Pool House Manager 7

Complete Billiard, Deli & Sales Management

User Guide

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1. Installation

Pool House Manager (**PHM**) software runs on Windows XP, Windows Vista, Windows 7, Windows 8 and Window 10. In general, Pool House Manager will run well if your computer is fast enough to run common office programs.

To install this program from the installation CD, insert the CD, run the Setup program within the CD and follow the on-screen instruction.

After installation, you can start this program from the program group under Windows **Task Bar** (**Start** button). For example, under Windows 7, first click on the lower left corner of your screen and select "All Program" (shown as "Programs" on some systems). Then select the "Pool House Manager" group and finally the "Pool House Manager" program icon.

If you want to have a more convenient access to this program, you can create a Windows "Shortcut" of this program on screen desktop. The Setup program may have already created a Shortcut for you during program installation.

Another way to start this program is to go to the installed directory (the C:\PHM folder, or a place you chose during installation) and double click on the "PHM" icon (shown as "PHM.exe" on some computers) to start it.

If this is your first time using the program, you will be asked to enter a **User code**. Please contact us to obtain the **User Code**. You will need to give us the **System Code** (the red one) shown on screen when you contact us by telephone or by e-mail.

This document is organized to introduce the program from setting up to more advanced features. If you only want to get a basic idea of what this program can do, you may skip some sections and go directly to the sections that explain the main features, such as the **Table Timer**, **Item List**, **TouchPad**, and **Dynamic Pricing** features. For example, most of the poolroom table/player features are explained in the **Table Timer** section later in this document.

Please feel free to e-mail or call us if you have technical questions regarding features or experience problems during installation.

2. Operator Login

This program uses username and password to identify a person who wants to use the program. By default, the program automatically logs you in as a **Master User** (i.e., business owner, manager or administrator) when you start it the first time. If you prefer a more secured manual login, you can use the **Password Setup** (to be described in the next section) to configure the login process. The default username (**master1**) and password (**master1**) can be used to login initially and can be changed in **Password Setup**.

Later in this document, the **Password Setup** section will tell you how to bypass the username and use only the password to login. In a multi-operator store, this can speed up the login process. Using shorter passwords and this program's on-screen keypad can also speed up the login process, especially if you have a touch-screen monitor.

If the program has been configured to require a manual login, the **Operator Login** window will show up when you start the program. Type in the username (if required), press the **Tab** key on the keyboard, enter the password and then press the **Enter** key (or the **OK** button) to login.

Alternatively, you can press the **Tab** key and then enter the username and password together in the **Password** field. This allows certain Fingerprint Recognition Systems to work with this program.

If you have a touch-screen monitor, you can find information about a more touch-friendly login option later in the **Password Setup** section.

Throughout this document, the team "window" is used to describe a framed panel (the so-called "dialog box") that hosts a group of visual components. Such visual components may include command buttons, option choices, menu bars, data entry fields and others. Certain windows (such as the main window of the program) can also host other "windows".

Once you log in, the main window of the program is displayed in full view. Through this main window, you will be able to access other windows that provide many features. The main window of the program includes the following components:

1. **Menu Bar**: The text line right below the program's top title bar. Each text description (e.g., Setup, Report) is called a "Menu Title". When you click on a Menu Title, a drop-down selection menu appears. You can then select one of the "Menu Items" to access a feature.
2. **Tool Bar**: Right below the Menu Bar, it is shown as a group of icons. You can press a Tool Bar icon to access a feature. These tool bar features are only a sub-set of the menu bar features. They are the ones used more frequently, however.
3. **Status Bar**: The lowest portion of the program's main window (about half of an inch in height). It is used to display information such as name of the current operator, number of customers, time this program was started, and alarm status.

The business owners and managers can use **Password Setup** to assign or change login usernames and passwords for the operators (e.g., cashiers, bartenders, wait staff members). Each operator uses his/her own username and password to login. After an operator finishes his/her shift, the next operator can use the **Operator Login** function (from the **Menu Bar** or **Tool Bar**) to begin a new shift and, at the same time, to conclude the leaving operator's shift. If the next operator is not yet in the store, the leaving operator can either **Exit** the program or use the **Logout and Stand By** function to conclude his/her own shift. The program maintains all customers and their purchased items and services (table time) even after you exit the program.

