02</td>
<td>56.68</td>
<td>131.35</td>
<td>0.00</td>
<td>1,233.05</td>
<td>-30.95</td>
</tr>
</tbody>
</table>

- The **Staff ID** column displays the Digital Dining staff member’s ID number.
- The **Name** column displays the name of the staff members.
- The **Check Amt** column displays the sum of all checks for each staff member.
- The **Discounts** column displays the sum of all discounts applied by each staff member.
- The **Charges** column displays the sum of all charges applied by each staff member.
- The **Total** column displays the sum of the values in the Check Amt, Discounts, and Charges column (Check Amt – Discounts + Charges).
- The **Tax** column displays the sum of all taxes applied at the POS.
- The **Tips** column displays the sum of all declared tips.
- The **Paid Ins** column displays the sum of receipts from sales of debitek cards, sales of gift certificates, and payments to A/R accounts.
- The **Receipts** column displays the sum of the Total, Tax, Tips, and Paid Ins columns (Total column + Tax column + Tips column + Paid Ins column).
- The **Adj** column displays any changes in the receipts total not included in the previous columns (such as drops made or received).
Receipts Report: Audit Format

You can change the report format by using the Report Format list on the Main tab of the Receipts Report Maintenance Window. The Audit format of the Receipts Report allows you to generate a report that displays a list of all receipts (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

The Table column displays the number of the table where a staff member opened a check.

The Check column displays the check number.

The ID column displays a staff member’s ID number.

The Server column displays the name of the server who served the table.

The Cashier column displays the name of the cashier who received the payment.

The Receipt Type column displays the receipt type the customer used to pay the check.

The Register column displays the register where the check was paid.

The Account Number column displays the A/R account number, if the customer charged the check to the A/R account.

<table>
<thead>
<tr>
<th>Table</th>
<th>Check</th>
<th>ID</th>
<th>Server</th>
<th>Cashier</th>
<th>Receipt Type</th>
<th>Register</th>
<th>Account No</th>
<th>Account</th>
<th>Tips</th>
<th>Amount</th>
<th>Details/ FD Customer</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>7490</td>
<td>10</td>
<td>Kay</td>
<td>Cash</td>
<td>Table Service</td>
<td>0.00</td>
<td>32.33</td>
<td>Jackson</td>
<td>0.00</td>
<td>42.27</td>
<td>4/1/02</td>
<td>1:54</td>
<td></td>
</tr>
<tr>
<td>2600</td>
<td>7504</td>
<td>15</td>
<td>Kay</td>
<td>Cash</td>
<td>Table Service</td>
<td>0.00</td>
<td>20.06</td>
<td>4/1/02</td>
<td>10:21</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2609</td>
<td>7488</td>
<td>10</td>
<td>Kay</td>
<td>Cash</td>
<td>Table Service</td>
<td>0.00</td>
<td>7.00</td>
<td>4/1/02</td>
<td>11:27</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>61</td>
<td>7489</td>
<td>10</td>
<td>wizard</td>
<td>Cash</td>
<td>Table Service</td>
<td>0.00</td>
<td>-6.69</td>
<td>4/1/02</td>
<td>11:38</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>71</td>
<td>7490</td>
<td>10</td>
<td>wizard</td>
<td>Account</td>
<td>Table Service</td>
<td>0.00</td>
<td>46.65</td>
<td>2013 Jones</td>
<td>4/1/02</td>
<td>11:48</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>81</td>
<td>7491</td>
<td>11</td>
<td>Miller</td>
<td>Account</td>
<td>Table Service</td>
<td>0.00</td>
<td>24.90</td>
<td>Paula</td>
<td>4/1/02</td>
<td>11:49</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C&amp;C</td>
<td>7492</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Bar Register</td>
<td>0.00</td>
<td>57.00</td>
<td>2008</td>
<td>4/1/02</td>
<td>12:24</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C&amp;C</td>
<td>7493</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Bar Register</td>
<td>0.00</td>
<td>21.00</td>
<td>2007</td>
<td>4/1/02</td>
<td>12:39</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C&amp;C</td>
<td>7494</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Bar Register</td>
<td>0.00</td>
<td>7.75</td>
<td>2006</td>
<td>4/1/02</td>
<td>13:28</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C&amp;C</td>
<td>7495</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Bar Register</td>
<td>0.00</td>
<td>8.75</td>
<td>Jennings Lisa</td>
<td>4/1/02</td>
<td>15:28</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C&amp;C</td>
<td>7496</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Bar Register</td>
<td>0.00</td>
<td>9.61</td>
<td>4/1/02</td>
<td>17:32</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C&amp;C</td>
<td>7497</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Bar Register</td>
<td>0.00</td>
<td>9.61</td>
<td>4/1/02</td>
<td>17:32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C&amp;C</td>
<td>7498</td>
<td>11</td>
<td>Miller</td>
<td>Cash</td>
<td>Bar Register</td>
<td>0.00</td>
<td>9.61</td>
<td>4/1/02</td>
<td>17:32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>7667</td>
<td>10</td>
<td>Kay</td>
<td>Cash</td>
<td>Table Service</td>
<td>0.00</td>
<td>36.00</td>
<td>51536</td>
<td>5/1/02</td>
<td>10:34</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2700</td>
<td>7666</td>
<td>10</td>
<td>Kay</td>
<td>Cash</td>
<td>Table Service</td>
<td>0.00</td>
<td>45.00</td>
<td>51536</td>
<td>5/1/02</td>
<td>14:58</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>71</td>
<td>7796</td>
<td>10</td>
<td>Kay</td>
<td>Cash</td>
<td>Table Service</td>
<td>0.00</td>
<td>45.00</td>
<td>52202</td>
<td>5/1/02</td>
<td>12:43</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 76.54 573.09
Grand Total: 76.54 573.09

**End of Report**
The **Account** column displays the A/R account name, if the customer charged the check to the A/R account.

The **Tips** column displays the amount of charged tips received by the server.

The **Amount** column displays the total amount of each payment for each check.

The **Details** column displays any details associated with the receipt that the staff member may have entered.

The **Date** column displays the date of the transaction.

The **Time** column displays the time when the staff member closed the check.
Receipts Report: Summary Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Receipts Report Maintenance Window. The **Summary** format of the Receipts Report allows you to generate a report that shows the debits and credits for all the transactions for the entire restaurant or the optional input that you provide (for more information, see “Optional Input list” on page 280) for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

<table>
<thead>
<tr>
<th>Receipt Type</th>
<th>Count</th>
<th>Tip</th>
<th>Expected Amount</th>
<th>Actual Amount</th>
<th>Over/Short</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>750</td>
<td>0.00</td>
<td>17,566.47</td>
<td></td>
<td></td>
</tr>
<tr>
<td>American Express</td>
<td>20</td>
<td>147.40</td>
<td>921.65</td>
<td></td>
<td></td>
</tr>
<tr>
<td>House Account</td>
<td>24</td>
<td>369.57</td>
<td>2,227.80</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Receipts</strong></td>
<td><strong>20,715.92</strong></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
</tr>
<tr>
<td><strong>Total Tips</strong></td>
<td><strong>516.97</strong></td>
<td><strong>511.79</strong></td>
<td><strong>511.79</strong></td>
<td><strong>511.79</strong></td>
<td><strong>511.79</strong></td>
</tr>
<tr>
<td>Server Commission</td>
<td><strong>5.18</strong></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
</tr>
<tr>
<td>Net Tips</td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
<td><strong>0.00</strong></td>
</tr>
<tr>
<td>Other Payouts</td>
<td><strong>462.00</strong></td>
<td><strong>462.00</strong></td>
<td><strong>462.00</strong></td>
<td><strong>462.00</strong></td>
<td><strong>462.00</strong></td>
</tr>
<tr>
<td>Net Cash</td>
<td><strong>16,092.68</strong></td>
<td><strong>16,092.68</strong></td>
<td><strong>16,092.68</strong></td>
<td><strong>16,092.68</strong></td>
<td><strong>16,092.68</strong></td>
</tr>
<tr>
<td>Others Receipts Turned In</td>
<td><strong>3,149.45</strong></td>
<td><strong>3,149.45</strong></td>
<td><strong>3,149.45</strong></td>
<td><strong>3,149.45</strong></td>
<td><strong>3,149.45</strong></td>
</tr>
<tr>
<td>Turned In</td>
<td><strong>19,742.13</strong></td>
<td><strong>19,742.13</strong></td>
<td><strong>19,742.13</strong></td>
<td><strong>19,742.13</strong></td>
<td><strong>19,742.13</strong></td>
</tr>
<tr>
<td>Restaurant Commission</td>
<td><strong>27.08</strong></td>
<td><strong>27.08</strong></td>
<td><strong>27.08</strong></td>
<td><strong>27.08</strong></td>
<td><strong>27.08</strong></td>
</tr>
</tbody>
</table>

***End of Report***

- The **Receipt Type** column displays the receipt type.
- The **Count** column displays the number of receipts of each receipt type.
- The **Tip** column displays the amount of charged tips for each receipt type.
- The **Expected Amount** column displays the total amount for each receipt type that the restaurant expects to receive.
- The **Actual Amount** column is a column that the restaurant completes. You can easily compare the actual amounts with the expected amounts.
- The **Over/Short** column is a column that the restaurant completes. You can enter the difference between the Expected Amount and the Actual Amount in this column.
Receipts Report: Summary II Format

The Summary II format allows you to generate a report that lists the total receipts for a given period, including the debits and credits for all the transactions for the entire restaurant within a given data range. The Summary II report format is designed to help you reconcile your daily receipts. The Summary II format differs from the Summary format in that it includes separate totals for cash on hand and net cash. The Summary II format is less condensed and more detailed than the original Summary format. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.
**Register Reports Menu**

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**DD CAFE**

**Operator:** wizard  
**Date/Range:** 1/10/02 to 1/17/02

### Summary Report II

<table>
<thead>
<tr>
<th>Count</th>
<th>Tip</th>
<th>Expected Amount</th>
<th>Actual Amount</th>
<th>Over/Short</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Cash Received</td>
<td>10493.63</td>
<td>490.33 (-)</td>
<td>1033.71</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Paid Outs</td>
<td>3597.40</td>
<td>1201.21 (-)</td>
<td>65.47</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Tips</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Server Commissions</td>
<td>14091.03</td>
<td>1691.54 (-)</td>
<td>1105.18</td>
<td>0.00</td>
</tr>
<tr>
<td>Net Tips</td>
<td>-130.52</td>
<td>0.00</td>
<td>-0.50</td>
<td>0.00</td>
</tr>
<tr>
<td>Tip Paid</td>
<td>-130.52</td>
<td>0.00</td>
<td>-0.50</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Cash on hand**  
- 0.00

**Cash on hand**  
- 90.00  
- 12.71 (+)  
- 0.00  
- 0.00  
- 192.71

**Tips Owed**  
- 1450.61  
- 1704.25 (-)  
- 1104.68  
- 0.00  
- 18259.66

**Net Cash**  
- 0.00

**Net Cash**  
- 978.66  
- 119.36 (+)  
- 77.40  
- 0.00  
- 18259.66

**Deposit Slip Total**  
- 0.00  
- 300.00  
- 300.00 (-)

**Deposit Receipts**  
- 0.00  
- 9.68 (+)  
- 0.00  
- 0.00  
- 9.68

**Check**  
- 0.00  
- 0.00 (+)  
- 0.00  
- 0.00  
- 0.00

**American Express**  
- 15541.04  
- 1633.29 (+)  
- 1182.08  
- 0.00  
- 29005.59

**Master Card**  
- 547  
- 146 (+)  
- 108  
- 0  
- 837

**Visa**  
- 307  
- 146 (+)  
- 108  
- 0  
- 307

**Diners**  
- 25.76  
- 11.59 (+)  
- 10.43  
- 0  
- 21.81

**House Account**  
- 45.90  
- 11.43 (+)  
- 10.23  
- 0.00  
- 30.57

**Gift Certificate**  
- 1276.12  
- 1933.29 (+)  
- 1182.08  
- 0.00  
- 17274.56

**Frequent Diner**  
- 0.00  
- 0.00 (+)  
- 0.00  
- 0.00  
- 0.00

**Total Receipts Turned In**  
- 0.00

**Total Receipts Turned In**  
- 1585.92  
- 1933.29 (+)  
- 1182.08  
- 0.00  
- 20424.43

**Restaurant Commissions**  
- 511.97  
- 0.00 (-)  
- 0.00  
- 0.00  
- 511.97

**Estimated Deposit**  
- 0.00

**Manager Promo**  
- 5.00  
- 0.00 (+)  
- 0.00  
- 0.00  
- 5.18

**Smyth**  
- 501.67  
- 0.00 (+)  
- 0.00  
- 0.00  
- 511.79

**Bad Payment**  
- -42.60  
- 0.00 (+)  
- 0.00  
- -34.00  
- -60.60

**Total Receipts Net Turned In**  
- 0.00

**Gift Certificate Paid In**  
- 12340.12  
- 1933.29 (+)  
- 1182.08  
- -34.00  
- 15812.98

**Open Account Paid In**  
- 301.80  
- 0.00 (+)  
- 0.00  
- 0.00  
- 3165.45

**Debit Card Paid In**  
- 0.00  
- 0.00 (+)  
- 50.00  
- 0.00  
- 50.00

**Total Paid In**  
- 0.00  
- 34.00  
- 20512.43

---

**End of Report**
Receipts Report: Server Format

You can change the report format by using the Report Format list on the Main tab of the Receipts Report Maintenance Window. The Server format of the Receipts Report allows you to generate a report that summarizes the total sales and receipts for each staff member for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

- The Staff ID column displays the Digital Dining staff member’s ID number.
- The Name column displays the name of the staff members.
- The Check Amt column displays the sum of all checks for each staff member.
- The Discounts column displays the sum of all discounts applied by each staff member.
- The Charges column displays the sum of all charges applied by each staff member.
- The Total column displays the sum of the values in the Check Amt, Discounts, and Charges column (Check Amt – Discounts + Charges).
- The Tax column displays the sum of all taxes applied at the POS.
- The Tips column displays the sum of all declared tips.
- The Paid Ins column displays the sum of receipts from sales of debitek cards, sales of gift certificates, and payments to A/R accounts.
- The Receipts column displays the sum of the Total, Tax, Tips, and Paid Ins columns (Total column + Tax column + Tips column + Paid Ins column).
- The Adj column displays any changes in the receipts total not included in the previous columns (such as drops made or received).
You can change the report format by using the **Report Format** list on the **Main** tab of the Receipts Report Maintenance Window. The **Profit Center** format of the Receipts Report allows you to generate a report that summarizes the debits and credits generated by each profit center so that you can start to identify sales trends that you might want to manipulate (for example, you might plan a sales competition among the staff to increase the average check price in a certain profit center). For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.
<table>
<thead>
<tr>
<th>Item</th>
<th>Main Dining Room</th>
<th>Main Bar</th>
<th>Delivery</th>
<th>Counter</th>
<th>Club Dining Room</th>
<th>Page Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>10493.03</td>
<td>496.33</td>
<td>1328.54</td>
<td>1029.71</td>
<td>0.00</td>
<td>13352.27</td>
</tr>
<tr>
<td>Beverage</td>
<td>3597.40</td>
<td>1291.21</td>
<td>36.69</td>
<td>65.47</td>
<td>0.00</td>
<td>4900.77</td>
</tr>
<tr>
<td>Other</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Sales Subtotal</td>
<td>14091.03</td>
<td>1691.54</td>
<td>1356.25</td>
<td>1161.18</td>
<td>0.00</td>
<td>16252.98</td>
</tr>
<tr>
<td>Discount</td>
<td>-130.52</td>
<td>0.00</td>
<td>-15.61</td>
<td>-0.50</td>
<td>0.00</td>
<td>-146.63</td>
</tr>
<tr>
<td>Charge</td>
<td>90.00</td>
<td>12.71</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>102.71</td>
</tr>
<tr>
<td>Total before tax</td>
<td>14001.51</td>
<td>1704.25</td>
<td>1340.62</td>
<td>1164.68</td>
<td>0.00</td>
<td>16209.66</td>
</tr>
<tr>
<td>Tax 1</td>
<td>978.56</td>
<td>119.36</td>
<td>94.52</td>
<td>77.40</td>
<td>0.00</td>
<td>1269.84</td>
</tr>
<tr>
<td>Tax 2</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax 3</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax 4</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax Subtotal</td>
<td>978.56</td>
<td>129.04</td>
<td>94.52</td>
<td>77.40</td>
<td>0.00</td>
<td>1277.52</td>
</tr>
<tr>
<td>Total of Check</td>
<td>15009.07</td>
<td>1833.29</td>
<td>1444.14</td>
<td>1182.08</td>
<td>0.00</td>
<td>19488.58</td>
</tr>
<tr>
<td>Tip collected</td>
<td>511.97</td>
<td>0.00</td>
<td>5.00</td>
<td>0.00</td>
<td>0.00</td>
<td>516.97</td>
</tr>
<tr>
<td>Pachin-AR</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Pachin-Debitk</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Pachin-Gift Certificates</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total receipts</td>
<td>15541.04</td>
<td>1833.29</td>
<td>1449.14</td>
<td>1182.08</td>
<td>0.00</td>
<td>20005.55</td>
</tr>
<tr>
<td>No of Covers</td>
<td>547</td>
<td>146</td>
<td>36</td>
<td>108</td>
<td>0.00</td>
<td>837</td>
</tr>
<tr>
<td>No of Checks</td>
<td>307</td>
<td>146</td>
<td>34</td>
<td>108</td>
<td>0.00</td>
<td>507</td>
</tr>
<tr>
<td>Avg cover</td>
<td>25.76</td>
<td>11.59</td>
<td>37.92</td>
<td>10.23</td>
<td>0.00</td>
<td>21.81</td>
</tr>
<tr>
<td>Avg check</td>
<td>45.00</td>
<td>11.43</td>
<td>40.15</td>
<td>10.23</td>
<td>0.00</td>
<td>30.57</td>
</tr>
<tr>
<td>Cash</td>
<td>12768.12</td>
<td>1933.29</td>
<td>1391.49</td>
<td>1182.08</td>
<td>0.00</td>
<td>17272.98</td>
</tr>
<tr>
<td>Check</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>American Express</td>
<td>804.00</td>
<td>0.00</td>
<td>57.65</td>
<td>0.00</td>
<td>0.00</td>
<td>921.65</td>
</tr>
<tr>
<td>Master Card</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Visa</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Diners</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>House Account</td>
<td>2227.80</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>222.80</td>
</tr>
<tr>
<td>Gift Certificate</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Frequent Diner</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Manager Promo</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Smyth</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total receipts</td>
<td>15859.92</td>
<td>1933.29</td>
<td>1449.14</td>
<td>1182.08</td>
<td>0.00</td>
<td>20424.43</td>
</tr>
<tr>
<td>Total tips</td>
<td>511.97</td>
<td>0.00</td>
<td>5.00</td>
<td>0.00</td>
<td>0.00</td>
<td>516.97</td>
</tr>
<tr>
<td>Server commission</td>
<td>0.00</td>
<td>0.00</td>
<td>0.18</td>
<td>0.00</td>
<td>0.00</td>
<td>0.18</td>
</tr>
<tr>
<td>Net tips</td>
<td>506.07</td>
<td>0.00</td>
<td>4.82</td>
<td>0.00</td>
<td>0.00</td>
<td>511.79</td>
</tr>
<tr>
<td>Total Pkd/Outs</td>
<td>426.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>426.00</td>
</tr>
<tr>
<td>Net cash</td>
<td>12340.12</td>
<td>1933.29</td>
<td>1391.49</td>
<td>1182.08</td>
<td>0.00</td>
<td>16812.96</td>
</tr>
<tr>
<td>Other receipts left</td>
<td>3091.00</td>
<td>0.00</td>
<td>57.65</td>
<td>0.00</td>
<td>0.00</td>
<td>3149.45</td>
</tr>
<tr>
<td>Server Drops</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>50.00</td>
<td>50.00</td>
</tr>
<tr>
<td>Turned in</td>
<td>15431.02</td>
<td>1933.29</td>
<td>1449.14</td>
<td>1232.08</td>
<td>0.00</td>
<td>20412.43</td>
</tr>
<tr>
<td>Restaurant commissions</td>
<td>25.240.00</td>
<td>1.84</td>
<td>0.00</td>
<td>0.00</td>
<td>27.08</td>
<td>27.08</td>
</tr>
<tr>
<td>Tips Paid</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tips Owed</td>
<td>506.07</td>
<td>0.00</td>
<td>4.82</td>
<td>0.00</td>
<td>0.00</td>
<td>511.79</td>
</tr>
<tr>
<td>Estimated deposit</td>
<td>14899.71</td>
<td>1933.29</td>
<td>1442.48</td>
<td>1232.08</td>
<td>0.00</td>
<td>19473.56</td>
</tr>
<tr>
<td>Beginning NRS Total</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Receipts</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Discounts</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Gross Total</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>NRS Total</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

*** End of Report ***
Receipts Report: Server Details Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Receipts Report Maintenance Window. The **Server Details** format of the Receipts Report allows you to generate a report that shows, for each server, the credits and debits of sales, receipts, and totals for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

### Server Details Report Example

<table>
<thead>
<tr>
<th>Date</th>
<th>10/7/08 11:39:52</th>
<th>Operator: wizard</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food</strong></td>
<td>10493.63</td>
<td>490.33</td>
</tr>
<tr>
<td><strong>Beverage</strong></td>
<td>3597.40</td>
<td>1201.21</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Sales Subtotal</strong></td>
<td>14091.03</td>
<td>1691.54</td>
</tr>
<tr>
<td><strong>Discount</strong></td>
<td>-130.52</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Charge</strong></td>
<td>90.00</td>
<td>12.71</td>
</tr>
<tr>
<td><strong>Total before tax</strong></td>
<td>14050.51</td>
<td>1704.25</td>
</tr>
<tr>
<td><strong>Tax 1</strong></td>
<td>975.56</td>
<td>119.36</td>
</tr>
<tr>
<td><strong>Tax 2</strong></td>
<td>0.00</td>
<td>9.68</td>
</tr>
<tr>
<td><strong>Tax Subtotal</strong></td>
<td>975.56</td>
<td>129.04</td>
</tr>
<tr>
<td><strong>Total of check</strong></td>
<td>15029.67</td>
<td>1833.29</td>
</tr>
<tr>
<td><strong>Tip collected</strong></td>
<td>511.87</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Payment - AR</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Payment - Credit</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Payment - Gift Certificate</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total receipts</strong></td>
<td>15541.64</td>
<td>1533.29</td>
</tr>
<tr>
<td><strong>No. of Covers</strong></td>
<td>547</td>
<td>146</td>
</tr>
<tr>
<td><strong>No. of Checks</strong></td>
<td>267</td>
<td>146</td>
</tr>
<tr>
<td><strong>Avg cover</strong></td>
<td>23.75</td>
<td>11.69</td>
</tr>
<tr>
<td><strong>Avg check</strong></td>
<td>45.90</td>
<td>11.43</td>
</tr>
<tr>
<td><strong>Cash</strong></td>
<td>12768.12</td>
<td>1933.29</td>
</tr>
<tr>
<td><strong>Check</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>American Express</strong></td>
<td>854.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Master Card</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Visa</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Diners</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>House Account</strong></td>
<td>2227.80</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Gift Certificate</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Frequent Diner</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Manager Promo</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total receipts</strong></td>
<td>15859.92</td>
<td>1933.29</td>
</tr>
<tr>
<td><strong>Total tips</strong></td>
<td>511.87</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Server commission</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Net tips</strong></td>
<td>569.87</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total paid out</strong></td>
<td>428.08</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Net cash</strong></td>
<td>12340.13</td>
<td>1693.29</td>
</tr>
<tr>
<td><strong>Other receipts turned in</strong></td>
<td>3981.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Server Drops</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Turned in</strong></td>
<td>15421.82</td>
<td>1932.29</td>
</tr>
<tr>
<td><strong>Restaurant commissions</strong></td>
<td>25.94</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Tips Paid</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Tips Owed</strong></td>
<td>505.97</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Estimated deposit</strong></td>
<td>14989.71</td>
<td>1933.29</td>
</tr>
<tr>
<td><strong>Beginning NRS Total</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total Receipts</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Discounts</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Grocery Total</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>NRS Total</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>10/7/08 11:39:52</th>
<th>Operator: wizard</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food</strong></td>
<td>10493.63</td>
<td>490.33</td>
</tr>
<tr>
<td><strong>Beverage</strong></td>
<td>3597.40</td>
<td>1201.21</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Sales Subtotal</strong></td>
<td>14091.03</td>
<td>1691.54</td>
</tr>
<tr>
<td><strong>Discount</strong></td>
<td>-130.52</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Charge</strong></td>
<td>90.00</td>
<td>12.71</td>
</tr>
<tr>
<td><strong>Total before tax</strong></td>
<td>14050.51</td>
<td>1704.25</td>
</tr>
<tr>
<td><strong>Tax 1</strong></td>
<td>975.56</td>
<td>119.36</td>
</tr>
<tr>
<td><strong>Tax 2</strong></td>
<td>0.00</td>
<td>9.68</td>
</tr>
<tr>
<td><strong>Tax Subtotal</strong></td>
<td>975.56</td>
<td>129.04</td>
</tr>
<tr>
<td><strong>Total of check</strong></td>
<td>15029.67</td>
<td>1833.29</td>
</tr>
<tr>
<td><strong>Tip collected</strong></td>
<td>511.87</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Payment - AR</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Payment - Credit</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Payment - Gift Certificate</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total receipts</strong></td>
<td>15541.64</td>
<td>1533.29</td>
</tr>
<tr>
<td><strong>No. of Covers</strong></td>
<td>547</td>
<td>146</td>
</tr>
<tr>
<td><strong>No. of Checks</strong></td>
<td>267</td>
<td>146</td>
</tr>
<tr>
<td><strong>Avg cover</strong></td>
<td>23.75</td>
<td>11.69</td>
</tr>
<tr>
<td><strong>Avg check</strong></td>
<td>45.90</td>
<td>11.43</td>
</tr>
<tr>
<td><strong>Cash</strong></td>
<td>12768.12</td>
<td>1933.29</td>
</tr>
<tr>
<td><strong>Check</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>American Express</strong></td>
<td>854.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Master Card</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Visa</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Diners</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>House Account</strong></td>
<td>2227.80</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Gift Certificate</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Frequent Diner</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Manager Promo</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total receipts</strong></td>
<td>15859.92</td>
<td>1933.29</td>
</tr>
<tr>
<td><strong>Total tips</strong></td>
<td>511.87</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Server commission</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Net tips</strong></td>
<td>569.87</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total paid out</strong></td>
<td>428.08</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Net cash</strong></td>
<td>12340.13</td>
<td>1693.29</td>
</tr>
<tr>
<td><strong>Other receipts turned in</strong></td>
<td>3981.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Server Drops</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Turned in</strong></td>
<td>15421.82</td>
<td>1932.29</td>
</tr>
<tr>
<td><strong>Restaurant commissions</strong></td>
<td>25.94</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Tips Paid</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Tips Owed</strong></td>
<td>505.97</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Estimated deposit</strong></td>
<td>14989.71</td>
<td>1933.29</td>
</tr>
<tr>
<td><strong>Beginning NRS Total</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total Receipts</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Discounts</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Grocery Total</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>NRS Total</strong></td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
In a server-banking operation, your staff members pay out any transactions that they generate. In a cashiering operation, you have designated staff members who close out transactions that other staff members start. Therefore, in a cashiering operation, the Server Details format of the Receipts report will display zero values for all information related to receipts (from the row labeled “Tip Collected” to the row labeled “NRS Total”).

**Receipts Report: Cashier Details Format**

You can change the report format by using the **Report Format** list on the **Main** tab of the Receipts Report Maintenance Window. The **Cashier Details** format of the Receipts Report allows you to generate a report that shows, for each server, the credits and debits of sales, receipts, and totals for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.
In a server-banking operation, your staff members pay out any transactions that they generate. In a cashiering operation, you have designated staff members who close out transactions that other staff members start. Therefore, in a cashiering operation, the Cashier Details format of the Receipts report will display zero values for all information related to sales (from the row labeled “Food” to the row labeled “Total of Check”).
Receipts Report: Date Format

You can change the report format by using the Report Format list on the Main tab of the Receipts Report Maintenance window. The Date format of the Receipts Report allows you to generate a list of receipt totals for each date within the selected date range, including totals for each main group type, discounts, charges, and each receipt type. Each column in the report includes totals for a single date. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipts by Date</td>
<td>Filtered By: Server, Receipt Type, Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food</td>
<td>10493.63</td>
<td>490.33</td>
<td>1328.54</td>
<td>1097.71</td>
</tr>
<tr>
<td>Beverage</td>
<td>3597.40</td>
<td>1201.21</td>
<td>36.69</td>
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</tr>
<tr>
<td>Other</td>
<td>5.00</td>
<td>0.00</td>
<td>0.00</td>
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</tr>
<tr>
<td>Sales Subtotal</td>
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<tr>
<td>Discount</td>
<td>-136.52</td>
<td>0.00</td>
<td>-15.61</td>
<td>0.00</td>
</tr>
<tr>
<td>Charge</td>
<td>96.00</td>
<td>12.71</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total before tax</td>
<td>14500.51</td>
<td>1704.25</td>
<td>1359.62</td>
<td>1149.65</td>
</tr>
<tr>
<td>Tax 1</td>
<td>978.56</td>
<td>119.36</td>
<td>94.52</td>
<td>77.40</td>
</tr>
<tr>
<td>Tax 2</td>
<td>0.00</td>
<td>0.68</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax 3</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax 4</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tax Subtotal</td>
<td>978.56</td>
<td>119.36</td>
<td>94.52</td>
<td>77.40</td>
</tr>
<tr>
<td>Total of check</td>
<td>16029.07</td>
<td>1823.29</td>
<td>1444.14</td>
<td>1120.06</td>
</tr>
<tr>
<td>Tip collected</td>
<td>511.07</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Paid-in-full</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Paid-in-Drinks</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total receipts</td>
<td>15541.04</td>
<td>1823.29</td>
<td>1444.14</td>
<td>1120.06</td>
</tr>
<tr>
<td>No of Covers</td>
<td>547</td>
<td>146</td>
<td>36</td>
<td>105</td>
</tr>
<tr>
<td>No of Checks</td>
<td>307</td>
<td>146</td>
<td>34</td>
<td>105</td>
</tr>
<tr>
<td>Avg cover</td>
<td>25.76</td>
<td>11.59</td>
<td>37.92</td>
<td>10.23</td>
</tr>
<tr>
<td>Avg check</td>
<td>45.00</td>
<td>11.43</td>
<td>46.15</td>
<td>10.23</td>
</tr>
<tr>
<td>Cash</td>
<td>12768.12</td>
<td>1033.29</td>
<td>1391.49</td>
<td>1192.09</td>
</tr>
<tr>
<td>Check</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>American Express</td>
<td>904.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Master Card</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Visa</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Diners</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>House Account</td>
<td>2227.80</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Gift Certificate</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Frequent Diner</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Manager Promo</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Server</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total receipts</td>
<td>15509.02</td>
<td>1303.29</td>
<td>1446.14</td>
<td>1192.09</td>
</tr>
<tr>
<td>Total tips</td>
<td>511.97</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Server commission</td>
<td>5.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Net tips</td>
<td>1616.97</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total PaidOuts</td>
<td>426.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Net cash</td>
<td>12440.92</td>
<td>1033.29</td>
<td>1391.49</td>
<td>1192.09</td>
</tr>
<tr>
<td>Other tips turned in</td>
<td>3591.90</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Turned in</td>
<td>1441.90</td>
<td>1283.29</td>
<td>1446.14</td>
<td>1239.08</td>
</tr>
<tr>
<td>Restaurant commission</td>
<td>20.40</td>
<td>1.84</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tip Paid</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tip Onedit</td>
<td>506.97</td>
<td>0.00</td>
<td>4.82</td>
<td>0.00</td>
</tr>
<tr>
<td>Estimated deposit</td>
<td>14899.71</td>
<td>1503.29</td>
<td>1442.48</td>
<td>1233.08</td>
</tr>
<tr>
<td>Beginning NRS Total</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Receipts</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Discounts</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Gross Total</td>
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<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>NRS Total</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

*** End of Report ***
Receipts Report: Deposit Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Receipts Report Maintenance window. The **Deposit** format of the Receipts Report allows you to generate a list of totals for deposits performed within the specified date range. The report includes totals for payments (sales), deposits, and the remaining difference. For more information on what the columns of this report contain or how to calculate their values, see “Receipts Report Examples” on page 290.

<table>
<thead>
<tr>
<th>Date</th>
<th>DateRange: 6/7/2006 to 6/10/2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operator</td>
<td>Roger</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Deposit</strong></td>
<td></td>
</tr>
<tr>
<td>Filtered By: Server, Receipt Type, Days</td>
<td></td>
</tr>
<tr>
<td>Payments</td>
<td>Deposits</td>
</tr>
<tr>
<td>Moore Alan</td>
<td>490.33</td>
</tr>
<tr>
<td>Cash</td>
<td>490.33</td>
</tr>
<tr>
<td>Miller Frank</td>
<td>255.12</td>
</tr>
<tr>
<td>Cash</td>
<td>255.12</td>
</tr>
<tr>
<td>Mullins Tori</td>
<td>342.82</td>
</tr>
<tr>
<td>Cash</td>
<td>342.82</td>
</tr>
<tr>
<td>Grand Totals</td>
<td>1088.27</td>
</tr>
</tbody>
</table>

* ***End of Report***

- The **Payments** column displays the amount of payments received by the staff member.
- The **Deposits** column displays the amount of the deposits that the staff members performed.
- The **Difference** column displays the amount that the staff members should still have available.
Sales Report Maintenance Window

Sales Reports allow you to analyze information about your sales. You can use them to compare and analyze information regarding menu item sales, including totals, refunds, and voids.

Sales Reports Window

Unlike the other Reports windows in the Register Reports menu, the Sales Reports window features the Compare to Range list and Compare to Date Range boxes, which allow you to generate a report that compares sales information from one time range with sales information from another time range.

To include comparison information in a report, click a period in the Compare to list. This list is identical to the standard Range list and features a variety of general time periods, such as any day of the week, any month of the year, the preceding pay period, and so on. If you want to set an irregular date range, you can click Custom and then enter the specific date range in the Compare to Date Range boxes. You can only use the Compare to list and the Compare to Date Range boxes to print or preview reports with a report format of “Compare.”
Sales Report Maintenance Window: Main Tab

On the **Main** tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The **Main** tab also allows you to filter sales information by staff ID, table number, time of day, and the PLU code of specific menu items.

