

Client Training Acceptance Form

By signing this form after completion of each section, the client hereby certifies that she/he has been trained on the following operational issues for the Restaurant Manager POS system as delivered under the terms and conditions of the contract. The client acknowledges a functional understanding of the concepts described below.

HARDWARE ORIENTATION

Prior To Beginning Any Operational Training, the trainer will identify for the trainees all components of the POS system including Back Office / Server Computer, Monitor, Report Printer, UPS/Power Strip.

The term 'Network Subsystem' refers to the Network Switch – Router, Cable/DSL Modem, and any additional components required for the system to communicate.

Trainer will identify power switch locations for all devices, and also how to powercycle ALL Switches, Routers, and Cable/DSL Modems. *(Note: ALL Cable Modems, Routers, Switches should be on a powerstrip for "1 Switch" Powercycling)* **Powercycling refers to the process of removing power from a component, waiting 10 seconds, then restoring power to the unit. Electronic units sometimes require this to resume normal operations- especially after power surges, spikes, etc.**

After identifying back office equipment, all front of house POS Components should be presented including how to: Powercycle POS & POS Printers; how to change POS Printer Paper; how to clear POS Printer paper jams. Demonstrate how to Self-Test a Printer.

REBOOTING

Windows on occasion needs a 're-boot' to work properly. This is an inherent behaviour in Windows and has nothing to do with Restaurant Manager. Restaurant Manager runs ON Windows and therefore, if Windows 'locks up', the system must be rebooted before it will operate properly.

It is not only OK to reboot, but one should absolutely reboot ALL Stations and Server, AND powercycle the network subsystem PRIOR to calling for tech support by following the steps below:

When to Reboot the entire system including server: If ENTIRE system is down- no stations working!

THE REBOOT CYCLE: HOW TO REBOOT THE ENTIRE SYSTEM

1. Power-off the powerstrip for the network subsystem. Wait 20 Seconds, Power-on the strip
2. Power-off the server (Press Power Switch till power is off. Wait 5 seconds, Power on (Press & Release Power Switch).
3. While server is booting up, go to each POS station, power off, power on.
 - If the above process does not restore functionality, contact tech support.

When to Reboot only a single station: If other stations are fine, but one station does NOT operate, then reboot ONLY that station. If rebooting that station does NOT work, reboot the entire system as above.

- If the above process does not restore functionality, contact tech support.

EXERCISE: Trainees will each go through the REBOOT CYCLE Steps 1,2,3 above, then Powercycle POS Stations and Printers;

KEY FACT: The vast majority of all problems are fixed by a reboot, so it should ALWAYS be done prior to calling. Most often you will not need to wait for a technician to get you running again if ***you*** do it first!

MEMOS:

PRINTER INK, TONER, RIBBONS

Client should ensure they have POS Paper (thermal / standard) and Office Paper, Ink, Toner etc PRIOR to go-live date.

Calls for ribbon issues, empty toner, or empty ink are not covered under warranty

CASH DRAWER KEYS

There are no 'Master Keys' for cash drawers, and we do not keep duplicates.

Drawer keys should be presented to store owner or manager at the time of installation.

In most cases we will not provide after hours on-site calls to open cash drawers if keys are lost. If an exception is made solely at the discretion of the management, time will be bill at double the standard hourly rate, including travel to and from the site.

System Support Programs

Rmssql, Rmtime, Security, etc. Explain all program & how to reset (All systems should have a 'Reset All Interfaces' shortcut for One-Click Reset of All Support Programs.)

Explain that if an interface is not running, the function cannot run.

RMspsol = Prep & Check Printing

RmccWin & Pc-Charge=Credit Cards

POSlink = Timed Send

Security = Must be running or system will shutdown

Resetall.bat

```
:Begin
Pv -f -k rm*.exe
Pv -f -k poslink*
Pv -f -k security*
Pv -f -f active-charge*
Wait 1
rem substitute drive letter
F:
Cd\rmwin
Start Rmtime.exe
Start rmstart.exe
:End
```

ALL Systems should use the following Loadserv.bat for startup.

```
:Begin
Pv -f -k rm*.exe
Pv -f -k poslink*
Pv -f -k security*
Pv -f -f active-charge*
Wait 1
rem substitute drive letter
F:
Cd\rmwin
Start Rmtime.exe
Del *.ntx
Wait 1
Start Rmindex.exe
Wait 10
Start rmstart.exe
:End
```

NOTE: Be sure to copy PV.exe and WAIT.exe to the \windows\system32 directory.

