DINERWARE®

Management QuickStart Guide v. 2.7

To begin building your database, enter **1234** as a password to begin setup. Once you enter the management screen, you can change your manager PIN.

This guide is an introduction to the management functions of Dinerware, including menu setup, employee management and reporting. We recommend that you read through this guide before beginning any programming. When you are ready to get started, enter 1234 into the keypad and log in.

Control all menu setup functions through the **Manager Screen**. To access the Manager Screen, click on the manager button on the upper right hand portion of the menu screen. Dinerware is designed to be intuitive and easy for you to program.

Manager Screen

The Dinerware menu management system is based upon a hierarchical method of organizing your menu. Consider the following hierarchy:

- A **Choice** is a modifier, a specific option (e.g., mayo) available to modify a given Menu Item.

- Choices are grouped according to **Choice Sets** that you will create.

- **Item groups** allow you to group menu items with like prices and are integral in course firing.

- **Screen categories** group your menu items for presentation on the Order Entry Screen.

- **Taxes** are applied to **Revenue classes**, which are attached to menu items.

- **Menu items** make up your menu. The categories listed above are attached to your menu items. (This will make more sense as you continue reading.)

We recommend you begin setting up your menu by first creating screen categories, item groups, choices, choice sets, and revenue classes so that when you enter your first menu item, all the required information will be ready to go.

Important   In Dinerware, nothing is ever deleted. If you do not want to use a menu item or screen category for any reason, you can Activate and Deactivate individual menu items, or entire Screen Categories as necessary. In most lists, you can choose to View Active or View All to see items that have been deactivated.

Choices

A Choice is a specific option (e.g., pepperoni) available to modify a given Menu Item. There are hundreds of choices within your menu. I.e. Medium Rare, On the Rocks, On the Side, Extra cheese, Double, No Onions, etc.

Note   You cannot order a Choice by itself, or without a Menu Item. Therefore, we suggest you create your choices first before you create the Choice Sets (the groups to which these choices belong.)

▶ **To create a Choice:**

1. From the Manager Screen, touch **Menu.**

2. Touch **Choices.**

3. Touch **New.**

   a. Name the Choice (e.g., "No Onions")

   b. Enter pricing modifier if the choice adds a cost to the customer (optional.) For example, Extra Avocado costs an addition $2

   c. Check what Choice Sets your choice resides in (I.e. No Onions is part of the Choice Set called "No")

   Important   If you have not yet created your list of Choice Sets, you will not see any choice sets listed. Not to worry, you will link your Choices to Choice Sets when you create your Choice Sets.

   d. You do not need to select a printer unless the Choice should be printed at a different location

   e. Check the box if you would like the choice to print in red

   f. Choose **OK** to return to the Choices screen and create another Choice.

4. **Repeat** until you have created the Choices that you want to start with on your menu.

   Hint   You can always create more Choices later.

Choice Sets

Choice sets are groupings of individual choices (sometimes called modifiers) specific to any given menu item or groups such as vodka or meat temperature. For example, the choice set "Meat Temp" might contain the choices "rare," "medium," "well." The choice set "Vodka" might consist of "OJ" and "Bloody Mary."

▶ **To create a Choice Set:**

1. From the Manager Screen, touch **Menu.**

2. Touch **Choice Sets.**

3. Touch **New**.

4. Name the Choice Set.

5. Determine whether you will allow multiple choices or only one choice within this choice set.

   For Example in the Choice Set "Pizza Toppings," you would most likely **Allow Multiple Choices** so that each of the Choices "Mushrooms," "Artichokes," "Garlic" could all be selected under this Choice Set.

   Alternatively, if you created a Choice Set called "Meat Temperature," you would most likely choose '**Allow only One Choice'** so that only one option of "Rare" or "Medium" or "Well-Done" could be selected.

6. Determine whether this Choice Set is **optional** or **mandatory** (the server must make a choice, for example "Meat Temp") and/or whether this Choice Set will **Print in Red** to the kitchen.

7. If you have created Choices, add them to your Choice Sets. You will see two lists **Choices Not In** and **Choices In**. Select the Choice you want to move into the set and touch the arrow to move it into the Choice Set.

   Alternatively, you can add choices to the choice set by touching the button **Choices in Set** that will take you to the **Add Choices to this Choice Set** Screen.

Item Groups

Item Groups are groups of menu items that you create for three primary reasons: to control kitchen printing order, to have the ability to change the price of a group of items in one-step, and for reporting. All menu items in an item group are given a default price that can be overridden when entering specific menu items. Item Groups do not appear on your menu-ordering screen, even though they may have names very similar to sections of your menu. "Micro Pints," "Appetizers," "Salads," and "Entrees" are all typical Item Groups. You may have many more or you may have less.

