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## Point Of Sale Operations Quick Reference Guide

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### Important Information Regarding Technical Support

Prior to calling Infinity technical support please refer to this guide and also refer to the 'Before You Call' document.

If you do not have this document, please download it by going to the Infinity website at [www.touchscreenpos.com](http://www.touchscreenpos.com), click Service & Support and the link will be at the top of the service and support page clearly labeled

[Download: 'Before You Call'](#)

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### ! PLEASE REMEMBER !

1. Non-emergency calls placed through the emergency support line, and emergency calls for non-covered issues are all billable.
2. If the problem is NOT affecting your ability to serve your customers you should call our main office number and leave a message for a technician to call you back.

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### CONTACTING TECH SUPPORT

**Infinity Contact Number  
843-497-7773**

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**Non-Emergency:** Press 1 & Leave Msg

**Emergency / 911 Only:** Press 0 and wait for the call to be transferred to a technician.

*If the call transfers to voice mail, leave a message, wait 5 minutes, call again and press zero once again to transfer your call to the on-call technician again.*

Note On 'Emergency' calls



Version 17

# Restaurant Manager POS v17

## OPERATIONS AND PROCEDURES

**Note:** Restaurant Manager POS is highly configurable so the exact location of each function button described below may vary slightly, however all functions are located either on the main status screen, or under 'Misc'. Also, not all systems are configured to use the 'Begin' key. If the 'Begin' key is not visible, simply skip that press and move to the next button in the instructions.

### START OF DAY / TIME CLOCK

#### START OF DAY (Session)

If Automatic Sessions are enabled this step is not required. However, if an automatic session failed and you see the message: "**Still Running On Yesterday's Session**" follow these steps:

**Begin > Misc > Session Open/Close > YES**

This procedure will: finalize your previous day's transactions; backup your data; initialize new sales data to start your new day.

(If you do not complete this step, your daily sales will carry over from the previous day.)

**Note:** (If you are prompted for any answers during this process, please answer YES.) This process will take less than ONE MINUTE. When it is complete, the screen will return to the normal POS status screen.

#### EMPLOYEE TIMECLOCK

**Empl > Touch Your Name > Follow Prompts**

#### • EDIT A LOGIN

(Use this to change the login or logout time for a login record. If an employee has not yet logged in, have them login 1<sup>st</sup>, THEN edit their record. NOTE: Editing login records can be done from the pos or back office, but to ADD A MISSED SHIFT for a previous day, you must work from the back office.)

#### **MISC > EDIT LOGIN.**

Use the arrows (up or down) or set the filter by EMP or DATE to find the login record. Touch EDIT LOGIN. Touch the Login or Logout time box, and make the adjustments as necessary.

#### • CLOCK OUT EMPLOYEES

(Use this to clock out multiple employees quickly. Most useful if employees left work and did not clock out. **Misc**

#### **> Clock Out Employee**

A list of logged in employees will appear. Touch the employee you wish to logout and follow prompts.

### GUEST CHECK ADJUSTMENTS

#### • DELETE AN ITEM (Post-Send)

Go into the order. Touch the item you want to delete. Touch DELETE, (Enter Password if Prompted). Enter a Reason. Exit the Order.

#### • ADJUST THE PRICE OF A GUEST CHECK ITEM (A one-time adjustment to the price of an item on the guest check)

Go into the order. Touch the item. **Misc > Price Adjustment** > Follow Prompts. (Note- if there are any modifiers attached to this item, you will be prompted to adjust prices. Touch Ok to accept the current price.

#### • PERMANENT PRICE, PRINTER or COLOR CHANGE OF AN ITEM (New setting will be effective immediately and system-wide for all new orders of this item).

Go into any order, or go into a FAST TRANSACTION. Navigate to the menu group that contains the item you wish to edit.

**MISC > Edit Menu Item.** Touch Item. Follow Prompts. (Note- You may also change the button color, and printer)

#### • DISCOUNT SELECTED ITEMS ONLY

Go into the order. Tag an item, or multiple items (TAG means touch to select item- it will turn Yellow)

**MISC > DISCOUNT ITEM.** Apply the Appropriate Discount. (Note- If you discount an item by mistake, Tag the item again, MISC > DISCOUNT ITEM > CLEAR DISCOUNT).

#### • DISCOUNT AN ENTIRE GUEST CHECK

Go into the order. **MISC > DISCOUNT CHECK.** Apply the Appropriate Discount (Note- If you discount a check by mistake, touch MISC > DISCOUNT ITEM > CLEAR DISCOUNT)

#### • CHANGE NUMBER OF GUESTS

Go into the order. **MISC > 'CUSTOMER COUNT'**

#### • MAKE A CHECK NON TAXABLE

Go into the order. **MISC > TAXABLE.** YES.  
(REPEAT TO TOGGLE BACK TO TAXABLE).