![Sales Report Maintenance Window](image)

**Report Format list**

You can select one of five different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Audit</strong></td>
<td>A list of menu items and each of their associated transactions, including the name of the staff member who performed each transaction; each transaction’s check number, table number, number of covers, and profit center; each menu item’s sales type, prep group, and price; the quantity ordered; and the time of the transaction.</td>
</tr>
<tr>
<td><strong>Sales</strong></td>
<td>A list of menu items with sales totals, including each item’s total sales, quantity sold, the percentage of total sales that the item represents, the percentage of sales within the main group that the item represents, sales divided by the number of covers, average sales per item sold, and the sales divided by the number of checks.</td>
</tr>
</tbody>
</table>
Register Reports Menu

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refund</td>
<td>A list of menu items associated with refund transactions, including the name of the staff member who performed the refund, the check and table numbers of the transaction, the profit center within which the transaction was performed, the item’s sales type and prep group, the item’s quantity for each transaction, the item’s price for each transaction, and the time the transaction was performed.</td>
</tr>
<tr>
<td>Voids</td>
<td>A list of menu items associated with void transactions, including total quantity and sales.</td>
</tr>
<tr>
<td>Compare</td>
<td>A list of menu items, comparing total sales and quantities sold for two separate time periods.</td>
</tr>
<tr>
<td>Special Item</td>
<td>A list of all the special items your staff members have ordered for the date range or period you provide.</td>
</tr>
<tr>
<td>Cost</td>
<td>A list of menu items and their cost information.</td>
</tr>
<tr>
<td>Sales by Item</td>
<td>A list of menu items sold within the data range, including sales totals and other sales information.</td>
</tr>
</tbody>
</table>

Report Level list

The Report Level list allows you to control how the program will subtotal sales information. For instance, if you define a sales report with a level of Main Group, the report will include sales totals for each main group.

<table>
<thead>
<tr>
<th>Report Level</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Totals Only</td>
<td>No subtotals.</td>
</tr>
<tr>
<td>By Item</td>
<td>Subtotals for each menu item.</td>
</tr>
<tr>
<td>Sales Type</td>
<td>Subtotals for each sales type.</td>
</tr>
<tr>
<td>Main Group</td>
<td>Subtotals for each main group.</td>
</tr>
<tr>
<td>Main Type</td>
<td>Subtotals for each main group type.</td>
</tr>
</tbody>
</table>
**Group By 1 list**

You can control how the program organizes the information in your report by selecting a grouping option from the **Group By 1** list. The program will list data alphabetically by the grouping option you select. You can group your data by any of the following criteria:

<table>
<thead>
<tr>
<th><strong>Staff ID</strong></th>
<th>Groups your transactions by the staff ID numbers of the staff members who handled the transactions.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prep Type</strong></td>
<td>Groups your menu items by their prep type.</td>
</tr>
<tr>
<td><strong>Profit Center</strong></td>
<td>Groups your transactions by the profit center within which they were performed.</td>
</tr>
<tr>
<td><strong>Week Day</strong></td>
<td>Groups your transactions by the day of the week when they were performed.</td>
</tr>
<tr>
<td><strong>Time Interval</strong></td>
<td>Groups your transactions by whatever time interval you have entered in the <strong>Time Interval</strong> box, if any.</td>
</tr>
</tbody>
</table>

**Group By 2 list**

You can group your data to a second level by selecting a subgrouping option from the **Group By 2** list. The **Group By 2** list is identical to the **Group By 1** list.

**Sort By list**

You can also control how the program organizes the information in a report by selecting a sorting option from the **Sort By** list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the **Sort By** list. You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th><strong>PLU Number</strong></th>
<th>Sorts your report by the PLU number of each menu item.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Sorts your report by the description of each menu item.</td>
</tr>
<tr>
<td><strong>Quantity</strong></td>
<td>Sorts your report by the quantity of each menu item sold.</td>
</tr>
<tr>
<td><strong>Sales Amount</strong></td>
<td>Sorts your report by the amount of item sales.</td>
</tr>
</tbody>
</table>
**Optional Input list**

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Sales Reports window. You can select one of the following optional input criteria:

<table>
<thead>
<tr>
<th>Optional Input</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Filters your report by the staff ID number of each server who performed the transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Prep Type</td>
<td>Filters your report by the prep type of each menu item.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Filters your report by the profit center of each transaction.</td>
</tr>
<tr>
<td>Sales Type</td>
<td>Filters your report by the sales type of each menu item.</td>
</tr>
</tbody>
</table>

**Default Range list**

If you select a default range from this list, this default range will appear in the Range list of the Sales Report window.

**Staff ID boxes**

You can filter your records by typing a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print sales information regarding transactions by servers with staff ID numbers between 100 and 200.

**Table boxes**

You can filter your records by entering a range of table numbers in the Table boxes. The program will only include sales information from transactions from tables that fall within this range.

**Time boxes**

You can filter your records by typing a range in the Time boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print information regarding transactions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.
Register Reports Menu

**Time Interval box**

You can enter a time interval by which the program will group the records in the report. The program will group sales information from transactions by whatever number of minutes you enter in the **Time Interval** box. For instance, if you type “30”, the program will collect information for transactions occurring within each 30-minute interval of the specified time range. If you type a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: transactions occurring from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00.

**PLU Code boxes**

You can enter a range of PLU numbers. The program will only include sales information from menu items whose PLU number falls within this range.

**Compare Range list**

If you select a range from this list, this default range will appear in the **Compare to** list of the Sales Report window. The **Compare Range** list will only appear if you set the report format to “Compare.”

**Sales Report Maintenance Window: Misc Tab**

The **Misc** tab allows you to include or exclude certain types of transactions in the Sales Report. If you select **Cash Sales**, the program will include information from cash sales in your report. If you select **Zero-Priced Items**, the program will include information from zero-priced items in your report. If you select **Promo Discounts**, the report will include sales data from promotional discount transactions. If you select **Comp Discounts**, the report will include sales data from complimentary discount transactions. (You can designate discounts as either promotional or complimentary by using the **Category** list on the **Main** tab of the Discount Definition Maintenance window.)
The tab also features the **Partial Toppings Filter** area, which allows you to include or exclude partial topping menu items in the Sales Report. If you select **No Filtering**, the program will include topping items in the Sales Report. If you select **Partial Toppings Only**, the program will only include partial topping menu items in the Sales Report. If you select **Exclude Partial Toppings**, the program will exclude partial topping menu items from the Sales Report.

### Sales Report Maintenance Window: Sal Typ Tab

The **Sal Typ** tab features a filter that allows you to include or exclude menu items associated with specific sales types. The program will only print menu items associated with sales types in the **Include** list and will not print any menu items associated with sales types in the **Exclude** list.
Sales Report Maintenance Window: Prp Typ Tab

The **Prp Typ** tab features a filter that allows you to include or exclude menu items associated with specific prep types. The program will only print menu items associated with prep types in the **Include** list and will not print any menu items associated with prep types in the **Exclude** list.

Sales Report Maintenance Window: Prp Grp Tab

The **Prp Grp** tab features a filter that allows you to include or exclude menu items associated with specific prep groups. You can include or exclude transactions paid with certain receipt types by adding prep groups to the **Include/Exclude** list.

You can set the program to either include or exclude menu items associated with the prep groups in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include items associated with the prep groups in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all items associated with the prep groups in the **Include/Exclude** list.

To move a prep group from the **Available** list to the **Include/Exclude** list, select the prep group and click $\text{Include}$ or $\text{Exclude}$. To move a prep group from the **Include/Exclude** list to the **Available** list, select the prep group and click $\text{Available}$. To move all prep groups from the **Available** list to the **Include/Exclude** list, click $\text{Include/Exclude}$. To move all prep groups in the **Include/Exclude** list to the **Available** list, click $\text{Available}$. 
Sales Report Maintenance Window: Pft Cnt Tab

The Pft Cnt tab features a filter that allows you to include or exclude transactions associated with specific profit centers. The program will only print transactions associated with profit centers in the Include list and will not print any transactions associated with profit centers in the Exclude list.

Sales Report Maintenance Window: Day Tab

The Day tab features a filter that allows you to include or exclude transactions performed on specific days of the week. The program will only print transactions performed on days of the week in the Include list and will not print any transactions performed on days of the weeks in the Exclude list.
Sales Report Maintenance Window: Menu Tab

The Menu tab features a filter that allows you to include or exclude the sales of specific menu items in the report. If you click Include, the program will only include the sales of menu items listed in the Menu Item list. If you click Exclude, the program will exclude the sales of menu items listed in the Menu Item list.

To add a menu item to the Menu Item list, select a menu item and click .
To remove a menu item from the Menu Item list, select the menu item and then click . To remove all menu items from the Menu Item list, click .

Sales Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Sales Report Examples

You can use Sales reports to summarize receipts by profit center, to review sales details for a selected staff member, or to analyze the average sales per cover. Digital Dining provides three end-of-day (EOD) reports (you cannot modify the report definition for EOD reports) and seven report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Sales Report Maintenance Window: Main Tab” on page 314).

What each column of the Sales report contains or how Digital Dining calculates the column is sometimes not self evident:

The **Avg Item** column displays the value of the Sales column divided by the value of the Quantity column, rounded to two decimal places (Sales column ÷ Quantity column).

The **Sales** column displays the sum of all the menu items that your staff members sold, grouped by Main Group type (for example, Food, Beverage, Other) and subgrouped by Sales Type (for example, Appetizers, Breakfast, or Dessert).

The **Plate Cost** column displays the sum of each menu item’s plate cost value that you entered in the **Cost** box on the **Main** tab of the Menu Item Maintenance window.

The **Inv Cost** column displays the sum of the inventory cost for all inventory items that go into the recipe for each menu item (you can review each recipe total in the Total Recipe row on the **Recipe** tab of the Menu Item Maintenance window).

The **Total Cost** column displays the sum of the total cost (you can review the cost for each menu item in the Total row on the **Recipe** tab of the Menu Item Maintenance window) for all the menu items that your staff members sold.

The **Cost Ratio** column displays the value of the Total Cost column divided by the Sales column, rounded to two decimal places and shown in percentages (Total Cost column ÷ Sales column).

The **Group %** column displays the value of the Sales column divided by the value of the Group subtotal line in the Sales column (Sales column ÷ Group subtotal).

The **Sales %** column displays the value of each sales type’s Sales column divided by the value in the Grand Total Sales column (Sales column ÷ Grand Total Sales column).
You can calculate the value in the Sales % column with the following equation:

\[(A + B) \times 100 = C\]

The **Sales** column displays the value of the Avg Item column multiplied by the Quantity column (Price column x Quantity column).

The **Avg Item** column displays the price that the restaurant charges for the menu item.

The **$/Cov** column displays the value of the Item Sales $ column divided by the Total Covers.

You can calculate the value in the $ / Cov column with the following equation:

\[A + B = C\]

The **Qty/Cov %** column displays the value of the total from the Quantity column divided by the value of the cover count from the Items Sales $ column. The value is a percentage rounded to two decimal places. To calculate the values in the Grand Total row, you can divide the value in the Quantity column by the Total Covers value (at the top of the report).
The $/Chk column displays the value of the total Item Sales $ column divided by the check count from the Quantity column. To calculate the values in the Grand Total row, you can divide the value in the Item Sales $ column by the Total Checks value (at the top of the report).

You can calculate the value in the Qty / Cov % column with the following equation:

\[
(A + B) \times 100 = C
\]

Here is the table:

<table>
<thead>
<tr>
<th>Item Sales $</th>
<th>Quantity</th>
<th>Sales %</th>
<th>Group %</th>
<th>$ / Cov</th>
<th>Qty/Cov %</th>
<th>Avg Item</th>
<th>$ / Chk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kitchen</td>
<td>Cover Count: 12</td>
<td>2,515.00</td>
<td>80.44</td>
<td>100.00</td>
<td>335.51</td>
<td>2,035.00</td>
<td>13.44</td>
</tr>
<tr>
<td>Kitchen Total</td>
<td>Check Count: 143</td>
<td>310.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td>6,482.73</td>
<td>607.00</td>
<td>100.00</td>
<td>4.00</td>
<td>41.19</td>
<td>8.87</td>
<td>7.32</td>
</tr>
</tbody>
</table>

*** End of Report ***
Sales Report: EOD Menu Item

The EOD Menu Item report displays a list of all the menu items that your staff members sold, grouped by Main Group (for example, Food, Beverage, Other) and subgrouped by Sales Type (for example, Appetizers, Breakfast, or Dessert). You can use the EOD Menu Item report to analyze sales by each menu item for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.

In this example, the Group % column and the Sales % column are identical because the EOD Menu Item report definition does not include grouping.

- The PLU column displays the PLU (Price Look-Up) number of each menu item.
- The Menu Item column displays the name of each menu item.
- The Quantity column displays the number of each item sold.
The **Avg Item** column displays the value of the Sales column divided by the value of the Quantity column, rounded to two decimal places (Sales ÷ Quantity).

The **Sales** column displays the total value of each item sold and the sum of all the menu items that your staff members sold, grouped by Main Group type (for example, Food, Beverage, Other) and subgrouped by Sales Type (for example, Appetizers, Breakfast, or Dessert).

The **Plate Cost** column displays the sum of each menu item’s plate cost value that you entered in the **Cost** box on the **Main** tab of the Menu Item Maintenance window multiplied by the number displayed in the Quantity column.

The **Inv Cost** column displays the sum of the inventory cost for all inventory items that go into the recipe for each menu item multiplied by the number displayed in the Quantity column. You can review each recipe total in the Total Recipe row on the **Recipe** tab of the Menu Item Maintenance window.

The **Total Cost** column displays the sum of the costs displayed in the Plate Cost and Inv Cost columns for all the menu items that your staff members sold. You can review the cost for each menu item in the Total row on the **Recipe** tab of the Menu Item Maintenance window.

The **Cost Ratio** column displays the value of the Total Cost column divided by the Sales column, rounded to two decimal places and shown in percentages (Total Cost ÷ Sales).

The **Group %** column displays the value of the Sales column divided by the value of the Group subtotal line in the Sales column (Sales ÷ Group subtotal).

The **Sales %** column displays the value of each sales type’s Sales column divided by the value in the Grand Total Sales column (Sales ÷ Grand Total Sales).

---

**Sales Report: EOD Sales Type**

The EOD Sales Type report displays a sum of total restaurant sales, grouped by Main Group (for example, Food, Beverage, Other) and subgrouped by Sales Type (for example, Appetizers, Breakfast, or Dessert). You can use the EOD Sales Type report to analyze sales by Sales Type for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.
The **Quantity** column displays the number of each item sold.

The **Avg Item** column displays the value of the Sales column divided by the value of the Quantity column, rounded to two decimal places (Sales ÷ Quantity).

The **Sales** column displays the total value of each item sold and the sum of all the menu items that your staff members sold, grouped by Main Group type (for example, Food, Beverage, Other) and subgrouped by Sales Type (for example, Appetizers, Breakfast, or Dessert).

The **Plate Cost** column displays the sum of each menu item’s plate cost value that you entered in the **Cost** box on the **Main** tab of the Menu Item Maintenance window multiplied by the number displayed in the Quantity column.

The **Inv Cost** column displays the sum of the inventory cost for all inventory items that go into the recipe for each menu item multiplied by the number displayed in the Quantity column. You can review each recipe total in the Total Recipe row on the **Recipe** tab of the Menu Item Maintenance window.

The **Total Cost** column displays the sum of the costs displayed in the Plate Cost and Inv Cost columns for all the menu items that your staff members sold. You can review the cost for each menu item in the Total row on the **Recipe** tab of the Menu Item Maintenance window.
The **Cost Ratio** column displays the value of the Total Cost column divided by the Sales column, rounded to two decimal places and shown in percentages (Total Cost ÷ Sales).

The **Group %** column displays the value of the Sales column divided by the value of the Group subtotal line in the Sales column (Sales ÷ Group subtotal).

The **Sales %** column displays the value of each sales type’s Sales column divided by the value in the Grand Total Sales column (Sales ÷ Grand Total Sales).

### Sales Report: EOD Specials

The EOD Specials report displays a list of all special items that your staff members ordered within the specified date range. You can use the EOD Specials report to analyze if you should add any recurring menu items to the menu. For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.

<table>
<thead>
<tr>
<th>PLU</th>
<th>Description</th>
<th>Price</th>
<th>Quantity</th>
<th>Value</th>
<th>Server</th>
<th>Manager</th>
<th>Check No</th>
<th>Sales Type</th>
<th>Prep Type</th>
<th>Profit Ctr</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>606</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>8126</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>08:24</td>
</tr>
<tr>
<td>607</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7803</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>09:12</td>
</tr>
<tr>
<td>622</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>8018</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>09:42</td>
</tr>
<tr>
<td>631</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>8506</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:14</td>
</tr>
<tr>
<td>637</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>8343</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:27</td>
</tr>
<tr>
<td>550</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>567</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:29</td>
</tr>
<tr>
<td>560</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>6666</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:31</td>
</tr>
<tr>
<td>586</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7705</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:39</td>
</tr>
<tr>
<td>592</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7994</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:49</td>
</tr>
<tr>
<td>514</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7733</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:45</td>
</tr>
<tr>
<td>622</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>6211</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:59</td>
</tr>
<tr>
<td>592</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7704</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:00</td>
</tr>
<tr>
<td>514</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7733</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:05</td>
</tr>
<tr>
<td>622</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>6211</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:10</td>
</tr>
<tr>
<td>592</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7704</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:15</td>
</tr>
<tr>
<td>514</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7733</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:20</td>
</tr>
<tr>
<td>622</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>6211</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:25</td>
</tr>
<tr>
<td>592</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7704</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:30</td>
</tr>
<tr>
<td>514</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7733</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:35</td>
</tr>
<tr>
<td>622</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>6211</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:40</td>
</tr>
<tr>
<td>592</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7704</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:45</td>
</tr>
<tr>
<td>514</td>
<td>CRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7733</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>11:50</td>
</tr>
</tbody>
</table>

The **Price** column displays the price of each special item.

The **Quantity** column displays the quantity of each special item sold.

The **Value** column displays the total value of each special item sold, calculated by multiplying the Price by the Quantity.
The Server column displays the name of the server who ordered each special item.

The Manager column displays the name of the manager who authorized each sale.

The Check No column displays the number of each check that included a special item.

The Sales Type column displays the sales type of each special item.

The Prep Type column displays the prep type of each special item.

The Profit Ctr column displays the profit center in which each special item was sold.

The Time column displays the time when each special item was ordered.

The Audit format of the Sales Report allows you to generate a report that displays a list of all sales (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently. For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.

<table>
<thead>
<tr>
<th>Staff</th>
<th>Check No</th>
<th>Table</th>
<th>Purchase</th>
<th>Prep Grp</th>
<th>Covers</th>
<th>Profit Ctr</th>
<th>Quantity</th>
<th>Price</th>
<th>Time</th>
<th>Part</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garlic pasta</td>
<td>3402</td>
<td>Key</td>
<td>8123</td>
<td>23</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>12.95</td>
</tr>
<tr>
<td>Spaghetti Mushi</td>
<td>3404</td>
<td>Key</td>
<td>8123</td>
<td>23</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>11.95</td>
</tr>
<tr>
<td>Pasta Primavera</td>
<td>3406</td>
<td>Key</td>
<td>8123</td>
<td>23</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>11.95</td>
</tr>
<tr>
<td>Spaghetti Mushi</td>
<td>3404</td>
<td>Key</td>
<td>8123</td>
<td>23</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>11.95</td>
</tr>
<tr>
<td>Prime Rib</td>
<td>1041</td>
<td>Key</td>
<td>8125</td>
<td>23</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>17.95</td>
</tr>
<tr>
<td>Grill Check San</td>
<td>1149</td>
<td>Key</td>
<td>7802</td>
<td>23</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>7.05</td>
</tr>
<tr>
<td>Fettuccine Alfredo</td>
<td>3402</td>
<td>Key</td>
<td>7888</td>
<td>23</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>12.95</td>
</tr>
<tr>
<td>New York Strip</td>
<td>1050</td>
<td>Key</td>
<td>8126</td>
<td>22</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>14.95</td>
</tr>
<tr>
<td>Two Plates</td>
<td>3602</td>
<td>Key</td>
<td>8126</td>
<td>22</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>4.95</td>
</tr>
<tr>
<td>Prime Rib</td>
<td>1041</td>
<td>Key</td>
<td>7802</td>
<td>23</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>17.95</td>
</tr>
<tr>
<td>Grill Check San</td>
<td>1149</td>
<td>Key</td>
<td>7802</td>
<td>23</td>
<td>ENTREES</td>
<td>PrepGrp1</td>
<td>1.00</td>
<td>Main DR</td>
<td>1.00</td>
<td>7.05</td>
</tr>
</tbody>
</table>

DD CAFE

Date: 12/3/08 12:50:57
Operator: wizard

Items By Prep

Report Level: Audit

Filter By: Discounts, Sales Type, Prep Type, Profit Center

Total Checks: 919

Staff | Check No | Table | Sales Type | Prep Grp | Covers | Profit Ctr | Quantity | Price | Time | Part |
-----|----------|------|------------|---------|--------|------------|----------|-------|------|------|
Garlic Pasta | 3402 | Key | 8123 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 12.95 | 07:20|
Spaghetti Mushi | 3404 | Key | 8123 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 11.95 | 07:20|
Pasta Primavera | 3406 | Key | 8123 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 11.95 | 07:20|
Spaghetti Mushi | 3404 | Key | 8123 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 11.95 | 07:20|
Prime Rib     | 1041 | Key | 8125 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 17.95 | 08:11|
Grill Check San | 1149 | Key | 7802 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 7.05  | 08:41|
Fettuccine Alfredo | 3402 | Key | 7888 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 12.95 | 08:24|
New York Strip | 1050 | Key | 8126 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 14.95 | 08:24|
Two Plates    | 3602 | Key | 8126 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 4.95  | 08:24|
Prime Rib     | 1041 | Key | 7802 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 17.95 | 08:41|
Grill Check San | 1149 | Key | 7802 | ENTREES | PrepGrp1 | 1.00 | Main DR | 1.00 | 7.05  | 08:41|

Calculation:

Grand Total: 20.00 26.00 206.00

The Staff column displays the name of the staff member who ordered each item.
The Check No column displays the number of each check that includes an item.

The Table column displays the number of the table where each item was ordered.

The Sales Type column displays the sales type of each item.

The Prep Grp column displays the prep group of each item.

The Covers column displays the number of covers on each check.

The Profit Center column displays the profit center in which each item was sold.

The Quantity column displays the quantity of each item ordered.

The Price column displays the price of each item.

The Time column displays the time when each item was ordered.
Sales Report: Sales Format

The Sales format of the Sales Report allows you to generate a report that allows, among other things, you to analyze sales contests or staff members who need additional training based on, for example, low $/Chk values. The setting that you select from the Report Level list on the Main tab of the Sales Report Maintenance Window determines, in large part, what the report displays and how you can use it (for more information, see “Report Level list” on page 315). For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.

- The Item Sales $ column displays the total amount of sales for each prep type.
- The Quantity column displays the number of items sold of each prep type.
- The Sales % column displays the value of each sales type’s Sales column divided by the value in the Grand Total Sales column (Sales ÷ Grand Total Sales).
- The Group % column displays the value of the Sales column divided by the value of the Group subtotal line in the Sales column (Sales ÷ Group).
The $/Cov column displays the value of the Item Sales $ column divided by the Total Covers.

The Qty/Cov % column displays the value of the total from the Quantity column divided by the value of the cover count from the Items Sales $ column. The value is a percentage rounded to two decimal places. To calculate the values in the Grand Total row, you can divide the value in the Quantity column by the Total Covers value (at the top of the report).

The Avg Item column displays the value of the Sales column divided by the value of the Quantity column, rounded to two decimal places (Sales ÷ Quantity).

The $/Chk column displays the value of the total Item Sales $ column divided by the check count from the Quantity column. To calculate the values in the Grand Total row, you can divide the value in the Item Sales $ column by the Total Checks value (at the top of the report).

Sales Report: Refunds Format

The Refunds format of the Sales Report allows you to generate a report that displays each refund transaction. For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.

- The PLU column displays the PLU (Price Look-Up) number of each refunded menu item.
- The Menu Item column displays the name of each refunded menu item.
- The Staff column displays the name of the staff member who performed each refund transaction.
Register Reports Menu

- The **Check No** column displays the number of each check that included a refund transaction.
- The **Table** column displays the table number where each staff member opened the check. In this example, C&C denotes Cash and Carry, so no table was used in this example.
- The **Sales Type** column displays the sales type of each refunded menu item.
- The **Prep Grp** column displays the prep group of each refunded menu item.
- The **Profit Ctr** column displays the profit center where each refund transaction was performed.
- The **Quantity** column displays the quantity of each menu item that refunded.
- The **Price** column displays the price of each menu item that was refunded.
- The **Time** column displays the time of each refund transaction.

**Sales Report: Voids Format**

The **Voids** format of the Sales Report allows you to generate a report that displays each void transaction. For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.
The **PLU** column displays the PLU (Price Look-Up) number of a menu item.

The **Menu Item** column displays the name of a menu item.

The **Sold** section displays the quantity of items sold and the total amount of sales.

The **Voids** section of the report displays the quantity of items voided and the total cost of the voided items.

The **Net** section of the report displays net quantity of items sold and the net amount of sales (after voided items).

The **Avg Item** column displays the value of the Sales column divided by the value of the Quantity column, rounded to two decimal places (Sales ÷ Quantity).
Sales Report: Compare Format

The **Compare** format of the Sales Report allows you to generate a report that compares the sales of menu items for the date range or period you provide. The setting that you select from the **Report Level** list on the **Main** tab of the Sales Report Maintenance Window determines, in large part, what the report displays and how you can use it (for more information, see “Report Level list” on page 315). For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.

The **PLU** column displays the PLU (Price Look-Up) number of the menu item.

The **Menu Item** column displays the name of the menu item.

The **Item Sales $** column displays the amount of sales of a menu item during a specific period of time.

The **Quantity** column displays the quantity of the menu items sold during a specific period of time.
Sales Report: Special Item Format

The **Special Item** format of the Sales Report allows you to generate a report that generates a list of all the special items your staff members have ordered for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.

- The **Price** column displays the price of each special item.
- The **Quantity** column displays the quantity of the special items sold.
- The **Value** column displays the total value of each special item sold (Price x Quantity).
- The **Server** column displays the name of the server who sold each special item.
- The **Manager** column displays the name of the staff member who authorized the transaction.
- The **Check No** column displays the number of each check that includes a special item.
- The **Sales Type** column displays the sales type of each special item.
- The **Prep Type** column displays the prep type of each special item.
- The **Profit Ctr** column displays the profit center where each special item was sold.
- The **Time** column displays the time when each special item was ordered.

---

**DD CAFE**

**Items By Prep**

*Report Level: Audit*  
*Grouped By: Prep Type*  
*Total Checks: 0*

<table>
<thead>
<tr>
<th>PLU</th>
<th>Description</th>
<th>Price</th>
<th>Quantity</th>
<th>Value</th>
<th>Server</th>
<th>Manager</th>
<th>Check No</th>
<th>Sales Type</th>
<th>Prep Type</th>
<th>Profit Ctr</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>590</td>
<td>GRILLEDCHEZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Wizard</td>
<td>Wizard</td>
<td>7499</td>
<td>SANDWICH</td>
<td>Kitchen</td>
<td>Main DR</td>
<td>11:31</td>
</tr>
<tr>
<td>594</td>
<td></td>
<td>5.00</td>
<td>1.00</td>
<td>5.00</td>
<td>Kay</td>
<td>Kay</td>
<td>6864</td>
<td>ENTREES</td>
<td>Kitchen</td>
<td>Club</td>
<td>13:39</td>
</tr>
<tr>
<td>Kitchen Total</td>
<td></td>
<td>9.00</td>
<td>2.00</td>
<td>9.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sandwich Prep</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>625</td>
<td>GRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>8126</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>08:24</td>
</tr>
<tr>
<td>604</td>
<td>GRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7863</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>09:10</td>
</tr>
<tr>
<td>616</td>
<td>GRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>8016</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>09:42</td>
</tr>
<tr>
<td>598</td>
<td>GRL CHZ</td>
<td>5.00</td>
<td>1.00</td>
<td>5.00</td>
<td>Key</td>
<td>Key</td>
<td>7777</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Club</td>
<td>10:02</td>
</tr>
<tr>
<td>622</td>
<td>GRL CHZ</td>
<td>6.00</td>
<td>1.00</td>
<td>6.00</td>
<td>Key</td>
<td>Key</td>
<td>8096</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:14</td>
</tr>
<tr>
<td>637</td>
<td>GRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>8343</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:27</td>
</tr>
<tr>
<td>487</td>
<td>GRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>4987</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:29</td>
</tr>
<tr>
<td>500</td>
<td>GRL CHZ</td>
<td>3.00</td>
<td>1.00</td>
<td>3.00</td>
<td>Key</td>
<td>Key</td>
<td>8665</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:30</td>
</tr>
<tr>
<td>596</td>
<td>GRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7756</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:39</td>
</tr>
<tr>
<td>586</td>
<td>GRL CHZ</td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td>Key</td>
<td>Key</td>
<td>7966</td>
<td>SANDWICH</td>
<td>Sandwich</td>
<td>Main DR</td>
<td>10:45</td>
</tr>
<tr>
<td>Sandwich Prep Total</td>
<td></td>
<td>4.00</td>
<td>1.00</td>
<td>4.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td>49.00</td>
<td>12.00</td>
<td>49.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

***End of Report***
Sales Report: Cost Format

The Cost format of the Sales Report allows you to generate a report that displays the cost information for your menu items. The setting that you select from the Report Level list on the Main tab of the Sales Report Maintenance Window determines, in large part, what the report displays and how you can use it (for more information, see “Report Level list” on page 315). For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.

- The Item Sales $ column displays the total amount of sales for each prep type.
- The Quantity column displays the number of items sold of each prep type.
- The Sales % column displays the value of each sales type’s Sales column divided by the value in the Grand Total Sales column (Sales ÷ Grand Total Sales).
- The Group % column displays the value of the Sales column divided by the value of the Group subtotal line in the Sales column (Sales ÷ Group subtotal).
- The $/Cov column displays the value of the Item Sales $ column divided by the Total Covers.
- The Qty/Cov % column displays the value of the total from the Quantity column divided by the value of the cover count from the Items Sales $ column. The value is a percentage rounded to two decimal places. To calculate the values in the Grand Total row, you can divide the value in the Quantity column by the Total Covers value (at the top of the report).
- The Avg Item column displays the value of the Sales column divided by the value of the Quantity column, rounded to two decimal places (Sales ÷ Quantity).
- The $/Chk column displays the value of the total Item Sales $ column divided by the check count from the Quantity column. To calculate the values in the Grand Total row, you can divide the value in the Item Sales $ column by the Total Checks value (at the top of the report).
Sales Report: Sales by Item Format

The Sales by Item format of the Sales Report allows you to generate a list of menu items sold within the data range, including sales totals and other sales information. The Sales by Item format is similar to the Sales format, but it has no grouping options.

The report level (as set in the Report Level list on the Main tab of the Sales Report Maintenance Window) determines, in large part, what the report displays and how you can use it (for more information, see “Report Level list” on page 315). For more information on what the columns of this report contain or how to calculate their values, see “Sales Report Examples” on page 323.

- The Item Sales $ column displays the total amount of sales for each item.
- The Quantity column displays the number of items sold of each item.
- The Sales % column displays each item’s percentage of total sales. (The value of each item’s sales divided by the Grand Total Sales.)
- The Group % column displays the value of the item’s sales divided by the Group total.
- The $/Cov column displays the value of the Item Sales divided by the Total Covers.
The Qty/Cov % column displays the value of the total from the Quantity column divided by the value of the cover count from the Items Sales $ column. The value is a percentage rounded to two decimal places. To calculate the values in the Grand Total row, you can divide the value in the Quantity column by the Total Covers value.

The Avg Item column displays the value of the Sales column divided by the value of the Quantity column, rounded to two decimal places (Sales ÷ Quantity).

The $/Chk column displays the value of the total Item Sales divided by the Quantity. To calculate the values in the Grand Total row, you can divide the value in the Item Sales $ column by the Total Checks value.

Discounts Report Maintenance Window

Discounts Reports allow you to analyze information about your discount transactions. You can use them to review and analyze information regarding specific transactions, including the staff members who performed them.

Discounts Report Maintenance Window: Main Tab

On the Main tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The Main tab also allows you to filter discount information by the ID of the manager who approved each transaction, the ID of the server who performed the transaction, the table number, and the time of day.
**Report Format list**

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary</strong></td>
<td>A summary of discount transactions, including the name of the server and manager who performed each transaction, the amount of each discount, the profit center within which each transaction took place, the discount reason, each item’s prep group, the check number, time, and date of each transaction, and any details the server entered at the POS.</td>
</tr>
<tr>
<td><strong>Audit</strong></td>
<td>A list of discount transactions performed within the specified time range, including the name of the server and manager who performed each transaction, the amount of each discount, the profit center within which each transaction took place, the discount reason, each item’s prep group, the check number, time, and date of each transaction, and any details the server entered at the POS.</td>
</tr>
<tr>
<td><strong>Audit with Sales</strong></td>
<td>A list of discount transactions performed within the specified time range. The Audit with Sales format includes the information in the Audit format, but also includes a list of the menu items discounted by each transaction. For each menu item, the report includes the PLU number, item description, quantity, original (undiscounted) price, the discounted price, and the amount of the discount. (If an item is a charge, the program labels the item as “CHARGE” in the PLU column.)</td>
</tr>
</tbody>
</table>

**Sort By list**

You can also control how the program organizes the information in a report by selecting a sorting option from the **Sort By** list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the **Sort By** list. You can sort your items by any of the following criteria:
<table>
<thead>
<tr>
<th>Group By 1 list</th>
<th></th>
</tr>
</thead>
</table>

You can control how the program organizes the information in your report by selecting a grouping option from the **Group By 1** list. The program will list data alphabetically by the grouping option you select. You can group your data by any of the following criteria:

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Groups your transactions by the staff ID number of the server who handled each transaction.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount Type</td>
<td>Groups your transactions by the discount type of each menu item.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Groups your transactions by the staff ID number of the manager who approved each transaction.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Groups your transactions by the profit center within which each transaction was performed.</td>
</tr>
<tr>
<td>Time Interval</td>
<td>Groups your transactions by whatever time interval you have entered in the <strong>Time Interval</strong> box, if any.</td>
</tr>
<tr>
<td>Week Day</td>
<td>Groups your transactions by the day of the week that each transaction was performed.</td>
</tr>
<tr>
<td>Details</td>
<td>Groups your transactions by details.</td>
</tr>
</tbody>
</table>
Group By 2 list

You can group your data to a second level by selecting a subgrouping option from the Group By 2 list. The Group By 2 list is identical to the Group By 1 list.

Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Discounts Reports window. You can select one of the following optional input criteria:

<table>
<thead>
<tr>
<th>Optional Input</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Filters your report by the staff ID number of each server who handled the transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Filters your report by the staff ID number of each manager who handled the transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Discount Type</td>
<td>Filters your report by the discount type of each menu item.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Filters your report by the profit center within which each transaction was performed.</td>
</tr>
<tr>
<td>Prep Group</td>
<td>Filters your report by the prep group of each menu item.</td>
</tr>
</tbody>
</table>

Default Range list

If you select a default range from this list, this default range will appear in the Range list of the Discounts Reports window.

Manager ID boxes

You can filter your records by typing a range of staff ID numbers in the Manager ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions approved by managers with staff ID numbers between 100 and 200.
**Staff ID boxes**

You can filter your records by typing a range of staff ID numbers in the **Staff ID** boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions by servers with staff ID numbers between 100 and 200.

**Table boxes**

You can filter your records by entering a range of table numbers in the **Table** boxes. The program will only include transactions from tables that fall within this range.

**Time boxes**

You can filter your records by typing a range in the **Time** boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print transactions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

**Time Interval box**

You can enter a time interval by which the program will group the records in the report. The program will group sales information from transactions by whatever number of minutes you enter in the **Time Interval** box. For instance, if you enter “30”, the program will collect information for transactions occurring within each 30-minute interval of the specified time range. If you enter a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: transactions occurring from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00.

**Cash Sales check box**

Click the **Cash Sales** check box to include cash sales transactions in your report.
Discounts Report Maintenance Window: Discount Tab

The Discount tab allows you to filter the report to include or exclude transactions associated with specific discount types. You can include or exclude transactions associated with certain discount types by adding discount types to the Include/Exclude list.

You can set the program to either include or exclude transactions associated with the discount types in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include transactions associated with the discount types in the Include/Exclude list. If you click Exclude, the program will exclude all transactions associated with the discount types in the Include/Exclude list.

To move an discount type from the Available list to the Include/Exclude list, select that discount type and click . To move an discount type from the Include/Exclude box to the Available list, select the discount type and click . To move all discount types from the Available list to the Include/Exclude box, click . To move all discount types in the Include/Exclude box to the Available list, click .
Discounts Report Maintenance Window: Prep Grp Tab

The Prep Grp tab allows you to filter the report to include or exclude transactions for menu items associated with specific prep groups. You can include or exclude transactions for menu items associated with specific prep groups by adding prep groups to the Include/Exclude list.

You can set the program to either include or exclude the prep groups in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include prep groups in the Include/Exclude list. If you click Exclude, the program will exclude all prep groups in the Include/Exclude list.

To move a prep group from the Available list to the Include/Exclude list, select that prep group and then click . To move a prep group from the Include/Exclude list to the Available list, select the prep group and then click . To move all prep groups from the Available list to the Include/Exclude list, click . To move all prep groups in the Include/Exclude box to the Available list, click .
Discounts Report Maintenance Window: Profit Cnt Tab

The Profit Cnt tab features a filter that allows you to include or exclude transactions associated with specific profit centers. The program will only print transactions associated with profit centers in the Include list and will not print any transactions associated with profit centers in the Exclude list.

Discounts Report Maintenance Window: Day Tab

The Day tab features a filter that allows you to include or exclude transactions performed on specific days of the week. The program will only print transactions performed on days in the Include list and will not print any transactions performed on days in the Exclude list.

Discounts Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Discounts Report Examples

You can use Discounts reports to summarize discounts by manager, to audit the discounts applied by a staff member, or to review how often your restaurant staff use a particular discount. Digital Dining provides three end-of-day (EOD) reports (you cannot modify the report definition for EOD reports) and two report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Discounts Report Maintenance Window: Main Tab” on page 340).

What each column of the Discount report contains or how Digital Dining calculates the column is sometimes not self-evident:

The Price column displays the amount that the staff member discounted for the transaction.
The **Gross Sales** column displays the sales total for the transaction associated with the discount.

The **Discount %** column displays the value of each discount’s Price column divided by the Gross Sales column (Price column ÷ Gross Sales column).

The **Value** column displays a sum of all the discounts of that discount type.

The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value column ÷ Quantity column).

The **Net Sales** column displays the value in the Gross Sales column minus the Value column (Gross Sales column – Value column).

The **% of Sales** column displays the value of Value column divided by the Gross Sales column (Value column ÷ Gross Sales column).

The **% of Discount** column displays the value of the Value column divided by the Grand Total.

You can calculate the value in the % of Discount column with the following equation: 

\[(A + B) \times 100 = C\]

---

### Discounts Report: EOD Discount Audit

The EOD Discount Audit report displays a list of each transaction that includes a discount. You can use the EOD Discount Audit report to analyze the value, date and time, and the staff member who applied each discount for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Discounts Report Examples” on page 347.
The **Discount** column displays the name (description) of each discount.

The **Price** column displays the amount that the staff member discounted for each transaction.

The **Gross Sales** column displays the sales total for the transaction associated with each discount.

The **Discount %** column displays the value of each discount’s Price column divided by the Gross Sales column (Price ÷ Gross Sales).

The **ID** column displays the staff ID number of each staff member that performed a discount.

The **Staff** column displays the name of each staff member that performed a discount.

The **Manager** column displays the name of each manager who approved a discount.

The **Profit Ctr** column displays the profit center where each discount was performed.

The **Discount Reason** column displays the reason for each discount.

The **Check** column displays the check number associated with each discount.

The **Details** column displays any additional details about the discount (if the staff member entered any at the POS).

The **Date** column displays the date of the discount transaction.

The **Time** column displays the time of the discount transaction.
Register Reports Menu

Discounts Report: EOD Discount Summary

The EOD Discount Summary report displays a sum of all the discount types that your staff members used at the POS. You can use the EOD Discount Summary report to analyze discount totals. For more information on what the columns of this report contain or how to calculate their values, see “Discounts Report Examples” on page 347.

- The Discount column displays name of the discount that you enter in the Description box.
- The Manager ID column displays the Digital Dining ID of the manager, who approved the discount.
- The Value column displays a sum of all the discounts of that discount type.
- The Quantity column displays the total number of the discounts used.
- The Average column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value ÷ Quantity).
- The Gross Sales column displays the sales total for the transaction associated with the discount.
- The Net Sales column displays the value in the Gross Sales column minus the Value column (Gross Sales – Value).
- The % of Sales column displays the value of Value column divided by the Gross Sales column (Value ÷ Gross Sales).
- The % of Discount column displays the value of the Value column divided by the Grand Total.
Discounts Report: EOD Disc by Manager

The EOD Disc by Manager report displays the sum of each discount type that each manager approved. You can use the EOD Disc by Manager report to analyze the value, date and time, and the manager who approved each discount for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Discounts Report Examples” on page 347.

The **Discount** column displays name of the discount.

The **Manager ID** column displays the Digital Dining ID of the manager, who authorized the discount.

The **Value** column displays a sum of all the discounts of that discount type.

The **Quantity** column displays the total number of discounts.

<table>
<thead>
<tr>
<th>Discount Type</th>
<th>Manager ID</th>
<th>Value</th>
<th>Quantity</th>
<th>Average</th>
<th>Gross Sales</th>
<th>Net Sales</th>
<th>% of Sales</th>
<th>% of Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wizard Comp</td>
<td>1</td>
<td>-$10.00</td>
<td>3.00</td>
<td>-3.33</td>
<td>57.00</td>
<td>$47.00</td>
<td>-17.5%</td>
<td>0.00%</td>
</tr>
<tr>
<td>Employee Discount</td>
<td>1</td>
<td>-$3.61</td>
<td>1.00</td>
<td>-5.61</td>
<td>67.00</td>
<td>$51.39</td>
<td>-9.8%</td>
<td>3.04%</td>
</tr>
<tr>
<td>Good Will</td>
<td>1</td>
<td>-$0.00</td>
<td>2.00</td>
<td>-6.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.0%</td>
<td>0.00%</td>
</tr>
<tr>
<td>Senior Citizen Discount</td>
<td>1</td>
<td>-$39.73</td>
<td>2.00</td>
<td>-4.97</td>
<td>38.90</td>
<td>$29.17</td>
<td>-25.0%</td>
<td>0.00%</td>
</tr>
<tr>
<td>VIP Discount</td>
<td>1</td>
<td>-$13.97</td>
<td>2.00</td>
<td>-6.99</td>
<td>139.60</td>
<td>$123.63</td>
<td>-10.0%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Wizard Total</td>
<td></td>
<td>-$39.31</td>
<td>16.00</td>
<td>-3.93</td>
<td>292.50</td>
<td>$253.19</td>
<td>-13.4%</td>
<td>21.30%</td>
</tr>
</tbody>
</table>

- Branson
  - Key
  - Prime Rib Coupon: $32.00
  - Two for One Beer: -$12.00
  - Half Price Entree: -$7.98
  - Key Total: -$63.15

- Miller
  - Rob
  - Good Will: -$34.95
  - VIP Discount: -$10.00
  - Rob Total: -$34.95

- Geiflers
  - Susan
  - Buy One Get One Free: -$17.95
  - Prime Rib Coupon: -$22.60
  - VIP Discount: -$35.90
  - Susan Total: -$76.03

- Oliver
  - Julie
  - Sausage Biscuit: -$1.50
  - Julie Total: -$1.50

- Grand Total: -$184.65
Register Reports Menu

- The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value column ÷ Quantity column).
- The **Gross Sales** column displays the sales total for the transaction associated with the discount.
- The **Net Sales** column displays the value in the Gross Sales column minus the Value column (Gross Sales – Value).
- The **% of Sales** column displays the value of Value column divided by the Gross Sales column (Value ÷ Gross Sales).
- The **% of Discount** column displays the value of the Value column divided by the Grand Total.

**Discounts Report: Summary Format**

You can change the report format by using the **Report Format** list on the **Main** tab of the Discounts Report Maintenance Window. The **Summary** format of the Discounts Report allows you to generate a report that displays totals for each discount type. For more information on what the columns of this report contain or how to calculate their values, see “Discounts Report Examples” on page 347.

---

**DD CAFE**

**Discounts**

<table>
<thead>
<tr>
<th>Discount</th>
<th>Manager ID</th>
<th>Value</th>
<th>Quantity</th>
<th>Average</th>
<th>Gross Sales</th>
<th>Net Sales</th>
<th>% of Sales</th>
<th>% of Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wizard Wizard</td>
<td>$-8.73</td>
<td>1.00</td>
<td>$-9.73</td>
<td>38.90</td>
<td>$28.17</td>
<td>-25.5%</td>
<td>19.00%</td>
<td></td>
</tr>
<tr>
<td>Kay</td>
<td>$-8.73</td>
<td>1.00</td>
<td>$-9.73</td>
<td>38.90</td>
<td>$28.17</td>
<td>-25.5%</td>
<td>19.00%</td>
<td></td>
</tr>
<tr>
<td>Senior Citizen Discount</td>
<td>$0.00</td>
<td>2.00</td>
<td>$0.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.0%</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Rob</td>
<td>$0.00</td>
<td>2.00</td>
<td>$0.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.0%</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Susan Wizard</td>
<td>$-8.51</td>
<td>1.00</td>
<td>$-5.61</td>
<td>57.00</td>
<td>$51.39</td>
<td>-9.8%</td>
<td>11.24%</td>
<td></td>
</tr>
<tr>
<td>Susan Senior Citizen Discount</td>
<td>$0.00</td>
<td>1.00</td>
<td>$0.00</td>
<td>0.00</td>
<td>$0.00</td>
<td>0.0%</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Susan Total</td>
<td>$-8.51</td>
<td>2.00</td>
<td>$-2.81</td>
<td>57.00</td>
<td>$51.39</td>
<td>-9.8%</td>
<td>11.24%</td>
<td></td>
</tr>
<tr>
<td>Wizard Wizard Total</td>
<td>$-18.34</td>
<td>5.00</td>
<td>$-3.07</td>
<td>95.90</td>
<td>$80.56</td>
<td>-16.0%</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Miller Rob</td>
<td>$-34.56</td>
<td>13.00</td>
<td>$-2.66</td>
<td>34.75</td>
<td>$0.19</td>
<td>-99.5%</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Miller Rob Total</td>
<td>$-34.56</td>
<td>13.00</td>
<td>$-2.66</td>
<td>34.75</td>
<td>$0.19</td>
<td>-99.5%</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td>$-48.90</td>
<td>19.00</td>
<td>$-2.77</td>
<td>130.65</td>
<td>$80.75</td>
<td>-38.2%</td>
<td>100.00%</td>
<td></td>
</tr>
</tbody>
</table>

Date 12/3/08  13:39:42  Date Range: 12/2/07 to 12/1/08
The **Discount** column displays name of the discount.

The **Manager ID** column displays the Digital Dining ID of the manager, who authorized the discount.

The **Value** column displays a sum of all the discounts of that discount type.

The **Quantity** column displays the total number of discounts.

The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value ÷ Quantity).

The **Gross Sales** column displays the sales total for the transaction associated with the discount.

The **Net Sales** column displays the value in the Gross Sales column minus the Value column (Gross Sales – Value).

The **% of Sales** column displays the value of Value column divided by the Gross Sales column (Value ÷ Gross Sales).

The **% of Discount** column displays the value of the Value column divided by the Grand Total.

### Discounts Report: Audit Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Discounts Report Maintenance Window. The **Audit** format of the Discounts Report allows you to generate a report that displays a list of all discounts (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently. For more information on what the columns of this report contain or how to calculate their values, see “Discounts Report Examples” on page 347.
• The **Discount** column displays name of the discount.

• The **Price** column displays the amount that the staff member discounted for the transaction.

• The **Gross Sales** column displays the sales total for the transaction associated with the discount.

• The **Discount %** column displays the value of each discount’s Price column divided by the Gross Sales column (Price ÷ Gross Sales).

• The **ID** column displays the Digital Dining ID number, associated with a staff member.

• The **Staff** column displays the name of the staff member, who applied the discount.

• The **Manager** column displays the name of the manager, who approved the discount.

• The **Profit Ctr** column displays the profit center associated with the check.

• The **Discount Reason** column displays the reason for discount, which the staff member who applies the discount can enter at the POS.

• The **Check** column displays the check number.

• The **Details** column displays any details associated with the transaction.

• The **Date** column displays the date of the transaction.

• The **Time** column displays the time of the transaction.
Discounts Report: Audit with Sales Format

You can change the report format by using the Report Format list on the Main tab of the Discounts Report Maintenance Window. The Audit with Sales format of the Discounts Report allows you to generate a report that displays a list of all discount transactions within the specified date range or period you provide. The Audit with Sales format includes the information in the Audit format, but also includes a list of the menu items discounted by each transaction. For each menu item, the report includes the PLU number, item description, quantity, original (undiscounted) price, the discounted price, and the amount of the discount. (If an item is a charge, the program labels the item as “CHARGE” in the PLU column.) For more information on what the columns of this report contain or how to calculate their values, see “Discounts Report Examples” on page 347.

### DD CAFE

<table>
<thead>
<tr>
<th>Date</th>
<th>12/2/2011 13:40:38</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operator</td>
<td>wizard</td>
</tr>
<tr>
<td>DateRange</td>
<td>10/20/2011 to 12/1/2011</td>
</tr>
<tr>
<td>Page</td>
<td>1</td>
</tr>
</tbody>
</table>

**Discount Audit with Sales**

Sorted By: Discount Type  Grouped By: Manager  Subgrouped By: Staff ID

Filtered By: Discount Types

<table>
<thead>
<tr>
<th>Discount</th>
<th>Price</th>
<th>Gross Sales</th>
<th>Discount %</th>
<th>ID</th>
<th>Staff</th>
<th>ID Manager</th>
<th>Profit Ctr</th>
<th>Discount Reason</th>
<th>Check</th>
<th>Details</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>$10 Comp p</td>
<td>-19.00</td>
<td>47.80</td>
<td>-20.00</td>
<td>10</td>
<td>Key</td>
<td>Wizard</td>
<td>Club Dining Ro</td>
<td>15495</td>
<td>429/02</td>
<td>15:31</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PLU</th>
<th>Qty</th>
<th>Item</th>
<th>Price</th>
<th>Disc Amt</th>
<th>Discounted Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1020</td>
<td>1.00</td>
<td>Buffalo Wings</td>
<td>5.95</td>
<td>1.24</td>
<td>4.71</td>
</tr>
<tr>
<td>1135</td>
<td>1.00</td>
<td>Pollo Skins</td>
<td>4.95</td>
<td>1.17</td>
<td>3.78</td>
</tr>
<tr>
<td>4002</td>
<td>1.00</td>
<td>Chicken Pota</td>
<td>14.95</td>
<td>-3.13</td>
<td>11.82</td>
</tr>
<tr>
<td>5074</td>
<td>1.00</td>
<td>Caesar Salad</td>
<td>2.00</td>
<td>0.42</td>
<td>1.58</td>
</tr>
</tbody>
</table>

| $25 Comp p | -25.00| 84.79 | -29.99     | 10 | Key     | Wizard     | Club Dining Ro | 15495 | 429/02 | 15:45 |

<table>
<thead>
<tr>
<th>PLU</th>
<th>Qty</th>
<th>Item</th>
<th>Price</th>
<th>Disc Amt</th>
<th>Discounted Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1020</td>
<td>1.00</td>
<td>Buffalo Wings</td>
<td>5.95</td>
<td>-1.78</td>
<td>4.19</td>
</tr>
<tr>
<td>1135</td>
<td>1.00</td>
<td>Pollo Skins</td>
<td>4.95</td>
<td>-1.46</td>
<td>3.49</td>
</tr>
<tr>
<td>1021</td>
<td>1.00</td>
<td>Shrimp Cocktail</td>
<td>7.95</td>
<td>-2.35</td>
<td>5.60</td>
</tr>
<tr>
<td>4009</td>
<td>1.00</td>
<td>Prime Rib</td>
<td>21.95</td>
<td>-6.48</td>
<td>15.47</td>
</tr>
</tbody>
</table>

*** End of Report ***

- The **Discount** column displays name of the discount.
- The **Price** column displays the amount that the staff member discounted for the transaction.
- The **Gross Sales** column displays the sales total for the transaction associated with the discount.
- The **Discount %** column displays the value of each discount’s Price column divided by the Gross Sales column (Price ÷ Gross Sales).
- The **ID** column displays the Digital Dining ID number, associated with a staff member.
The **Staff** column displays the name of the staff member, who applied the discount.

The **Manager** column displays the name of the manager, who approved the discount.

The **Profit Ctr** column displays the profit center associated with the check.

The **Discount Reason** column displays the reason for discount, which the staff member who applies the discount can enter at the POS.

The **Check** column displays the check number.

The **Details** column displays any details associated with the transaction.

The **Date** column displays the date of the transaction.

The **Time** column displays the time of the transaction.

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**Charges Report Maintenance Window**

Charges Reports allow you to analyze information about your charge transactions. You can use them to review and analyze information regarding specific transactions, including the staff members who performed them.

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**Charges Report Maintenance Window: Main Tab**

On the **Main** tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The **Main** tab also allows you to filter charge information by the ID of the manager who approved the transaction, the ID of the server who performed the transaction, table number, and the time of day.
Report Format list

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>A summary of charge transactions, including value, quantity, average, gross sales, net sales, and the charge’s percentage off the item’s original price.</td>
</tr>
<tr>
<td>Audit</td>
<td>A list of charge transactions, including the name of the server and manager who performed each transaction; the amount of each charge; the profit center within which each transaction took place; each item’s prep group; the check number, time, and date of each transaction; and any details the server entered at the POS.</td>
</tr>
</tbody>
</table>

Sort By list

You can also control how the program organizes the information in a report by selecting a sorting option from the Sort By list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the Sort By list. You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th>Sort By</th>
<th>Sorts your report by the item you select in the Sort By list.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Sorts your report by the staff ID number of the server who handled each transaction.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Sorts your report by the staff ID number of the manager who approved each transaction.</td>
</tr>
<tr>
<td>Charge Type</td>
<td>Sorts your report by the charge type of each menu item.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Sorts your report by the profit center within which each transaction took place.</td>
</tr>
<tr>
<td>Prep Group</td>
<td>Sorts your report by the prep group of each menu item.</td>
</tr>
<tr>
<td>Details</td>
<td>Sorts your report by the details of each transaction.</td>
</tr>
</tbody>
</table>
**Group By 1 list**

You can control how the program organizes the information in your report by selecting a grouping option from the **Group By 1 list**. The program will list data by the grouping option you select. You can group your data by any of the following criteria:

<table>
<thead>
<tr>
<th><strong>Staff ID</strong></th>
<th>Groups your transactions by the staff ID number of the server who handled each transaction.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Charge Type</strong></td>
<td>Groups your transactions by the charge type of each menu item.</td>
</tr>
<tr>
<td><strong>Manager ID</strong></td>
<td>Groups your transactions by the staff ID number of the manager who approved each transaction.</td>
</tr>
<tr>
<td><strong>Profit Center</strong></td>
<td>Groups your transactions by the profit center within which each transaction was performed.</td>
</tr>
<tr>
<td><strong>Time Interval</strong></td>
<td>Groups your transactions by whatever time interval you have entered in the <strong>Time Interval</strong> box, if any.</td>
</tr>
<tr>
<td><strong>Week Day</strong></td>
<td>Groups your transactions by the day of the week that each transaction was performed.</td>
</tr>
<tr>
<td><strong>Details</strong></td>
<td>Group your transactions by details.</td>
</tr>
</tbody>
</table>

**Group By 2 list**

You can group your data to a second level by selecting a subgrouping option from the **Group By 2 list**. The **Group By 2 list** is identical to the **Group By 1 list**.
**Optional Input list**

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Charges Reports window. You can select one of the following optional input criteria:

<table>
<thead>
<tr>
<th>Input</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Filters your report by the staff ID number of each server who handled the transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Filters your report by the staff ID number of each manager who handled the transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Charge Type</td>
<td>Filters your report by the charge type of each menu item.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Filters your report by the profit center within which each transaction was performed.</td>
</tr>
<tr>
<td>Prep Group</td>
<td>Filters your report by the prep group of each menu item.</td>
</tr>
</tbody>
</table>

**Default Range list**

If you select a default range from this list, this default range will appear in the Range list of the Charges Reports window.

**Manager ID boxes**

You can filter your records by typing a range of staff ID numbers in the Manager ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions by managers with staff ID numbers between 100 and 200.
**Staff ID boxes**

You can filter your records by typing a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions by servers with staff ID numbers between 100 and 200.

**Table boxes**

You can filter your records by entering a range of table numbers in the Table boxes. The program will only include transactions from tables that fall within this range.

**Time boxes**

You can filter your records by typing a range in the Time boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print transactions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

**Time Interval box**

You can enter a time interval by which the program will group the records in the report. The program will group sales information from transactions by whatever number of minutes you type in the Time Interval box. For instance, if you type “30”, the program will collect information for transactions occurring within each 30-minute interval of the specified time range. If you type a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: transactions occurring from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00.

**Cash Sales check box**

Click the Cash Sales check box to include cash sales transactions in your report.

**Include charges used as tips check box**

In the Charges Maintenance window, you can create a charge and set it to function as a tip. If you wish to include these tip charges in the report, click the Include charges used as tips check box.
Charges Report Maintenance Window: Charge Tab

The Charge tab allows you to filter the report to include or exclude transactions associated with specific charge types. You can include or exclude records associated with certain charge types by adding charge types to the Include/Exclude list.

You can set the program to either include or exclude transactions associated with the charge types in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include transactions associated with the charge types in the Include/Exclude list. If you click Exclude, the program will exclude all transactions associated with the charge types in the Include/Exclude list.

To move a charge type from the Available list to the Include/Exclude list, select that charge type and click >. To move a charge type from the Include/Exclude box to the Available list, select the charge type and click <. To move all charge types from the Available list to the Include/Exclude box, click —>. To move all charge types in the Include/Exclude box to the Available list, click —<.
Charges Report Maintenance Window: Prep Grp Tab

The Prep Grp tab allows you to filter the report to include or exclude transactions for menu items associated with specific prep groups. You can include or exclude transactions for menu items associated with specific prep groups by adding prep groups to the Include/Exclude list.

You can set the program to either include or exclude the prep groups in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include prep groups in the Include/Exclude list. If you click Exclude, the program will exclude all prep groups in the Include/Exclude list.

To move a prep group from the Available list to the Include/Exclude list, select that prep group and click \[ \text{Include/Exclude} \] \[ \text{Include/Exclude} \]. To move a prep group from the Include/Exclude list to the Available list, select the prep group and click \[ \text{Include/Exclude} \] \[ \text{Include/Exclude} \]. To move all prep groups from the Available list to the Include/Exclude list, click \[ \text{Include/Exclude} \] \[ \text{Include/Exclude} \]. To move all prep groups in the Include/Exclude box to the Available list, click \[ \text{Include/Exclude} \] \[ \text{Include/Exclude} \].
Charges Report Maintenance Window: Profit Cnt Tab

The Profit Cnt tab features a filter that allows you to include or exclude transactions associated with specific profit centers. The program will only print transactions associated with profit centers in the Include list and will not print any transactions associated with profit centers in the Exclude list.

Charges Report Maintenance Window: Day Tab

The Day tab features a filter that allows you to include or exclude transactions performed on specific days of the week. The program will only print transactions performed on days in the Include list and will not print any transactions performed on days in the Exclude list.

Charges Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Charges Report Examples

You can use Charges reports to summarize charges by manager, to audit the charges applied by a staff member, or to review how often your restaurant staff use a particular charge. Digital Dining provides three end-of-day (EOD) reports (you cannot modify the report definition for EOD reports) and two report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Charges Report Maintenance Window: Main Tab” on page 356).

What each column of the Charges report contains or how Digital Dining calculates the column is sometimes not self evident:

The Price column displays the amount that the staff member charged for the transaction.
The **Gross** column displays the sales total for the transaction associated with the discount.

The **Chg %** column displays the value of each discount’s Price column divided by the Gross column (Price column ÷ Gross column).

The **Value** column displays a sum of all the discounts of that discount type.

The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value column ÷ Quantity column).

The **Gross Sale** column displays the sum of sales totals for the transactions associated with a charge.

The **Net Sale** column displays the value in the Gross Sales column plus the Value column (Gross Sales column + Value column).

The **Charge %** column displays the value of the Value column divided by the Gross Sale column (Value column ÷ Gross Sale column).

The **% of Total** column displays the value of the Value column divided by the Grand Total.

You can calculate the value in the % of Total column with the following equation: 

\[(A + B) \times 100 = C\]

<table>
<thead>
<tr>
<th>Charge</th>
<th>Manager ID</th>
<th>Value</th>
<th>Quantity</th>
<th>Average</th>
<th>Gross Sale</th>
<th>Net Sale</th>
<th>Charge %</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Charge</td>
<td>12</td>
<td>2.00</td>
<td>1.00</td>
<td>2.00</td>
<td>0.00</td>
<td>2.00</td>
<td>0.00%</td>
<td>13.8%</td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>11</td>
<td>249.00</td>
<td>14.00</td>
<td>10.00</td>
<td>277.46</td>
<td>477.46</td>
<td>50.50%</td>
<td>23.1%</td>
</tr>
<tr>
<td>Large Party Service</td>
<td>11</td>
<td>3.36</td>
<td>1.00</td>
<td>3.36</td>
<td>22.40</td>
<td>25.76</td>
<td>15.00%</td>
<td>2.31%</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td>145.36</td>
<td>16.00</td>
<td>9.09</td>
<td>299.86</td>
<td>445.22</td>
<td>48.50%</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

***End of Report***
Register Reports Menu

Digital Dining Back Office User's Guide

Charges Report: EOD Charge Audit

The EOD Charge Audit report displays a list of each transaction that includes a charge. You can use the EOD Charge Audit report to analyze the value, date and time, and the staff member who applied each charge for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Charges Report Maintenance Window” on page 363.

The **Charge** column displays the name of each charge.

The **Price** column displays the amount that the staff member charged for each transaction.

The **Gross** column displays the sales total for the transaction associated with each charge.

The **Chg %** column displays the value of each discount’s Price column divided by the Gross column (Price ÷ Gross).

The **ID** column displays each staff member’s ID number.

The **Staff** column displays the name of the staff member who applied each charge.

The **Manager** column displays the name of the manager who approved each charge.

The **Profit Ctr** column displays the profit center associated with each check.

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**DD CAFE**

**EOD Charges Audit**

<table>
<thead>
<tr>
<th>Charge</th>
<th>Price</th>
<th>Gross</th>
<th>Chg %</th>
<th>ID</th>
<th>Staff</th>
<th>ID</th>
<th>Manager</th>
<th>Profit Ctr</th>
<th>Prep Group</th>
<th>Check</th>
<th>Details</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banana Key</td>
<td>10.00</td>
<td>10.00</td>
<td>10.00</td>
<td>10</td>
<td>Key</td>
<td></td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8518</td>
<td>7/7/08</td>
<td>10:48</td>
<td></td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00%</td>
<td>10</td>
<td>Key</td>
<td></td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7959</td>
<td>6/29/08</td>
<td>15:52</td>
<td></td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00%</td>
<td>10</td>
<td>Key</td>
<td></td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7967</td>
<td>6/29/08</td>
<td>21:31</td>
<td></td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00%</td>
<td>10</td>
<td>Key</td>
<td></td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8549</td>
<td>7/7/08</td>
<td>13:00</td>
<td></td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00%</td>
<td>10</td>
<td>Key</td>
<td></td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8549</td>
<td>7/22/08</td>
<td>13:06</td>
<td></td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00%</td>
<td>10</td>
<td>Key</td>
<td></td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8176</td>
<td>7/22/08</td>
<td>13:06</td>
<td></td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00%</td>
<td>10</td>
<td>Key</td>
<td></td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8251</td>
<td>6/1/08</td>
<td>18:44</td>
<td></td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00%</td>
<td>10</td>
<td>Key</td>
<td></td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8259</td>
<td>6/28/08</td>
<td>12:00</td>
<td></td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00%</td>
<td>10</td>
<td>Key</td>
<td></td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8549</td>
<td>7/22/08</td>
<td>13:06</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>110.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td></td>
</tr>
<tr>
<td><strong>Milk</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Milk</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>110.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td></td>
</tr>
<tr>
<td><strong>Milk</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>110.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td>11.00</td>
<td></td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>123.60</td>
<td>13.00</td>
<td>13.00</td>
<td>13.00</td>
<td>13.00</td>
<td>13.00</td>
<td>13.00</td>
<td>13.00</td>
<td>13.00</td>
<td>13.00</td>
<td>13.00</td>
<td>13.00</td>
<td></td>
</tr>
</tbody>
</table>

---

"End of Report"
The **Prep Group** column displays the prep group of the register that performed each charge transaction.

The **Check** column displays the check number that contains each charge.

The **Details** column displays any details associated with each transaction.

The **Date** column displays the date of each transaction.

The **Time** column displays the time of each transaction.

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### Charges Report: EOD Charge Summary

The EOD Charge Summary report displays a sum of all the charge types that your staff members used at the POS. You can use the EOD Charge Summary report to analyze charge totals. For more information on what the columns of this report contain or how to calculate their values, see “Charges Report Maintenance Window” on page 363.

<table>
<thead>
<tr>
<th>Charge</th>
<th>Manager ID</th>
<th>Value</th>
<th>Quantity</th>
<th>Average</th>
<th>Gross Sale</th>
<th>Net Sale</th>
<th>Charge %</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Charge</td>
<td>12</td>
<td>2.90</td>
<td>1.00</td>
<td>2.00</td>
<td>6.90</td>
<td>2.90</td>
<td>9.00%</td>
<td>1.30%</td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>11</td>
<td>140.00</td>
<td>14.00</td>
<td>10.00</td>
<td>277.46</td>
<td>417.46</td>
<td>50.50%</td>
<td>98.31%</td>
</tr>
<tr>
<td>Large Party Service</td>
<td>11</td>
<td>3.36</td>
<td>1.00</td>
<td>3.36</td>
<td>22.40</td>
<td>25.76</td>
<td>15.00%</td>
<td>2.31%</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td>145.36</td>
<td>16.00</td>
<td>9.09</td>
<td>299.86</td>
<td>445.22</td>
<td>48.50%</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

---

The **Charge** column displays the name of each charge type.

The **Manager ID** column displays the Digital Dining ID of the manager who approved the charge.

The **Value** column displays a sum of all the charges in each charge type.

The **Quantity** column displays the number of charges in each charge type.

The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value ÷ Quantity).

The **Gross Sale** column displays the total sales for each charge type.

The **Net Sale** column displays the value in the Gross Sales column plus the Value column (Gross Sales + Value).

The **Charge %** column displays the value of the Value column divided by the Gross Sale column (Value ÷ Gross Sale).

The **% of Total** column displays the value of the Value column divided by the Grand Total (Value ÷ Grand Total).
Charges Report: EOD Chg by Manager

The EOD Chg by Manager report displays the sum of each charge type that each manager approved. You can use the EOD Chg by Manager report to analyze the value, date and time, and the manager who approved each charge for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Charges Report Maintenance Window” on page 363.

- The **Charge** column displays the name of each charge.
- The **Manager ID** column displays the staff ID number of the manager who approved each charge.
- The **Value** column displays a sum of all the charges of that charge type.
- The **Quantity** column displays the number of charges.
- The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value ÷ Quantity).
- The **Gross** column displays the sales total for the transaction associated with the discount.
- The **Net Sale** column displays the value in the Gross Sales column plus the Value column (Gross Sales + Value).
- The **Charge %** column displays the value of the Value column divided by the Gross Sale column (Value ÷ Gross Sale).
- The **% of Total** column displays the value of the Value column divided by the Grand Total.

<table>
<thead>
<tr>
<th>Charge</th>
<th>Manager ID</th>
<th>Value</th>
<th>Quantity</th>
<th>Average</th>
<th>Gross Sale</th>
<th>Net Sale</th>
<th>Charge %</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branson Kay</td>
<td>1</td>
<td>110.00</td>
<td>11.00</td>
<td>10.00</td>
<td>242.66</td>
<td>352.86</td>
<td>45.30%</td>
<td>89.17%</td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>11</td>
<td>16.00</td>
<td>1.00</td>
<td>10.00</td>
<td>2.50</td>
<td>12.50</td>
<td>400.00%</td>
<td>8.11%</td>
</tr>
<tr>
<td>Branson Kay Totals:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Miller Rob</td>
<td>11</td>
<td>3.36</td>
<td>1.00</td>
<td>3.36</td>
<td>22.40</td>
<td>25.76</td>
<td>15.00%</td>
<td>2.72%</td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td>11</td>
<td>13.36</td>
<td>2.00</td>
<td>6.68</td>
<td>24.90</td>
<td>38.26</td>
<td>53.65%</td>
<td>10.83%</td>
</tr>
<tr>
<td>Large Party Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Miller Rob Totals:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td>123.36</td>
<td>13.00</td>
<td>9.49</td>
<td>267.56</td>
<td>390.92</td>
<td>46.11%</td>
<td>100.00%</td>
<td>100.00%</td>
</tr>
</tbody>
</table>
Charges Report: Audit Format

You can change the report format by using the Report Format list on the Main tab of the Charges Report Maintenance Window. The Audit format of the Charges Report allows you to generate a report that displays a list of all charges (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently. For more information on what the columns of this report contain or how to calculate their values, see “Charges Report Maintenance Window” on page 363.

