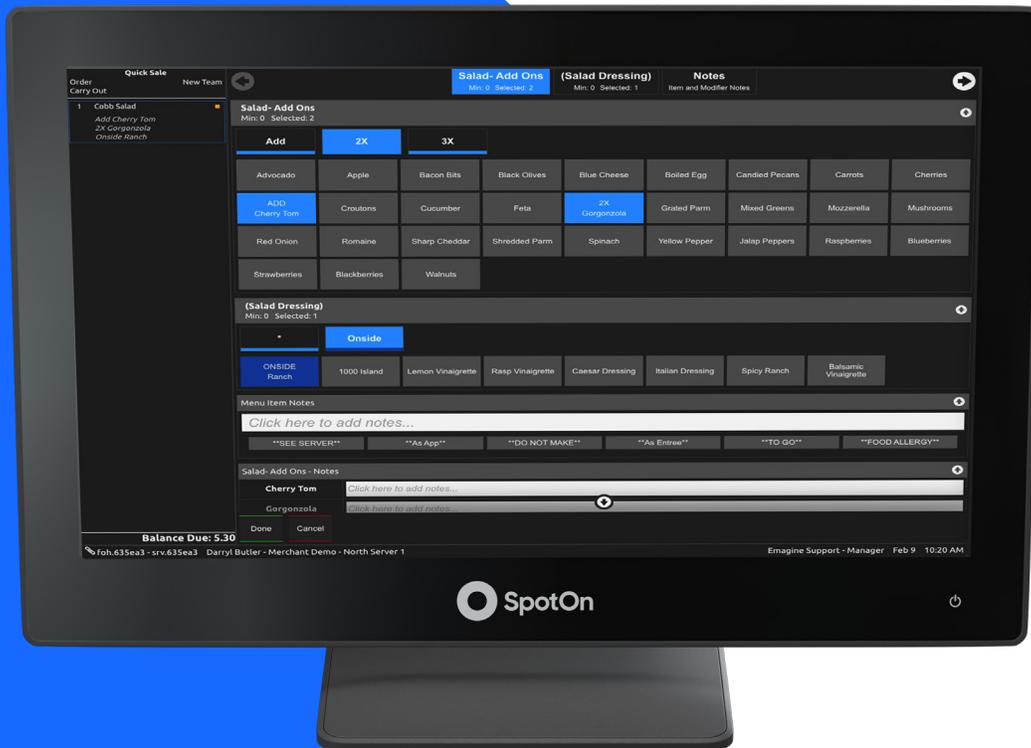


# SpotOn Restaurant POS How-to.



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# Introduction

This introduction is a primer for new users to the POS software. It is a **Level 1** manual on which our foundational competency will be built upon.

There are nuances to keep in mind when working with a cloud-based solution that are not immediately apparent but for you to enjoy to great benefit. The software updates are in **real-time** and can be **accessed from any device that is able to use Google Chrome**. Gone are the days of having to go on-site to implement updates; we send them daily to improve the system and any internal changes to the Back of House (BOH) can be made remotely.

All the tasks that required a physical presence in the store can now be shifted to remote work. No one likes to take work home with them, but no one also likes staying at the workplace until the sun comes up handling administrative tasks that are necessary to close the business. When the business day is over, and everything is cleaned up; go home. The POS will have your business reports ready for you in the morning to access while you are having your coffee after getting a full night's rest.

The software is not an easy button for your business, but it will make things easier. The Front of House (FOH) functionality will be sure to please any team that works with it. It was designed by servers and bartenders for servers and bartenders. The BOH is easy to navigate and implementing changes to the system takes seconds once a person is competent in the software's workflow. The path to competency is a straight-forward and smooth one.

The software was designed for end users to be self-sufficient. This was done purposely so the end user can have more time freed up to operate their business at a high level. A chef running a 5-star Michelin restaurant has better things to do with his or her time than to spend all day on a computer. The software was designed with that in mind and it will enable end users to spend less time on time-consuming tasks and spend more time on what is **important**.