▶ **To Create Item Groups:**

1. From the **Manager Screen**, touch **Menu**.

2. Touch **Item Group.**

3. At the bottom-right of the screen, touch **New** to **Create a New item Group.**

   You should now be inside the **Edit Item Group** screen

4. Name your Item Group.

5. Enter a price.

Repeat until you have entered your entire list of Item Groups.

6. Once you have completed your list, be sure they are in proper course firing order for your restaurant.

Hint   Create a category called "Appetizers." Remember that in Item Groups, you will attach one price to the group and each item in that group will inherit the same price. If each of your menu items grouped in Appetizers are priced the same, $6.95 for example, you would enter that price here. If the menu items that belong to the Appetizer Item group are priced differently, you will still be forced to enter a price - but you may enter a zero. We recommend you enter a very large number like $1000. The advantage of entering such a large amount is the likelihood of catching pricing errors on your tickets.

Screen Categories

Screen categories are the 'groups' menu categories that appear on your main ordering screen. They organize your individual menu items into categories that make sense when servers are entering orders. Categories can appear in different orders for different jobs. For example, Bottled Beer, Draft Beer, Soups, Salads, Appetizers, Pasta, Burgers, and Sandwiches are all common Screen Categories.

▶ **To Set up Screen Categories**

1. Be sure you are inside the **Menu** Screen. In the upper right-hand corner, you should see: "Menu, Revenue, and Tax Setup."

2. Touch **Screen Categories.**

3. At the bottom-right of the screen, touch **New** to **Create a New Screen Category.**

4. Name your Screen Category.

5. Repeat until you have entered your entire list of screen categories.

The order in which you create your screen categories in the management screen will be the order in which they appear on the "Order Entry" screen.

Revenue Classes

Revenue classes group items into different categories for tax purposes. Dinerware is

▶ **To create a new Revenue Class**

1. From the **Manager Screen**, touch **Menu**.

2. Touch **Revenue Class**.

3. Touch **New**.

4. Name the **Revenue Class.**

5. Select which taxes apply to this **Revenue Class**.

6. If you want the revenue class you are creating to show up in your customer favorites, the select the check box "Include in Customer Favorites." For example, you may want to see food and wine your customers prefer but not cocktails.

    You may need to go to Taxes and create a new tax if you do not see one you need.

▶ **To Create Sales Tax Percentages**

1. Touch **Taxes.**

2. Create the required sales tax(es)

3. Enter percentage.

4. If the tax applies to all items, select '**Applies to All Items'.**

5. If you want the tax to apply only to certain items or revenue classes, then check those items specifically in the box to the right labeled **Apply Tax to Specific Items and Revenue Classes**.

6. Once you have selected the options appropriate for your restaurant, touch **OK**.

Menu Items

By now, you should have created everything you will need to complete your first Menu Item. Menu items are the specific items the server orders and sends to the kitchen, or bar so that it can be prepared. Menu items reside within Screen Categories and have taxes, revenue classes, choice sets, item groups, printers associated with them.

▶ **To Enter Menu Items**

1. From the **Manager Screen**, touch **Menu.**

2. Touch **Menu Items.**

3. Touch **New.**

4. Fill out all the required and any optional information you choose: **Menu Item Name, Alternate Kitchen Print Name**. The alternate menu name to what the customer sees. I.e. "Grilled Portobello Sandwich" on the ticket might translate to "Portobello" in the kitchen.

5. Select **Revenue Class**

6. Select the **Item Group** and whether or not the Item has a Unique Price (different from the group pricing you attached earlier when you created Item Groups.)

7. Determine whether the Menu Item is hidden (will not appear on customer receipts) by checking the box "Do not Print on Customer Receipts."

Example: Create a Hidden Menu Item called "Fire Now." You could use this to send a message to the kitchen to make the item now; the customer would never see this on their receipt only the kitchen staff in the kitchen.

8. Check the appropriate Screen Categories and Choice Sets that are associated with this menu item.

9. Finally, select the Printer to which this Menu Item should print. For example, "Kitchen," "Bar Printer," "Cold Line."

Hint Use Save as New when you are creating menu items. This will allow you to create new menu items based on your previous item thus eliminating unnecessary repetitions.

Taxes

Dinerware will apply taxes to items at whatever rate you set and with some important options. For example, Hidden Liquor Tax will allow you to sell alcoholic beverages with tax included.