- The Charge column displays the name of the charge.
- The Price column displays the amount that the staff member charged for the transaction.
- The Gross column displays the sales total for the transaction associated with the discount.
- The Chg % column displays the value of each discount’s Price column divided by the Gross column (Price ÷ Gross)
- The ID column displays the Digital Dining ID number, associated with a staff member.

<table>
<thead>
<tr>
<th>Charge</th>
<th>Price</th>
<th>Gross</th>
<th>Chg %</th>
<th>Staff ID</th>
<th>ID</th>
<th>Manager</th>
<th>Profit Ctr</th>
<th>Prep Group</th>
<th>Check</th>
<th>Details</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Bar</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>12/03/08</td>
<td>15:04</td>
</tr>
<tr>
<td>Main Bar Total</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Large Party</td>
<td>22.40</td>
<td>15.93</td>
<td>15.93</td>
<td>10 Key</td>
<td>1</td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7925</td>
<td></td>
<td>12/03/08</td>
<td>13:00</td>
</tr>
<tr>
<td>Charges</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Bar</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>12/03/08</td>
<td>15:04</td>
</tr>
<tr>
<td>Entertainment</td>
<td>10.00</td>
<td>56.00</td>
<td>17.89</td>
<td>10 Key</td>
<td>1</td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7925</td>
<td></td>
<td>12/03/08</td>
<td>13:00</td>
</tr>
<tr>
<td>Charge</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Dining Room</td>
<td>10.00</td>
<td>14.85</td>
<td>67.34</td>
<td>10 Key</td>
<td>1</td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7925</td>
<td></td>
<td>12/03/08</td>
<td>13:00</td>
</tr>
<tr>
<td>Charges</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Dining Room</td>
<td>12.00</td>
<td>58.58</td>
<td>49.36</td>
<td>10 Key</td>
<td>1</td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7925</td>
<td></td>
<td>12/03/08</td>
<td>13:00</td>
</tr>
<tr>
<td>Charges</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Dining Room</td>
<td>15.00</td>
<td>121.51</td>
<td>121.51</td>
<td>10 Key</td>
<td>1</td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7925</td>
<td></td>
<td>12/03/08</td>
<td>13:00</td>
</tr>
<tr>
<td>Charges</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Dining Room</td>
<td>16.85</td>
<td>59.35</td>
<td>59.35</td>
<td>10 Key</td>
<td>1</td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7925</td>
<td></td>
<td>12/03/08</td>
<td>13:00</td>
</tr>
<tr>
<td>Charges</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Dining Room</td>
<td>20.00</td>
<td>185.80</td>
<td>92.90</td>
<td>10 Key</td>
<td>1</td>
<td>Wizard</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7925</td>
<td></td>
<td>12/03/08</td>
<td>13:00</td>
</tr>
<tr>
<td>Charges</td>
<td>3.36</td>
<td>3.36</td>
<td></td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Dining Room</td>
<td>25.00</td>
<td>400.00</td>
<td>400.00</td>
<td>11 Rob</td>
<td>11</td>
<td>Main Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>12/03/08</td>
<td>14:95</td>
</tr>
</tbody>
</table>

**End of Report**
- The **Staff** column displays the name of the staff member, who posted the charge.
- The **Manager** column displays the name of the manager, who approved the charge.
- The **Profit Ctr** column displays the profit center associated with the check.
- The **Prep Group** column displays the prep group of the register definition where the transaction occurred.
- The **Check** column displays the check number.
- The **Details** column displays any details associated with the transaction.
- The **Date** column displays the date of the transaction.
- The **Time** column displays the time of the transaction.
Charges Report: Summary Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Charges Report Maintenance Window. The **Summary** format of the Charges Report allows you to generate a report that displays totals for each charge type. For more information on what the columns of this report contain or how to calculate their values, see “Charges Report Maintenance Window” on page 363.

The **Charge** column displays the name of the charge.

The **Manager ID** column displays the Digital Dining ID of the manager, who approved the charge.

The **Value** column displays a sum of all the discounts of that discount type.

The **Quantity** column displays the number of charges.

The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value ÷ Quantity).

The **Gross** column displays the sales total for the transaction associated with the discount.

The **Net Sale** column displays the value in the Gross Sales column plus the Value column (Gross Sales + Value).

The **Charge %** column displays the value of the Value column divided by the Gross Sale column (Value ÷ Gross Sale).

The **% of Total** column displays the value of the Value column divided by the Grand Total.

<table>
<thead>
<tr>
<th>Charge</th>
<th>Manager ID</th>
<th>Value</th>
<th>Quantity</th>
<th>Average</th>
<th>Gross Sale</th>
<th>Net Sale</th>
<th>Charge %</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Bar</td>
<td>11</td>
<td>3.36</td>
<td>1.00</td>
<td>3.36</td>
<td>22.40</td>
<td>25.76</td>
<td>15.00%</td>
<td>2.34%</td>
</tr>
<tr>
<td>Large Party Service</td>
<td>11</td>
<td>140.00</td>
<td>14.00</td>
<td>10.00</td>
<td>277.46</td>
<td>417.46</td>
<td>50.50%</td>
<td>97.66%</td>
</tr>
<tr>
<td>Main Bar Totals:</td>
<td></td>
<td>140.00</td>
<td>14.00</td>
<td>10.00</td>
<td>277.46</td>
<td>417.46</td>
<td>50.50%</td>
<td>97.66%</td>
</tr>
<tr>
<td>Main Dining Room</td>
<td></td>
<td>143.36</td>
<td>15.00</td>
<td>9.56</td>
<td>299.86</td>
<td>443.22</td>
<td>47.80%</td>
<td>100.00%</td>
</tr>
<tr>
<td>Entertainment Charge</td>
<td></td>
<td>140.00</td>
<td>14.00</td>
<td>10.00</td>
<td>277.46</td>
<td>417.46</td>
<td>50.50%</td>
<td>97.66%</td>
</tr>
<tr>
<td>Main Dining Room:</td>
<td></td>
<td>140.00</td>
<td>14.00</td>
<td>10.00</td>
<td>277.46</td>
<td>417.46</td>
<td>50.50%</td>
<td>97.66%</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td>143.36</td>
<td>15.00</td>
<td>9.56</td>
<td>299.86</td>
<td>443.22</td>
<td>47.80%</td>
<td>100.00%</td>
</tr>
</tbody>
</table>
Voids Report Maintenance Window

Voids Reports allow you to analyze information about your void transactions. You can use them to review and analyze information regarding specific transactions, including the staff members who performed them.

Voids Report Maintenance Window: Main Tab

On the Main tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The Main tab also allows you to filter void information by the ID of the manager who approved the transaction, the ID of the server who performed the transaction, table number, and the time of day.
Register Reports Menu

Report Format list

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>A summary of void transactions, including value, quantity, average, gross sales, and net sales.</td>
</tr>
<tr>
<td>Audit</td>
<td>A list of void transactions, including the name of the server and manager who performed each transaction, the amount of each void, the profit center within which each transaction took place, each item’s prep group, the check number, time, and date of each transaction, and any details the server entered at the POS.</td>
</tr>
</tbody>
</table>

Sort By list

You can also control how the program organizes the information in a report by selecting a sorting option from the Sort By list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the Sort By list. You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th>Sort By</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Sorts your report by the staff ID number of the server who handled each transaction.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Sorts your report by the staff ID number of the manager who approved each transaction.</td>
</tr>
<tr>
<td>Void Reason</td>
<td>Sorts your report by the reason for each voided transaction.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Sorts your report by the profit center within which each transaction took place.</td>
</tr>
<tr>
<td>Prep Group</td>
<td>Sorts your report by the prep group of each menu item.</td>
</tr>
<tr>
<td>Time</td>
<td>Sorts your report by the time that each transaction took place.</td>
</tr>
</tbody>
</table>
**Group By 1 list**

You can control how the program organizes the information in your report by selecting a grouping option from the **Group By 1** list. The program will list data alphabetically by the grouping option you select. You can group your data by any of the following criteria:

<table>
<thead>
<tr>
<th>Grouping Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Groups your transactions by the staff ID number of the server who handled each transaction.</td>
</tr>
<tr>
<td>Void Reason</td>
<td>Groups your transactions by the reason for each voided transaction.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Groups your transactions by the staff ID number of the manager who approved each transaction.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Groups your transactions by the profit center within which each transaction was performed.</td>
</tr>
<tr>
<td>Time Interval</td>
<td>Groups your transactions by whatever time interval you have entered in the <strong>Time Interval</strong> box, if any.</td>
</tr>
<tr>
<td>Week Day</td>
<td>Groups your transactions by the day of the week that each transaction was performed.</td>
</tr>
</tbody>
</table>

**Group By 2 list**

You can group your data to a second level by selecting a subgrouping option from the **Group By 2** list. The **Group By 2** list is identical to the **Group By 1** list.
Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Voids Reports window. You can select one of the following optional input criteria:

<table>
<thead>
<tr>
<th>Optional Input</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Filters your report by the staff ID number of each server who handled the transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Filters your report by the staff ID number of each manager who approved the transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Void Reason</td>
<td>Filters your report by the reason for each voided transaction.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Filters your report by the profit center within which each transaction was performed.</td>
</tr>
<tr>
<td>Prep Group</td>
<td>Filters your report by the prep group of each menu item.</td>
</tr>
</tbody>
</table>

Default Range list

If you select a default range from this list, this default range will appear in the Range list of the Voids Reports window.

Manager ID boxes

You can filter your records by typing a range of staff ID numbers in the Manager ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions approved by managers with staff ID numbers between 100 and 200.

Staff ID boxes

You can filter your records by typing a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions by servers with staff ID numbers between 100 and 200.
**Table boxes**

You can filter your records by entering a range of table numbers in the **Table** boxes. The program will only include transactions from tables that fall within this range.

**Time boxes**

You can filter your records by typing a range in the **Time** boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print transactions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

**Time Interval box**

You can enter a time interval by which the program will group the records in the report. The program will group sales information from transactions by whatever number of minutes you type in the **Time Interval** box. For instance, if you type “30”, the program will collect information for transactions occurring within each 30-minute interval of the specified time range. If you type a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: transactions occurring from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00.

**Cash Sales check box**

Click the **Cash Sales** check box to include cash sales transactions in your report.

**Voids Report Maintenance Window: Void Rsn Tab**

The **Void Rsn** tab allows you to filter the report to include or exclude transactions associated with specific void reasons. You can include or exclude transactions associated with certain void reasons by adding void reasons to the **Include/Exclude** list.
You can set the program to either include or exclude transactions associated with the void reasons in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include transactions associated with the void reasons in the Include/Exclude list. If you click Exclude, the program will exclude all transactions associated with the void reasons in the Include/Exclude list.

To move a void reason from the Available list to the Include/Exclude list, select that void reason and click >>. To move a void reason from the Include/Exclude box to the Available list, select the void reason and click <<. To move all void reasons from the Available list to the Include/Exclude box, click >>>. To move all void reasons in the Include/Exclude box to the Available list, click <<.

Voids Report Maintenance Window: Prep Grp Tab

The Prep Grp tab allows you to filter the report to include or exclude transactions for menu items associated with specific prep groups. You can include or exclude transactions for menu items associated with specific prep groups by adding prep groups to the Include/Exclude list.
You can set the program to either include or exclude the prep groups in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include prep groups in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all prep groups in the **Include/Exclude** list.

To move a prep group from the **Available** list to the **Include/Exclude** list, select that prep group and then click [ ]. To move a prep group from the **Include/Exclude** list to the **Available** list, select the prep group and then click [ ]. To move all prep groups from the **Available** list to the **Include/Exclude** list, click [ ]. To move all prep groups in the **Include/Exclude** box to the **Available** list, click [ ].

**Voids Report Maintenance Window: Profit Cnt Tab**

The **Profit Cnt** tab features a filter that allows you to include or exclude transactions associated with specific profit centers. The program will only print transactions associated with profit centers in the **Include** list and will not print any transactions associated with profit centers in the **Exclude** list.

**Voids Report Maintenance Window: Day Tab**

The **Day** tab features a filter that allows you to include or exclude transactions performed on specific days of the week. The program will only print transactions performed on days in the **Include** list and will not print any transactions performed on days in the **Exclude** list.
Voids Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Voids Report Examples

You can use Voids reports to summarize voids by manager, to audit the voids applied by a staff member, or to review how often your restaurant staff use a particular void. Digital Dining provides three end-of-day (EOD) reports (you cannot modify the report definition for EOD reports) and two report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Voids Report Maintenance Window: Main Tab” on page 371).

What each column of the Voids report contains or how Digital Dining calculates the column is sometimes not self-evident:

The Price column displays the amount that the staff member voided for the transaction.

The Average column displays the value of the Price column divided by the value of the Quantity column, rounded to two decimal places (Price column ÷ Quantity column).

The % of Total column displays the value of the Value column divided by the Grand Total.

You can calculate the value in the % of Total column with the following equation:

\[
\frac{(A + B) \times 100}{C}
\]
Voids Report: EOD Void Audit

The EOD Void Audit report displays a list of each transaction that includes a void. You can use the EOD Void Audit report to analyze the value, date and time, and the staff member who applied each discount for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Voids Report Examples” on page 378.

<table>
<thead>
<tr>
<th>Void Reason</th>
<th>PLU</th>
<th>Menu Item</th>
<th>Price</th>
<th>Staff</th>
<th>Manager</th>
<th>Date</th>
<th>Profit Ctr</th>
<th>Prep Grp</th>
<th>Check No</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ordered Wrong Item</td>
<td>2006</td>
<td>HEINEKEN</td>
<td>$3.27</td>
<td>Rob</td>
<td>Wizard</td>
<td>5/23/08</td>
<td>Main Bar</td>
<td>Prep Group 2</td>
<td>7810</td>
<td>10:02</td>
</tr>
<tr>
<td>Ordered Wrong Item</td>
<td>4444</td>
<td>Crab Dip</td>
<td>$4.95</td>
<td>Kay</td>
<td>Wizard</td>
<td>5/23/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7803</td>
<td>10:23</td>
</tr>
<tr>
<td>Ordered Wrong Item</td>
<td>3962</td>
<td>TWO PLATES</td>
<td>$4.95</td>
<td>Kay</td>
<td>Wizard</td>
<td>7/17/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8053</td>
<td>11:07</td>
</tr>
<tr>
<td>Ordered Wrong Item</td>
<td>Special</td>
<td>Item</td>
<td>$0.00</td>
<td>Kay</td>
<td>Wizard</td>
<td>7/17/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8053</td>
<td>11:07</td>
</tr>
<tr>
<td>Incorrect Prep</td>
<td>3006</td>
<td>OVER EASY</td>
<td>$0.00</td>
<td>Kay</td>
<td>Wizard</td>
<td>6/14/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7882</td>
<td>11:55</td>
</tr>
<tr>
<td>Incorrect Prep</td>
<td>3007</td>
<td>WHEAT TOAST</td>
<td>$0.00</td>
<td>Kay</td>
<td>Wizard</td>
<td>6/14/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7882</td>
<td>11:55</td>
</tr>
<tr>
<td>Ordered Wrong Item</td>
<td>1022</td>
<td>SCALLOPS IN BACON</td>
<td>$5.95</td>
<td>Wizard</td>
<td>Wizard</td>
<td>4/11/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7342</td>
<td>11:57</td>
</tr>
<tr>
<td>Ordered Wrong Item</td>
<td>2216</td>
<td>DOUBLE JAI</td>
<td>$6.07</td>
<td>Rob</td>
<td>Wizard</td>
<td>5/4/08</td>
<td>Main Bar</td>
<td>Prep Group 2</td>
<td>7706</td>
<td>12:46</td>
</tr>
<tr>
<td>Ordered Wrong Item</td>
<td>1028</td>
<td>CALAMARI</td>
<td>$6.95</td>
<td>Kay</td>
<td>Wizard</td>
<td>8/8/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>7706</td>
<td>12:59</td>
</tr>
<tr>
<td>Voided</td>
<td>2002</td>
<td>COORS LIGHT BOTTLE</td>
<td>$2.00</td>
<td>Rob</td>
<td>Wizard</td>
<td>8/27/08</td>
<td>Main Bar</td>
<td>Prep Group 2</td>
<td>8413</td>
<td>15:04</td>
</tr>
<tr>
<td>Over Cooked</td>
<td>1056</td>
<td>LEMONADE</td>
<td>$7.75</td>
<td>Kay</td>
<td>Wizard</td>
<td>8/7/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8281</td>
<td>18:42</td>
</tr>
<tr>
<td>Over Cooked</td>
<td>1506</td>
<td>ICED TEA</td>
<td>$1.75</td>
<td>Kay</td>
<td>Wizard</td>
<td>8/1/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8261</td>
<td>18:42</td>
</tr>
<tr>
<td>Over Cooked</td>
<td>1077</td>
<td>COPPER</td>
<td>$1.75</td>
<td>Kay</td>
<td>Wizard</td>
<td>8/1/08</td>
<td>Main Dining Room</td>
<td>Prep Group 1</td>
<td>8261</td>
<td>18:42</td>
</tr>
</tbody>
</table>

**End of Report**

- The **Void Reason** column displays the reason for voiding a menu item.
- The **PLU** column displays the PLU (Price Look-Up) number of the menu item voided.
- The **Menu Item** column displays the name of the menu item.
- The **Price** column displays the amount that the staff member voided for the transaction.
- The **Staff** column displays the name of the staff member who voided the item at the POS.
- The **Manager** column displays the name of the manager who confirmed the transaction.
- The **Date** column displays the date of the transaction.
- The **Profit Ctr** column displays the profit center associated with the check.
- The **Prep Grp** column displays the prep group of each voided item.
- The **Check No** column displays the number of the check that includes the void transaction.
- The **Time** column displays the time of the void transaction.
### Voids Report: EOD Void Summary

The EOD Void Summary report displays a sum of all the void types that your staff members used at the POS. You can use the EOD Void Summary report to analyze void totals. For more information on what the columns of this report contain or how to calculate their values, see “Voids Report Examples” on page 378.

<table>
<thead>
<tr>
<th>Void Reason</th>
<th>Manager ID</th>
<th>Manager Name</th>
<th>Price</th>
<th>Quantity</th>
<th>Average</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorrect Prep</td>
<td>1</td>
<td>Wizard</td>
<td>3.90</td>
<td>3.00</td>
<td>$1.17</td>
<td>2.0%</td>
</tr>
<tr>
<td>Ordered Wrong Item</td>
<td>1</td>
<td>Wizard</td>
<td>87.99</td>
<td>23.00</td>
<td>$3.82</td>
<td>50.2%</td>
</tr>
<tr>
<td>Over Cooked</td>
<td>1</td>
<td>Wizard</td>
<td>58.35</td>
<td>11.00</td>
<td>$5.30</td>
<td>33.3%</td>
</tr>
<tr>
<td>Voided</td>
<td>16</td>
<td>Lisa</td>
<td>25.25</td>
<td>9.00</td>
<td>$2.81</td>
<td>14.4%</td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td></td>
<td>174.99</td>
<td>46.00</td>
<td>$3.89</td>
<td>100%</td>
</tr>
</tbody>
</table>

- The **Void Reason** column displays the reason for voiding a menu item that a staff member selected at the POS.
- The **Manager ID** column displays the Digital Dining ID number of the manager who approved the transaction.
- The **Manager Name** column displays the name of the manager who approved the transaction.
- The **Price** column displays the amount that the staff member voided for the transaction.
- The **Quantity** column displays the number of items that the staff member voided.
- The **Average** column displays the value of the Price column divided by the value of the Quantity column, rounded to two decimal places (Price column ÷ Quantity column).
- The **% of Total** column displays the value of the Value column divided by the Grand Total.

### Voids Report: EOD Void by Manager

The EOD Void by Manager report displays the sum of each void type that each manager approved. You can use the EOD Void by Manager report to analyze the value, date and time, and the manager who approved each void for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Voids Report Examples” on page 378.
The **Void Reason** column displays the reason for voiding a menu item that a staff member selected at the POS.

- The **Manager ID** column displays the Digital Dining ID number of the manager who approved the transaction.
- The **Manager Name** column displays the name of the manager who approved the transaction.
- The **Price** column displays the amount that the staff member voided for the transaction.
- The **Quantity** column displays the number of items that the staff member voided.
- The **Average** column displays the value of the Price column divided by the value of the Quantity column, rounded to two decimal places (Price column ÷ Quantity column).
- The **% of Total** column displays the value of the Value column divided by the Grand Total.

### Voids Report: Audit Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Voids Report Maintenance Window. The **Audit** format of the Voids Report allows you to generate a report that displays a list of all voids (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently. For more information on what the columns of this report contain or how to calculate their values, see “Voids Report Examples” on page 378.
The **Void Reason** column displays the reason for voiding a menu item that a staff member selected at the POS.

The **PLU** column displays the PLU (Price Look-Up) number of the menu item voided.

The **Menu Item** column displays the name of the menu item.

The **Price** column displays the amount that the staff member voided for the transaction.

The **Staff** column displays the name of the staff member who voided the item at the POS.

The **Manager** column displays the name of the manager who confirmed the transaction.

The **Date** column displays the date of the transaction.

The **Profit Ctr** column displays the profit center associated with the check.

The **Prep Grp** column displays the prep group of each voided item.

The **Check No** column displays the number of the check that includes the void transaction.

The **Time** column displays the time of the void transaction.
Voids Report: Summary Format

You can change the report format by using the Report Format list on the Main tab of the Voids Report Maintenance Window. The Summary format of the Voids Report allows you to generate a report that displays totals for each void type. For more information on what the columns of this report contain or how to calculate their values, see “Voids Report Examples” on page 378.

The Void Reason column displays the reason for voiding a menu item that a staff member selected at the POS.

The Manager ID column displays the Digital Dining ID number of the manager who approved the transaction.

The Manager Name column displays the name of the manager who approved the transaction.

The Price column displays the amount that the staff member voided for the transaction.

The Quantity column displays the number of items that the staff member voided.

The Average column displays the value of the Price column divided by the value of the Quantity column, rounded to two decimal places (Price column ÷ Quantity column).

The % of Total column displays the value of the Value column divided by the Grand Total.

<table>
<thead>
<tr>
<th>Void Reason</th>
<th>Manager ID</th>
<th>Manager Name</th>
<th>Price</th>
<th>Quantity</th>
<th>Average</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wizard</td>
<td>1</td>
<td>Wizard</td>
<td>3.50</td>
<td>3.00</td>
<td>$1.17</td>
<td>2.6%</td>
</tr>
<tr>
<td>Incomplete Prep</td>
<td>1</td>
<td>Wizard</td>
<td>72.99</td>
<td>20.00</td>
<td>$3.65</td>
<td>54.1%</td>
</tr>
<tr>
<td>Over-Cooked</td>
<td>1</td>
<td>Wizard</td>
<td>58.35</td>
<td>11.00</td>
<td>$5.30</td>
<td>43.3%</td>
</tr>
<tr>
<td>Wizard Total</td>
<td></td>
<td></td>
<td>134.84</td>
<td>34.00</td>
<td>$3.97</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Grand Total

<table>
<thead>
<tr>
<th>Date</th>
<th>12/3/08</th>
<th>Date Range: 12/3/08 to 12/3/08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operator</td>
<td>wizard</td>
<td>Page 1</td>
</tr>
</tbody>
</table>
Labor Report Maintenance Window

Labor Reports allow you to analyze payroll information about your staff members and staff departments. You can use them to compare and analyze information regarding hours worked, pay rates, manager overhead, and total costs.

Labor Report Maintenance Window: Main Tab

On the **Main** tab, you determine how the program organizes and sorts your records. The **Main** tab also allows you to filter your staff information by staff ID, table number, and the time of day.
Format list

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>A list of labor totals for each staff department, including total hours, cost, and average hourly rate for regular, overtime, and double-time hours. This report also includes total cost and total cost percentage for each staff department.</td>
</tr>
<tr>
<td>Consolidated OT</td>
<td>A list of labor totals for each staff department, but with overtime and double-time totals (hours and cost) combined. This report also includes total cost and total cost percentage for each staff department, as well as total sales.</td>
</tr>
<tr>
<td>Time &amp; Attendance</td>
<td>A list of time and attendance transactions that occurred within the specified date range, including the ID number and name of the staff member associated with each transaction, the staff member's department, the times the staff member clocked in and clocked out, the total number of hours the staff member was clocked in during that shift, the amount of tips (if any) declared when the staff member clocked out, and any comments the staff member included when clocking in or out.</td>
</tr>
</tbody>
</table>
Group list

You can control how the program organizes the information in your report by selecting a grouping option from the Group list. The program will list data alphabetically by the grouping option you select. You can group your data by any of the following criteria:

<table>
<thead>
<tr>
<th>Department Group</th>
<th>Groups your staff records by their department groups.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Type</td>
<td>Groups your staff records by their department types.</td>
</tr>
<tr>
<td>Time Interval</td>
<td>Groups your staff records by time interval.</td>
</tr>
</tbody>
</table>

Subgroup list

You can group your data to a second level by selecting a subgrouping option from the Subgroup list. The Subgroup list is identical to the Group list.

Default Range list

If you select a default range from this list, this default range will appear in the Range list of the Labor Reports window.

Staff ID boxes

You can filter your records by typing a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions by servers with staff ID numbers between 100 and 200.

Table boxes

You can filter your records by entering a range of table numbers in the Table boxes. The program will only include transactions from tables that fall within this range.
Include in Report area

You can use the Include in Report area to control which items to include or exclude from your reports. Click the Cash Sales check box to include information from cash sales transactions in your report. Click the Include Discounts check box to include information from discount transactions in your report. Click the Include Charges check box to include information from charge transactions in your report. Click the Include Manager Overhead check box to include manager overhead information in your report.

Time boxes

You can filter your records by typing a range in the Time boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print transactions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

Interval box

You can enter a time interval by which the program will group the records in the report. The program will group sales information from transactions by whatever number of minutes you type in the Interval box. For instance, if you type “30”, the program will collect information for transactions occurring within each 30-minute interval of the specified time range. If you type a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: transactions occurring from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00.

Labor Report Maintenance Window: Staff Dept Tab

The Staff Dept tab features a filter that allows you to include or exclude specific staff departments. The program will only print information from staff departments in the Include list and will not print information from staff departments in the Exclude list.
Labor Report Maintenance Window: Pft Cnt Tab

The Pft Cnt (Profit Center) tab features a filter that allows you to include or exclude labor costs associated with specific profit centers. You can use this filter to create labor reports to measure the labor costs of specific profit centers to help assess patterns and scheduling. This filter only applies to reports in the summary and consolidated report formats.

The program will only include labor costs associated with profit centers in the Include list and will not include labor costs associated with profit centers in the Exclude list.

Labor Report Maintenance Window: Day Tab

The Day tab features a filter that allows you to include or exclude information from transactions performed on specific days of the weeks. The program will only include information from transactions performed on days in the Include list and will not include any information from transactions performed on days in the Exclude list.

Labor Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Labor Report Examples

You can use Labor reports to summarize labor cost (that is, staff costs as a percentage of staff sales) by profit center, to summarize the labor costs of a staff department, or to summarize the labor costs of a staff department group (for example, front of the house, back of the house, or management). Digital Dining provides two end-of-day (EOD) reports (you cannot modify the report definition for EOD reports) and three report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Labor Report Maintenance Window: Main Tab” on page 384).

What each column of the Labor report contains or how Digital Dining calculates the column is sometimes not self-evident:

The **Cost** column displays the value of each hours column (that is the Reg Hrs, OT Hrs, or DT Hrs columns) multiplied by the average hourly rate (Av. Rate column) plus any manager overhead (Mgr OH column).

You can calculate the value in the Cost column with the following equation:

\[(A \times B) + C = D\]

<table>
<thead>
<tr>
<th>Labor Report Examples</th>
<th>Reg Hrs</th>
<th>Mgr OH</th>
<th>Cost</th>
<th>Av. Rate</th>
<th>Total Hrs</th>
<th>Cost</th>
<th>Av. Rate</th>
<th>DT Hrs</th>
<th>Cost</th>
<th>Av. Rate</th>
<th>Labor Cost</th>
<th>Cost %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host/Hostesses</td>
<td>0.45</td>
<td>0.00</td>
<td>2.42</td>
<td>5.01</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>2.42</td>
<td>4.40</td>
</tr>
<tr>
<td>Phone Order 1</td>
<td>0.73</td>
<td>0.00</td>
<td>3.73</td>
<td>4.49</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>3.00</td>
<td>5.91</td>
</tr>
<tr>
<td>Server 1</td>
<td>0.47</td>
<td>0.00</td>
<td>1.83</td>
<td>3.49</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1.60</td>
<td>2.96</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1.42</td>
<td>0.00</td>
<td>7.08</td>
<td>5.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>7.08</td>
<td>12.87</td>
</tr>
<tr>
<td><strong>Front of House Total</strong></td>
<td>1.42</td>
<td>0.00</td>
<td>7.08</td>
<td>5.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>7.08</td>
<td>12.87</td>
</tr>
</tbody>
</table>

*** End of Report ***
The **Cost %** column displays the value of the Labor Cost column divided by the Total Sales.

You can calculate the value in the Cost % column with the following equation:

\[(A + B) \times 100 = C\]

<table>
<thead>
<tr>
<th>Front of House</th>
<th>Reg Hrs</th>
<th>Mgr OH</th>
<th>Cost</th>
<th>Av. Rate</th>
<th>Total Sales $</th>
<th>OT Hrs</th>
<th>Cost</th>
<th>Av. Rate</th>
<th>DT Hrs</th>
<th>Cost</th>
<th>Av. Rate</th>
<th>Labor Cost</th>
<th>Cost %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host/Hostess</td>
<td>0.48</td>
<td>9.00</td>
<td>3.42</td>
<td>5.01</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>-4.43</td>
<td>-4.43</td>
</tr>
<tr>
<td>Phone Order 1</td>
<td>0.47</td>
<td>9.00</td>
<td>3.03</td>
<td>6.49</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Server 1</td>
<td>0.47</td>
<td>9.00</td>
<td>1.53</td>
<td>2.49</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1.00</td>
<td>2.98</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1.42</td>
<td>9.00</td>
<td>7.06</td>
<td>5.03</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>7.00</td>
<td>12.97</td>
</tr>
<tr>
<td>Front of House Total</td>
<td>1.42</td>
<td>9.00</td>
<td>7.06</td>
<td>5.03</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>7.00</td>
<td>12.97</td>
</tr>
</tbody>
</table>

If you are creating a labor report that has *both* the **Summary** format selected from the **Report Format** list and **Time Interval** selected from the **Group** list, then Digital Dining calculates the Cost % based on the sales for that interval.

You can calculate the value in the Sales % column with the following equation:

\[(A + B) \times 100 = C\]

<table>
<thead>
<tr>
<th>Reg Hrs</th>
<th>Mgr OH</th>
<th>Cost</th>
<th>Av. Rate</th>
<th>Total Sales $</th>
<th>OT Hrs</th>
<th>Cost</th>
<th>Av. Rate</th>
<th>DT Hrs</th>
<th>Cost</th>
<th>Av. Rate</th>
<th>Labor Cost</th>
<th>Cost %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Front of House</strong></td>
<td>2.07</td>
<td>0.00</td>
<td>10.33</td>
<td>6.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>10.33</td>
<td>7.91</td>
</tr>
<tr>
<td>Host/Hostess</td>
<td>1.52</td>
<td>0.00</td>
<td>5.08</td>
<td>5.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>5.08</td>
<td>3.37</td>
</tr>
<tr>
<td>Server 1</td>
<td>0.50</td>
<td>0.00</td>
<td>1.75</td>
<td>3.50</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1.75</td>
<td>1.34</td>
</tr>
<tr>
<td><strong>Front of House Total</strong></td>
<td>3.58</td>
<td>0.00</td>
<td>17.16</td>
<td>4.79</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>17.16</td>
<td>13.14</td>
</tr>
<tr>
<td><strong>08:00 To 09:59 Total</strong></td>
<td>5.63</td>
<td>0.00</td>
<td>28.94</td>
<td>5.14</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>28.94</td>
<td>22.16</td>
</tr>
</tbody>
</table>

**Labor Cost** column displays the sum of all the other cost columns in the report.

The **Decl Tips** column displays the dollar amount of tips that the employee recorded while clocking out.
Labor Report: EOD Labor Cost

The EOD Labor Cost report provides a summary of labor cost information for the date range or period you provide. You can use this report to review your labor costs, calculated as a percentage of total sales. For more information on what the columns of this report contain or how to calculate their values, see “Labor Report Examples” on page 389.

- The **Reg Hrs** column displays the total number of regular hours for this department.
- The **Mgr OH** column displays the cost (in dollars) for the manager based on the regular hours of the department.
- The **Cost** column displays the value of each hours column (that is the Reg Hrs, OT Hrs, or DT Hrs columns) multiplied by the average hourly rate (Av. Rate column) plus any manager overhead (Mgr OH column).
- The **Av Rate** column displays the average pay rate for each department based on the clocked in staff.
- The **OT Hrs** column displays overtime hours by department.
- The **Labor Cost** column displays the sum of all the other cost columns in the report.
- The **Cost %** column displays the value of the Labor Cost column divided by the Total Sales.
Labor Report: EOD Time & Attend

The EOD Time & Attend report lists the details of every clock in or clock out transaction for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Labor Report Examples” on page 389.