## SPLIT CHECKS & ITEMS, TRANSFERS

### • SPLIT A CHECK

Go into a check. Touch SPLIT CHECK. To the right of each item touch in the column that represents the check number you want to assign the item. If you want to reassign an item to another check, touch in another column and it will move. Touch COMBINE SEATS or SPLIT ITEMS to access those options. When Finished, touch OK to complete the split. Checks are now ready to print. (PRINT, PRINT ALL. Or, if you are NOT ready to print yet, just touch EXIT.)

### • SPLIT AN ITEM (To share among separate checks)

Go into the order. Tag the item to split. MISC > SPLIT ITEM. Enter the number of ways to split.

NOTE: When you Split a check you may assign the fractions of a split item to any seat/check.

### • UNSPLIT A CHECK (ReCombine all Checks)

Go into the table > touch any seat.  
> MISC > Unsplit Check.

### • COMBINING CHECKS AFTER SPLITTING

Go into an order, touch the 1<sup>st</sup> seat or check you want to work with. Touch COMBINE SEATS, and select the seat you want to combine. To combine another seat with the current check, touch COMBINE SEATS again. To combine other seats, 1<sup>st</sup> navigate to the correct seat number using the SEAT key, then touch COMBINE SEATS to select the appropriate seat to combine.

### • TRANSFER A TABLE TO A NEW TABLE or MERGE TABLES

Begin > MISC > TRANSFER ITEMS. Select Source Table. Select Destination Table. Select Employee.

Note- If the Destination Table is unused, this will create a new table. If the Destination Table is in use, it will merge the contents of the two table.

(IMPORTANT NOTE: There is a TRANSFER TABLES function in the system that should NOT be confused with TRANSFER ITEMS. 'Transfer Tables' is used to quickly transfer ALL TABLES from ONE Employee to another employee. Useful if an employee who has active table is ready to be cut or has to leave for some reason. A new employee can quickly be assigned those tables.

### • TRANSFER SELECTED ITEMS TO A DIFFERENT ORDER

Go into the order & TAG Items to transfer.

MISC > Transfer Items. Touch the Destination TAB or TABLE.

## SETTLEMENT, PAYMENTS, TIPS

### • SETTLE A CHECK

Go into the order,> SETTLE. Touch a form of payment (CASH, VISA, etc). You will be presented an amount. To settle the entire amount to this payment, simply touch OK. If you only want to apply a partial amount to this form of payment (ie: PART CASH, PART CREDIT CARD) enter the Amount you wish to apply. Then touch the next form of payment and enter the amount to apply.

When finished, accept the YES to finalize, or touch FINALIZE to finish and answer YES.

### • APPLY A GRATUITY

Go into the order.

MISC > Gratuity > Choose Percent or Fixed. Apply Percent or Amount.

### • CANCEL A GRATUITY

Go into the order.

MISC > Gratuity > CANCEL GRATUITY.

### • APPLY MULTIPLE CREDIT CARDS TO A SINGLE CHECK

Go Into the Check, Settle, Touch the Credit Card Payment Key. Swipe the 1st Card.

Enter the AMOUNT to charge to this card, or, for EVEN SPLITS, touch the appropriate FRACTION key on the right. Repeat for each card then SUBMIT when ready to process cards.

### • REVISE A SETTLEMENT (Change Paytype or Tip Amount)

NOTE: Use this function if you closed a check to the wrong form of payment (Cash instead of Credit Card for example) OR if you need to adjust the TIP on a credit card.

Begin > MISC > Revise Settlement > Filter > Order Number > [Enter the Order Number > OK.

When the settlement screen appears do one of the following:

#### 1. TO CHANGE FORM OF PAYMENT

- Touch [DELETE] & yes to delete the payment.
- Touch the new form of payment (CASH, Visa etc...)
- Enter the amount or hit ok to accept.
- Touch FINALIZE, & YES

#### 2. TO CHANGE A TIP ON A CREDIT CARD

- Touch the TIP amount at the top of the screen.
- Enter the correct TIP amount.
- Touch OK.
- Touch FINALIZE, & YES

## SETTLEMENT, PAYMENTS, TIPS Cont'd

### • RE-OPEN A CLOSED CHECK

**Misc > RECALL CHECK.** Locate the order and touch 'Recall Check'. Note: The order will be found under the TABS screen. Recalled orders are sent to the Tabs screen to avoid the conflict of having two tables with the same number open at the same time. You may continue to work on a recalled check as if it was never closed. You may choose to transfer it back to a table or leave it in Tabs.

### • EMPLOYEE PAID OUT

**MISC > Employee Payout.** Use to take excess money from an employee ie- a server is carrying \$1000 and you only want them to have \$200. Do an \$800 Emp. Payout. Note: If you take this money and put it into a Cash Tray, see the next function MONEY DROP.

### • MONEY DROP

**MISC > MONEY DROP.** Note: This function is used to account for money added to an employee's cash tray ie- if the money was taken from an employee has accumulated more cash than you wish them to carry in a banking or driver setting. Money 'dropped' will be credited to the Cash Due of the selected cash tray.

### • REVENUES REPORTS (Employee Sales)

Touch EMPL. Or **Misc > Revenues Report.** NOTE: Revenue Reports are tracked from LOGIN to LOGOUT. If an employee has MORE than ONE login with sales in a business day they will have a revenue report for each period worked.