▶ **To Enter Taxes**

1. From the **Manager Screen**, touch **Menu.**

2. Touch **Taxes**.

3. Touch **New**.

4. Enter the **Name** of the tax and enter a **Percentage.** E.g. 8.8%.

5. Select H**idden Tax** if you would like the tax amount to be subtracted from the price of the menu item. I.e. Tax-included items such as bar beverages. Dinerware will calculate the tax out of the item price you set and report that appropriately.

6. If the tax applies to all items, select '**Applies to All Items'.**

   If you want the tax to apply only to certain items or revenue classes, then check those items specifically in the box labeled **Apply Tax to Specific Items and Revenue Classes.**

You are now done with creating your menu. Once you have completed your menu, move on to other sections of the Manager Screen to complete your database.

7. Once you have selected the tax options appropriate for your restaurant, touch **OK.**

Important After you finish setting up your menu, it is a good idea to backup your database. Quit Dinerware from the Manager screen and return to the Dinerware Brain. Select the Backup Database button to backup your database.

Creating Jobs for Employees/Restaurant

Before you start entering your users, we recommend you create 'Jobs' for your restaurant. For example:

- Day Bartender
- Night Bartender

  Creating either day and night server or bartender can work well if you are creating customized lunch and dinner menus or special bar menus.

- Day Server
- Night Server
- Cocktail
- Chef
- Dishwasher
- Driver, if using Delivery.

Before a job is assigned, it must be defined on the system.

▶ **To Create a Specific Job and Define Job Functions**

1. Touch **Jobs**.
2. Enter the name of the Job, i.e. **Server** and enter the job description.
3. Define **Job Settings**.

   a. Select **Blind Job**, for example, if you do not wish your bartenders to know how much cash is in the drawer.

   b. Select how the Job logs in. For example you would want your Delivery Drivers to log in to list view. You would want your bartender to log in and not 'auto logout' if he or she is the only person accessing the workstation.

   c. Select Fast Pay, List View, Privileges, Printing and Delivery Options.

4. Enter Pay Rate and Overtime Pay. The base pay rate for a job is the rate that is assigned to an employee the first time you assign him or her to this specific job. In other words, it is the default rate for the position.

   You can change the pay the employee receives for any Job from the Users screen.

   The newly defined job will now appear on the Job list, and may now be assigned.

Fast Pay

Jobs can be given the option of allowing **Fast Pay**. Fast Pay is designed for fast cash transactions and is typically employed in fast paced bars and coffee establishments. Fast Pay automatically assumes the payment is cash and instantly displays likely tender amounts. For example, open a ticket with two beers at $3.50 each. Fast Pay will display $7, $10, $20. Choose an amount and Dinerware will display, change due, open the cash drawer and close the ticket to cash.

List View

There are two ways to view tickets in Dinerware. One way is on the order screen. The tickets are shown individually on the left side of the order screen. Dinerware also has a List View where you can view all tickets at once, easily combine them, pay out to cash or assign tips rapidly. You can also hide preauthorized tickets (tickets needing tips) so they don't interfere with your open ticket. List view is handy for servers, bartenders and delivery drivers.

Access to Previous Tickets

With permission as a manager, you may access any closed ticket at any time. But what if my bartender closes a ticket to Fast Pay, but the customer wants to open a tab, or needs a receipt? "Access to Most Recently Closed Ticket" is an option in the Jobs category that allows employees with this job to either print a receipt of the last ticket, or fully access the last ticket they closed.

Creating an User and Adding a Job Function

▶ **To add a User**

1. From the **Manager Screen**, touch **User.**

2. To Create New User, Touch **New.**

3. Enter the Employees Screen Name as it is to appear on receipts.

4. Create **PIN** for each user (or allow user to select)

    • Enter Information for User

    • Enter Personal Info

    • Set Security Settings

    • Assign Jobs. You must first create the User and save, then Edit the User Record to assign a job. Employees can have more than one job.

Sections

Adding/Editing Tables and Seating

Design the seating layout of your establishment. Define floor areas such as bar, patio, front tables, back tables, window and delivery.

▶ **To add/edit Tables and Seating**

1. From the Manager Screen, Touch Sections

2. Touch New Area to add a new area. Name the area.

3. Assign a Revenue Center. More on revenue centers further on in this document.

4. Determine settings for Custom Table Names and Customers Selection or use the Quick Settings on the right of the screen. Dinerware has quick settings for Tables, Delivery and Carry-Out that will assign the appropriate settings.

5. Choose whether the tickets in that section will have an Expected Time, i.e. 45 minutes for the Delivery section.

6. Require user to specify number of persons on the ticket.

7. Once you have created your sections, **Add New Table** to the area.

   You can deactivate any table or table area you are no longer using.