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Department</th>
<th>Date</th>
<th>Time In</th>
<th>Time Out</th>
<th>Hours</th>
<th>Decl Tips</th>
<th>Comment In</th>
<th>Comment Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Brandon, Kay</td>
<td>Server 1</td>
<td>12/03/08</td>
<td>09:01</td>
<td>11:58</td>
<td>2.95</td>
<td>10:00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Brandon, Kay</td>
<td>Server 1</td>
<td>12/03/08</td>
<td>12:32</td>
<td>17:04</td>
<td>4.53</td>
<td>12.50</td>
<td>Clock-Out Error</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Goff, Susan</td>
<td>Server 1</td>
<td>12/03/08</td>
<td>14:00</td>
<td>--</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Goff, Susan</td>
<td>Phone Order 1</td>
<td>12/03/08</td>
<td>09:31</td>
<td>10:23</td>
<td>0.87</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Hurst, Alan</td>
<td>Delivery Driver</td>
<td>12/03/08</td>
<td>09:29</td>
<td>10:23</td>
<td>0.90</td>
<td>0.01</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Hurst, Alan</td>
<td>Delivery Driver</td>
<td>12/03/08</td>
<td>13:09</td>
<td>17:02</td>
<td>3.90</td>
<td>15.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Jones, Anne</td>
<td>Dish Thr</td>
<td>12/03/08</td>
<td>13:54</td>
<td>14:40</td>
<td>0.77</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Lewis, Samantha</td>
<td>Host/Hostess</td>
<td>12/03/08</td>
<td>16:31</td>
<td>17:01</td>
<td>0.50</td>
<td>0.00</td>
<td>Clock-Out Error</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Lewis, Samantha</td>
<td>Host/Hostess</td>
<td>12/03/08</td>
<td>10:00</td>
<td>12:06</td>
<td>2.10</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Server 1</td>
<td>12/03/08</td>
<td>11:48</td>
<td>11:52</td>
<td>0.07</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Miller, Rob</td>
<td>Bartender</td>
<td>12/03/08</td>
<td>12:16</td>
<td>17:02</td>
<td>4.77</td>
<td>16.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>21.56</td>
<td>52.51</td>
</tr>
</tbody>
</table>

- The **Staff ID** column displays the Digital Dining ID number, associated with a staff member.
- The **Name** column displays the name of the staff member.
- The **Department** column displays the name of the staff member’s department.
- The **Date** column displays the date of the transaction.
- The **Time In** column displays the clock in time.
- The **Time Out** column displays the clock out time.
- The **Hours** column displays how many hours a staff member worked during the shift.
- The **Decl Tips** column displays the amount of tips declared by a staff member.
- The **Comment In** column displays any comment a staff member might have entered at the POS at clock in.
- The **Comment Out** column displays any comment a staff member might have entered at the POS at clock out.
Labor Report: Consolidated OT Format

You can change the report format by using the Report Format list on the Main tab of the Labor Report Maintenance Window. The Consolidated OT format of the Labor Report allows you to generate a report that summarizes labor cost information for the date range or period you provide. You can use this report to review your labor costs, calculated as a percentage of total sales. For more information on what the columns of this report contain or how to calculate their values, see “Labor Report Examples” on page 389.

The OT Hours column of this report format displays the sum of regular overtime hours and double time hours, if needed.

- The Reg Hrs column displays the total number of regular hours for this department.
- The Mgr OH column displays the cost (in dollars) for the manager based on the regular hours of the department.
- The Cost column displays the value of each hours column (that is the Reg Hrs, OT Hrs, or DT Hrs columns) multiplied by the average hourly rate (Av. Rate column) plus any manager overhead (Mgr OH column).
The **Av Rate** column displays the average pay rate for each department based on the clocked in staff.

The **OT Hrs** column displays overtime hours by department.

The **Labor Cost** column displays the sum of all the other cost columns in the report.

The **Cost %** column displays the value of the Labor Cost column divided by the Total Sales.

---

**Labor Report: Summary Format**

You can change the report format by using the **Report Format** list on the **Main** tab of the Labor Report Maintenance Window. The **Summary** format of the Labor Report allows you to generate a report that provides a summary of labor cost information for the date range or period you provide. You can use this report to review your labor costs, calculated as a percentage of total sales. For more information on what the columns of this report contain or how to calculate their values, see “Labor Report Examples” on page 389.

The **Reg Hrs** column displays the total number of regular hours for this department.

The **Mgr OH** column displays the cost (in dollars) for the manager based on the regular hours of the department.
The **Cost** column displays the value of each hours column (that is the Reg Hrs, OT Hrs, or DT Hrs columns) multiplied by the average hourly rate (Av. Rate column) plus any manager overhead (Mgr OH column).

- The **Av Rate** column displays the average pay rate for each department based on the clocked in staff.
- The **OT Hrs** column displays overtime hours by department.
- The **Labor Cost** column displays the sum of all the other cost columns in the report.
- The **Cost %** column displays the value of the Labor Cost column divided by the Total Sales.
Labor Report: Time & Attendance Format

You can change the report format by using the Report Format list on the Main tab of the Labor Report Maintenance Window. The Time & Attendance format of the Labor Report allows you to generate a report that lists the details of every clock in or clock out transaction for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Labor Report Examples” on page 389.

The Staff ID column displays the Digital Dining staff member ID number.

The Staff name column displays the name of the staff member.

The Department column displays the primary department for a staff member.

The Date column displays the date of clock in and clock out transactions.

The Time In column displays the clock in time.

The Time Out column displays the clock out time.

The Hours column displays how many hours a staff member worked during the shift.

The Decl Tips column displays the amount of tips declared by a staff member.

The Comment In column displays any comment a staff member might have entered at the POS at clock in.

The Comment Out column displays any comment a staff member might have entered at the POS at clock out.
Security Report Maintenance Window

Security Reports allow you to analyze information about successful and unsuccessful security transactions in the POS. You can use them to review and analyze information regarding specific transactions that require a security clearance, including successful and unsuccessful transactions and the staff members who performed them.

Security Report Maintenance Window: Main Tab

On the Main tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The Main tab also allows you to filter security actions by the ID of the manager who approved the action, the ID of the server who performed the action, and the time of day.
**Register Reports Menu**

**Report On list**

You can select one of three different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denied</td>
<td>A list of unsuccessful actions that the program denied, including the date and time of each action, the name of the server who tried to perform each action, the name of the manager who tried to approve the action (if any), the number of each reopened checks (if any), the password level and the type of action that was attempted.</td>
</tr>
<tr>
<td>Accessed OK</td>
<td>A list of successful actions, including the date and time of each action, the name of the server who performed each action, the name of the manager who approved the action (if any), the number of each reopened checks (if any), the password level and the type of action that was performed.</td>
</tr>
<tr>
<td>Both</td>
<td>A list of both successful and unsuccessful actions.</td>
</tr>
</tbody>
</table>

**Group By list**

You can control how the program organizes the information in your report by selecting a grouping option from the **Group By** list. The program will list the actions alphabetically by the grouping option you select. You can group your actions by any of the following criteria:

| Manager ID | Groups your transactions by the staff ID number of the manager who approved each action. |
| Server ID  | Groups your transactions by the staff ID number of the server who performed each action. |
| Password Level | Groups your actions by the required password level of each action. |
Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Security Reports window. You can select one of the following optional input criteria:

<table>
<thead>
<tr>
<th><strong>Manager ID</strong></th>
<th>Filters your report by the staff ID number of each manager who approved the action. You can use this option to view data for one staff member at a time.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Server ID</strong></td>
<td>Filters your report by the staff ID number of each server who performed the action. You can use this option to view data for one staff member at a time.</td>
</tr>
</tbody>
</table>

Default Range list

If you select a default range from this list, this default range will appear in the Range list of the Security Reports window.

Manager ID boxes

You can filter your records by typing a range of staff ID numbers in the Manager ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print actions approved by managers with staff ID numbers between 100 and 200.

Server ID boxes

You can filter your records by typing a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print actions performed by servers with staff ID numbers between 100 and 200.

Time boxes

You can filter your records by typing a range in the Time boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print actions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.
Keyword box

You can filter your records for specific types of actions by typing a keyword in the Keyword box. You can use the name of any password-protected function as a keyword. For instance, if you type “separate checks” in the Keyword box, the program will only include Separate Checks actions in the report.

Security Report Maintenance Window: Password Tab

The Password tab features a filter that allows you to include or exclude actions associated with specific passwords. The program will only print actions associated with passwords in the Include list and will not print any actions associated with passwords in the Exclude list.

Security Report Maintenance Window: Day Tab

The Day tab features a filter that allows you to include or exclude actions performed on specific days of the weeks. The program will only print actions performed on days in the Include list and will not print any actions performed on days in the Exclude list.

Security Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Security Report Examples

You can use Security Reports to summarize the transactions in which the staff member’s password was denied or approved during a specified time range or to audit the denied or approved passwords for a manager. Digital Dining provides three report formats for this report. You can customize how and what the reports show by defining the reports in the Security Report Maintenance window (for more information, see “Security Report Maintenance Window: Main Tab” on page 397).
Security Report: Denied Format

You can change the report format by using the Report Format list on the Main tab of the Security Report Maintenance Window. The Denied format of the Security Report allows you to generate a report that displays all the failed attempts to access a password protected feature of the POS. For more information on what the columns of this report contain or how to calculate their values, see “Security Report Examples” on page 400.

- The Date column displays the date of the transaction.
- The Time column displays the time of the transaction.
- The Manager column displays the name of the manager that authorized the function.
- The Server column displays the name of the server that initiated the function.
- The Password Level column displays the password level assigned to the function.
- The Result column displays the system response (Denied or Accessed OK).
- The Function Keyword column displays the truncated description of the function.
- The Details column displays any additional details associated with the function.

You can change the report format by using the Report Format list on the Main tab of the Security Report Maintenance Window. The Accessed OK format of the Security Report allows you to generate a report that displays all the successful attempts to access a password-protected feature of the POS. For more information on what the columns of this report contain or how to calculate their values, see “Security Report Examples” on page 400.

- The Date column displays the date of the transaction.
- The Time column displays the time of the transaction.
- The Manager column displays the name of the manager that authorized the function.
- The Server column displays the name of the server that initiated the function.
- The Password Level column displays the password level assigned to the function.
- The Result column displays the system response (Denied or Accessed OK).
- The Function Keyword column displays the truncated description of the function.
- The Details column displays any additional details associated with the function.
Security Report: Both Format

You can change the report format by using the Report Format list on the Main tab of the Security Report Maintenance Window. The Both format of the Security Report allows you to generate a report that displays all the successful and failed attempts to access a password-protected feature of the POS. For more information on what the columns of this report contain or how to calculate their values, see “Security Report Examples” on page 400.

The Date column displays the date of the transaction.
- The Time column displays the time of the transaction.
- The Manager column displays the name of the manager that authorized the function.
- The Server column displays the name of the server that initiated the function.
- The Password Level column displays the password level assigned to the function.
- The Result column displays the system response (Denied or Accessed OK).
- The Function Keyword column displays the truncated description of the function.
- The Details column displays any additional details associated with the function.
Sales Tax Report Maintenance Window

Sales Tax Reports allow you to analyze information about your sales tax, and also to demonstrate to the IRS that you have been compliant. You can use them to compare and analyze tax information regarding specific menu item sales, including the amount of sales tax per item.

Sales Tax Report Maintenance Window: Main Tab

On the Main tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The Main tab also allows you to filter tax information by check number, cashier ID, table number, and the time of day.
**Report Format list**

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>A list of tax totals for each tax description, including total taxes collected, taxable sales, and tax exempt sales.</td>
</tr>
<tr>
<td>Audit</td>
<td>A list of taxes for menu items sold within the specified period, grouped by their check number, including the price of each item, the amount of the sales tax, the receipt type of the sale, the profit center within which the sale took place, the name of the cashier who performed the sale, and the time and date of the sale.</td>
</tr>
</tbody>
</table>

**Sort By list**

You can also control how the program organizes the information in a report by selecting a sorting option from the **Sort By** list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the **Sort By** list. You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cashier ID</td>
<td>Sorts your report by the staff ID number of the cashier who handled each transaction.</td>
</tr>
<tr>
<td>Receipt Type</td>
<td>Sorts your report by the receipt type of each transaction.</td>
</tr>
<tr>
<td>Tax Rate</td>
<td>Sorts your report by the tax rate used in each transaction.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Sorts your report by the profit center within which each transaction took place.</td>
</tr>
<tr>
<td>Check Number</td>
<td>Sorts your report by the check number of each transaction.</td>
</tr>
</tbody>
</table>

**Group By list**

You can control how the program organizes the information in your report by selecting a grouping option from the **Group By** list. The program will list the actions alphabetically by the grouping option you select. You can group your actions by any of the following criteria:
Register Reports Menu

### Cashier ID
Groups your taxes by the staff ID number of the cashier who handled each transaction.

### Receipt Type
Groups your taxes by the receipt type of each transaction.

### Tax Rate
Groups your taxes by the tax rate used in each transaction.

### Profit Center
Groups your taxes by the profit center where each transaction took place.

### Check Number
Groups your taxes by the check number of each transaction.

---

**Optional Input list**

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Sales Tax Reports window. You can select one of the following optional input criteria:

<table>
<thead>
<tr>
<th>Optional Input</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cashier ID</td>
<td>Filters your report by the staff ID number of the cashier who performed each transaction. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Receipt Type</td>
<td>Filters your report by the receipt type of each transaction.</td>
</tr>
<tr>
<td>Tax Rate</td>
<td>Filters your report by the tax rate used in each transaction.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Filters your report by the profit center where each transaction took place.</td>
</tr>
</tbody>
</table>

---

**Default Range list**

If you select a default range from this list, this default range will appear in the **Range** list of the Sales Tax Reports window.

---

**Check No boxes**

You can filter your records by entering a range of check numbers in the **Check No** boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print taxes for transactions from check numbers between 1000 and 2000.
Cashier ID boxes

You can filter your records by typing a range of staff ID numbers in the Cashier ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions performed by cashiers with staff ID numbers between 100 and 200.

Table boxes

You can filter your records by entering a range of table numbers in the Table boxes. The program will only include taxes from transactions performed at tables that fall within this range.

Time boxes

You can filter your records by typing a range in the Time boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print taxes from transactions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

Tax area

You can filter your report to include tax-exempt items only, taxable items only, or both. Click Tax-Exempt to include only tax-exempt items in your report. Click Taxable to include only taxable items in your report. Click Both to include both tax-exempt and taxable items in your report.

Sales Tax Report Maintenance Window: Receipt Tab

The Receipt tab allows you to filter the report to include or exclude taxes from transactions associated with specific receipt types. You can include or exclude transactions associated with certain receipt types by adding receipt types to the Include/Exclude list.
You can set the program to either include or exclude taxes associated with the receipt types in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include taxes associated with the receipt types in the Include/Exclude list. If you click Exclude, the program will exclude all taxes associated with the receipt types in the Include/Exclude list.

To move a receipt type from the Available list to the Include/Exclude list, select that receipt type and click ▶. To move a receipt type from the Include/Exclude box to the Available list, select the receipt type and click ◀. To move all receipt types from the Available list to the Include/Exclude list, click ▶▶. To move all receipt types in the Include/Exclude list to the Available list, click ◀◀.

Sales Tax Report Maintenance Window: Tax Rate Tab

The Tax Rate tab allows you to filter the report to include or exclude taxes from transactions associated with specific tax rates. You can include or exclude taxes associated with certain tax rates by adding tax rates to the Include/Exclude list.
You can set the program to either include or exclude taxes associated with the tax rates in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include taxes associated with the tax rates in the Include/Exclude list. If you click Exclude, the program will exclude all taxes associated with the tax rates in the Include/Exclude list.

To move a tax rate from the Available list to the Include/Exclude list, select that tax rate and click \( \rightarrow \). To move a tax rate from the Include/Exclude box to the Available list, select the tax rate and click \( \leftarrow \). To move all tax rates from the Available list to the Include/Exclude box, click \( \rightarrow \). To move all tax rates in the Include/Exclude box to the Available list, click \( \leftarrow \).

Sales Tax Report Maintenance Window: Profit Cnt Tab

The Profit Cnt tab features a filter that allows you to include or exclude taxes from transactions performed in specific profit centers. You can include or exclude taxes from transactions performed in specific profit centers by adding profit centers to the Include/Exclude list.

You can set the program to either include or exclude taxes from transactions performed in the profit centers in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include taxes from the profit centers in the Include/Exclude list. If you click Exclude, the program will exclude all taxes from the profit centers in the Include/Exclude list.

To move a profit center from the Available list to the Include/Exclude list, select that profit center and click \( \rightarrow \). To move a profit center from the Include/Exclude list to the Available list, select the profit center and click \( \leftarrow \). To move all profit centers from the Available list to the Include/Exclude list, click \( \rightarrow \). To move all profit centers in the Include/Exclude box to the Available list, click \( \leftarrow \).
Sales Tax Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Sales Tax Report Examples

You can use Sales Tax reports to summarize sales tax by profit center, to audit sales that are tax exempt, or to summarize how often Digital Dining applied a particular tax. Digital Dining provides two end-of-day (EOD) reports (you cannot modify the report definition for EOD reports) and two report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Sales Tax Report Maintenance Window: Main Tab” on page 404).

What each column of the Sales Tax report contains or how Digital Dining calculates the column is sometimes not self evident:

The **Sales** column displays the total sales for that transaction.

The **Tax** column displays the amount of tax levied for that transaction.

The **Tax Collected** column displays the sum of tax levied for that tax type.

The **Taxable Sales** column displays the sum of sales that can be taxed.

The **Tax Exempt Sales** column displays the sum of sales that cannot be taxed.
Sales Tax Report: EOD Sales Tax Audit

The EOD Sales Tax Audit report provides a list of each transaction for which Digital Dining either applied or did not apply a sales tax for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Sales Tax Report Examples” on page 410.

<table>
<thead>
<tr>
<th>Check No</th>
<th>Sales</th>
<th>Tax Desc</th>
<th>Tax</th>
<th>Receipt</th>
<th>Profit Center</th>
<th>Cashier</th>
<th>Date</th>
<th>Time</th>
<th>Tax Exemption Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>7354</td>
<td>39.50</td>
<td>State</td>
<td>2.77</td>
<td>Cash</td>
<td>Main DR</td>
<td>Key</td>
<td>08/01/08</td>
<td>10:59</td>
<td></td>
</tr>
<tr>
<td>7468</td>
<td>31.15</td>
<td>State</td>
<td>2.18</td>
<td>Cash</td>
<td>Main DR</td>
<td>Key</td>
<td>08/01/08</td>
<td>10:54</td>
<td></td>
</tr>
<tr>
<td>7469</td>
<td>3.95</td>
<td>None</td>
<td>0.00</td>
<td>Cash</td>
<td>Main DR</td>
<td>Key</td>
<td>08/01/08</td>
<td>10:54</td>
<td></td>
</tr>
<tr>
<td>7485</td>
<td>6.70</td>
<td>State</td>
<td>0.47</td>
<td>Cash</td>
<td>Main DR</td>
<td>wizard</td>
<td>08/01/08</td>
<td>11:41</td>
<td></td>
</tr>
<tr>
<td>7487</td>
<td>49.00</td>
<td>State</td>
<td>3.43</td>
<td>Cash</td>
<td>Main DR</td>
<td>Golfers</td>
<td>08/01/08</td>
<td>13:38</td>
<td></td>
</tr>
<tr>
<td>7488</td>
<td>18.75</td>
<td>State</td>
<td>1.31</td>
<td>Cash</td>
<td>Delivery</td>
<td>Golfers</td>
<td>08/01/08</td>
<td>10:21</td>
<td></td>
</tr>
<tr>
<td>7489</td>
<td>25.90</td>
<td>State</td>
<td>1.85</td>
<td>Visa</td>
<td>Main DR</td>
<td>wizard</td>
<td>08/01/08</td>
<td>11:26</td>
<td></td>
</tr>
<tr>
<td>7493</td>
<td>3.85</td>
<td>None</td>
<td>0.00</td>
<td>Visa</td>
<td>Main DR</td>
<td>wizard</td>
<td>08/01/08</td>
<td>11:26</td>
<td></td>
</tr>
<tr>
<td>7489</td>
<td>59.26</td>
<td>State</td>
<td>4.15</td>
<td>Cash</td>
<td>Main DR</td>
<td>wizard</td>
<td>08/01/08</td>
<td>11:27</td>
<td></td>
</tr>
<tr>
<td>7489</td>
<td>16.86</td>
<td>None</td>
<td>0.00</td>
<td>Cash</td>
<td>Main DR</td>
<td>wizard</td>
<td>08/01/08</td>
<td>11:27</td>
<td></td>
</tr>
<tr>
<td>7490</td>
<td>4.95</td>
<td>None</td>
<td>0.00</td>
<td>Account</td>
<td>Main DR</td>
<td>wizard</td>
<td>08/01/08</td>
<td>11:45</td>
<td></td>
</tr>
<tr>
<td>7490</td>
<td>82.45</td>
<td>State</td>
<td>5.77</td>
<td>Account</td>
<td>Main DR</td>
<td>wizard</td>
<td>08/01/08</td>
<td>11:45</td>
<td></td>
</tr>
<tr>
<td>7490</td>
<td>34.00</td>
<td>None</td>
<td>0.00</td>
<td>Account</td>
<td>Main DR</td>
<td>wizard</td>
<td>08/01/08</td>
<td>11:45</td>
<td></td>
</tr>
<tr>
<td>7491</td>
<td>12.00</td>
<td>State</td>
<td>0.84</td>
<td>Account</td>
<td>Main DR</td>
<td>Miller</td>
<td>08/01/08</td>
<td>11:49</td>
<td></td>
</tr>
<tr>
<td>7492</td>
<td>25.20</td>
<td>State</td>
<td>1.75</td>
<td>Cash</td>
<td>Main DR</td>
<td>wizard</td>
<td>08/01/08</td>
<td>12:24</td>
<td></td>
</tr>
</tbody>
</table>

Grand Totals: Tax: 24.95 Sales: 414.62

---

- The **Check No** column displays the check number.
- The **Sales** column displays the total sales for that transaction.
- The **Tax Desc** column displays the name of the tax applied to the transaction.
- The **Tax** column displays the amount of tax levied for that transaction.
- The **Receipt** column displays the receipt type that the customer used for the transaction.
- The **Profit Center** column displays the profit center associated with the check.
- The **Cashier** column displays the name of the cashier who processed the payment.
- The **Date** column displays the date of the transaction.
- The **Time** column displays the time of the transaction.
- The **Tax Exemption Reference** column displays the tax exemption number or details of the transaction.
Sales Tax Report: EOD Sales Tax Summ

The EOD Sales Tax Summ report provides a sales tax totals for each of the tax rates you have defined for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Sales Tax Report Examples” on page 410.

<table>
<thead>
<tr>
<th>Description</th>
<th>Tax Collected</th>
<th>Taxable Sales</th>
<th>Tax Exempt Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>0.00</td>
<td>738.50</td>
<td>0.00</td>
</tr>
<tr>
<td>Liquor Tax</td>
<td>146.90</td>
<td>2,094.55</td>
<td>0.00</td>
</tr>
<tr>
<td>Sales Tax</td>
<td>386.01</td>
<td>4,782.62</td>
<td>0.00</td>
</tr>
</tbody>
</table>

- The **Description** column displays the name of the tax.
- The **Tax Collected** column displays the sum of tax levied for that tax type.
- The **Taxable Sales** column displays the sum of sales that can be taxed.
- The **Tax Exempt Sales** column displays the sum of sales that cannot be taxed.
Sales Tax Report: Audit Format

You can change the report format by using the **Report Format** list on the **Main** tab of the Sales Tax Report Maintenance Window. The **Audit** format of the Sales Tax Report allows you to generate a report that displays a list of all sales taxes applied (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently. For more information on what the columns of this report contain or how to calculate their values, see “Sales Tax Report Examples” on page 410.

<table>
<thead>
<tr>
<th>Check No</th>
<th>Sales</th>
<th>Tax Desc</th>
<th>Tax</th>
<th>Receipt</th>
<th>Profit Center</th>
<th>Cashier</th>
<th>Date</th>
<th>Time</th>
<th>Tax Exemption Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>7354</td>
<td>30.50</td>
<td>State</td>
<td>2.77</td>
<td>Cash</td>
<td>Main DR</td>
<td>Kay</td>
<td>4/11/08</td>
<td>10:59</td>
<td></td>
</tr>
<tr>
<td>7468</td>
<td>31.15</td>
<td>State</td>
<td>2.18</td>
<td>Cash</td>
<td>Main DR</td>
<td>Kay</td>
<td>4/11/08</td>
<td>10:54</td>
<td></td>
</tr>
<tr>
<td>7468</td>
<td>3.95</td>
<td>None</td>
<td>0.00</td>
<td>Cash</td>
<td>Main DR</td>
<td>Kay</td>
<td>4/11/08</td>
<td>10:54</td>
<td></td>
</tr>
<tr>
<td>7467</td>
<td>6.70</td>
<td>State</td>
<td>0.47</td>
<td>Cash</td>
<td>Main DR</td>
<td>wizard</td>
<td>4/11/08</td>
<td>11:41</td>
<td></td>
</tr>
<tr>
<td>7487</td>
<td>49.00</td>
<td>State</td>
<td>3.43</td>
<td>Cash</td>
<td>Main DR</td>
<td>Geffens</td>
<td>4/11/08</td>
<td>13:38</td>
<td></td>
</tr>
<tr>
<td>7488</td>
<td>18.75</td>
<td>State</td>
<td>1.31</td>
<td>Cash</td>
<td>Delivery</td>
<td>Geffens</td>
<td>4/11/08</td>
<td>10:21</td>
<td></td>
</tr>
<tr>
<td>7489</td>
<td>26.90</td>
<td>State</td>
<td>1.88</td>
<td>Visa</td>
<td>Main DR</td>
<td>wizard</td>
<td>4/11/08</td>
<td>11:26</td>
<td></td>
</tr>
<tr>
<td>7489</td>
<td>3.95</td>
<td>None</td>
<td>0.00</td>
<td>Visa</td>
<td>Main DR</td>
<td>wizard</td>
<td>4/11/08</td>
<td>11:26</td>
<td></td>
</tr>
<tr>
<td>7489</td>
<td>50.28</td>
<td>State</td>
<td>4.15</td>
<td>Cash</td>
<td>Main DR</td>
<td>wizard</td>
<td>4/11/08</td>
<td>11:27</td>
<td></td>
</tr>
<tr>
<td>7489</td>
<td>16.86</td>
<td>None</td>
<td>0.00</td>
<td>Cash</td>
<td>Main DR</td>
<td>wizard</td>
<td>4/11/08</td>
<td>11:27</td>
<td></td>
</tr>
<tr>
<td>7490</td>
<td>4.95</td>
<td>None</td>
<td>0.00</td>
<td>Account</td>
<td>Main DR</td>
<td>wizard</td>
<td>4/11/08</td>
<td>11:45</td>
<td></td>
</tr>
<tr>
<td>7490</td>
<td>82.45</td>
<td>State</td>
<td>5.77</td>
<td>Account</td>
<td>Main DR</td>
<td>wizard</td>
<td>4/11/08</td>
<td>11:45</td>
<td></td>
</tr>
<tr>
<td>7491</td>
<td>34.00</td>
<td>None</td>
<td>0.00</td>
<td>Account</td>
<td>Main DR</td>
<td>wizard</td>
<td>4/11/08</td>
<td>11:46</td>
<td></td>
</tr>
<tr>
<td>7491</td>
<td>12.00</td>
<td>State</td>
<td>0.84</td>
<td>Account</td>
<td>Main DR</td>
<td>Miller</td>
<td>4/11/08</td>
<td>11:46</td>
<td></td>
</tr>
<tr>
<td>7492</td>
<td>25.20</td>
<td>State</td>
<td>1.76</td>
<td>Cash</td>
<td>Main DR</td>
<td>wizard</td>
<td>4/11/08</td>
<td>12:34</td>
<td></td>
</tr>
</tbody>
</table>

**Grand Totals Tax:** 245.56  **Sales:** 414.82

- The **Check No** column displays the check number.
- The **Sales** column displays the total sales for that transaction.
- The **Tax Desc** column displays the name of the tax applied to the transaction.
- The **Tax** column displays the amount of tax levied for that transaction.
- The **Receipt** column displays the receipt type that the customer used for the transaction.
- The **Profit Center** column displays the profit center associated with the check.
- The **Cashier** column displays the name of the cashier who processed the payment.
- The **Date** column displays the date of the transaction.
- The **Time** column displays the time of the transaction.
- The **Tax Exemption Reference** column displays the tax exemption number or details of the transaction.
Sales Tax Report: Summary Format

You can change the report format by using the Report Format list on the Main tab of the Sales Tax Report Maintenance Window. The Summary format of the Sales Tax Report allows you to generate a report that displays totals for each tax rate. For more information on what the columns of this report contain or how to calculate their values, see “Sales Tax Report Examples” on page 410.

<table>
<thead>
<tr>
<th>Description</th>
<th>Tax Collected</th>
<th>Taxable Sales</th>
<th>Tax Exempt Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>0.00</td>
<td>5,072.12</td>
<td>0.00</td>
</tr>
<tr>
<td>Liquor Tax</td>
<td>911.16</td>
<td>1,298.04</td>
<td>0.00</td>
</tr>
<tr>
<td>Sales Tax</td>
<td>943.01</td>
<td>13,470.22</td>
<td>0.00</td>
</tr>
<tr>
<td>Total</td>
<td>1,054.17</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Description column displays the name of the tax.

The Tax Collected column displays the sum of tax levied for that tax type.

The Taxable Sales column displays the sum of sales that can be taxed.

The Tax Exempt Sales column displays the sum of sales that cannot be taxed.
Alarms Report Maintenance Window

Alarms Reports allow you to examine information about your table alarms. You can use them to monitor the frequency of table alarms at the POS, including which alarms occur most frequently. You can also compare the frequency of table alarms between different profit centers, stations, or servers.

Alarms Report Maintenance Window: Main Tab

On the **Main** tab, you determine the format of your new report, as well as decide how the program organizes and sorts your alarm records. The **Main** tab also allows you to filter information by server ID number, check number, alarm duration, alarm level, and the time of day.
Register Reports Menu

**Report Format list**

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>A summary of alarm occurrences, listing the number of occurrences of each alarm type.</td>
</tr>
<tr>
<td>Audit</td>
<td>A list of alarm occurrences, including the name of the server, the station, the table number, and the check number associated with the alarm, as well as the date, start time, duration, and level of each alarm.</td>
</tr>
</tbody>
</table>

**Sort By list**

You can also control how the program organizes the information in a report by selecting a sorting option from the **Sort By** list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the **Sort By** list. You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th>Server ID</th>
<th>Sorts your report by the staff ID number of the server who handled the transaction associated with each alarm.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alarm Type</td>
<td>Sorts your report by the alarm type of each alarm.</td>
</tr>
<tr>
<td>Check</td>
<td>Sorts your report by the check number of the transaction associated with each alarm.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Sorts your report by the profit center within which each alarm took place.</td>
</tr>
</tbody>
</table>

**Group By 1 list**

You can control how the program organizes the information in your report by selecting a grouping option from the **Group By 1** list. The program will list data alphabetically by the grouping option you select. You can group your data by any of the following criteria:
Server ID | Groups your alarms by the staff ID numbers of the servers who handled the transactions associated with each alarm.
--- | ---
Alarm Type | Groups your alarms by their alarm types.
Check | Groups your alarms by the check number of the transaction associated with each alarm.
Profit Center | Groups your alarms by the profit centers within which each alarm occurred.
Station | Groups your alarms by the stations where each alarm occurred.
POS Date | Groups your alarms by the system date at the moment of each alarm.

**Group By 2 list**

You can group your data to a second level by selecting a subgrouping option from the Group By 2 list. The Group By 2 list is identical to the Group By 1 list.

**Optional Input list**

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Alarms Reports window. You can select one of the following optional input criteria:

Server ID | Filters your report by the staff ID numbers of the servers who handled the transactions associated with each alarm. You can use this option to view data for one staff member at a time.
--- | ---
Alarm Type | Filters your report by the alarm type.
Check | Filters your report by the check numbers of the transactions associated with each alarm.
Profit Center | Filters your report by the profit centers where each alarm occurred.
Station | Filters your report by the station where each alarm occurred.

**Default Range list**

If you select a default range from this list, this default range will appear in the Range list of the Alarms Reports window.
Server ID boxes

You can filter your records by typing a range of staff ID numbers in the Server ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print alarms associated with servers with staff ID numbers between 100 and 200.

Check Number boxes

You can filter your records by entering a range of check numbers in the Check Number boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the program will only print alarms associated with check numbers between 1000 and 2000.

Time boxes

You can filter your records by typing a range in the Time boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print alarms occurring between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

Duration boxes

You can filter your records by the duration, in minutes, of each alarm. For instance, if you type “5” in the first box and “10” in the second box, the program will only print alarms with a duration between five to 10 minutes.

Alarm Level area

You can filter your alarms by alarm level by clicking one of the options in the Alarm Level area. Click Low Only to include only low level alarms in your report. Click High Only to include only high level alarms in your report. Click Any to include both low and high level alarms in your report.

Alarms Report Maintenance Window: Alarm Tab

The Alarm tab features a filter that allows you to include or exclude specific types of alarms. The program will only print alarms in the Include list and will not print any alarms in the Exclude list.
Alarms Report Maintenance Window: Station Tab

The Station tab features a filter that allows you to include or exclude alarms associated with specific stations. The program will only print alarms associated with stations in the Include list and will not print any alarms associated with stations in the Exclude list.

Alarms Report Maintenance Window: Profit Cnt Tab

The Profit Cnt tab features a filter that allows you to include or exclude alarms associated with specific profit centers. The program will only print alarms associated with profit centers in the Include list and will not print any alarms associated with profit centers in the Exclude list.

Alarms Report Maintenance Window: Day Tab

The Day tab features a filter that allows you to include or exclude alarms occurring on specific days of the week. The program will only print alarms occurring on days in the Include list and will not print any alarms occurring on days in the Exclude list.

Alarms Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Alarms Report Examples

You can use Alarm reports to analyze when Digital Dining fired alarms at the POS. You can use these reports to identify problem stations (for example, stations that are too large) or employees who need more training. Digital Dining provides two report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Alarms Report Maintenance Window: Main Tab” on page 415).
Alarms Report: Audit Format

The Audit format of the Alarms Report allows you to generate a report that displays a list of all alarms that your staff members triggered (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently.

- The **Alarm** column displays the type of the alarm.
- The **Server Name** column displays the name of the server, who triggered the alarm.
- The **Station** column displays the station, where the server worked at the moment of the alarm.
- The **Table No** column displays the number of the table on which the alarm was triggered.
- The **Check No** column displays the number of the check that contains the alarm transaction.
- The **POS Date** column displays the system date at the moment of the alarm.
- The **Start Time** column displays the start time of the alarm.
- The **Duration** column displays the alarm duration time until the alarm was satisfied.
- The **Level** column displays the alarm level.
- The **Accessed** column displays the number of times staff members accessed the alarm until it was satisfied.
- The **Alarm Visible** column displays whether the alarm was visible at the POS or not.
Alarms Report: Summary Format

The Summary format of the Alarms Report allows you to generate a report that allows you to analyze more easily problem areas (for example, stations that are too large) or employees who need more training. For this report, the Group By 1 list on the Main tab of the Alarms Report Maintenance window.