So, as we get started on this path of learning and working towards competency there are

## 8 things to keep in mind:

1. We strive for competency, not mastery. The POS system is a Software as a Service (SaaS) solution that is continually improving which means all users of the software are continually learning.
2. It is okay to make 'mistakes' because that means you are learning. Much like what the wise man Bob Ross once said, "There are no mistakes, only happy accidents."
3. Try to push the limits with your creativity. Nothing exciting ever happens from people who follow trends. Set one.
4. Be confident from the start. Don't wait. This software while it is unique in design, in principal, is another program that you'll adopt to get the job done. You've always managed to get the job done before and will continue to do so; this time with SpotOn's help.
5. Bring the enthusiasm and passion that brought you to the restaurant game to this learning experience. It will show in the quality of work that is done to bring success to your business.
6. Please be bothersome! Your questions matter and having questions means you are learning.
7. Enjoy the process. There's a beginning, middle, and not an end, but **goal** to achieve.
8. This software when it is implemented is always a living document and it requires feedback and input to grow. Sometimes this process can be the most painful part of the whole experience, do not sweat it. **Growing pains are a sign of good health.**

## Adjustment Reason Creation

**Adjustment Reasons** are the notes that are added to Paid Ins/Paid Outs & Voids. This allows for note keeping when the adjustments are reviewed by management.

1. Select the **New Item (+)** button to create a **New Reason**
2. Enter the appropriate verbiage for the **Text**
3. Select the corresponding **Adjustments**
  - a. **Applies To (General)**
    - i. Paid In
    - ii. Paid Out
    - iii. Voids
  - b. **Applies To (Discounts)**
    - i. List of Discounts will display

## Backoffice Permissions

**Backoffice Permissions** enable a restaurant owner to limit what a **User** who works in the **BOH** can do. The role assigned to the **User** in the **Structure** of the **Organization** is required for the **Backoffice Permissions** to function.

1. Select the **New Item (+)** button to create a **New Backoffice Permission** then name it
2. Assign a color to distinguish this permission set from the others
3. Assign the **Permissions** to the **Backoffice Permission** by selecting the appropriate checkboxes

## Customer Creation

**Customers** are the guests you serve. These profiles can be created a number of ways and will help you efficiently serve repeat **Customers**.

1. Select the **New Item (+)** button to create a **New Customer**
2. Input necessary identifying General Information
  - a. First Name
  - b. Last Name
  - c. Email Address
  - d. Phone Number
3. Input necessary Addresses if applicable. Select **New Address** button to begin.
  - a. Street
  - b. Street 2
  - c. City
  - d. State
  - e. Zip
  - f. Phone

## Discount Creation

**Discounts** are a way of reducing a check's balance. They can vary from the simple to complex.

1. Select the **New Item** button to create a **New Discount**
  - a. Name the **Discount**
  - b. Set the **Discount Type**
    - i. Amount Off
    - ii. Percent Off
    - iii. Popup Amount Off
    - iv. Popup Percent Off
    - v. Popup Set Price
    - vi. Price Level
    - vii. Set Price
  - c. Enter **Minimum Order Amount** if applicable
  - d. Enter **Maximum Discount Amount** if applicable
  - e. Check **Can Only Be Used Once Per Order** if applicable
2. Mark the appropriate **Availability** checkboxes
  - a. Enabled: Turns it on and off
  - b. Prompt For Note: Forces an **Adjustment Reason** to be attached to **Discount**
3. Select the applicable **Order Types** that the **Discount** can apply to
4. Select the Users permitted to use the **Discount**
5. Select the **Adjustment Reasons** that can be applied to the **Discount**
6. If **Discount** is to be set on a Schedule, follow the instructions on how to **Schedule a Pricing Event**
7. If the Discount is **Item Exclusive** check the **Available For Only The Items Below** checkbox
  - a. **New Item** button will populate an entry in the list
    - i. **Kind**: Set to either **Menu Item** or **Menu Item Group**
    - ii. **Group/Item**: Select the appropriate **Menu Item** or **Menu Item Group** the **Discount** is meant for
      1. **Edit Specific Locations** allows for **Location** specific handling