Discounts and Voids

Examples of Discounts: Happy Hour; Dissatisfied Customer, Spoiled Food, Employee Meals, Coupons, Specials, Monday Night Football. Any time food or drink is made, apply a discount to it. On the other hand, a void is used when an item is not made such as; Server Error, Testing, or Training.

Determine the forced price, amount or percentage off your discount, whether it applies to items and/or the entire tickets. Specify hours, days, dates when the discount will apply. Determine whether your Discount will apply automatically or not. Happy Hour from 4 PM to 6 PM is an automatic discount. Manager comp is not.

▶ **To create Discounts**

1. Go to **Manager Screen.**

2. Touch **Discounts.**

3. Touch **New** to create a **New Discount.**

Voids

▶ **To create a Void reason**

1. Go to **Manager Screen**

2. Touch **Voids**

3. Create a **New Void Reason**, Touch **New**

4. To Edit/Change any existing Void Reason, Touch **Edit**

Advanced Options

Custom Screen Sets, Discounts and Sections

Dinerware allows you to customize your menus, discount, and table areas through Advanced Options.

▶ **To Create Customized Categories**

1. From the **Manager Screen**, select **Advanced Options**.

2. Touch **Category.**

3. Add **Set.**

4. From the screen that will now appear on your right, select the screen categories that will make up your custom menu.

   For example, to create a separate lunch menu, select those Screen Categories that apply to the lunch menu omitting Screen Categories relating to Dinner.

   When your lunch server clocks in, (he/she) will view the Lunch Menu only on the order entry screen.

5. In the "Jobs" screen, you will tie the custom set to the actual job.

In the same way, create custom discounts and custom sections.

Revenue Centers

A revenue center is an accounting entity that usually matches an outlet in the restaurant such as the dining room, bar or gift shop and delivery. The revenue center can also be the entire restaurant. Revenue centers provide sales tracking, accounting and transaction control. Since transactions are created both in a section and by a user, there is a hierarchy to determine which revenue center the transaction belongs in.

▶ To Create Revenue Centers

1. Under Management > Advanced Options, choose Revenue Centers

2. Touch New and name the revenue center, i.e. Bar

3. Select the Sections and Jobs that contribute to that revenue center, i.e. Bar, Pool Tables, Cocktail Server and Bartender.

4. Choose the priority, Job or Section.

Daily

Within the Daily section of the Manager Screen, there are three main functions, **Fresh Sheet**, **Daily Report** and **Message of the Day**.

Fresh Sheet

The Fresh Sheet allows you to track the items that are limited in quantity and prevent ordering once they are gone. To place an item on the Fresh Sheet, use the arrow keys to place it on the sheet then press the Quantity button. You will be prompted to enter how many items are available and at what point you wish the quantity to be displayed. For example, you may enter that you have 30 bottles of a particular Merlot available, and have the quantity display and subsequently count down when 10 are left.

Daily Report

The Daily Report is an up-to-the-second report on your business. Designed in conjunction with both restaurateurs and accountants, it is easy to understand and provides a concise and accurate summary of all aspects of operations. It can be run at anytime, for any time specified (real time). This report is formatted to print on the receipt printer.

Message of the Day

Use this function to communicate important issues to your employees. The message appears on the upper left of the main login screen.

Tickets

The tickets section is where you can view all tickets, re-open tickets or print a receipt of a closed ticket. Notice the scroll menu that allows you to view tickets within a particular period. You may also search for tickets using the Ticket ID number found on the guest check.

Labor

The Labor section allows you to edit, create, and delete employee shift in an easy and self-explanatory fashion. If you have your system set to record employee breaks, as required in some states, you may edit those here as well.

Reports

Numerous detailed reports are available. There are six categories of reports: sales, labor, transactions, menu, product mix, and auditing.

System

The system section is typically not accessed beyond initial set-up. There are a number of sub categories in which your preferences are set. Below is a brief description of the options available in each.

Security
You may require PINs at each login or allow "One Touch" in which the employee appears on the login screen. Non-service employees (dishwashers) do not appear.

Credit
Typically this section is setup by your Dinerware installer and does not require any changes.

Receipts
Here you enter what you wish to appear on your guest checks and receipts.

Tickets
You may set open tickets to be displayed alpha numerically or by age of ticket.

Time
Determine your start-of-day time, offset "bar time" and the time a server is automatically logged out. (Not clocked out.)

This Workstation
This section is used primarily for peripheral devices such as scales and pole displays.

Customers
Use this section to create defaults such as area code or zip code for your customers. This section also has printing options for Delivery.