<table>
<thead>
<tr>
<th>Main Dining Room</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of alarms:</td>
<td>6</td>
</tr>
</tbody>
</table>

*** End of Report ***
Gift Certificate Report Maintenance Window

Gift Certificate Reports allow you to examine information about your gift certificates. You can use them to monitor the sales of your gift certificates, and to compare the sales of different gift certificates.

Gift Certificate Report Maintenance Window: Main Tab

On the Main tab, you determine the format of your new report, as well as decide how the program organizes and sorts your transaction records. The Main tab also allows you to filter information by server ID number, manager ID number, table number, and the time of day.
Report Format list

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>A summary of gift certificate transactions, including the price and value of each type of gift certificate, the quantity of each type of gift certificate, and the average price and average value of each type of gift certificate.</td>
</tr>
<tr>
<td>Audit</td>
<td>A list of gift certificate transactions, including the type of gift certificate used in each transaction, the price of the order, the value of the gift certificate, the name of the staff member who handled the transaction, the name of the manager who approved the transaction, the profit center in which the transaction occurred, the check number, date, and time of the transaction, and the ID number of the gift certificate used.</td>
</tr>
</tbody>
</table>

Sort By list

You can also control how the program organizes the information in a report by selecting a sorting option from the Sort By list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the Sort By list. You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th>Sort By</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Sorts your report by the staff ID numbers of the servers who handled each transaction associated with a gift certificate. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Sorts your report by the staff ID number of the manager who approved each transaction associated with a gift certificate. You can use this option to view data for one manager at a time.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Sorts your report by the profit centers where each gift certificate was used.</td>
</tr>
<tr>
<td>Gift Certificate ID</td>
<td>Sorts your report by the ID number of an individual gift certificate.</td>
</tr>
</tbody>
</table>
**Group By 1 list**

You can control how the program organizes the information in your report by selecting a grouping option from the **Group By 1 list**. The program will list data alphabetically by the grouping option you select. You can group your data by any of the following criteria:

<table>
<thead>
<tr>
<th>Grouping Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staff ID</strong></td>
<td>Groups your information by the staff ID numbers of the servers who handled the transactions associated with gift certificates.</td>
</tr>
<tr>
<td><strong>Gift Certificate Type</strong></td>
<td>Groups your information by gift certificate types.</td>
</tr>
<tr>
<td><strong>Manager ID</strong></td>
<td>Groups your information by the staff ID number of each manager who approved the transaction.</td>
</tr>
<tr>
<td><strong>Profit Center</strong></td>
<td>Groups your information by the profit centers within which each transaction occurred.</td>
</tr>
<tr>
<td><strong>Time Interval</strong></td>
<td>Groups your information by the time interval within which each transaction occurred.</td>
</tr>
<tr>
<td><strong>Week Day</strong></td>
<td>Groups your information by the day of the week within which each transaction occurred.</td>
</tr>
<tr>
<td><strong>Gift Certificate ID</strong></td>
<td>Groups your information by the ID number of each individual gift certificate.</td>
</tr>
</tbody>
</table>

**Group By 2 list**

You can group your data to a second level by selecting a subgrouping option from the **Group By 2 list**. The **Group By 2 list** is identical to the **Group By 1 list**.
**Optional Input list**

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Gift Certificate Reports window. You can select one of the following optional input criteria:

<table>
<thead>
<tr>
<th>Input Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Filters your report by the staff ID numbers of the servers who handled the transactions associated with each gift certificate. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Filters your report by the staff ID number of the manager who approved the transaction. You can use this option to view data for one manager at a time.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Filters your report by the profit centers where each gift certificate was used.</td>
</tr>
<tr>
<td>Gift Certificate ID</td>
<td>Filters your report by the ID number of an individual gift certificate.</td>
</tr>
</tbody>
</table>

**Default Range list**

If you select a default range from this list, this default range will appear in the Range list of the Gift Certificate Reports window.

**Manager ID boxes**

You can filter your records by typing a range of staff ID numbers in the Manager ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions approved by managers with staff ID numbers between 100 and 200.

**Staff ID boxes**

You can filter your records by typing a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print transactions performed by servers with staff ID numbers between 100 and 200.
**Table boxes**

You can filter your records by typing a range of table numbers in the **Table** boxes. The program will only include transactions performed at tables that fall within this range.

**Time boxes**

You can filter your records by typing a range in the **Time** boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only include transactions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

**Time Interval box**

You can enter a time interval by which the program will group the records in the report. The program will group sales information from transactions by whatever number of minutes you type in the **Time Interval** box. For instance, if you type “30”, the program will collect information for transactions occurring within each 30-minute interval of the specified time range. If you type a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: transactions occurring from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00.

**Gift Certificate Report Maintenance Window: Gift Certificate Tab**

The **Gift Certificate** tab features a filter that allows you to include or exclude gift certificates of specific gift certificate types. If you click **Include**, the program will only include gift certificates of the types listed in the **Gift Certificate** list. If you click **Exclude**, the program will exclude all gift certificates of the types listed in the **Gift Certificate** list. To add a gift certificate type to the **Gift Certificate** list, click **Find** and select a gift certificate type in the Find Gift Certificate Report window. To remove a gift certificate type from the **Gift Certificate** list, select the gift certificate type and then click **Remove**. To remove all gift certificate types from the **Gift Certificate** list, click **Clear**.
Gift Certificate Report Maintenance Window: Profit Cnt Tab

The Profit Cnt tab features a filter that allows you to include or exclude gift certificates used in specific profit centers. You can include or exclude gift certificates used in specific profit centers by adding profit centers to the Include/Exclude list.

You can set the program to either include or exclude gift certificates used in specific profit centers in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include gift certificates used in the profit centers in the Include/Exclude list. If you click Exclude, the program will exclude gift certificates used in the profit centers in the Include/Exclude list.

To move a profit center from the Available list to the Include/Exclude list, select that profit center and click Include/Exclude list. To move a profit center from the Include/Exclude list to the Available list, select the profit center and click Available list. To move all profit centers from the Available list to the Include/Exclude list, select the Available list and click Include/Exclude list.
Include/Exclude list, click ➔ To move all profit centers in the Include/Exclude box to the Available list, click ←.

Gift Certificate Report Maintenance Window: Day Tab

The Day tab features a filter that allows you to include or exclude gift certificates used on specific days of the week. The program will only print gift certificates used on days of the week in the Include list and will not print any gift certificates used on days of the week in the Exclude list.

Gift Certificate Report Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text will automatically wrap to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Gift Certificate Report Examples

You can use Gift Certificate reports to examine information about your gift certificates. Digital Dining provides a liability report (you cannot modify the report definition for the liability report) and two report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Gift Certificate Report Maintenance Window: Main Tab” on page 422).

What each column of the Gift Certificate report contains or how Digital Dining calculates the column is some times not self evident:

- The **Price** column displays the cost of the gift certificate to the customer.
- The **Value** column displays the amount that the customer can redeem with the gift certificate.
- The **Average Price** column displays the value of the Price column divided by the Quantity column (Price column ÷ Quantity column).
- The **Average Value** column displays the value of the Value column divided by the Quantity column (Value column ÷ Quantity column).
The Gift Certificate Liability Report allows you to generate a report on a restaurant’s outstanding liability for gift certificates. The report lists all gift certificates sold, including each gift certificate’s current value, issue date, access date, and expiration date. The report also includes the total value of the gift certificates, with subtotals for Expired and Effective (not expired) gift certificates.

Note

The Gift Certificate Liability Report only reports liability data up to the current day. To review liability information for a specific data range, you can use the Gift Certificate Liability Range Report.

The Gift Certificate ID column displays the gift certificate number.

The Current Value column displays the amount the customer can redeem with the gift certificate.

The Issue Date column displays the date when the site issued a gift certificate.

The Access Date column displays the last date staff members used the gift certificate at the POS.

The Expiration Date column displays the expiration date of the gift certificate.
Gift Certificate Liability Detail Report

The Gift Certificate Liability Detail Report allows you to generate a report that lists details how a gift certificate's liability changes for each transaction. The report includes the date and time that each transaction was performed, the amount used or added to the gift certificate, and the gift certificate's balance after each transaction. Like the Gift Certificate Liability Report, you cannot delete or modify the Gift Certificate Liability Detail Report. For more information on what the columns of this report contain or how to calculate their values, see “Gift Certificate Report Examples” on page 428.

- The **Gift Certificate ID** column displays the gift certificate number.
- The **Current Value** column displays the amount the customer can redeem with the gift certificate.
- The **Issue Date** column displays the date when the site issued a gift certificate.
- The **Access Date** column displays the last date staff members used the gift certificate at the POS.
- The **Expiration Date** column displays the expiration date of the gift certificate.
- The **Transaction Details** section displays the details of the transactions performed with the gift certificate including the date and time of the transaction, the amount posted on the gift certificate, the remaining balance and the name of the store where the transaction was performed.

---

**DD CAFE**

**Gift Certificate Liability Details Report**

<table>
<thead>
<tr>
<th>Gift Certificate ID</th>
<th>Current Value</th>
<th>Issue Date</th>
<th>Access Date</th>
<th>Expiration Date</th>
</tr>
</thead>
</table>

**Transaction Details**

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Amount</th>
<th>Balance</th>
<th>Store</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/30/09</td>
<td>10:35</td>
<td>+100.00</td>
<td>100.00</td>
<td>DD Cafe</td>
</tr>
<tr>
<td>03/30/09</td>
<td>10:30</td>
<td>-50.92</td>
<td>49.08</td>
<td>DD Cafe</td>
</tr>
<tr>
<td>03/30/09</td>
<td>10:37</td>
<td>-47.51</td>
<td>21.57</td>
<td>DD Cafe</td>
</tr>
</tbody>
</table>

*** End of Report ***
Gift Certificate Liability Range Report

The Gift Certificate Liability Range Report allows you to generate a report on a restaurant’s outstanding liability for gift certificates. The report lists all gift certificates sold within the specified data range, including each gift certificate’s current value, issue date, access date, and expiration date. The report also includes the total value of the gift certificates, with subtotals for Expired and Effective (not expired) gift certificates.

Note

The Gift Certificate Liability Range Report includes the same information as the Gift Certificate Liability Report, but you can specify a date range. The Gift Certificate Liability Report only reports liability data for the current day.

Gift Certificate Report: Audit Format

You can change the report format by using the Report Format list on the Main tab of the Gift Certificate Report Maintenance Window. The Audit format of the Gift Certificate Report allows you to generate a report that displays a list of all gift certificates that your customers redeemed (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently. For more information on what the columns of this report contain or how to calculate their values, see “Gift Certificate Report Examples” on page 428.

DD CAFE

Date 12/3/08 14:13:36
Operator: wizard

DateRange: 12/3/08 to 12/3/08

Gift Certificate Report: Audit Format

<table>
<thead>
<tr>
<th>Gift Certificate</th>
<th>Price</th>
<th>Value</th>
<th>Staff</th>
<th>Manager</th>
<th>Profit Ctrl</th>
<th>Check</th>
<th>Date</th>
<th>Time</th>
<th>Gift Certificate ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wizard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gift Certificate</td>
<td>100.00</td>
<td>100.00</td>
<td>1</td>
<td>1</td>
<td>Main Bar</td>
<td>7503</td>
<td>12/3/08 13:49</td>
<td>154676542135</td>
<td></td>
</tr>
<tr>
<td>Gift Certificate Total</td>
<td>100.00</td>
<td>100.00</td>
<td>Quantity: 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wizard Total</td>
<td>100.00</td>
<td>100.00</td>
<td>Quantity: 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$100 Gift Certificate</td>
<td>100.00</td>
<td>100.00</td>
<td>10</td>
<td>10</td>
<td>Main Dining Room</td>
<td>7813</td>
<td>12/3/08 11:11</td>
<td>15467654235</td>
<td></td>
</tr>
<tr>
<td>$100 Gift Certificate Total</td>
<td>100.00</td>
<td>100.00</td>
<td>Quantity: 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key Total</td>
<td>100.00</td>
<td>100.00</td>
<td>Quantity: 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td>200.00</td>
<td>200.00</td>
<td>Quantity: 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**End of Report**
The **Gift Certificate** column displays the name of the gift certificate.

- The **Price** column displays the cost of the gift certificate to the customer.
- The **Value** column displays the amount that the customer can redeem with the gift certificate.
- The **Staff** column displays the staff ID that accessed the gift certificate.
- The **Manager** column displays the manager ID that satisfied any manager prompt associated with the gift certificate.
- The **Profit Ctr** column displays the profit center, where the transaction took place.
- The **Check** column displays the check number of the transaction.
- The **Date** column displays the date when the customer used the gift certificate.
- The **Time** column displays the time of transaction.
- The **Gift Certificate ID** column displays the unique gift certificate number.

**Gift Certificate Report: Summary Format**

You can change the report format by using the **Report Format** list on the **Main** tab of the Gift Certificate Report Maintenance Window. The **Summary** format of the Gift Certificate Report allows you to generate a report that displays totals for each gift certificate type. For more information on what the columns of this report contain or how to calculate their values, see “Gift Certificate Report Examples” on page 428.

<table>
<thead>
<tr>
<th>Gift Certificate</th>
<th>Price</th>
<th>Value</th>
<th>Quantity</th>
<th>Average Price</th>
<th>Average Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wizard Gift Certificate</td>
<td>100.00</td>
<td>100.00</td>
<td>1</td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>Wizard Total</td>
<td>100.00</td>
<td>100.00</td>
<td>1</td>
<td>100.00</td>
<td>100.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key</th>
<th>Price</th>
<th>Value</th>
<th>Quantity</th>
<th>Average Price</th>
<th>Average Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100 Gift Certificate</td>
<td>100.00</td>
<td>100.00</td>
<td>1</td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>$100 Gift Certificate Total</td>
<td>100.00</td>
<td>100.00</td>
<td>1</td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>Key Total</td>
<td>100.00</td>
<td>100.00</td>
<td>1</td>
<td>100.00</td>
<td>100.00</td>
</tr>
</tbody>
</table>

**Grand Total** | 200.00 | 200.00 | 2 | 100.00 | 100.00 |
- The **Quantity** column displays how many gift certificates are included in the report.
- The **Average Price** column displays the value of the Price column divided by the Quantity column (Price ÷ Quantity).
- The **Average Value** column displays the value of the Value column divided by the Quantity column (Value ÷ Quantity).

### Paid Out Report Maintenance Window

Paid Out Reports allow you to analyze information about your paid out transactions. You can use them to review and analyze information regarding specific transactions, including the staff members who performed them.

### Paid Out Report Maintenance Window: Main Tab

On the **Main** tab, you determine the format of your new report, as well as decide how the program organizes and sorts your records. The **Main** tab also allows you to filter paid out information by the ID of the manager who approved the transaction, the ID of the server who performed the transaction, the type of paid out, and the profit center in which the paid out was performed.
Report Format list

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>A summary of paid out transactions by type, including the value of each type of paid out, the quantity of each type of paid out, the average value of each type of paid out, and the percentage of the total amount of paid outs.</td>
</tr>
<tr>
<td>Audit</td>
<td>A list of paid out transactions, including the type of paid out used in each transaction, the value of the paid out, the name and ID number of the staff member who handled the paid out, the name and ID number of the manager who approved the paid out, any details entered at the time of the paid out, the profit center in which the paid out occurred, the register definition used to perform the paid out, and the date and time of the transaction.</td>
</tr>
</tbody>
</table>

Sort By list

You can also control how the program organizes the information in a report by selecting a sorting option from the Sort By list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the Sort By list. You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th>Sort By</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Sorts your report by the staff ID numbers of the servers who performed each paid out. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Sorts your report by the staff ID number of the manager who approved each paid out. You can use this option to view data for one manager at a time.</td>
</tr>
<tr>
<td>Paid Out Type</td>
<td>Sorts your report by each type of paid out.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Sorts your report by the profit centers within which the paid outs were performed.</td>
</tr>
</tbody>
</table>
Group By 1 list

You can control how the program organizes the information in your report by selecting a grouping option from the Group By 1 list. The program will list data alphabetically by the grouping option you select. You can group your data by any of the following criteria:

<table>
<thead>
<tr>
<th><strong>Staff ID</strong></th>
<th>Groups your information by the staff ID numbers of the servers who performed the paid outs.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Paid Out Type</strong></td>
<td>Groups your information by each type of paid out.</td>
</tr>
<tr>
<td><strong>Manager ID</strong></td>
<td>Groups your information by the staff ID numbers of managers who approved the paid outs.</td>
</tr>
<tr>
<td><strong>Profit Center</strong></td>
<td>Groups your information by the profit centers within which the paid outs were performed.</td>
</tr>
<tr>
<td><strong>Time Interval</strong></td>
<td>Groups your information by the time interval within which each paid out occurred.</td>
</tr>
<tr>
<td><strong>Week Day</strong></td>
<td>Groups your information by the day of the week within which each paid out occurred.</td>
</tr>
</tbody>
</table>

Group By 2 list

You can group your data to a second level by selecting a subgrouping option from the Group By 2 list. The Group By 2 list is identical to the Group By 1 list.
Optional Input list

If you select an optional input, the program will display a filter window for the selected data each time you print or preview this report at the Paid Out Reports window. You can select one of the following optional input criteria:

<table>
<thead>
<tr>
<th>Input</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff ID</td>
<td>Filters your report by the staff ID numbers of the servers who performed the paid outs. You can use this option to view data for one staff member at a time.</td>
</tr>
<tr>
<td>Manager ID</td>
<td>Filters your report by the staff ID numbers of the managers who approved the paid outs. You can use this option to view data for one manager at a time.</td>
</tr>
<tr>
<td>Paid Out Type</td>
<td>Filters your report by each type of paid out.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>Filters your report by the profit centers within which the paid outs were performed.</td>
</tr>
</tbody>
</table>

Default Range list

If you select a default range from this list, this default range will appear in the Range list of the Paid Out Reports window.

Manager ID boxes

You can filter your records by typing a range of staff ID numbers in the Manager ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print paid outs approved by managers with staff ID numbers between 100 and 200.

Staff ID boxes

You can filter your records by typing a range of staff ID numbers in the Staff ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print paid outs performed by servers with staff ID numbers between 100 and 200.
**Time boxes**

You can filter your records by typing a range in the *Time* boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only include paid outs performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

**Time Interval box**

You can enter a time interval by which the program will group the records in the report. The program will group paid outs by whatever number of minutes you type in the *Time Interval* box. For instance, if you type “30”, the program will collect information for paid outs occurring within each 30-minute interval of the specified time range. If you type a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: paid outs occurring from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00.

**Paid Out Report Maintenance Window: Paid Out Tab**

The *Paid Out* tab allows you to filter the report to include or exclude specific types of paid out transactions. You can include or exclude specific types of paid out transactions by adding paid out types to the *Include/Exclude* list.

You can set the program to either include or exclude the paid out types in the *Include/Exclude* list by clicking *Include* or *Exclude*. If you click *Include*, the program will only include the paid out types in the *Include/Exclude* list. If you click *Exclude*, the program will exclude the paid out types in the *Include/Exclude* list.

To move a paid out type from the *Available* list to the *Include/Exclude* list, select that paid out type and click \(\rightarrow\). To move a paid out type from the *Include/Exclude* box to the *Available* list, select the paid out type and click \(<\). To move all paid out types from the *Available* list to the
Register Reports Menu

Include/Exclude box, click \(\Rightarrow\). To move all paid out types in the Include/Exclude box to the Available list, click \(\Leftarrow\).

Paid Out Report Maintenance Window: Register Tab

The Register tab allows you to filter the report to include or exclude paid out transactions performed with specific register definitions. You can include or exclude paid out transactions performed with specific register definitions by adding register definitions to the Include/Exclude list.

You can set the program to either include or exclude paid out transactions performed with the register definitions in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include paid out transactions performed with the register definitions in the Include/Exclude list. If you click Exclude, the program will exclude all paid out transactions performed with the register definitions in the Include/Exclude list.

To move a register definition from the Available list to the Include/Exclude list, select that register definition and click \(\Rightarrow\). To move a register definition from the Include/Exclude box to the Available list, select the register definition and click \(\Leftarrow\). To move all register definitions from the Available list to the Include/Exclude box, click \(\Rightarrow\). To move all register definitions in the Include/Exclude box to the Available list, click \(\Leftarrow\).
Paid Out Report Maintenance Window: Profit Cnt Tab

The **Profit Cnt** tab features a filter that allows you to include or exclude paid out transactions performed in specific profit centers. You can set the program to include or exclude paid out transactions performed in specific profit centers by adding profit centers to the **Include/Exclude** list.

You can set the program to either include or exclude paid out transactions performed in specific profit centers in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include paid out transactions performed with specific profit centers in the **Include/Exclude** list. If you click **Exclude**, the program will exclude paid out transactions performed in specific profit centers in the **Include/Exclude** list.

To move a profit center from the **Available** list to the **Include/ Exclude** list, select that profit center and click ➔. To move a profit center from the **Include/Exclude** list to the **Available** list, select the profit center and click ←. To move all profit centers from the **Available** list to the **Include/Exclude** list, click ➔. To move all profit centers in the **Include/Exclude** box to the **Available** list, click ←.

Paid Out Report Maintenance Window: Day Tab

The **Day** tab allows you to filter the report to include or exclude paid out transactions performed on specific days of the week. The program will only print transactions performed on the days listed in the **Include** list and will not print any transactions performed on days listed in the **Exclude** list.
**Paid Out Report Maintenance Window: Memo Tab**

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text automatically wraps to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

**Paid Out Report Examples**

You can use Sales Tax reports to summarize sales tax by profit center, to audit sales that are tax exempt, or to summarize how often Digital Dining applied a particular tax. Digital Dining provides three end-of-day (EOD) reports (you cannot modify the report definition for EOD reports) and two report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Paid Out Report Maintenance Window: Main Tab” on page 433).

What each column of the Paid Out report contains or how Digital Dining calculates the column is sometimes not self evident:

The **Value** column displays the amount the staff member paid out for each transaction.

The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value column ÷ Quantity column).

The **% of Total** column displays the value of the Value column divided by the Grand Total.
Paid Out Report: EOD Paidout Audit

The EOD Paidout Audit report displays a list of each transaction that includes a paidout. You can use the EOD Paidout Audit report to report to analyze the value, date and time, and the staff member who applied each paid out for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Paid Out Report Examples” on page 440.

- The **Paid Out** column displays the name of the paid out that a staff member used at the POS.
- The **Value** column displays the amount the staff member paid out for each transaction.
- The **ID** column displays the Digital Dining staff member ID number.
The **Staff** column displays the name of the staff member who performed the transaction.

- The **Manager** column displays the name of the manager who approved the transaction.
- The **Details** column displays any additional details entered at the time of transaction.
- The **Profit Ctr** column displays the name of the profit center where a staff member performed the transaction.
- The **Register** column displays the register where a staff member performed the transaction.
- The **Date** column displays the date of the transaction.
- The **Time** column displays the time of the transaction.

### Paid Out Report: EOD Paidout Summary

The EOD Paidout Summary report displays a sum of all the paidout types that your staff members used at the POS. You can use the EOD Void Summary report to analyze paid out totals. For more information on what the columns of this report contain or how to calculate their values, see “Paid Out Report Examples” on page 440.

<table>
<thead>
<tr>
<th>Paid Out</th>
<th>Value</th>
<th>Quantity</th>
<th>Average</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Supplies</td>
<td>-462.00</td>
<td>14</td>
<td>-33.60</td>
<td>100.00%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>-462.00</td>
<td>14</td>
<td>-33.60</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

- The **Paid Out** column displays the name of the paid out that the manager performed.
- The **Value** column displays the amount the staff member paid out for each transaction.
- The **Quantity** column displays the number of transactions performed.
- The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value ÷ Quantity).
- The **% of Total** column displays the value of the Value column divided by the Grand Total.
Paid Out Report: EOD Pdout by Manager

The EOD Pdout by Manager report displays the sum of each paidout type that each manager approved. You can use the EOD Pdout by Manager report to analyze the value, date and time, and the manager who approved each discount for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Paid Out Report Examples” on page 440.

- The Paid Out column displays the name of the paid out that the manager performed.
- The Value column displays the amount the staff member paid out for each transaction.
- The Quantity column displays the number of transactions performed.
- The Average column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value ÷ Quantity).
- The % of Total column displays the value of the Value column divided by the Grand Total.

<table>
<thead>
<tr>
<th></th>
<th>Value</th>
<th>Quantity</th>
<th>Average</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wizard</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Supplies</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wizard, 1 Total</td>
<td>$462.00</td>
<td>14</td>
<td>-33.00</td>
<td>100.00%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>$462.00</td>
<td>14</td>
<td>-33.00</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

Paid Out Report: Audit Format

You can change the report format by using the Report Format list on the Main tab of the Paid Out Report Maintenance Window. The Audit format of the Paid Out Report allows you to generate a report that displays a list of all paid outs (including the date and time of the transaction) for the date range or period you provide so that you can track the transaction more efficiently. For more information on what the columns of this report contain or how to calculate their values, see “Paid Out Report Examples” on page 440.
Register Reports Menu

The **Paid Out** column displays the name of the paid out that a staff member used at the POS.

The **Value** column displays the amount the staff member paid out for each transaction.

The **ID** column displays the Digital Dining staff member ID number.

The **Staff** column displays the name of the staff member who performed the transaction.

The **Manager** column displays the name of the manager who approved the transaction.

The **Details** column displays any additional details entered at the time of transaction.

The **Profit Ctr** column displays the name of the profit center where a staff member performed the transaction.

The **Register** column displays the register where the staff member performed the transaction.

The **Date** column displays the date of the transaction.

The **Time** column displays the time of the transaction.

### DD CAFE

<table>
<thead>
<tr>
<th>Paid Out</th>
<th>Value</th>
<th>ID</th>
<th>Staff ID</th>
<th>Manager</th>
<th>Details</th>
<th>Profit Ctr</th>
<th>Register</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Supplies</td>
<td>-34.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>5/23/08</td>
<td>10:03</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-37.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>7/22/08</td>
<td>10:35</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-37.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Club Dining Room</td>
<td>Club DR Register</td>
<td>5/18/08</td>
<td>10:49</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-37.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>7/18/08</td>
<td>11:09</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-37.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>8/20/08</td>
<td>11:24</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-37.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>5/14/08</td>
<td>11:47</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-37.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>7/28/08</td>
<td>11:57</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-34.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>7/17/08</td>
<td>12:51</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-34.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>5/22/08</td>
<td>13:12</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-4.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>5/6/08</td>
<td>13:25</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-37.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>8/15/08</td>
<td>14:35</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-37.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>8/27/08</td>
<td>15:10</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-37.00</td>
<td>10</td>
<td>Kay</td>
<td>Wizard</td>
<td>Stamps</td>
<td>Main Dining Room</td>
<td>Table Service Register</td>
<td>7/29/08</td>
<td>15:22</td>
</tr>
</tbody>
</table>

Grand Total: -602.00  Quantity: 14  Average: -35.00

***End of Report***
Paid Out Report: Summary Format

You can change the report format by using the Report Format list on the Main tab of the Paid Out Report Maintenance Window. The Summary format of the Paid Out Report allows you to generate a report that displays totals for each paid out type. For more information on what the columns of this report contain or how to calculate their values, see “Paid Out Report Examples” on page 440.

<table>
<thead>
<tr>
<th>Date</th>
<th>12/3/08 14:17:27</th>
<th>Date Range: 1/3/08 to 12/3/08</th>
<th>Page 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operator: wizard</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paid Out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Supplies</td>
<td>-$462.00</td>
<td>14</td>
<td>-33.00</td>
</tr>
<tr>
<td>Grand Total</td>
<td>-$462.00</td>
<td>14</td>
<td>-33.00</td>
</tr>
</tbody>
</table>

- The **Paid Out** column displays the name of the paid out that the manager performed.
- The **Value** column displays the amount the staff member paid out for each transaction.
- The **Quantity** column displays the number of transactions performed.
- The **Average** column displays the value of the Value column divided by the value of the Quantity column, rounded to two decimal places (Value ÷ Quantity).
- The **% of Total** column displays the value of the Value column divided by the Grand Total.
Check Report Maintenance Window

Check Reports allow you to list and analyze checks, including open checks. You can use them to review and analyze information regarding specific transactions, including the staff members who performed them.

Check Report Maintenance Window: Main Tab

On the **Main** tab, you determine the format of your new report, as well as decide how the program groups your records. The **Main** tab also allows you to filter the report by a range of check numbers.
**Report Format list**

You can select one of three different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit</td>
<td>A list of checks and the menu items in each check, including the server’s name and each menu item’s description, price, quantity, value, and order time.</td>
</tr>
<tr>
<td>Summary</td>
<td>A list of checks, listed by check number, and the name of the server who opened each check.</td>
</tr>
<tr>
<td>Table Turns</td>
<td>A list of checks and the length of the table turn associated with each check.</td>
</tr>
<tr>
<td>Detail</td>
<td>A list of checks and the menu items in each check, including each item’s description, price, quantity, value, and order time. For each check, the report consolidates like items (where main items and modifiers are the same).</td>
</tr>
</tbody>
</table>

**Report Level list**

If you select the Table Turns report format, you must also select an appropriate report level in the Report Level list. By selecting a report level, you determine how much information the report includes regarding each check. (The Report Level list is only available with the Table Turns report format.)

<table>
<thead>
<tr>
<th>Report Level</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit</td>
<td>A list of checks and the menu items in each check, including the server’s name and each menu item’s description, price, quantity, value, and order time.</td>
</tr>
<tr>
<td>Summary</td>
<td>A list of checks, including the name of the server who opened each check.</td>
</tr>
</tbody>
</table>
**Group By list**

You can control how the program organizes the checks in your report by selecting a grouping option from the **Group By** list. The program will list data alphabetically by the grouping option you select. You can group your data by any of the following criteria:

<table>
<thead>
<tr>
<th>Server ID</th>
<th>Groups checks by the staff ID number and names of the servers who opened them.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profit Center</td>
<td>Groups checks by the profit centers in which the checks were opened.</td>
</tr>
<tr>
<td>Table Turn</td>
<td>Groups checks by the duration of each check’s table turn. (This option is only available for reports in the Table Turn format.)</td>
</tr>
<tr>
<td>Time Interval</td>
<td>Groups checks by whatever time interval you have entered in the <strong>Time Interval</strong> box, if any. (This option is only available for reports in the Table Turn format.)</td>
</tr>
</tbody>
</table>

**Subgroup By list**

You can group your data to a second level by selecting a subgrouping option from the **Subgroup By** list. The **Subgroup By** list is identical to the **Group By** list.

**Sort By list**

You can control how the program organizes the information in a report by selecting a sorting option from the **Sort By** list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the **Sort By** list. (The **Sort By** list is only available with the Table Turns report format.) You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th>Check Number</th>
<th>Sorts your report by check number.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seat Time</td>
<td>Sorts your report by the amount of time the customers on each check were seated at the table.</td>
</tr>
<tr>
<td>Table Turn</td>
<td>Sorts your report by amount of time of the table turn of each check.</td>
</tr>
<tr>
<td>Wait Time</td>
<td>Sorts your report by amount of time the customers on each check were on the wait list.</td>
</tr>
</tbody>
</table>
Default Range list

If you select a default range from this list, this default range will appear in the Range list of the Open Checks Reports window.

Check Number boxes

You can filter the report by typing a range of check numbers in the Check Number boxes. For instance, if you type “1000” in the first box and “2000” in the second box, the report only includes open checks with check numbers between 1000 and 2000.

Server ID boxes

You can filter your checks by server by typing a range of staff ID numbers in the Server ID boxes. For instance, if you type “100” in the first box and “200” in the second box, the program will only print checks opened by servers with staff ID numbers between 100 and 200. (The Server ID boxes are only available with the Table Turns report format.)

Time boxes

You can filter your records by typing a range in the Time boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only include checks opened between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range. (The Time boxes are only available with the Table Turns report format.)

Time Interval box

You can enter a time interval by which the program will group the checks in the report. The program will group checks by whatever number of minutes you type in the Time Interval box. For instance, if you type “30”, the program will collect information for checks occurring within each 30-minute interval of the specified time range. If you type a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with sales information in four groups: checks opened from 5:00 to 5:30, from 5:30 to 6:00, from 6:00 to 6:30, and from 6:30 to 7:00. (The Time Interval box is only available with the Table Turns report format.)
Status Filter area

The **Status Filter** area allows you to filter the report to only include open or deleted checks. If you click **Open Checks Only**, the report will only include checks that are currently open. If you click **Closed Checks Only**, the report will only include checks that have been closed. If you click **Deleted Checks Only**, the report will only include checks that were deleted. If you click **None**, the report will not filter the report for open or deleted checks. (The **Status Filter** area is not available for the Table Turns report format.)

Check Report Maintenance Window: Profit Cnt Tab

The **Profit Cnt** tab features a filter that allows you to include or exclude open checks opened in specific profit centers. You can include or exclude open checks opened in specific profit centers by adding profit centers to the **Include/Exclude** list.

You can set the program to either include or exclude open checks opened in specific profit centers in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include open checks opened in the profit centers in the **Include/Exclude** list. If you click **Exclude**, the program will exclude open checks opened in the profit centers in the **Include/Exclude** list.

To move a profit center from the **Available** list to the **Include/Exclude** list, select that profit center and click . To move a profit center from the **Include/Exclude** list to the **Available** list, select the profit center and click . To move all profit centers from the **Available** list to the **Include/Exclude** list, click . To move all profit centers in the **Include/Exclude** box to the **Available** list, click .
Check Report Maintenance Window: Times Tab

If you are using the Table Turn report format, you can use the **Times** tab to filter the checks in the report based on whether or not they have reached certain events. In a table service environment, the “life cycle” of a typical check includes several events: the check is opened, the customer’s first order is sent, the customer pays the check, and so on. Digital Dining records the times of each of these events, and the **Times** tab enables you to include or exclude checks from the Check Report if they have or have not reached one or more of these events.

For instance, you could generate a report listing all open checks currently in the restaurant by filtering the report to only include checks with customers who have been seated (they have reached the seat time) but have not yet paid the check (they have not reached the close time).