## Job Position Creation

**Job Positions** are the **Role** the **Users** of an **Organization** work after they clock in.

1. Select the **New Item (+)** button to create a **New Job Position**
2. Name the **Job Position**
3. Select the **Time Clock Only** checkbox
4. This **Job Position** can now be used to clock in and work
  - a. This is a simple **Job Position**; most templates contain the standard restaurant positions
  - b. If there are lead positions, such as Head Bartenders, you can duplicate a **Job Position** and then edit the specific permissions needed

## Menu Item Group Creation

**Menu Item Groups** are the categories that **Menu Items** are placed into to quickly retrieve them.

1. Select the **New Item (+)** button to create a **New Menu Item Group**
2. Name the **Menu Item Group** and assign a **Color**
  - a. This will add color to all the buttons in this group; however, if a **Menu Item** in this group has a different color set, that will display
3. You can now assign **Menu Items** to this group

## Menu Item Creation

**Menu Items** are what is ordered from the establishment. They can be taxable or non-taxable and offered through a variety of mediums.

1. Select the **New Item (+)** button to generate a **New Menu Item**
2. Under the **General Information** section, input the **Name** and **Report Group**
3. Under **Location Specific Settings**, set the **Requisition Group**
4. Under the **Taxes** section, add all applicable **Taxes**
5. Under **Menu Item Groups** section, on the **Menu Item** select the appropriate **Menu Item Group**
6. Travel to the **Menu Item Groups** page and select the **Menu Item Group** the newly created **Menu Item** is in, click the **Edit Menu Items** button located under the **Menu Items** section of the **Menu Item Groups** page
7. The **Menu Items** are now sorted by **Group**; you can duplicate items and change the name and price as appropriate
8. The price is entered under **Location Specific Settings** and can be priced according to **Level**
9. With all the **Menu Items** created go through and set up the **Modifier** linkages with the correct settings
10. After the **Modifiers** are linked go through and set up the **Sub-Item linkages** with the correct settings

## Menu Items and Groups Configuration for Online Ordering (OLO)

The configuration of **Menu Items** and **Menu Item Groups** for OLO is handled through a section named **Online Ordering Settings** that is a part of both **Menu Items** and **Menu Item Groups**.

1. When working on **Menu Items** or **Menu Items Groups** check the **Exclude From Online Ordering** checkbox to make the selection unavailable for OLO. This way we can edit the Menu without any troublesome orders taking place.
2. Next update the **Display Name**. This field allows us to have customer-facing names for the end users of OLO while being able to name **Menu Items** appropriately for internal use. For example, **4 PC CHX 2 SIDES** would be the **Menu Item** name and **Four Piece and Choice of Two Sides** would be the **Display Name**.
3. The **Description** box is where the **Menu Item Description** can be added to provide lengthy details for both **Menu Items** and **Menu Item Groups**.
4. If there are **Menu Items** that may require notes from the customer, select the **Accept Item Notes** checkbox. This will allow end users to input custom notes on individual **Menu Items**.
5. To organize **Menu Item Groups** on the OLO site, use the **Display Position** section of **Menu Item Groups**. Entering a "1" on a **Menu Item Group** will cause it to display first and the same with "2" displaying second.
6. To add imagery to **Menu Items** scroll down to the **Extra Information** section of a **Menu Item**. Here you can click the **Choose Image** button that is listed next to **Menu Item Image**. It will prompt for an upload and allow you to select.  
(Max Boundaries: 600w x 337h)

## Menu Upkeep for Multi-Location Organizations

Menu upkeep for merchants with numerous sites is easy to handle in the POS system. There are sections throughout the BOH named **Location Specific Settings** that house global settings and within these sections there is an **Edit Specific Locations** button that will bring up an individual site to edit. Listed below are where to find examples of this.