Back Of House Operations

Identify the Back Office icon. Explain that most programming will be done via the Back Office program. Reports will be accessed via the RmReports icon. Explain that when working with tech support what it means to 'Open the Back Office Program' or 'Open RmReports'

SECTION I. MENU PROGRAMMING

- a. Understanding the Menu: MENU ITEM Groups, MODIFIER Groups, CUSTOM Group (if applicable) , Course Types. Group Types, & Menu Navigation.
- b. Knowing the Steps in Menu Building: Define Logical Groups. Add Modifiers. Add Items. Link Modifiers to the Items. Define Colors. Create Speed Groups if needed. Populate the Menu Navigation Bar(s).
- c. Modifiers. Adding modifiers to the menu database. Pricing modifiers. Modifier printing options: follow item; follow item and print at other printer(s); do not follow menu item; do not follow item but do print at other printer(s).
- d. Adding a menu item to a group. Setting Price (& Price Levels if used), setting button color, printer destinations. Adding modifiers to the item.
- e. Advanced Menu Features: Taxes, Open Prices,
- f. Adding new Groups: Menu, Modifier & Speed Groups.

• MENU PRACTICE EXERCISES:

1. Trainee should open back office, open MENU, and learn how to navigate through the menu 'tree'. Explain the Menu Tree, Menu Groups, & Items. Learn ow to 'Open' and 'Close' Menus and Groups. Learn how to display the contents of a menu group by selecting a Menu Group in the menu tree. Learn how to select a Menu Item by selecting it in the tree, or by 'Right Click' in the displayed group items section on the right.
2. Use the Menu 'SEARCH' function to find an item
3. Select an existing item and change: Price, Printer, Color, Location (drag & drop).
4. Add new menu item from scratch: Right click. Enter item name, Enter Price, Set color, Assign a Printer.
5. Add new menu item with Modifiers: Steak, w/ Temp & Side Choices.
(After adding the item, click Modifiers Tab, Select the Cooking Mods on the right, drag temp mods to the left in Screen 1. Change Screen 1 to Screen 2. Select 'Sides' on the right, drag sides into Screen 2 on the left. Change the Max count to allow 2 Side choices)
6. Add new 'SIDE' modifier & then add it to an existing menu item.

Completed: Date _____ Client _____ Trainer _____

SECTION II. EMPLOYEE SETUP (Adding, Removing, Changing Jobs or Pay)

SETUP > Employees

- a. Define JOBS: Setup, Labor Classifications
- b. Define Payroll Period, Starting Day: Activities, Payroll Options
- c. Understanding the **Employees** form: Name, POS Name, Active, Security Levels, Assigning Job(s), Pay Rates, OT Rates, and Personal Info Fields.

- **EMPLOYEE PRACTICE EXERCISES**

1. Add new employee: Name, POS Name, Password, Security Levels (In and Out), (Personal Info – Optional), Add several jobs & Pay rates. Explain OT: Should NOT be used unless a specific employee has negotiated pay OTHER than Time x 1.5
2. Explain Active vs Inactive. Do NOT delete employees for at least a year. If deleted, NO pay detail or other info will be available for reports, labor board or unemployment inquiries. Instead, make them Inactive.
3. Change a Job for an existing employee. Delete a Job. Change pay rates.

Completed: Date _____ Client _____ Trainer _____

SECTION III. MANAGING LOGIN DATA (Employee Hours Worked)

- a. Login at POS. Logout. Revenue Reports, Declaring Tips.
- b. Edit Login Record from POS station.
- c. Logout Multiple Employees.
- d. Back Office: Edit Logins for pay period wage reports. Add records if needed.
- e. Understand Overtime and the need to 'Calculate Overtime' before running report.