### • FLASH REPORT (Instant Sales Summary)

**Misc > Flash Report**

### • OTHER SALES REPORTS

**Misc > Reports**

Reports Include:

- \* Employee Attendance Report
- \* Table Turns (By Employee)
- \* Hourly Sales (w/ Labor and Food Cost)
- \* Sales By Menu Group (By Group Type, Hourly)
- \* Job Class Summary (Labor costs and wages)

## CASH TRAY OPTIONS - CASHIER REPORTS

### \* Open Cash Drawer:

Cash Tray Options, > Open Drawer

### \* Initialize Cash Tray (Starting Cash)

Cash Tray Options, Initialize Tray  
Enter Starting Cash

### \* Finalize Cash Tray (Ending Cash)

Cash Tray Options, > Finalize Tray  
Enter Ending Cash

**Note:** To enter ending cash by Denomination (bill and coin counts), Rm Back Office, Setup, Station Configuration, Devices, Cash Drawers, Pos Cash Drawers, Cash Drawer Declaration. Change Cash Declaration Mode To: Declare By Denomination

### \* Show Tray Info

Cash Tray Options > Show Tray Info

This displays a listing of all trays for the current session and the status. Note: You may only use cash tray numbers ONCE per session.

### \* View Trays

Cash Tray Options – Same as Show Tray Info but has had the ability to edit cash tray totals. Note: Editing a cash tray will FINALIZE and CLOSE they tray. You should edit a tray ONLY when you are finished with it for the day.

### \* Cash Tray Report

Cash Tray Options > Cash Tray Report. Enter the cash tray number and then output to printer or screen.

## ENDING A BUSINESS DAY

### • Misc > End Of Day

This function will:

1. Settle any Open Orders
2. Finalize any Open Cash Trays
3. Logout Employees
4. Verify Credit Card Batch (Mercury Only)
5. Close the Session

**Note-** The End Of Day function may be configured to either ask the user for input on the handling of each function, or to proceed with a default handling of each function automatically. For example, you may wish to have all Open Orders settled automatically to cash, OR you may wish you have the system PROMPT the user to settle each order individually.

## TROUBLESHOOTING

Many issues can be easily handled without calling technical support. If you are experiencing a problem, review this section and you may be able to resolve it immediately. If you cannot resolve the issue please have an authorized caller contact your POS Technical Support department.

### • PRINTER PROBLEMS:

1. No Power Light.
  - a. Check power cable going into printer.
  - b. Check power cable going into surge protector.
  - c. Check power on surge protector. Make sure you can plug a known working device (a lamp, etc) into the same receptacle & that it works there.
2. Power on but will not print.
  - a. Check cable from printer to computer. Make sure all connections are tight on the printer and computer/switch.
  - b. Power cycle printer: Off- wait 5 seconds, then On.
  - c. Self test printer: Power off. Press & Hold Paper Feed, then Power on while holding down paper feed. Printer should print a 'Self Test' sheet.
  - d. Paper Jam  
Remove the paper roll. Tear off paper. Press paper feed while you attempt to pull remaining paper through. Or use a thin but rigid (like a credit card) piece of plastic to push paper through.
3. Paper comes through printer, but no text on paper: Check ribbon, or on thermal printers be sure you have thermal paper. Also, thermal paper is only active on ONE SIDE! Be sure it is inserted correctly for the active side!

### • POS STATION PROBLEMS:

For all issues at the stations including POS 'freezing', error message on screen, slowness or other problem"

1<sup>st</sup>: Turn power off. Wait 5 Seconds. Turn On. Wait for reboot cycle to complete. If the POS loads properly attempt to use it and see if the reboot solved the problem.

OR

1. If computer screen is showing Windows, but POS program does not load, check all cables going into the back of the POS Computer, especially the 'Network' cable (this will usually be beige or other colored cable with a connector that looks almost exactly like a telephone connector plug).
2. If there is NO video picture at all, check the power switch on the Screen itself. Check all power cables on the screen, PC, Terminal etc. Use a KNOWN working outlet. If using a UPS Battery Backup, try removing the power cables from the UPS and plugging the POS directly into the wall electrical outlet

### WHEN TO REBOOT / WHAT TO REBOOT

As a general rule, if you have multiple stations and only one station is giving you a problem, you do not need to reboot the entire system.

You should only reboot the station that is having a problem.

If EVERY station on the network is down, reboot the whole system. **REMEMBER: It IS OK to REBOOT the SYSTEM.** Do not wait for a technician if your whole system is down. More often than not a simple reboot can clear up system-wide problems. ***You can be up and running in Minutes instead of an hour or more!!!***

**HOW TO REBOOT THE SYSTEM.** To reboot a single station, turn the power off to the PC/Processor AND Screen. Wait 5 seconds. Power on. To reboot the whole system, turn off all stations. Reboot SERVER. Wait for the desktop to appear. Then turn on all remaining stations in any order. If this does not restore your system, please call.