1. **Menu Items**: The **Edit Specific Locations** button is found under the **Specific Location Settings** section
  - a. **LSS**: Able to adjust price, availability, requisition settings and, quantity on hand
  - b. **Taxes**: Able to set Taxes applicable to each location
  - c. **Pricing Events**: Displays all associated pricing events
  - d. **Modifiers**: Option to change Modifier Display Mode
2. **Modifier Groups**: The **Edit Specific Locations** button is a little hidden. Select a **Modifier Group** then select the **Edit Modifiers** button, then from the list of **Modifiers**, select a **Modifier**, and select the **Edit Specific Locations** button.
  - a. **LSS**: Pricing, requisition name, and availability
3. **Modifiers**: The **Edit Specific Locations** button is listed under the **Pricing** section
  - a. **LSS**: Pricing, requisition name, and availability

4. **Pricing Events:** The [Edit Specific Locations](#) button is listed at the bottom of the page under the [Event Items](#) section
  - a. LSS: Enable, order types, schedule, and event items
5. **Discounts:** The [Edit Specific Locations](#) button is listed at the bottom of the page under the [Available Groups/Items](#) section
  - a. LSS: Enable, order types, schedule, available groups/items
6. **Surcharges:** The [Edit Specific Locations](#) button is listed under the [Location Specific Settings](#)
  - a. LSS: Enable, type, and value of surcharge
7. **Taxes:** The [Edit Specific Locations](#) button is listed under the [Location Specific Settings](#)
  - a. LSS: Tax rates based on order type per location
8. **Tip Jars:** The [Edit Specific Locations](#) button is located [Location Specific Settings](#)
  - a. LSS: Enable and percentage

## Menu Screens Creation

**Menu Screens** are used to organize the **User Interface (UI)** of the **FOH** so **Users** can quickly send orders to the kitchen.

1. Select the [New Item \(+\)](#) button to create a [New Menu Screen](#)
2. Input the name of the [Menu Screen](#)
3. Set the [Quantity Bar Mode](#) to Left
4. For the 'Main' Screen place all the [Menu Screen Buttons](#) on the bottom panel
  - a. This ensures that all the different screens display the same buttons for navigation. Only place screen buttons on [one](#) screen.
  - b. You will have to come back to this screen after they have been created to place them
5. Place the [Menu Items](#) on the screen utilizing [Menu Group Lists](#) by clicking the blank space and adding a [Menu Group List](#)
  - a. You can sort the order after the [Menu Group Lists](#) have been placed
  - b. You can insert a [Menu Group List](#) in front of the [Menu Group List](#) you are clicking above or add at the end of the [Menu Group Lists](#)
6. Create as many [Menu Screens](#) as needed
7. Circle back to the 'Main' screen to place the [Menu Screen Buttons](#) on the bottom panel for navigation

## Modifier Groups Creation

**Modifier Groups** are built with **Modifiers** and **Modifier Options** so **Users** have the ability to send **Menu Items** to the kitchen with special preparation instructions.

1. Select the **New Item (+)** button to create a **New Modifier Group**
2. Under the **General Information** section, input the **Name**
3. Under the **Modifiers** section, type in the **Modifiers** needed for the group
4. Under the **Modifier Options** section, click the **Add New Modifier Option** button and select the appropriate **Modifier Options**
5. Under the **Modifiers** section on the **Modifier Groups** page, select the **Edit Modifiers** button to edit the pricing associated with the **Modifier Option** and **Modifier**

## Modifier Option Creation

**Modifier Options** are the action being performed to the **Modifier**.

1. Select the **New Item (+)** button to create a **New Modifier Option**
2. Name the **Modifier Option**. Typically this is the type of modification being made; i.e. Add, No, Extra, Sub, Onside, etc.
3. Assign a Button Color to the **Modifier Option**
  - a. This will highlight selected **Modifiers** in this color; i.e. Green for Add, Red for No, Blue for Onside, etc.
4. Use the **Modifier Groups** section to quickly assign **Modifier Options** to **Modifier Groups**

## Modifier Creation

**Modifiers** are the selections that are made that alter a dish. A Meat Temp for a Steak would be an easy example.

1. Select the **New Item (+)** button to create a **New Unique Modifier**
2. Name the **Modifier**
3. Attach a **Report Group** via the **Reporting** section
4. Use the **Modifier Groups** section to quickly assign the **Modifier** to multiple **Modifier Groups**
5. Fill in **Pricing** information as needed
  - a. Price is associated by the **Modifier Option**
  - b. Price Levels will list under the **Standard** price

## Order Type Creation

**Order Types** are used to designate how the order will be treated. Is the customer grabbing food to-go? Are they a dine-in customer?