- **EDIT LOGIN PRACTICE EXERCISES**

1. EDIT EXISTING LOGIN (Someone clocked in at noon but got there at 9am). Back Office, Activities, Edit Logins. Select 'Show Only This Employee'. Select the employee from the list on the right side of the form.
Set date range & click 'Set Filter'.
Double Click the record to Edit info. Change in or out time, job, pay etc. Ok when finished.
2. ADD A LOGIN (Someone forgot to clock in for an entire shift). Select the employee, set the date range & click 'Set Filter'.
At the bottom, set the date of the missing shift, & click Add Record for Selected Date.
Complete the fields for the shift & click Ok when finished.
3. CLEAR A SHIFT (You were adding a shift & now realize it was added by mistake. You CANNOT delete a shift, but you may CLEAR it so the hours are zero for that record).

Completed: Date _____ Client _____ Trainer _____

SECTION IV. GENERATING REPORTS

- a. Accessing the RM-Reports Module.
- b. Which reports to run? When?: Session Summary is THE main report, all other optional.
- c. Client should examine all reports to determine those that have specific importance for the needs of the client.
- d. Session Reports
- e. Sales Reports
- f. Understanding Report Filters.
- g. Employee Reports- Wage Details, Wage Summary
- h. Clearing all filters. Assigning new filters.
- i. Setting Date Ranges.
- j. GROUPS, Creating Custom Groups. Drag Reports into Groups.
- k. Printing All vs. Selected reports.

• **REPORT PRACTICE EXERCISES**

1. SESSION SUMMARY FOR SINGLE DATE

Note: This is the main report to be run every night which provides the basic financial balancing data required to check up for a business day. Any other reports are optional

Open RmReports. Select SESSION SUMMARY. Select a Session. Understand the OUTPUT selector: SCREEN vs. PRINT

2. SESSION SUMMARY FOR MULTIPLE SESSION

- a. Select sessions by click & drag or
- b. Select 'Session Start Date' filter & use Calendar 'Start' & 'Finish'

3. SESSION SUMMARY with MULTIPLE FILTERS: Select a Session, then click the Employee filter in the middle & then select an employee (or several emps using the ALT key click other employees ie; for a group contest (Dona, Susan, & Kim)

4. WAGE REPORTS:

WAGE DETAILS REPORT (Employee, Wage Details) This report is used to review all logins and logouts daily for each employee to ensure hours are coreect prior to running final pay reports.

WAGE SUMMARY – This report is useful to turn into your payroll service or accountant along with the Employee Tips Report.

REMEMBER: Once you learn how to run ONE Report, they all run the same way! Simply Select a report on the left, then Select a Date or Date Tange & PRINT the report.

Completed: Date _____ Client _____ Trainer _____

SECTION V. SESSIONS

- a. Understanding a SESSION.
- b. Accessing Sessions via POS or Back Office
- c. How to Open a Session.
- d. How to Close a Session.
- e. If a session is not started each day, two days CANNOT be separated.
- f. 24 Hr Mode vs. Standard Mode.
- g. Automatic Credit Card Batch Settle on Session Close.
- h. Using PageUp to access previous year sessions

Completed: Date _____ Client _____ Trainer _____

SECTION VI. SALES TAX

- a. Sales tax set for local tax rates
- b. Handling of VAT (value added tax- ie, Tax is included IN the price of a Beer at the bar, but at a table, the tax is added TO the price of the beer)

Note: These generally should NOT be changed by the end user, however it is important to discuss taxes at training to be SURE taxes are being handled appropriately and that TAX RATES are correct.

TAX RATES FOR THIS SITE AT THE TIME OF TRAINING ARE:

SALES TAX NAME	%RATE	VAT? - Bar Dining - Other
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

Completed: Date _____ Client _____ Trainer _____

Client acknowledges and requests the tax rates above to be programmed as listed.