The **Show only checks with** area includes four check boxes, each representing an event in the “life” of a typical check. You can set the program to filter checks in the report by selecting one or more of these check boxes:

<table>
<thead>
<tr>
<th>This check box</th>
<th>Represents this event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seat Times</td>
<td>The customer is seated.</td>
</tr>
<tr>
<td>Order Times</td>
<td>The customer’s first order is sent.</td>
</tr>
<tr>
<td>Print Times</td>
<td>The customer’s (first) check is printed.</td>
</tr>
<tr>
<td>Close Times</td>
<td>The check is closed.</td>
</tr>
</tbody>
</table>
The **Show only checks with** area also includes three options that enable you to include or exclude the checks that have reached the selected events:

<table>
<thead>
<tr>
<th>If you select this option</th>
<th>The report will</th>
</tr>
</thead>
</table>
| **Not yet reached**       | Only include checks that have not yet reached the selected event(s).  
For instance, if you select the **Order Times** check box, the report only includes checks that have not reached the order time. |
| **Time reached**          | Only include checks that have reached the selected event(s).  
For instance, if you select the **Order Times** check box, the report only includes checks that have reached the order time. |
| **Time greater than zero**| Only include checks that have reached the selected event(s), but only if more than one minute elapsed since the previous event.  
For instance, if you select the **Order Times** check box, the report only includes checks that have reached the order times event, but only if the order times event occurred more than one minute after the seat event. This report would generate a list of checks and the amount of time each check’s customer waited after being seated to place a first order. However, the report also excludes any check where the customer waited less than one minute. |

### Check Report Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text automatically wraps to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Check Report Examples

You can use check reports to summarize sales tax by profit center, to audit sales that are tax exempt, or to summarize how often Digital Dining applied a particular tax. Digital Dining provides one end-of-day (EOD) report (you cannot modify the report definition for EOD reports) and two report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Check Report Maintenance Window: Main Tab” on page 446).

What each column of the Open Check report contains or how Digital Dining calculates the column is sometimes not self evident:

The **Price** column displays the amount of each menu item on each open check for each server.

The **Value** column displays the value of the Price column multiplied by the Quantity column (Price column x Quantity column).

Check Report: EOD Open Checks

The EOD Open Checks report displays a list of all menu items on all open checks for each staff member with at least one open check. You can use the EOD Open Checks report to list all open checks for any staff member with open checks for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Check Report Examples” on page 453.
The **Check Date** column displays the date the check was opened.

- The **Check** column displays the check number.
- The **Server** column displays the name of the server who opened the check.
- The **Menu Item** column displays the list of menu items from the open check.
- The **Price** column displays the amount of each menu item on each open check for each server.
- The **Quantity** column displays the number of menu items on the check.
- The **Value** column displays the value of the Price column multiplied by the Quantity column (Price x Quantity).
- The **Order Time** column displays the time when the customer ordered the menu items.

### Check Report: EOD Open Check Summ

The EOD Open Check Summ report displays a list of every check number (and the staff member who opened it) for the date range or period you provide. For more information on what the columns of this report contain or how to calculate their values, see “Check Report Examples” on page 453.
The **Check Date** column displays the date the staff member opened the check.

- The **Check Number** column displays the number of the check.
- The **Server** column displays the name of the server who served the check.

### Check Report: Audit Format

The **Audit** format allows you to generate a report that displays a list of all checks opened within the specified date range. For each check, the report includes the name of the server who opened the check, as well as the name, price, quantity, value, and order time of each menu item ordered on each check. For more information on what the columns of this report contain or how to calculate their values, see “Check Report Examples” on page 453.

- The **Check Date** column displays the date each check was opened.
- The **Check** column displays each check’s number.
- The **Server** column displays the name of the server who opened each check.
The Quantity column displays the number of menu items on each check.

The Menu Item column displays the name of each menu item.

The Order Type column displays the type of each menu item or transaction in the report.

The Order Status column displays the order status of each menu item in the report.

The Price column displays the amount of each menu item on each open check for each server.

The Value column displays the value of the Price column multiplied by the Quantity column (Price x Quantity).

The Order Time column displays the time when the customer ordered each menu item.

Check Report: Summary Format

The Summary format allows you to generate a report that lists any check (by its check number) and the name of the server who opened it. For more information on what the columns of this report contain or how to calculate their values, see “Check Report Examples” on page 453.

The Check Date column displays the date the staff member opened the check.

The Check Number column displays the number of the check.

The Server column displays the name of the server who served the check.
Check Report: Table Turn Format

The Table Turn format generates a report that lists checks opened within the selected date range. For each check, the report lists the check’s number, the table number, and the name and ID of the server who served the table. Also, for each check, the report lists the time the customer arrived, the time the customer was seated, the time the customer’s first order was sent, the time the customer’s check was first printed, and the time the check was closed. The report also includes the amount of time (in minutes) between each of these events (the amount of time between the arrival time and the seat time, and so on). The report also lists the length of each check’s table turn. The report’s footer also includes a total of the checks in the report and averages for each column. For more information on what the columns of this report contain or how to calculate their values, see “Check Report Examples” on page 453.

- The **Date** column displays the selected date range for the report.
- The **Table #** column displays the numbers of the tables served.
- The **Check #** column displays the numbers of the checks for those tables.
- The **ID** column displays the Digital Dining staff member ID number.
- The **Server** column displays the name of the server who served the table.
- The **Times** area displays the time when the customer arrived, the time the customer was seated, the time the customer’s first order was sent, the time the customer’s check was first printed, and the time the staff member closed the check.
- The **Minutes** area displays the amount of time (in minutes) between those events.

If you run the report with the Audit report level, the report lists each check within the date range. If you run the report with the Summary report level, the report only includes the grand totals and averages for each group and the overall report.
Check Report: Detail Format

The **Detail** format allows you to generate a report that displays a list of all checks opened within the specified date range. For each check, the report includes the name of the server who opened the check, as well as the name, price, quantity, and value of each menu item ordered on each check. For each check, the report consolidates like items (where main items and modifiers are the same).

- **Quantity** column displays the number of menu items on the check.
- **Menu Item** column displays the list of menu items from the open check.
- **Price** column displays the amount of each menu item on each open check for each server.
- **Value** column displays the value of the Price column multiplied by the Quantity column (Price x Quantity).
Reservations Reports allow you to list and analyze pending reservations. For instance, you can generate a report that filters and sorts pending reservations by status, by the reserved date and time, or by the properties of the reserved tables.

Reservations Report Maintenance Window: Main Tab

On the **Main** tab, you determine the format of your new report, as well as decide how the program organizes and sorts the reservations. The **Main** tab also allows you to filter reservations by time range and the number of covers of the reserved tables.

**Report Format list**

You can select one of two different report formats. Each format will produce a report with different information and/or arrangement:

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reservation List</strong></td>
<td>A list of reservations within a set date range, including the status of each reservation, the date and time of each reservation, the number of covers of each reserved table, the customer’s name and telephone number, and the special event (if any). The report can include old reservations or pending reservations, depending on the date range.</td>
</tr>
</tbody>
</table>
### Register Reports Menu

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reservation w/</td>
<td>A list of paid out transactions, including the type of paid out used in each transaction, the value of the paid out, the name and ID number of the staff member who handled the paid out, the name and ID number of the manager who approved the paid out, any details entered at the time of the paid out, the profit center in which the paid out occurred, the register definition used to perform the paid out, and the date and time of the transaction.</td>
</tr>
<tr>
<td>Properties</td>
<td></td>
</tr>
</tbody>
</table>

### Sort By list

You can set how the program organizes the information in a report by selecting a sorting option from the Sort By list. The program will sort items in alphabetical and/or numerical order by whatever item you select in the Sort By list. You can sort your items by any of the following criteria:

<table>
<thead>
<tr>
<th>Name</th>
<th>Sorts your reservations by their associated customer names.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date and Time</td>
<td>Sorts your reservations by their dates and times.</td>
</tr>
<tr>
<td>Special Events</td>
<td>Sorts your reservations by their associated special events.</td>
</tr>
<tr>
<td>Number of Covers</td>
<td>Sorts your reservations by the number of covers of the reserved tables.</td>
</tr>
<tr>
<td>Source</td>
<td>Sorts your reservations by their associated reservation sources.</td>
</tr>
</tbody>
</table>

### Group By list

You can control how the program organizes the reservations in your report by selecting a grouping option from the Group By list. The program will list data alphabetically by the grouping option you select. You can group your reservations by any of the following criteria:

<table>
<thead>
<tr>
<th>Date</th>
<th>Groups your reservations by the date.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Interval</td>
<td>Groups your reservations by time interval.</td>
</tr>
<tr>
<td>Number of Covers</td>
<td>Groups your reservations by the number of covers of the reserved tables.</td>
</tr>
<tr>
<td>Special Events</td>
<td>Groups your reservations by their associated special events.</td>
</tr>
</tbody>
</table>
**Reservation Status**
Groups your reservations by their statuses.

---

**Subgroup By list**

You can control how the program organizes the reservations in your report by selecting a grouping option from the **Subgroup By list**. The program will list data alphabetically by the grouping option you select. You can group your reservations by any of the following criteria:

<table>
<thead>
<tr>
<th>Grouping Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Groups your reservations by the date.</td>
</tr>
<tr>
<td>Time Interval</td>
<td>Groups your reservations by time interval.</td>
</tr>
<tr>
<td>Number of Covers</td>
<td>Groups your reservations by the number of covers of the reserved tables.</td>
</tr>
<tr>
<td>Special Events</td>
<td>Groups your reservations by their associated special events.</td>
</tr>
<tr>
<td>Reservation Status</td>
<td>Groups your reservations by their statuses.</td>
</tr>
</tbody>
</table>

---

**Default Range list**

If you select a default range from this list, this default range will appear in the **Range list** of the Reservations Report window.

---

**Covers boxes**

You can filter your report to include on reservations for tables with covers within a specified range. For instance, if you type “2” in the first box and “4” in the second box, the program will only print reservations for tables with two, three, or four covers.

---

**Time boxes**

You can filter your reservations by typing a range in the **Time boxes**. For instance, if you type “6:00” in the first box and “7:00” in the second box, the program will only include reservations for time slots between 6:00 P.M. and 7:00 P.M. of each day within the chosen date range.
Time Interval box

You can enter a time interval by which the program will group the reservations in the report. The program will group reservations by whatever number of minutes you type in the Time Interval box. For instance, if you type “30”, the program will collect information for reservations occurring within each 30-minute interval of the specified time range. If you type a time range of “5:00” to “7:00” and a time interval of “30”, the program will print a report with reservations in four groups: reservations for 5:00, for 5:30, for 6:00, and for 6:30.

Reservations Report Maintenance Window: Events Tab

The Events tab allows you to filter the report to include or exclude reservations associated with specific special events. You can include or exclude records associated with certain special events by adding special events to the Include/Exclude list.

You can set the program to include or exclude reservations associated with the special events in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include reservations associated with the special events in the Include/Exclude list. If you click Exclude, the program will exclude all reservations associated with the special events in the Include/Exclude list.

To move a special event from the Available list to the Include/Exclude list, select that special event and click Include. To move a special event from the Include/Exclude box to the Available list, select the special event and click Exclude. To move all special events from the Available list to the Include/Exclude box, click Include. To move all special events in the Include/Exclude box to the Available list, click Exclude.
Reservations Report Maintenance Window: Properties Tab

The Properties tab allows you to filter the report to include or exclude reservations for tables with specific table properties. You can include or exclude reservations associated with certain table properties by adding properties to the Include/Exclude list.

You can set the program to either include or exclude reservations associated with the table properties in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include reservations associated with the table properties in the Include/Exclude list. If you click Exclude, the program will exclude all reservations associated with the table properties in the Include/Exclude list.

To move a table property from the Available list to the Include/Exclude list, select that table property and click . To move a table property from the Include/Exclude box to the Available list, select the table property and click . To move all table properties from the Available list to the Include/Exclude box, click . To move all table properties in the Include/Exclude box to the Available list, click .

Reservations Report Maintenance Window: Status Tab

The Status tab allows you to filter the report to include or exclude reservations with specific statuses. For instance, you can filter a report to only include reservations that were canceled.
The **Available** list includes the following statuses:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirmed</td>
<td>The reservation exists and is pending.</td>
</tr>
<tr>
<td>Arrived</td>
<td>The reservation’s customer has arrived, but has not been seated.</td>
</tr>
<tr>
<td>Canceled</td>
<td>The customer canceled the reservation.</td>
</tr>
<tr>
<td>No Show</td>
<td>The customer did not show up to use the reservation.</td>
</tr>
<tr>
<td>Seated</td>
<td>The reservation’s customer arrived and has been seated.</td>
</tr>
</tbody>
</table>

You can set the program to include or exclude reservations with certain statuses by adding statuses to the **Include/Exclude** list. To move a status from the **Available** list to the **Include/Exclude** list, select that status and click ➔. To move a status from the **Include/Exclude** list to the **Available** list, select the status and click ◀. To move all statuses from the **Available** list to the **Include/Exclude** list, click ➔. To move all statuses in the **Include/Exclude** list to the **Available** list, click ◀.

You can set the program to either include or exclude reservations with the statuses in the **Include/Exclude** list by clicking **Include** or **Exclude**. If you click **Include**, the program will only include reservations with statuses in the **Include/Exclude** list. If you click **Exclude**, the program will exclude all reservations with statuses in the **Include/Exclude** list.

### Reservations Report Maintenance Window: Memo Tab

Every maintenance window has a **Memo** tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text automatically wraps to the next line, just as in most text and word processing programs. The **Memo** tab always has the number “0” as its shortcut key. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.
Reservations Reports

You can use Reservations reports to generate a list of reservations. They can include old reservations or pending reservations, depending on the date range. You can sort reservations by date and time, customer name, number of covers, special event, or source. Digital Dining provides two report formats for this report. You can customize how and what reports show by defining reports (for more information, see “Reservations Report Maintenance Window: Main Tab” on page 459).

Reservations Report: Reservations List

The Reservations List Report provides a list of reservations within a set date range. For each reservation, the report includes the status of the reservation, the date and time of the reservation, the number of covers of the reserved table, the customer’s name and telephone number, and the special event (if any). The report can include old reservations or pending reservations, depending on the date range.

<table>
<thead>
<tr>
<th>Status</th>
<th>Number</th>
<th>Date</th>
<th>Time</th>
<th>Covers</th>
<th>Name</th>
<th>Phone</th>
<th>Event</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amured</td>
<td>4</td>
<td>12/3/2011</td>
<td>6:30 PM</td>
<td>2</td>
<td>Anderson</td>
<td>(703) 523-9811</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amured</td>
<td>6</td>
<td>12/3/2011</td>
<td>6:30 PM</td>
<td>3</td>
<td>James</td>
<td>(703) 912-4555</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6:30:00 PM to 6:59:00 PM

2 reservations for 5 people.

7:00:00 PM to 7:29:00 PM

| Seated | 5      | 12/3/2011| 7:00 PM| 2      | Farnan    | (603) 645-7874 |                    |       |
| Seated | 9      | 12/3/2011| 7:00 PM| 2      | Peterson  | (703) 523-8911|                    |       |
| Seated | 8      | 12/3/2011| 7:00 PM| 4      | Wiberg    | (703) 523-3344| Smith Birthday    |       |
| Seated | 7      | 12/3/2011| 7:00 PM| 2      | Connell   | (703) 545-8807| Smith Birthday    |       |
| Seated | 10     | 12/3/2011| 7:00 PM| 5      | Smith     | (703) 523-8605| Smith Birthday    |       |

7:00:00 PM to 7:29:00 PM

5 reservations for 15 people.

Total
7 reservations for 20 people.
The **Status** column displays the reservation status.

The **Number** column displays the reservation number.

The **Date** column displays the date of the reservation.

The **Time** column displays the time of the reservation.

The **Covers** column displays the number of covers.

The **Name** column displays the name of the customer, who made the reservation.

The **Phone** column contains the customers’ phone numbers.

The **Event** column displays whether the customer made the reservation to celebrate an event.

The **Notes** column displays any notes entered by the staff member at the POS while taking the reservation.

---

### Reservations Report: Reservations with Properties

The Reservations with Properties Report provides a list of reservations with their associated table properties. For each reservation, the report includes the table properties, the status of the reservation, the date and time of the reservation, the number of covers of the reserved table, the customer’s name and telephone number, and the special event (if any). The report can include old reservations or pending reservations, depending on the date range.
General Reports Window

From the General Reports window, you can
- select a report to preview or print form the Report list,
- change the default period for the defined report,
- set a custom date range for the defined report,
- select whether to preview or print the report, or
- define the report.

After you create or access a report definition, you can print or preview from the General Reports Window.

General Report Maintenance Window: Main Tab

Using the Main tab of the General Report Maintenance window, you can create the bulk of the settings for each of the 99 general reports you can create.
Register Reports Menu

Export Type list

For each report definition, you can set the export type that Digital Dining will use to create the Microsoft Excel spreadsheet. The Export Type list displays the main exports that Digital Dining currently supports. You cannot modify the names of these export types, nor can you add new export types. Select the export type that matches the version of Microsoft Excel that you have installed on your computer.

Workbook box

For each report definition, you can customize the filename of the spreadsheet that Digital Dining creates. That is, the text (a maximum of twenty characters) that you enter in the Workbook box and .xls becomes the name of the file that Digital Dining creates for the report that you design (for example, if you have EODProfit in the Workbook box, then Digital Dining creates EODProfit.xls).

Note

Digital Dining replaces any spaces that you include in the Workbook box with underscores. Also, if you include any of the six characters that cannot be part of a Windows filename (that is, < > [ ] * ?), then Digital Dining replaces those characters with underscores, too. For example, if you type “<My>EOD[Profit]Center*Report?Name” in the Workbook box, then Digital Dining will change this to “_My_EOD_Profit_Center_Report_Name” when you save or exit the report definition. Remember, however, that your file name can only be twenty characters; therefore, your filename will be “_My_EOD_Profit_Cente.xls”

Macro box

For each report definition, you can have Digital Dining tell Microsoft Excel to run a macro on the created worksheet. For example, each time you create a worksheet, you could have Excel save it as a tab-delimited text file so that you could import that file directly into an accounting package, such as QuickBooks. The name of the macro should contain letters and underscores only, should not contain spaces, and should not exceed 20 characters.
**Date Range list**

If you select a default range from this list, this default range will appear in the **Range** list of the General Reports window. You can change this date before you preview or print the report from the General Reports window.

**Time Range boxes**

You can filter your records by typing a range in the **Time Range** boxes. For instance, if you type “10:00” in the first box and “14:00” in the second box, the program will only print information regarding transactions performed between 10:00 A.M. and 2:00 P.M. of each day within the chosen date range.

**Create Separate Daily Reports? check box**

If you select the **Create Separate Daily Reports?** check box, then Digital Dining will create a new workbook (a new file, that is) for each day that includes all the data items that you have in the **Include** list on the **Data** tab.

**Worksheets to Print box**

When Digital Dining creates the Microsoft Excel file, it creates

- a locked (cannot be printed or edited directly) worksheet for each data type you have put in the **Include** list on the **Data** tab
- a locked worksheet for the standard header information (for example, the name of the operator, the date, time, and name of the report when the report was created)
- a number (equal to the number you have entered in the **Worksheets to Print** box) of worksheets that you can manipulate (format, rearrange, or recalculate).
If you exported (let’s say that you previewed it) the above report definition and then reduced the value in the **Worksheets to Print** box to one and exported the report again, then the resulting Excel workbook would still have two worksheets. To remove a worksheet from a workbook, you must manually delete it while working in Excel.

### Password box

In the **Password** box, you can enter a password to protect your workbook (that is, the .xls file that gets created) from being viewed, modified, or printed. The user can still design, preview, or preview the report from the Back Office program without being prompted for a password. If, however, a user attempts to open the .xls file, then that user will be prompted to enter the password that appears in the **Password** box on the **Main** tab of the General Report Maintenance window.

### Design Report command

If you click **Design Report**, then Digital Dining will display the workbook in Excel so that you can manipulate the worksheets that you want to preview or print. Digital Dining retains all the changes you make to the .xls workbook and its worksheets. For example, if you rename a worksheet to, let’s say, “EODPfCtrl” or if you add borders, shading, font, color, calculations, or anything directly or by reference to cells from other worksheets, then Digital Dining will keep those attributes, calculations, or references each time you design, print, or preview the report definition (or until you manually change the worksheet again).
General Reports Maintenance Window: Data Tab

Using the **Data** tab of General Reports Maintenance window, you can include or exclude material from the report based on its data type. To move a data type from (to) the **Exclude** list to (from) the **Include** list, click the data type and click an appropriate single arrow direction (or ). If you click a double arrow direction ( or ), then Digital Dining will move all the data types from the list in the direction you specified.

![Data Tab Diagram]

If you add a data source to the Include list, the program includes that data source worksheet to the report’s Excel workbook.

General Reports Maintenance Window: Menu Tab

Using the **Menu** tab of the General Reports Maintenance window, you can filter the menu items that appear or don’t appear as part of your report. If you click **Find**, the Back Office program will display a window with all the menu items you have currently defined. Select **Include** to include the menu items or **Exclude** to exclude the menu items from the resulting report. To add a menu item to the list, double-click the menu item or select the menu item and click . To remove a menu item from the list, click the menu item and click . To remove all menu items from the list, click .
General Reports Maintenance Window: Day Tab

Using the Day tab of General Reports Maintenance window, you can include or exclude material from the report based on the day of the week the information was recorded. To move a day from (to) the Exclude list to (from) the Include list, click the day and click an appropriate single arrow direction ( or ). If you click a double arrow direction ( or ), then Digital Dining will move all the data types from the list in the direction you specified.

General Reports Maintenance Window: Memo Tab

Every maintenance window has a Memo tab, which is a large multiline, editable text box. If you type more than one line of information in this field, the text automatically wraps to the next line, just as in most text and word processing programs. You can use this tab to type comments about the current record or to inform other management or staff members about the record. You can type up to approximately 30 pages of text.

Process Credit Card Batch Report Examples

You can use Process Credit Card Batch reports to review a summary of the credit card batches that you have posted or the transaction details of each credit card transaction a staff member has posted in your operation. Digital Dining provides a detail summary format for the Process Credit Card Batch reports.
The Process Credit Card Details Report utility allows you to generate a report listing all of the credit card transactions posted for a selected date. The Process Credit Card Detail Report includes each transaction's check number, person number, server and cashier names (from the Report Names box on the Main tab of the Staff Member Maintenance window), credit card type, amount of the tip (if any), credit card number, and date of expiration. When you click Details Report (in the Process Credit Card Batch Report submenu of the Register Reports menu), the Report Date window opens. In the Date box, select the date whose (posted) credit card transactions you want to include in the report and click OK. The program generates the report and displays it in a standard report preview window.
Process Credit Card Batch Report: Summary Report

The Process Credit Card Batch Report utility allows you to generate a report listing any credit card batches on a selected date. The Process Credit Card Summary Report includes each batch’s number, process date, progress, status, the name of the manager who posted the batch, and call-in code (CIC). The report also includes the number and amount of transactions that Digital Dining transmitted per batch. The Receipt Count and Receipt Amount columns list the total number of transactions and their total amount in a particular batch. The Included Count and Included Amount columns list the total number of transactions and their total amount from the batch that were successfully transmitted to the credit card modem. The Forward Count and Forward Amount columns list the total number of transactions and their total amount that was successfully transmitted to the clearinghouse.

Credit Card Batch Summary Reports now display if a batch was manually reset. If you process a credit card batch and something disrupts the process, Digital Dining displays a prompt asking you to clear the batch or reset the batch. Later, if you generate a Credit Card Batch Summary Report that includes the disrupted batch, the report will indicate which choice you made (“Clear” or “Reset”).

Note

The call-in code (CIC) column will show an asterisk (that is, “*”) if the batch was successful. If, however, the batch was not successful, then the CIC column will show a number (the error number) that you can use when you call the clearinghouse to resolve the error.

To access the report, click Batch Report in the Process Credit Card Batch Report submenu of the Register Reports menu. The Report Date window opens. In the Date box, click the date whose credit card batches you want to view and click OK. The program will generate the report and display it in a standard report preview window.
### DD CAFE

**Date:** 12/22/08  14:27:56  
**Operator:** Smith

#### Today

<table>
<thead>
<tr>
<th>Batch #</th>
<th>Transport</th>
<th>Batch Date</th>
<th>Result</th>
<th>Batch Type</th>
<th>Posted</th>
<th>Receipts</th>
<th>Not Posted</th>
</tr>
</thead>
<tbody>
<tr>
<td>DD Batch: 3</td>
<td>VITAL</td>
<td>12/22/08</td>
<td>Completed</td>
<td>CC: Verifications</td>
<td>28.00</td>
<td>28.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Clearinghouse Batch Number</td>
<td>Action</td>
<td>Action Date &amp; Time</td>
<td>Status</td>
<td>Manager</td>
<td>Forward Count</td>
<td>Amount</td>
<td>Count</td>
</tr>
<tr>
<td>499</td>
<td>New Batch</td>
<td>12/22/08 14:04</td>
<td>Completed</td>
<td>Settled</td>
<td>1</td>
<td>1.00</td>
<td>28.00</td>
</tr>
<tr>
<td>DD Batch: 2</td>
<td>HEARTL</td>
<td>12/22/08</td>
<td>Completed</td>
<td>CC: PostAuth</td>
<td>7.00</td>
<td>7.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Clearinghouse Batch Number</td>
<td>Action</td>
<td>Action Date &amp; Time</td>
<td>Status</td>
<td>Manager</td>
<td>Forward Count</td>
<td>Amount</td>
<td>Count</td>
</tr>
<tr>
<td>524</td>
<td>New Batch</td>
<td>12/22/08 14:02</td>
<td>Completed</td>
<td>Settled</td>
<td>1</td>
<td>1.00</td>
<td>7.00</td>
</tr>
<tr>
<td>DD Batch: 1</td>
<td>HEARTL</td>
<td>12/22/08</td>
<td>Completed</td>
<td>CC: Verifications</td>
<td>0.00</td>
<td>16.00</td>
<td>16.00</td>
</tr>
<tr>
<td>Clearinghouse Batch Number</td>
<td>Action</td>
<td>Action Date &amp; Time</td>
<td>Status</td>
<td>Manager</td>
<td>Forward Count</td>
<td>Amount</td>
<td>Count</td>
</tr>
<tr>
<td>522</td>
<td>New Batch</td>
<td>12/22/08 14:00</td>
<td>Completed</td>
<td>Settled</td>
<td>1</td>
<td>1.00</td>
<td>16.00</td>
</tr>
<tr>
<td>523</td>
<td>Refund</td>
<td>12/22/08 14:01</td>
<td>Completed</td>
<td>Settled</td>
<td>1</td>
<td>1.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Batch Totals:** 35.00  51.00  16.00

---

The **Batch #** column displays the Digital Dining batch number (in **bold**) and the clearinghouse batch number (in regular print).

The **Transport** column displays the transport type through which the batch was posted (for example, Vital, Heartland, Demo). The **Action** column displays whether the batch is new, reposted, or it will be a refund.

The **Batch Date** column displays the date and time a restaurant attempted to post the batch.

The **Result** column displays the outcome of the attempt to process the batch (for example, completed, incompleted, or failed).

The **Batch Type** column displays the type of the batch and the type of authorizations connected to the batch. The **Status** column displays the status of the batch. The **Manager** column displays the manager logged in during the posting of the batch.

The **Posted** column consists of two columns: the **Forward Count** column and the **Forward Amount** column. The **Forward Count** column displays the number of transactions posted. The **Forward Amount** column displays the dollar amount posted.
The **Receipts** column consists of two columns: the **Receipts Count** column and the **Receipts Amount** column. The **Receipts Count** column displays the number of receipts sent. The **Receipts Amount** column displays the dollar amount of receipts processed.

The **Not Posted** column displays displays the transport type and the error message if the batch processing fails or is incomplete.

**Process Credit Card Batch Report: Receipt Summary Report**

The Credit Card Receipt Summary Report utility allows you to generate a report that lists batch information for particular credit card type (Visa, Master Card, and so on). The report lists total tips and sales per card type, the date the batch was processed, the batch’s status and progress, and the name of the manager who processed the batch.

<table>
<thead>
<tr>
<th>Card Type</th>
<th>Tips</th>
<th>Amount</th>
<th>Process Date</th>
<th>Progress</th>
<th>Status</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Card</td>
<td>26.85</td>
<td>152.34</td>
<td>10/04/03</td>
<td>Settled</td>
<td>Completed</td>
<td>Joe</td>
</tr>
<tr>
<td>Visa</td>
<td>54.40</td>
<td>366.81</td>
<td>10/04/03</td>
<td>Settled</td>
<td>Completed</td>
<td>Joe</td>
</tr>
<tr>
<td>Master Card + Visa</td>
<td>81.25</td>
<td>519.15</td>
<td>10/04/03</td>
<td>Settled</td>
<td>Completed</td>
<td>Joe</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td></td>
<td><strong>519.15</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The **Card Type** column displays the type of credit card.

The **Tips** column displays the amount of tips charged to the card.

The **Amount** column displays the full amount charged to the card.

The **Process Date** column displays the date when the system processed the batch.

The **Status** column displays the current status of each batch.

The **Manager** column displays the name of the manager who processed the batch.
To access the report, click Receipt Summary in the Process Credit Card Batch Report submenu of the Register Reports menu. The Report Date window opens. In the Date box, click the date whose credit card batches you want to view and click OK. The program will generate the report and display it in a standard report preview window.

Credit Card Log Report

The Credit Card Log Report can include information from the credit card log about either credit card transactions, batches, or both. In the Log Mode box, click Normal to include only credit card transactions in the report, click Batch to include only batch information in the report, or click Both to include both transactions and batches.

You can select a time period from the Range list, such as any day of the week, any month of the year, the preceding pay period, and so on. If you want to set an irregular date range, you can click Custom and then type the specific date range in the Date Range boxes.

In the Print area, you can set the program to print the report or preview the report before printing. You can preview a report by clicking the Preview option and then clicking the Print command. The program will display a preview of the report, which you can then print or save (that is, export as a file). You can print your report without previewing it by clicking the Print option and then clicking the Print command.
Credit Card Log Report Examples

You can use the Credit Card Log reports as trouble shooting aids for individual credit card problems and for processing batch problems. Unlike most other reports, you can adjust only the date range for the Credit Card Log reports.

Credit Card Log Report: Both Log Mode

You can change the log mode by using the Log Mode list on the Credit Card Log Report window. The Both log mode of the Credit Card Log Report allows you to generate a report that lists each step of a credit card transaction and each step of a batch transaction.

<table>
<thead>
<tr>
<th>Time</th>
<th>Message</th>
<th>Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/16/2008</td>
<td>Sending Request</td>
<td>Normal</td>
</tr>
<tr>
<td>11:37:10</td>
<td>Request type: 2</td>
<td></td>
</tr>
<tr>
<td>11:37:32</td>
<td>Check No: 10954</td>
<td>Normal</td>
</tr>
<tr>
<td>11:37:32</td>
<td>Amount: 8.28</td>
<td>Normal</td>
</tr>
<tr>
<td>11:37:32</td>
<td>Request result: Approved</td>
<td>Normal</td>
</tr>
<tr>
<td>11:38:39</td>
<td>Sending Request</td>
<td>Normal</td>
</tr>
<tr>
<td>11:38:59</td>
<td>Finished processing. Waiting for next Request</td>
<td>Normal</td>
</tr>
<tr>
<td>11:38:59</td>
<td>Request type: 2</td>
<td></td>
</tr>
<tr>
<td>11:38:59</td>
<td>Check No: 10955</td>
<td>Normal</td>
</tr>
<tr>
<td>11:38:59</td>
<td>Amount: 6.26</td>
<td>Normal</td>
</tr>
<tr>
<td>11:38:59</td>
<td>Request result: Approved</td>
<td>Normal</td>
</tr>
<tr>
<td>11:38:59</td>
<td>Sending Request</td>
<td>Normal</td>
</tr>
<tr>
<td>11:38:59</td>
<td>Finished processing. Waiting for next Request</td>
<td>Normal</td>
</tr>
</tbody>
</table>

***End of Report***
Credit Card Log Report: Normal Log Mode

You can change the log mode by using the Log Mode list on the Credit Card Log Report window. The Normal log mode of the Credit Card Log Report allows you to generate a report that lists each step of a credit card transaction.

<table>
<thead>
<tr>
<th>Time</th>
<th>Message</th>
<th>Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/14/08 16:29:10</td>
<td>Switching to file: C:\T2700\Demo\CD\CLO11402.DBF</td>
<td>Normal</td>
</tr>
<tr>
<td>16:29:10</td>
<td>*** DDC/3RV1 7.2.701 Started ***</td>
<td>Normal</td>
</tr>
<tr>
<td>16:29:10</td>
<td>Operation Mode: DEMO</td>
<td>Normal</td>
</tr>
<tr>
<td>16:29:10</td>
<td>Office Path</td>
<td>Normal</td>
</tr>
<tr>
<td>16:29:10</td>
<td>Local Computer Name: D5YP97EVE</td>
<td>Normal</td>
</tr>
<tr>
<td>18:32:51</td>
<td>Switching to file: C:\T2700\Demo\CD\CLO11402.DBF</td>
<td>Normal</td>
</tr>
<tr>
<td>18:32:51</td>
<td>*** Terminating The Program ***</td>
<td>Normal</td>
</tr>
<tr>
<td>1/15/08 08:22:51</td>
<td>Switching to file: C:\T2700\Demo\CD\CLO11502.DBF</td>
<td>Normal</td>
</tr>
<tr>
<td>08:22:51</td>
<td>*** DDC/3RV1 7.3.501 Started ***</td>
<td>Normal</td>
</tr>
<tr>
<td>08:22:51</td>
<td>Operation Mode: DEMO</td>
<td>Normal</td>
</tr>
<tr>
<td>08:22:51</td>
<td>Office Path</td>
<td>Normal</td>
</tr>
<tr>
<td>08:22:51</td>
<td>Local Computer Name: D5YP97EVE</td>
<td>Normal</td>
</tr>
<tr>
<td>14:49:02</td>
<td>Received Verification Request Type 1, Staff 10, Check 6644, Amount 29.85, ID 1</td>
<td>Normal</td>
</tr>
<tr>
<td>14:49:02</td>
<td>&lt;D&gt; REGULAR VERIFICATION - request completed: ID 1, Type 1, Staff 10, Check 6644, Amount Normal</td>
<td>Normal</td>
</tr>
<tr>
<td>29.85</td>
<td></td>
<td>Normal</td>
</tr>
<tr>
<td>18:02:15</td>
<td>Switching to file: C:\T2700\Demo\CD\CLO11502.DBF</td>
<td>Normal</td>
</tr>
<tr>
<td>18:02:17</td>
<td>*** Terminating The Program ***</td>
<td>Normal</td>
</tr>
</tbody>
</table>

*** End of Report ***
Credit Card Log Report: Batch Log Mode

You can change the log mode by using the **Log Mode** list on the Credit Card Log Report window. The **Batch** log mode of the Credit Card Log Report allows you to generate a report that lists each step of a batch transaction.