1. Select the **New Item (+)** button to create a **New Order Type**
2. Name the **Order Type** under the **General Information** section
3. Under **Settings**, configure the various settings based on **Order Type** needs
  - a. **Price Level** - Use this to set a **Price Level** to use for all **Menu Items**
  - b. **Customer Attachment Requirement:**
    - i. None
    - ii. Customer
      1. Name
      2. Email
      3. Phone Number
    - iii. Customer Address: 1-3 from above plus:
      1. Physical Address
  - c. **Print Customer Info on Reqs:** Checkbox to print **Customer Info** on kitchen chits
  - d. **Print Order Type In Red on Reqs:** Checkbox to highlight **Order Type** on kitchen chits in red
  - e. **Print Customer Info On Receipts:** Checkbox to print **Customer Info** on itemized receipt
  - f. **Show "For the Table" on Tickets:** Checkbox to turn on a Guest that holds all the shared items before they are split
4. Under **Display Settings**, you can change the verbiage of the Customer on the receipts:
  - a. **Singular Customer Verbiage:** Single Guest
  - b. **Plural Customer Verbiage:** Multiple Guests
5. Under **Order Type Tip Settings**, you can change various settings:
  - a. **Allow Tips on Order Type:** Checkbox to enable/disable tips on **Order Type**
  - b. **Override Location Suggested Tip Percentages:** Checkbox to override the Tip Percentages setup on the **Locations** page
  - c. **Suggested Tip Percentages:** 3 fields to input suggest Tip Percentage
  - d. **Default Tip Percentage:** Selection between the above 3 fields or No Tip
6. **Automatically Applied Surcharges:** List of **Surcharges** to check to apply to **Order Type**
7. **Receipt Settings:** Contains text box to input **Footer Notes**
  - a. **Footer Notes:** Text box to input a receipt message

## Price Levels Creation

**Price Levels** are used to change pricing from the **Standard Price**. They can be used in a variety of ways.

1. Select the **New Item (+)** button to create a **New Price Level**
2. Name the **Price Level**
  - a. You can set **Price Levels** in 3 areas of **BOH**
    - i. **Pricing Events**
    - ii. **Sub-Menu Items Linkages**
    - iii. **Order Type Settings**

## Pricing Events

**Pricing Events** are used to employ “Happy Hour” pricing on a schedule. It is a set-it-and-forget-it tool used to have the correct pricing charge at the correct times.

1. Select the **New Item (+)** button to make a **New Pricing Event**
2. Under the **General Information**, section input the **Name** of the **Pricing Event**
3. Under the **Order Types** section, select the **Order Types** participating in the **Pricing Event**
4. Under the **Schedule** section, select the **New Date Range Button** and set the **Dates** included in the event
  - a. **All Dates** – The whole calendar year
  - b. **Custom** – A range of dates or a single day; i.e. St. Patrick’s Day or Month of December
5. Under the **Schedule** section, select the **New Days Button** and set the days of the week included as well as the time of day
  - a. **Days** – Days included in event
  - b. **Time Kind** – All Day, Custom, and Store hours
    - i. Note: Time is in the format of military time for this setup. 4:00 pm translates to 16:00 and 4:00 am would be 04:00
6. Under the **Event Items** section, select the **New Event Button** to add **Menu Items** and **Menu Item Groups** to the **Pricing Event**
  - a. **Kind** – Choice between Menu Item or Menu Item Group
  - b. **Group/Item** – Choose specific Menu Item Groups or Menu Items
  - c. **Adjustment Kind** –
    - i. **Amount** – Numeric amount added (-) or subtracted (+) from the Item; i.e. Happy Hour versus Band Pricing
    - ii. **Fixed** – Fixed numeric value pricing
    - iii. **Level** – Price level pricing set on an item-to-item basis
    - iv. **Percent** – Numeric percentage added or subtracted from the Item