FRONT OF HOUSE OPERATIONS

SECTION VII. KNOWING YOUR HARDWARE

- a. Define the POS 'Terminal' or station & its parts.
- b. How to Power Cycle or reboot PC. Power off / On.
- c. Maintaining a Clean Touchscreen Sensor.
- d. Identify ALL cables and connections: Printer, Touch (if not all-in-one), Card Reader, Pole Display, Fingerprint Reader etc.
- e. The Printer. Power. Printer Cable to POS Connections & how to check cables.
- f. Cash Drawer Cable.
- g. Loading Changing Paper.
- h. Paper Jams. Cutter Jams.
- i. How to Self Test a printer for diagnostics & understand led's for printer status.

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SECTION VIII. THE POS ORDER ENTRY SCREEN

- a. Understanding Login, vs. Begin.
- b. Understanding layout of POS Main Screen. Bulletin Board, Function Buttons, Table Display, Table Groups, Dining Areas. Station ID Number, Date, Version.
- c. Learning POS Function Buttons.
- d. POS Modes
- e. MISC button. In MAIN, ORDER ENTRY, & Settlement. Differences in each.
- f. Switching POS Modes & defining default modes & opening menu item screens.
- g. Table Selection. Customer Count.
- h. Understanding layout of the POS Order entry Screen. On Screen Check Display, Check Display controls (PageUp, PageDown, Select All, etc.)
- i. Enhanced Seat Management
- j. Quantity Keys.
- k. Selecting & Deselecting Items on the display.
- l. Menu Group display area, menu items.
- m. Navigation Bar. Paging up/down, Selecting Groups.
- n. POS Function Buttons.

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SECTION IX. BASIC POS ORDER ENTRY PRACTICE PROCEDURES

- a. Begin, Select Table, Customer Count.
- b. Choose items from a displayed group.
- c. Change groups via MAIN MENU or NAV BAR.
- d. Change Quantity: (Use Qty +/- and QTY function button (if enabled))
- e. Send Items. Exit POS.
- f. Recall existing order. Add new items. Reorder existing items.
- g. Add modifiers. Add Free Modifiers vs. Optional Modifiers.
- h. Edit Modifiers
- i. Deleting items (pre-send). Understanding deletions by mgr. only, after sending.
- j. Assigning Seats During Order Entry (Enhanced, vs. On-The-Fly, vs None).
- k. Print Guest Check.
- l. Print w/ Subtotals (if enabled)
- m. Split Checks. Assign Items. Split Items. Unsplit Checks.
- n. Settlement. Cash Button for quick cash (no change)
- o. Settle key – allows for splitting payment. Settle a check to part credit card, part cash.
- p. Credit Card auth, tip, finalize.

Completed: Date _____ Client _____ Trainer _____

SECTION X. ADVANCED POS ORDER ENTRY PRACTICE PROCEDURES

Note: Some functions may not apply to all sites!

- a. Split Items, unsplit.
- b. Hold and Fire
- c. Delayed Send
- d. Change seats
- e. Combine Seats
- f. Customer counts
- g. Change course
- h. Gratuity
- i. Recipe Lookup
- j. Find Item
- k. Special Instructions
- l. Send to Tabs
- m. View check

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SECTION XI. COMMON BAR ENTRY PROCEDURES

- a. Starting a Tab; Reference; Tabs Displayed; Tab Order Displayed; Tab Columns
- b. Recalling Tab
- c. Transferring items between tabs
- d. Fast Order
- e. 'Send to Tabs' in a fast order
- f. Send to Table
- g. Transfer to Tab

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SECTION XII. COMMON MANAGERIAL POS PROCEDURES

See DAILY OPERATIONS GUIDE FOR STEP BY STEP

- a. Understanding Managerial Override (prompt for password- look for Security Level)
- b. Delete (void) an item – post send
- c. Discounts: Discount Items vs. Discount Checks.
- d. Applying Discounts & Clearing Discounts
- e. Transferring Items: Transfer a single item. Transfer multiple items. Merge 2 tables via transfer. Move a table via transfer.
- f. Employee Transfer (One Table vs. 'Transfer Tables' for All Tables)
- g. MACROS
- h. Price Adjust
- i. Price LEVEL Adjust
- j. Revenue Ctrs
- k. Taxable vs. Non. Taxable
- l. TaxTables
- m. Revise Settlement
- n. Recall Checks
- o. Reprint Credit Card Slip
- p. Flash reports
- q. Edit Logins
- r. Settle All

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FINAL END OF NIGHT REPORT

Session Summary

The Session Summary report may be printed either from the POS or from the back office RmReports.