<table>
<thead>
<tr>
<th>Time</th>
<th>Message</th>
<th>Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/16/2008</td>
<td>Initiating the Batch. Processing date: 01/16/2003</td>
<td>Batch</td>
</tr>
<tr>
<td>20:52:49</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20:52:50</td>
<td>Get Batch status</td>
<td>Batch</td>
</tr>
<tr>
<td>Batch status: 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Batch number: 32</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total count including voids: 54</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total count without voids: 54</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requested balance: 924.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forward count: 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forward balance: 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Error description: Message code: 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20:52:50</td>
<td>Evaluating Batch Status</td>
<td>Batch</td>
</tr>
<tr>
<td>20:52:50</td>
<td>Creating New Batch Summary Record</td>
<td>Batch</td>
</tr>
<tr>
<td>20:52:50</td>
<td>Batch Reset</td>
<td>Batch</td>
</tr>
<tr>
<td>20:52:51</td>
<td>Clear Batch request succeeded</td>
<td>Batch</td>
</tr>
<tr>
<td>20:52:52</td>
<td>Open Batch request - success</td>
<td>Batch</td>
</tr>
<tr>
<td>20:52:53</td>
<td>Get Batch status</td>
<td>Batch</td>
</tr>
</tbody>
</table>

*** End of Report ***

Check Audit

The Check Audit utility allows you to print an audit report for a specific check. An audit report lists all of the actions (Exit, Finish, Send, Pay, and so on) that occurred while the check was open, and the exact time that each action occurred. In the **Date** box, select the date of the check that you want to audit. To select a specific check, click in the **Check** box and then select the appropriate check number from the Find Check Number window.
To view a preview of the check audit report, select Preview and then click OK. To print the report, select Print and then click OK.

Print Slip

The Print Slip utility allows you to preview or reprint a closed check or receipt. In the Type list, select the type of slip that you want to view (either Check or Receipt). In the Date box, select the date of the check or receipt you want to view.

To select a specific check or receipt, click in the Check box and then select the appropriate check number from the Find Check Number window. To view a preview of the check or receipt, select Preview and then click OK. To print a copy, select Print and then click OK.
List Reports

The List Reports utility allows you to preview or print a List Report from any maintenance window available within any of the programs in Digital Dining.

In the **Project Area** list, select the Digital Dining program that includes the maintenance window where you create or edit the records you want to list. For instance, if you want to generate a list of staff departments, you would select DDWin in the **Project Area** list, because you create staff departments in the Staff Department Maintenance window, which is in the Back Office program (DDWin.exe).

After you select a program in the **Project Area** list, the **List Report** list will include all of the types of records available in the selected program. Select the type of List Report you want to list. To view a preview of the list, click **Print**. The program will display a List Report report listing all of the items of the selected type.
## Register Reports Menu

### DD CAFE

**List of Sales Reports**

<table>
<thead>
<tr>
<th>Report</th>
<th>Format</th>
<th>Sort By</th>
<th>Group 1</th>
<th>Group 2</th>
<th>Staff Range</th>
<th>Tab Range</th>
<th>Time Range</th>
<th>Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profit Center</td>
<td>OREASLES</td>
<td>None</td>
<td>Profit C</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>--</td>
<td>0</td>
</tr>
<tr>
<td>Item Sales Report 1</td>
<td>OREASLES</td>
<td>Quantity</td>
<td>Time</td>
<td>None</td>
<td>0--0</td>
<td>1--</td>
<td>11:00-18:00</td>
<td>15</td>
</tr>
<tr>
<td>Item Sales Report 2</td>
<td>OREASLES</td>
<td>PLU</td>
<td>Staff ID</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>06:00-05:59</td>
<td>0</td>
</tr>
<tr>
<td>Audit Report</td>
<td>ORAUDIT</td>
<td>None</td>
<td>Time</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>--12:00</td>
<td>15</td>
</tr>
<tr>
<td>Items By Profit</td>
<td>OREASLES</td>
<td>PLU</td>
<td>Profit C</td>
<td>Time</td>
<td>0--0</td>
<td>--</td>
<td>--</td>
<td>0</td>
</tr>
<tr>
<td>Items By Day</td>
<td>OREASLES</td>
<td>PLU</td>
<td>WeekDay</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>06:00-05:59</td>
<td>15</td>
</tr>
<tr>
<td>Items By Time</td>
<td>OREASLES</td>
<td>PLU</td>
<td>Time</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>--</td>
<td>15</td>
</tr>
<tr>
<td>Audit</td>
<td>ORAUDIT</td>
<td>None</td>
<td>Time</td>
<td>None</td>
<td>10--0</td>
<td>--</td>
<td>--</td>
<td>15</td>
</tr>
<tr>
<td>Sales Contest</td>
<td>OREASLES</td>
<td>PLU</td>
<td>Staff ID</td>
<td>None</td>
<td>10--0</td>
<td>--</td>
<td>--</td>
<td>0</td>
</tr>
<tr>
<td>Sandwich Day/Part</td>
<td>OREASLES</td>
<td>PLU</td>
<td>Profit C</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>--</td>
<td>240</td>
</tr>
<tr>
<td>Non-Alcoholic Bever</td>
<td>OREASLES</td>
<td>PLU</td>
<td>Staff ID</td>
<td>None</td>
<td>10--0</td>
<td>--</td>
<td>06:00-05:59</td>
<td>0</td>
</tr>
<tr>
<td>Items by Hour</td>
<td>OREASLES</td>
<td>PLU</td>
<td>Time</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>--15:55-05:59</td>
<td>15</td>
</tr>
<tr>
<td>Test</td>
<td>OREASLES</td>
<td>None</td>
<td>Profit C</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>15:55-05:59</td>
<td>15</td>
</tr>
<tr>
<td>Weekly Beer</td>
<td>OREASLES</td>
<td>None</td>
<td>Staff ID</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>06:00-05:59</td>
<td>15</td>
</tr>
<tr>
<td>Weekly Beer Sales</td>
<td>OREASLES</td>
<td>None</td>
<td>Prep Typ</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>06:00-05:59</td>
<td>15</td>
</tr>
<tr>
<td>Hourly Sales</td>
<td>OREASLES</td>
<td>None</td>
<td>Profit C</td>
<td>Time</td>
<td>10--0</td>
<td>--</td>
<td>06:00-05:59</td>
<td>60</td>
</tr>
<tr>
<td>Pizza Sales Contest</td>
<td>OREASLES</td>
<td>PLU</td>
<td>Staff ID</td>
<td>None</td>
<td>10--0</td>
<td>--</td>
<td>06:00-05:59</td>
<td>0</td>
</tr>
<tr>
<td>Monday Sales Contest</td>
<td>OREASLES</td>
<td>PLU</td>
<td>Staff ID</td>
<td>None</td>
<td>10--0</td>
<td>--</td>
<td>11:00-14:00</td>
<td>0</td>
</tr>
<tr>
<td>Server Check Report</td>
<td>ORAUDIT</td>
<td>None</td>
<td>Prep Typ</td>
<td>None</td>
<td>0--0</td>
<td>--</td>
<td>06:00-05:59</td>
<td>0</td>
</tr>
</tbody>
</table>
Utilities Menu

Overview

The **Utilities** menu includes an array of processing utilities, which you can use to process your daily POS and credit card transactions files. Most restaurant managers typically perform these duties on a daily basis, immediately before or after each workday. Therefore, we refer to these utilities collectively as the End-of-Day Processing utilities.

The **Utilities** menu also includes several troubleshooting utilities, such as the Repair Daily Data Files and the Remove Credit Card Utility windows, which can help you to repair errors in your daily POS files or fix faulty credit card transaction data. You can also use the Zip Data utility to create a zip file containing all your system files, as well as all the POS daily files within a specified data range. And finally, the Utilities menu includes the Get Updates utility, which allows you to download update and patch files from within the Back Office program.

Process Registers

By using the Process Registers utility, you can process each day’s transactions without printing all of your register reports. You might use this utility if your end-of-day process is delayed and you have already printed your register reports.

When you click **Process Registers** on the **Utilities** menu, the program will prompt you to process daily POS files for the date following the most recent date of processing. For instance, if you last processed your registers on December 11, 1997, the program will automatically process daily POS files for December 12, 1997. Click **Yes** at the prompt to process the registers. The program will extract information from the daily POS files and update your menu item, staff, A/R, discounts, charges, tips, frequent diner, and inventory history files. The program will then reset and clear all of the transaction information in the daily register files. If you try to process daily POS files for a date that does not have any, the program will first prompt you to create daily POS files for that date before processing them.
Utilities Menu

Note

You must process the credit cards transactions of a given date before you can process the registers of that date (for more information, see "Process Credit Cards" on page 488).

Process and Reports

By using the Process and Report utility, you can process each day’s transactions and print all of your register reports simultaneously. When you click Process and Report on the Utilities menu, the program will automatically prompt you to process daily POS files for the date following the most recent date of processing. For instance, if you last processed your registers on December 11, 1997, the program will automatically process daily POS files for December 12, 1997. If you click Yes at the prompt, the program will then process the daily POS files and then print the end-of-day reports.

Process Date Range

The Process Date Range utility allows you to process daily POS files for any specific date or for a range of dates. Unlike the Process Registers utility, which only processes registers for the latest date in the date sequence, the Process Date Range utility allows you to process registers for any particular date. You can also use this utility to process registers for multiple days at once.

When you click Process Date Range on the Utilities menu, the Process Date Range window opens. The program will automatically use the date of the most
current processing as the opening date. Click a date in the second Date box to set a date range and then click Start. The program will then check each date within the date range and prompt you to create and process daily POS files for any dates that have no files.

**Current Date check box**

If you click the Current Date check box, the program will process the daily POS files for the current date along with any other dates in the date range. If you clear the Current Date check box, the program will not process daily POS files for the current date.

**Future Dates check box**

If you click the Future Dates check box, the program will create and process the daily POS files for any future dates within the date range. You can use this feature to create and process daily POS files for upcoming holidays. For instance, if your restaurant is closed on Sundays, you can use this utility on a Saturday evening to process daily POS files for both Saturday and Sunday. When you open your restaurant Monday morning, your history records will be up to date.

**Missing Dates (creates empty files) check box**

If you click the Missing Dates (creates empty files) check box, the program will automatically create and process daily files for any dates that have no files, without prompting for each date. If you click the Missing Stand Alone POS Uploads check box, the program will automatically create and process daily files for any defined stand-alone POS workstations with dates that have no files, without prompting for each date.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once you have processed daily POS files for a particular date, the program will not allow you to open the POS on that date. Therefore, you should not process daily files for the current date or any future dates if you plan to run the POS.</td>
</tr>
</tbody>
</table>
Utilities Menu

Process Utilities

The Process Utilities utility allows you to access the POS from the Back Office so that you can review or edit the daily POS files. You can edit files for any date, so long as the daily POS files exist for that date.

When you click Process Utilities on the Utilities menu, the POS Date window opens. In the Date box, click the date of the daily POS files you wish to edit and click OK. The POS will open, displaying the Register Reports and Register Option buttons. You can access any of the register reports or register options from this screen. You can perform any type of transaction other than ordering menu items.

Process Members

If you use a club package interface (such as DMS, Jonas, or Vanguard), you can use the Process Members utility to process your club package files. When you click Process Members on the Register Reports menu, the Export Date window opens. In the Date box, click the date of the files you wish to process and click OK. The program will create a file containing all of the club package transactions for the selected date, which your club package software can use later.

Process Credit Cards Window

The Process Credit Cards utility allows you to manage batches of credit card transactions. In this window, you can perform various tasks to manage credit card batches, such as post batches, troubleshoot failed batches, and clear unposted transactions (if necessary).

Process Credit Cards Window: Batching Tab

The Batching tab allows you to post credit card batches for specific dates, and other troubleshooting tasks. If you click the Date box, the program will display a calendar box, which allows you to select the day that needs processing. In the calendar box, the program displays the days that need processing with a light blue background.
In the **Task** list, you can select a task that you want the utility to perform. After selecting an appropriate task, choose the batch you wish to process in the **Batch** list. The **Batch** list includes each of the batches processed on the selected date, including its status and total dollar amount. After selecting an appropriate date, task, and batch, click **Next Step**. If you selected **Process Batch** in the **Task** list, the program will process the selected batch.

You can use the Process Credit Cards utility to perform the following tasks:

<table>
<thead>
<tr>
<th>Utility Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Process Batch</strong></td>
<td>If you run this task, the program processes the selected batch of credit card transactions and sends the information to the clearinghouse.</td>
</tr>
<tr>
<td><strong>Reverify Batch</strong></td>
<td>If a batch fails to post, you can use this task to repair the interrupted batch before reposting. If you run the task, the program will repair the transaction data without reassigning the status of “swiped” transactions to “manual entry” or reclassifying the transactions as post-authorized.</td>
</tr>
<tr>
<td><strong>Clear Batch</strong></td>
<td>If you run this task, the program will set all transactions within the selected batch as posted.</td>
</tr>
<tr>
<td><strong>Reset Batch</strong></td>
<td>If you run this task, the program will reset all transactions within the selected batch as unposted.</td>
</tr>
<tr>
<td><strong>Refund Batch</strong></td>
<td>If you run this task, the program will refund all transactions within the selected batch. Specifically, the program inverts the value of all transactions within the batch. For instance, the program would resend a transaction for $20 as “$-20.”</td>
</tr>
</tbody>
</table>
### Utilities Menu

<table>
<thead>
<tr>
<th>Utility Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repost Batch</td>
<td>If you run this task, the program will post all unposted transactions within the selected batch. If a specific batch has failed due to communication issues, then this utility would be a likely remedy.</td>
</tr>
<tr>
<td>Repost Batch with new number</td>
<td>If you run this task, the program will automatically increment the batch number during the posting process. You can use this task if the clearinghouse views the batch you are posting as a duplicate of a previously posted batch. To avoid double posting, notify the clearinghouse before using this utility.</td>
</tr>
<tr>
<td>Reverify with new approval</td>
<td>If you run this task, the program will contact the network and receive a new approval code for each unposted transaction in the batch. This task corrects problem batches that include bad approval codes, improper entry of post authorized approval codes, or resends a batch that has been found to be dormant for an extended period of time.</td>
</tr>
</tbody>
</table>

### Process Credit Cards Window: Utilities Tab

The **Utilities** tab contains the Clear All utility, which allows you to post all unposted transactions that are associated with batch numbers. The program clears these transactions by running the batching process with the Demo transport type. To clear the unposted credit card transactions, select the date in the **Clear Transactions** box and click the **Clear All** button. The Back Office program will display a warning message and require you to type “YES” to continue. If you type “YES”, the program will clear all the unposted credit card and gift card transactions.
American Express Settlement

If the site uses American Express, you can use the American Express Settlement utility to check the American Express .ftp site and download any new confirmation messages.

Unlike most clearinghouses, American Express does not immediately verify that they have received a batch. Instead, American Express posts an acknowledgment message (acknowledging that they received the batch) and a confirmation message (confirming that they processed the transactions). The acknowledgment and confirmation messages are text files that American Express posts on their .ftp site. They usually post the acknowledgment message a few minutes after you send a batch, and they usually post the confirmation message roughly six hours after you send a batch.

Digital Dining features a program (DDpollAmex.exe) that runs alongside the Credit Card Server program and monitors the American Express .ftp site at hourly intervals. If the DDPollAmex program detects an acknowledgment or confirmation message, it automatically downloads the text file to a subdirectory in the Digital Dining system data (C:\DDWin\DATA\GENERAL\Amex).

The name of each acknowledgment and confirmation text file contains the site’s file name, the tracking number, and the date and time the file was created. Each file’s name also contains a letter code (“A” or “C”) that designates it as either an acknowledgment or a confirmation.

If you run the Credit Card Batch Report after you receive a confirmation message, the Report will list the status of the new batch as “Confirmed.”

The DDPollAmex program automatically searches for newly posted messages at approximately hourly intervals, but you can also search for new files manually by running the American Express Settlement utility. The DDPollAmex program will immediately check the American Express .ftp site and download any new messages.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you have problems posting a batch, you can contact American Express at 1-800-297-5555 and ask for the SFT Department.</td>
</tr>
</tbody>
</table>
Search Credit Card Transactions

The Search Credit Card Transactions utility allows you to find the specific data (such as transaction date, check number, person number, receipt amount and receipt type) of a rejected American Express credit card transaction in a posted batch. The American Express clearinghouse assigns a record ID number to each transaction in a posted batch. If a transaction fails, you can find its record ID in the batch status report that you download from the American Express secure FTP site.

In the **Batch Record ID** box, enter the record ID of the failed transaction. In the **DD Batch Number** box, type the batch number. Then click **Search**. The program will display the transaction information in the dialog box.

Credit Card Info

The Credit Card Info window allows you to view or print a report listing information about one or more credit card transactions. You can specify a single credit card transaction or view all credit card transactions within a specified date range. To view all of the credit card transactions within a specified date range, select a range of dates in the **Date Range** boxes.

The **Card Type** list allows you to select the type of transactions that you want to include in the report. If you select **Credit Cards**, the report will only include credit card transactions and will exclude all gift card transactions. If you select **Gift Cards**, the report will include gift card transactions only and will exclude all credit card transactions. If you select **Both**, the report will include both credit card and gift card transactions.

To view all of the transactions associated with a single credit card, type the last four digits of the credit card number in the **Last Four Digits of Card Number** box.
In the Print area, you can set the program to print the report or preview the report before printing. To preview the report, click the Preview option and then click the Print command. The program displays a preview of the report, which you can then print or save (that is, export as a file). To print the report without first previewing it, click the Print option and then click the Print command.

The report lists each transaction’s credit card number, the credit card’s expiration date, the transaction’s amount, the charge tip amount, the owner’s name, the check number, the transaction’s date and time, the server’s ID number, the cardholder’s Person Number, and the approval number.
If you use the In The Bank transport type, the Reference Number column will list the invoice numbers of the transactions. (The Shift4 network requires the program to include the reference number to comply with its standards.)

The report also includes the card’s use state in the Used State column. For each transaction in the report, the program indicates if the card was used to pay the transaction and if was posted. If the card was verified but not used to pay the transaction, the report will list the state as “Unused”. If the card was used to pay the transaction but not posted, the report will list the state as “Not Posted”. If the card was used to pay the transaction and has already been posted, the report will list the state as “Posted”.

Card Voice Authorization Entry

The Card Voice Authorization Entry utility allows you to enter a new authorization code for a particular credit card transaction. You can use this utility to perform offline settlement. If you call a clearinghouse and receive a new approval number for a transaction, you can use the Card Voice Authorization Entry utility to find the transaction and enter the new approval number.

In the Transaction Date box, select the date of the transaction that you want to approve. When you find the appropriate transaction, enter the new approval number in the New Approval Code box.
Export Transactions to XML

The Export Transactions to XML utility allows you to manually export POS transaction information in the XML format using the settings from an XML export definition created in the XML Export Maintenance window (in the Setup program).

When you access the Export Transactions to XML utility, the program displays the Export Transactions to XML window. The XML Export definition to be used list contains all of the XML export definitions you have created in the XML Export Maintenance window. In this list, select the XML export definition that contains the settings necessary to perform the export.

The Date of POS transactions to be exported list allows you to select a time period of the transactions you want to export. This list features a variety of general time periods, such as any day of the week, any month of the year, the preceding pay period, and so on. If you want to set an irregular date range, you can click Custom and then type a specific date range in the Date Range boxes.

After you select the desired date range, click Export to run the utility. To exit the Export Transactions to XML window, click Exit.

Browser

If you have set the Back Office program to display a web browser page and you close the web browser window, the Browser utility allows you to reopen the web browser window. You can set the Back Office program to display the web browser window in the Options window of the Setup program. (If you have not set it, the program will display a message describing the problem.)

User Layout Token Maintenance Window

The Digital Dining programs feature many layouts, which are templates for printed items such as checks, receipts, and prep tickets. You create layouts by combining
Utilities Menu

You can use tokens to perform various functions, such as:

- Sending instructions to a printer,
- Performing an action in a program,
- Retrieving some stored information and inserting it on a printed item.

You can use this last type of token in a variety of ways. For instance, you can use the @ {STAFF_NAME} token to retrieve a server’s name and print it on checks. The Digital Dining programs include a wide selection of tokens, but you can also create your own tokens to represent longer strings of text. For instance, you can create a “Goodbye” token which could print a lengthy goodbye message at the bottom of a check. The User Layout Token Maintenance window allows you to create custom tokens, which you can then add to any layout in the Digital Dining suite (for more information on tokens and layouts, see the Digital Dining Setup User’s Guide).

User Layout Token Maintenance Window: Main Tab

Using the Main tab of the User Layout Token Maintenance window, you can create up to 99 user layout tokens. When you enter a token name in the Item Description box, the system captures the first eight characters of the description (including spaces) and displays these characters in the Short Description box. The program will use this Short Description as part of the actual token itself. For example, if you add a new token with a Short Description of “Goodbye”, then the new token will appear as “@ {USER_GOODBYE}” when you add it to a layout.

User Layout Token Maintenance Window: Memo Tab

This tab features a large multiline, editable text box, within which you can type the text that your user layout token represents. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can type up to approximately 30 pages of text.
Once you type the text that your new token represents in the Memo tab, you can add this token to any of the layouts in the Digital Dining suite. Afterwards, if you add this token to a layout, the text that you enter in this box will appear in the printed item. For instance, you might create a “Goodbye” token and type a phrase in the Memo tab, such as “Thank you for dining with us.” If you add the “@{USER_GOODBYE}” token to a check layout, this phrase will appear on the check when it prints.

![User Layout Token Maintenance](image)

You can also add other tokens to your user layout token. For instance, you might create a “Greeting” token and type a phrase in the Memo tab, such as “Welcome to @ {RESTAURANT_NAME}.” Then, when you add this “Greeting” token to a layout, the program will automatically add the name of your restaurant to the greeting (“Welcome to Joe’s Bar and Grill”).

### Program Handhelds

If you use handheld POS workstations on the restaurant’s network, you can use the Program Handhelds utility to install the ddConnect program on each handheld PC. The ddConnect program configures Terminal Services Client on your handheld PC to communicate with the Terminal Server computer. When you run ddConnect on the handheld PC, it automatically runs Terminal Services Client, connects to the Terminal Server computer, and starts a session of the POS program.

You can install ddConnect by using the Program Handhelds utility in the Digital Dining Back Office program. Before running the Program Handhelds utility, connect the handheld PC to the Back Office computer (with the handheld PC’s cradle) and run Microsoft ActiveSync. After making the connection, open the Back Office program, and click **Program Handhelds** on the **Utilities** menu. The Program Handheld window opens.
Utilities Menu

To install DDConnect on the handheld PC, click **Install DDConnect**. If you need to install Microsoft .NET Compact Framework on the handheld PC, select the handheld PC’s operating system in the **Install .NET Framework in Handheld** list, then click **Install Framework**. Click **Exit** to close the Program Handheld utility.

**Repair Daily Files**

If the program displays an error when you try to process daily POS files for particular day, you can use the Repair Daily Files utility to troubleshoot the problem. The Repair Daily Files utility can check and repair all the transaction files of a particular day.

When you click **Repair Daily Files** on the **Utilities** menu, the Repair Daily Data Files window opens. The **From** and **To** date boxes allow you to set a date range. If you select a date in the **From** box and another date in the **To** date box, then run the utility, the program will only repair the daily files for the dates within the specified date range. Click **Repair All** to run the utility. Click **Exit** to close the window.
Zip Data

The Zip Data utility allows you to zip your data files into a single zip file. Using this utility, you can create a single zip file containing the regular system files (in the Data folder), as well as the daily POS files (in their assorted subfolders). The Zip Data utility includes the template files along with date-specific data files. This utility also allows you to filter your daily POS files by a customized date range.

To create a zip file, open the Zip Data Utility window. When the program creates a zip file, it will place the file in a Zip subfolder located in the Data folder (C:\DDWin\Data\DDZip) and name the file based on the exact time and date that the file was created. For instance, if you create the zip file at exactly 11:45 A.M. on September 5th, 2001, the program will create a file named 20010905114500.zip (2001 representing the year, 0905 representing the month and date, 114500 representing the hour, minute, and second of the day). If you wish to supplement the name of the file (such as adding a call ticket number), you can type additional text in the File Name box. When the program creates the zip file, it will add this text to the end of the standard file name. (For instance, if you create the zip file at exactly 11:45 A.M. on September 5th, 2001 and type 1111 in the File Name box and click Zip, the program will create a file named 20010905114500_1111.zip.)

If you wish to filter your daily POS files by a date range, click the Filter by date range check box, type or select a start date in the Start Date box, type or select an
end date in the **End Date** box, then click **Zip**. The program will create a zip file containing only the POS Daily files within that date range. When the program creates a zip file, it will not include the Image or DDZip subfolders, nor will it include any other zip files.

**Get Updates**

The Get Update utility allows you to download new updates and patches via the Internet. Digital Dining releases new versions of its program suite approximately every five weeks. These new versions are distributed to clients in the form of update files. Along with its update files, Digital Dining also releases patch files, newer versions of executable files that incorporate any repairs to earlier versions. Previously, Digital Dining released these update files and patch files to dealers either by mail (in the form of DVD-ROMs) or by download from our company website. After receiving these files, dealers needed to install the patches or perform conversions directly, at the restaurant site. Now, we have simplified these installs and conversions by allowing store managers to download patches and updates directly, using the Back Office program.

When you use the Get Update utility, the Back Office program will access the Internet and search for new updates and/or patches on a designated FTP site. (Typically, you will receive updates and patches either from Menusoft’s FTP site directly, or from the dealer’s FTP site.) If the program finds a new update or patch file, it will download the file to a folder in the DDWin directory. The DDStart program searches this folder for new updates and patches whenever you start your Back Office computer and (if it finds any) installs them automatically.

To use the Get Updates utility, you must first set up Digital Dining to search the Internet. You must equip your Back Office computer with an Internet connection, and then set the appropriate FTP settings in the Setup program. In the FTP Location Maintenance window, you can set the necessary information (such as the FTP address, user name, and password) for automated downloads.

Once you set the FTP information in the Setup program, you can use the Get Updates utility to search for new updates and patches. To open the Get Updates utility window, click the **Utilities** menu and then click **Get Updates**. To download new update files, click **Updates** and then click **Get**. To download new patch files, click **Patches** and then click **Get**. When you click **Get**, the program will access the FTP site and search for new update or patch files. If it finds a new file (either update or patch), it will download that file to the CDRom folder (C:\DDWin\Data\CDRom). The next time you start the Back Office computer, the DDStart program will open and (in the case of a new patch) install the newly patched executable files or (in the case of an update) perform a new conversion.
Since multistore members receive updates and patches from their corporate FTP site, rather than directly from Menusoft or a dealer, the Get Updates utility is unavailable for licensed multistore members.

Data Exchange

If you use the Digital Dining Multistore package to exchange data from your restaurant with your corporate headquarters through an FTP server, you can use the Data Exchange utility to upload a copy of your daily POS files to your FTP site and to download any update packages.

In the Data Exchange window, you can send and/or receive data from your FTP site. Click the Upload Store’s Data check box to upload a copy of your daily POS files to the FTP server. Click the Download Update Packages check box to download any available update packages. Click the Run Data Update check box to open a downloaded update package and update your data. You can click all of the check boxes to perform all of these functions at once. After you make the appropriate settings, click Exchange to run the data exchange or click Exit to cancel the operation.

You can also recreate a store package for a single day. Click Create Store Package from Previously Processed Day, select a date from the Date box, then click Exchange. The Back Office program will only recreate the package from the existing daily files; it will not recreate the store’s daily files, which you can only do by processing the registers.

Clear Expired Gift Certificates

The Clear Expired Gift Certificates utility allows you to clear the records of expired gift certificates from your store’s data files. If you collect gift certificate cards
Utilities Menu

associated with expired gift certificate records, you can reuse the cards after you clear the expired records. If you click Run, the utility will delete the records of any gift certificates that have passed their expiration dates and have a balance of $0.00.

The Clear Expired Gift Certificates utility includes a Print area, which allows you to set the utility to print or preview a report that lists all expired gift certificate records. You can preview a report by clicking the Preview option and then clicking the Print command. The program displays a preview of the report, which you can then print or save (that is, export as a file). You can print the report by clicking the Print option and then clicking the Print command.

Edit Gift Certificate Data

The Edit Gift Certificate Data utility allows you to edit the balance amount of an existing gift certificate. To edit a gift certificate’s balance, type the gift card’s ID number in the Gift Card ID box. After you type the number, the program will display the card’s current value in the Current Value box. It will also display information about the card (such as the card’s activation date, expiration date, and transaction history) in the Card Details box.
Utilities Menu

To add an amount to the card’s existing balance, type a dollar amount in the **Adjustment** box. The program will display the sum of the existing balance and your adjustment amount in the **New Value** box. If you are satisfied with the new value, you can set the card’s new value by clicking **Adjust**.

### Add Group of Gift Certificates

The Add Group of Gift Certificates utility allows you to create a block of gift certificate records in the Digital Dining system files. If you use internal (Digital Dining) gift certificates, you can specify a range of gift certificate numbers and set an activation date, expiration date, and value for all the records in the new group. If you use a third-party gift certificate service, you can use the Add Group of Gift Certificates utility to import a group of gift certificate records from a third-party import file into Digital Dining’s gift certificate records.

![Add Group of Gift Certificates](image)

**Activation Date box**

The **Activation Date** box allows you to set the date when the gift certificates in the new group will become active. In the **Activation Date** box, select the specific date when the gift certificate will become active.

**Expiration Date box**

The **Expiration Date** box allows you to set the date when the gift certificates in the new group will expire. In the **Expiration Date** box, select the specific date when the gift certificates in the new group will expire.
**Days Good For box**

The **Days Good For** box allows you to enter the number of days that each gift certificate in the new group will be valid after it is activated.

**Value box**

The **Value** box allows you to enter the value of the gift certificates in the group you are importing. You must enter a solid dollar value, without decimals, up to three digits. For instance, to set a value amount of $100, enter “100”.

**Gift Card Type list**

The **Gift Card Type** list includes all of the gift certificate definitions you have created in the Gift Certificate Definition Maintenance window. If you select a gift certificate type in the **Gift Card Type** list and then run the utility, the program will apply that gift certificate type (and its settings) to all of the new gift certificate records that you create.

**Add Range of Cards area**

The **Add Range of Cards** area includes several controls which allow you to specify an exact range of card numbers for the imported gift certificates.

In the **Starting Card Number** box, you can enter the gift certificate ID number of the first card in the group of cards that you are importing. In the **Number of Cards** box, you can enter the total number of cards in the group that you are importing.

If you click **Verify**, the program will review the existing gift certificate records and confirm that you can create new records with the specified range of card numbers. If one or more records already exist with card numbers within the specified range, the program will display a message explaining the problem.

If you click **Create**, the program will create the gift certificate records you have specified.

**Import From File area**

The **Import From File** area includes controls that allow you to import a group of gift certificate records from a third-party import file.

The **File Path and Name** box allows you to specify the location and name of the import file from which the utility will import gift certificate records. To set the
location of the import file on the network, type the path in the **File Path and Name** box or click ![file_browser_icon] and select an appropriate path in the Browse for Folder window. You can select a path to a directory location on your local network. You must also include the name of the import file with the path.

If you click **Import**, the utility will import the gift certificate records from the specified import file and add them to Digital Dining’s gift certificate records.

---

**Gift Certificate Fee Utility**

The Gift Certificate Fee utility allows you to deduct a predefined fee from gift certificates of one or more specific gift certificate types.

The **Fee to apply** list allows you to select the gift certificate fee that you want to apply with the utility. The list includes all of the gift certificate fees you have created in the Gift Certificate Fee Maintenance window.

If you click **Run**, the program will apply the gift certificate fee you have selected in the **Fee to Apply** list, and the program will deduct the fee from all gift certificates of the included types. If you click **Define**, the program will open the Gift Certificate Fee Maintenance window, wherein you can edit or create gift certificate fees for the utility.

---

**Gift Certificate Fee Maintenance Window**

The Gift Certificate Fee Maintenance window allows you to define fees for certain types of gift certificates, which can later deduct by running the Gift Certificate Fee utility. In the Gift Certificate Fee Maintenance window, you can define the amount of each fee as a percentage of each gift certificate’s amount. You can also set a range for the fee’s amount. You can also specify which type of gift certificates the fee will deduct from.
Gift Certificate Fee Maintenance Window: Main Tab

Using the **Main** tab of the Gift Certificate Fee Maintenance window, you can set the amount and the range of each gift certificate fee. When you enter a gift certificate fee name in the **Item Description** box, the program captures the first eight characters of the description (including spaces) and displays these characters in the **Short Description** box. You can change the Short Description or keep the system-defined description. The text that appears in the **Short Description** box is the description that will show on reports.

In the **Fee Percent** box, you can enter a percentage amount for the fee. If you enter an amount, the program will deduct that percentage from the value of each gift certificate affected by the fee. For instance, if you enter “5” in the **Fee Percent** box, the program will deduct 5% from the value of each gift certificate when you run this fee in the Gift Certificate Fee utility.

In the **Minimum Fee** box, you can set a minimum amount for the fee. When you run the fee in the Gift Certificate Fee utility, the program will deduct no amount less than the specified minimum amount when deducting fees from all affected gift certificates.

In the **Maximum Fee** box, you can set a maximum amount for the fee. When you run the fee in the Gift Certificate Fee utility, the program will deduct no amount greater than the specified maximum amount when deducting fees from all affected gift certificates.

Gift Certificate Fee Maintenance Window: Gift Certificate Tab

The **Gift Certificate** tab allows you to filter the fee to include or exclude specific gift certificate types. If you set the filter to include one or more gift certificate types,
the program will deduct the fee from all gift certificates of the included types when you run the Gift Certificate Fee utility.

You can set the program to either include or exclude the gift certificate types in the Include/Exclude list by clicking Include or Exclude. If you click Include, the program will only include gift certificate types in the Include/Exclude list. If you click Exclude, the program will exclude all types in the Include/Exclude list.

To move a gift certificate type from the Available list to the Include/Exclude list, select that gift certificate type and click \( \rightarrow \). To move a gift certificate type from the Include/Exclude list to the Available list, select the gift certificate type and click \( \leftarrow \). To move all gift certificate types from the Available list to the Include/Exclude list, click \( \rightarrow \). To move all gift certificate types in the Include/Exclude box to the Available list, click \( \leftarrow \).

**Gift Certificate Fee Maintenance Window: Memo Tab**

This tab features a large multiline, editable text box, within which you can type the text that your user layout token represents. If you type more than one line of information in this box, the text will automatically wrap to the next line, just as in most text and word processing programs. You can type up to approximately 30 pages of text.

**Create New Encryption Key**

Digital Dining uses Triple DES (168bit) encryption to protect credit cardholder data. The encryption keys are derived from a password and a SALT using the PBKDF2 algorithm from PKCS #5 Password-Based Cryptography Standard v2.0. The password used to create the encryption key is changed on a daily basis using a FIPS-
140/X9.31/X9.17-compliant random number generator. If, for whatever reason, you need to create a new password (to create the encryption key), you can do so by clicking Create New Encryption Key in the Utilities menu.
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