## Print Routing Setup

**Print Routes** are used to direct kitchen chits to the correct printer(s).

1. Each **Print Route** that is set up has one or more corresponding **Requisition Groups**
  - a. Print Routes are used to send “like” items to the different stations around the restaurant
  - b. Often restaurants will have numerous bars, a kitchen, and “special” kitchen stations where menu items are prepped
  - c. If a merchant has numerous bars then the Bar requisition group would suffice and you would create the various routes based off station names; i.e. Up Bar, Down Bar, Back Bar, Main Bar, etc.
  - d. If a merchant has a complex kitchen with numerous **Requisition Groups**, then create more **Requisition Groups**
    - i. Requisition groups for the individual special station; i.e. Raw Bar
    - ii. Requisition groups for the combination of stations needed; i.e. Raw Bar/ Kitchen/Up Bar or Raw Bar/Kitchen/Down Bar

In conjunction with the combination **Requisition Groups**, create Print Routes that include the Printers at the needed stations; i.e. Raw Remote Printer, Kitchen Remote, Up Bar Remote or Raw Remote Printer, Kitchen Remote, Down Bar Remote.

## Printer Failover Creation

**Printer Failover** is used to set up a backup plan for when a **printer** goes offline. It is a list of Printers to use in replacement of the main **Printer**.

1. Select the **New Item (+)** button to create a **New Printer Failover**
2. Name the **Printer Failover** and assign it a **Location**
3. Select the **Printers** to use in the **Printer Failover** by assigning the value of 1 to the first printer to failover to, then 2 for the second, and so on

**The Printer that the new Printer Failover is meant for should NOT be treated as the 1st Printer in the Printer Failover.**

## Printer Setup - Receipts

**Printers** are used to print Receipts and Chits. Receipts are handed to **Customers** and chits are for cooks, bartenders, etc.

1. Navigate to **Printers** in the **BOH**
2. Select the receipt **Printer** from the list
3. Set the correct **Location**, set the **Model** to Epson T88, and set **Kind** to Local
4. Under **Local Settings** adjust **Station** to corresponding **Printer**
  - a. Verify **Use Default Printer** is selected
5. Navigate to the **Station** via the **Stations** page in **BOH**
6. Under Settings change Receipt Printer to appropriate Printer

## QuickNotes Creation

**QuickNotes** are used to notate on **Menu Items** or **Orders** and can serve a variety of purposes.

1. Select the **New Item (+)** button to create a **New QuickNote**
2. Enter the verbiage for the **QuickNote** in the **Text** field

## Report Groups Creation

**Report Groups** are used to capture the **Data** needed to guide business decisions.

1. Select the **New Item (+)** button to create a **New Report Group**
2. Under **General Information**, input the **Name** and set the **Parent Group** if the newly created **Report Group** is a **Child Group**
  - a. If a **Report Group** is a **Parent Group** typically the naming convention is such: (FOOD) (BEER) (LIQUOR) (WINE) (RETAIL)
  - b. If a **Report Group** is a **Child Group** then the typical naming convention is to use the name of the **Menu Item Group** as the name of the **Child Report Group**:  
Bottled Beer, Red Wine, Beverages
  - c. Those **Child Report Groups** then report up to the **Parent Group**:  
Bottled Beer --> (BEER)  
Red Wine --> (WINE)  
Burgers --> (FOOD)

## Requisition Group Creation

**Requisition Groups** are used to categorize items. If a **Menu Item** comes from the **Kitchen** it would be a part of the Kitchen **Requisition Group**.

1. Select the **New Item (+)** button to create a **New Requisition Group**
2. Name the newly created **Requisition Group**

## Station Types Configuration

**Station Types** are used to categorize the type of **Station** the business needs.

1. Select the appropriate **Station Type** from the 3 templates
  - a. **Bartender**
    - i. Multiple users working out of one or two cash drawers
  - b. **Cashier**
    - i. One user handling the transactions of multiple users out of one cash drawer
  - c. **Server**
    - i. Multiple users sharing a station with no cash drawer
2. There are numerous Configuration settings that can be changed to adapt to different business needs and the following list is meant to serve as a foundation:

- a. **Primary Menu Screen** – Sets the first screen that is shown when the Menu button is pressed; i.e. Bartenders would prefer to see drinks first while servers may need to see Appetizers first
  - b. **Default Order Type** – Sets the Order Type the Station defaults to when starting a New Order
  - c. **Order Type Prompt** – Can be set to None so Default Order Type is honored and only changed when toggled, Prompt on New Order creation, or Prompt on Send
  - d. **Start Screen** – First screen that the user sees after logging into the system. Servers are typically set to Table Layout and Bartenders are typically set to Menu
  - e. **Allowed Payments** – Toggle accepted payment types permitted through different stations; i.e. Moby M70. EMV Payment type is different from the EMV Payment type for S300s and Q30s. A M70 would not need to use the EMV Payments setup for the S300s and Q30s. Likewise, the S300s and Q30s would not use the M70 payment type.
3. There are numerous **Receipts/Printing** settings that can be changed to adapt to different business needs and the following list is meant to serve as a foundation:
    - a. **Consolidate Items on Receipts**: When turned on it ‘shrinks’ the receipt down to display as much information in as little room as possible
    - b. **Consolidate Taxes on Receipts**: Much like Consolidate Items but with Taxes
    - c. **Print Call Number**: Prints a number on the receipt for the user to “call-out” to customer with. Reset daily.
    - d. **Print Receipt When Payment Taken**: Yes, No, or Prompt
    - e. **Print Modifiers on Receipts**: Always, Never, or When Modifier Has Price
    - f. **Print Sub Items on Receipts**: Always, Never, or When Sub Item Has Price
    - g. **# of Credit Card Receipts**: Enter value for number of receipts needed to print out
  4. The **Command Bars** are set up with a Default arrangement of buttons based on the station type needs. There are a total of 67 buttons that can be placed on the **Command Bar**.
    - a. The defaults attached to the stations get used most but it is always worth reviewing the desired workflow

## Station Type Configuration to Station

**Stations** are the physical terminals that waitstaff use to operate the business. Each terminal has a **Station** in the **BOH** to configure accordingly.

1. Name the **Station** what it is typically referred to by waitstaff
2. There are numerous settings with varying degrees of complexity. The following list is meant to serve as a foundation:
  - a. **Station Type**: Bartender, Cashier, Server, etc.
  - b. **Receipt Printer**: Assign the desired Receipt Printer

- c. **Primary Payment Terminal**: Assign the correct EMV Payment device
    - i. **ProTip** – use the last 4 of the serial number for easy verbal reference when working with EMVs
  - d. **Use Cash Drawer Assignments**: Checkmark on so Bartenders or other similar users can assign the draw to themselves. Not always needed to be **on**.
  - e. **Prompt For Guest Count (Table Layout)**: When turned on, displays a prompt for number of guests when a table is selected
  - f. **Initial Table Layout**: Set to display default layout
3. Select the **New Drawer** button in the **Cash Drawers** section
    - a. Name the **Drawer**
    - b. Select the attached **Receipt Printer** via the **Connection**
      - i. If utilizing a second drawer setup another drawer and select the second Drawer checkbox
  4. In the **Routings** section assign the **Print Routes** needed to correctly send items
    - a. I.e. the **Bar Requisition Group** often has multiple routes - Up Bar, Down Bar, Patio - because it is common for merchants to have multiple bars
      - i. This is important to know because Servers always want to send their drinks to the right bar for service
  5. Select **New Order Type Route** to set up a **Print Override** in case the Merchant has OLO
    - a. Set the **Requisition Group**: Kitchen
    - b. Choose the **Order Type**: Online Ordering
    - c. Select the **Print Routing**: Kitchen
      - i. **Print Overrides** are used with OLO so that the POS system will be able to print orders as needed without disrupting the normal workflow
      - ii. The above is an **example** and be will based on Menu programming

## Structures – Setup

**Structures** are meant to define the Organizational hierarchy also known as the chain of command. **Users** are added to the **Structure** and then given a **Backoffice Permission** based on the type of work they perform and then attached to either the **Organization** at the **top silver bar** or at the **Location** level in the **gold bar(s)**.