The Session Summary Presents the following information:

Payment Types: This section lists the total number and amount of all payment received into the POS system from all sales activities for the given period. Note that this total is NOT a SALES TOTAL as it may also include TIPS on CREDIT CARDS, and Payments Received On Account such as for the purchase of Gift Cards/Certificates.

Group Types: This section lists the net sales (pre-tax amounts) by group type. Note, the 80 Column format of Session Summary will also indicated any discounts per group type.

Tax Types: This section lists all taxes collected

Others: This section lists Tips and Dollar Discounts

YOUR PLACE CAFE

Session Summary
 Date: 12/03/08
 Time: 11:01 PM
 Session #: 1 06/01/90 - 12/03/08

Filter Settings
 No active filtering

Payment Types

Description	Number	Debit	Credit
Cash	17	1,093.46	
On Account	2	-77.62	
Visa	1	198.37	
Discover	1	200.00	
Total:	21	1,414.21	

Group Types

Description	Number	Debit	Credit
Food	125		824.84
Beer	9		40.93
Wine	1		324.97
Merch	17		8.60
Total:	152.00	1,199.34	

<<- Note: This amount is Net Sales (Sales Pre Tax)

Tax Types

Description	Number	Debit	Credit
Food Tax	9		40.20
Alc Tax	1		30.60
Total:	19		70.80

Others

Description	Number	Debit	Credit
Total Tips	1		124.90
Total Cash Back	1		
Total Dollar Discounts			
Total:	3		124.90

CASH HANDLING DETAIL: This section is used for the final cash balancing. The NET CASH should be the actual amount of cash left after all other activity, and would be considered the 'DEPOSIT'. This amount is calculated as shown below, with all cash taken in, minus any tips paid back to staff, and then any other paid-ins, paid-outs, etc.

The 'Net Received' amount is the total amount of Sales + Tax.

```

-----
Cash Handling Detail
Cash type:                               Amount
Gross Cash:                               1,093.46
Less Tips:                                -    124.90
Cash Back:                                 -     0.00
Credit Card Fees:                         +     0.00
Paid Ins:                                  +     0.00
Paid Outs:                                 -     0.00
Net Cash:                                  968.56
Other forms of payment:                    +    320.75
Net Received:                              1,289.31
-----
    
```

```

-----
Money Drop / Employee Tip Out
Money Drops                                0.00
Employee paid out                          45.00
Discount Detail
-----
    
```

```

Discount type                               Amount
Line item discounts:                       -53.30
Group discounts:                           0.00
Coupons:                                    0.00
Price Adjustment:                          0.00
Check Discounts:                           0.00
Guest:                                     0     0.00
2 For 1 discounts:                         0.00
Total:                                     -53.30
-----
    
```

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```

-----
Totals Settled Open Total%Settled
Sales 1,199.34 2,041.43,240.80 37.01
Customers 29 78 107 27.10
Checks 18 28 46 39.13
Void: 15 378.00
NonTax Revenues: 0.00
Total Sales + Tax: 1,289.31
-----
    
```

<<- Note: This amount is Gross Sales (Sales + Tax)

```

-----
Averages
Sales per Hour:                            477.17
Avg. Cust Spend (Total Sales / Total Customers): 30.29
Avg Cust Spend Excluding Discounts 30.79
Avg. Check (Sales (inc discounts) / Total Checks): 70.45
Sales per Man Hour:                        0.00
-----
    
```

```

-----
Costs
Labor Cost                                 0.00
Labor % of sales                          0.00
Food Cost                                  189.68
Food % of Sales                            5.85
-----
    
```

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CLIENT SIGNATURE(s)

Please retain a copy of this document for your records. A copy will remain in your file at the Infinity Computer Systems, Inc. main office.