1. **Structures** will be set up for you, however you will need to configure the Users that will eventually be added to the **BOH** for work
2. Click on either the **silver** bar or **gold** bar to display a pop-up menu then select **Add User**
3. Select the newly added **User** and assign a **Backoffice Permission**
  - a. **Support will have to assist with first time login to BOH**

## Surcharge Creation

**Surcharges** are a way of adding fees to orders. They vary in purpose and usage based on establishment.

1. Select the [New Item \(+\)](#) button to create a [New Surcharge](#)
2. Fill in the appropriate information
  - a. [General Information](#)
    - i. Name
    - ii. Can Manually Add To Order
      1. Useful for sporadic charges; i.e. Cork Fee to a customer who brings in a bottle of wine for dinner as opposed to daily scenarios
    - iii. Taxable
      1. Useful for [Taxable Surcharges](#)
  - b. [Automatically Applied to Order Types](#)
    - i. Useful for adding fees associated with order types; i.e. \$3 Delivery Fee added to all delivery orders
  - c. [Automatically Applied to Payment Types \(Credit Type Only\)](#)
    - i. Useful for setting up Cash Discount to apply to Credit Card transactions
      1. Please see the [Cash Discount Surcharge Setup](#) for explicit instructions
  - d. [Excluded Menu Groups](#)
    - i. Useful for excluding [Menu Item Groups](#) from the newly created [Surcharge](#)

## Table Layouts Creation

**Table Layouts** are used to assist waitstaff in seating and serving guests in a timely fashion.

1. Select the [New Item \(+\)](#) button to create a [New Table Layout](#)
2. Name the [Table Layout](#) and assign it a [Location](#)
3. Select the [Edit Layout](#) button to navigate to the [Table Layout Editor](#)
4. In the [Table Layout](#) Editor use [Commands](#) to create and organize the [Table Layout](#) and use [Properties](#)
  - a. Commands:
    - i. Add – Plus Sign
    - ii. Delete – Minus Sign
    - iii. Cut – Scissors
    - iv. Copy – Two Pages
    - v. Paste – Glue Button
    - vi. Duplicate Table Style – Two Filled in Pages

- b. Properties
  - i. Shape Selection – 3 Styles
  - ii. Size Selection – 3 Sizes
5. Add a **New Table** to the **Table Layout**, pick its shape, size, assign a table number, and then select **Submit** to save your work

## Table Statuses Creation

**Table Statuses** are used to indicate what state a table is in

1. Select the **New Item (+)** button to create a **New Table Status**
2. Name the **Table Status**, assign it a **Location**, and pick a color that will display in the **FOH** for the **Table Status**

## Taxes

**Taxes** are set in accordance to State and Local law used to gather funds for societal benefit.

1. Select the **New Item (+)** button to create a **New Tax**
2. Under the **General Information** section input the name of the **Tax**
3. Under the **Location Specific** Settings section input the **Tax** rate as applicable based on the **Order Type**
4. Assign to all applicable **Menu Items**. **Taxes** can be added in Bulk utilizing **Select All** to make it a speedy process

## Tip Jar Creation

**Tip Jars** are used to portion off an amount of the tips collected to pay out to support staff; i.e. bussers, food runners, barbacks, bartenders, etc.

1. Select the **New Item (+)** button to make a **New Tip Jar**
2. Name the newly created **Tip Jar**
3. Assign **Job Positions** that will contribute to the **Tip Jar**
4. Assign the **Calculation Type**
  - a. Net Sales – Calculate based off total adjusted sales figures
  - b. Report Group Sales – Calculate based on selected Report Groups; i.e. Food, Liquor, etc.
5. Set the **Percentage** to be gathered from the sales figures and enable the **Tip Jar**

## Users Creation

**Users** are the members of the business. From Owner level down to timeclock-only positions.

1. Select the **New Item (+)** button to create a **New User**
2. Under the **General Information** section input the **First Name** and **Last Name**
3. Under the **POS Location Assignments** click the **Edit Assignments** button
4. Click on the Bar on the left side of the screen with the User's name displayed, click **Add Location**, and then select the **Location** the **User** will work at
5. Under the **User Location – General Information** section input the **Login Code** for the **User**
6. Click the bar on the left side of the screen that displays the newly added **Location** and select **Add Job Position**
7. Select the **Job Position** for the **User** to work
  - a. Under the **User Job – General Information** section you can input a Pay Rate for this user. Pay Rates can be set globally from the **Job Positions** section of **BOH** and then further refined locally from this section. For example, a busser starts off at \$7.00 then earns a merit raise of \$0.50 that would only apply to one user.

### Restaurant Support

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