If you have multiple operators (e.g., multiple wait staff members) using the same station at the same time, please read the description of the **Auto-Stand By** option in the **Password Setup** section (provided later) for details.

3. Setups

This program is designed to be resolution-independent. Therefore you can resize the program window to fit your entire screen area, or to utilize only certain portion of the screen. We recommend setting the screen to 1024x768 or similar resolution. Higher resolutions allow more to be displayed on screen but make visual components (such as buttons and entry fields) small and more difficult to read. Thus a resolution setting higher than 1280x1024 is not recommended unless you have a 17-inch or larger monitor.

If your monitor is small, you can try setting the resolution to 800x600, but may want to disable (hide) the **Tool Bar** (the one with icons below the **Menu Bar**) to leave more room for other features. You can still access all **Tool Bar** features from the **Menu Bar** or **FKey** features. To disable **Tool Bar**, select and uncheck **Show Tool Bar** from the program's **Menu Bar** under the **Windows** menu title.

If you have a touch-screen monitor, you can find information about a more touch-friendly screen arrangement option called **Operation Style** in this section.

This program is an integrated sales and management environment. You can accomplish many tasks without switching back to Windows system or to another program. You can keep the program running all the time. You can also quit this program at any time without losing any data such as past records or in-use tabs. Under this program, all features can be accessed from the **Menu Bar**. Certain features can also be accessed from the **Tool Bar** or the **Status Bar** (near the bottom).

Important: **If your have the Network Edition of this program, please make sure all computers' clocks are synchronized to within 3 minutes.**

Before we continue, several terms are defined here and will be used in this section and throughout this entire document. Some of these terms are relevant only if you have certain optional features. The definitions listed here are intended to provide only a quick and basic understanding of the program's flow of operations. For further details, please refer to later sections.

Register: This is the place where all transactions are finalized. That is, the operator prepares a receipt in **Register** window and uses it to conclude a sale.

Table: This is a service or charge unit used to host one or more Customers (to be defined later) and Items (to be defined later). Depending on types of you business and services, a Table can represent a dinning table, a sports system, a pool table, an Internet computer, a game console, a board game table, a poker table, a tanning station, a treadmill… etc. Customers and Items at a Table can later be sent to **Register** to create a receipt. In this program, a feature called **Table Timer** is used to manage all Tables. If your business has a restaurant side that often gets busy, a **Seat Editor** feature can help you manage the purchased items and separate checks more easily.

Service: A time-dependent service your business provides to your customer for a fee. For example, A Service can be "Ten dollars fix charge for using the computer to access the Internet for the entire afternoon" or "Three dollars per hour for playing at a pool table". For a Service to be time-dependent, it must be attached to a Player (to be defined later) at a Table.

Table Charge: This is the fee rendered as a result of Services that occur at a Table. Although a Table may also host other non-service type products (e.g., foods and drinks), the term "Table Charge" is only used to describe fees for time-dependent services.

Service Charge: Same as Table Charge.

Item: A non-service type product (e.g., food or drink). Items are created by using the **Shop Sale** and **Deli/Bar Sale** windows. Items can be sold from the **Shop Sale** or **Deli/Bar Sale** window, or from a more graphical option called **TouchPad**.

Player: A Player is a specific type of customer who is hosted by a Table for a time-dependent Service. More than one Player can be hosted at the same Table. For example, a customer paying an hourly fee to use a game console or tanning equipment is a Player. In addition to the time-dependent Service, the operator can also attach Items (e.g., foods and drinks) to the Player and later charge the Player for the items he/she purchased along with the time-dependent Service.

Guest: A Guest is another type of customer. No time-dependent Service is attached to a Guest. When a guest is sent to a Table, no ongoing fee is rendered. The only purpose of adding Guests to a Table is to hold Items. That is, the operator can attach Items (e.g., foods and drinks) to a Guest at a Table and later charge the Guest for the items he/she purchased. For example, if a particular Table is used to represent a dinning table, then Guests can be sent to seats of this Table. More than one Guest can be hosted at the same Table. Guests and Players can also be hosted at the same Table at the same time.

Member: A Member is a customer who can be either a Player or a Guest. The two main purposes of using Members are to maintain individual purchase records and to apply certain discounts. Members are first created in the member list (explained in later sections) and can be sent to Tables as needed.

Customer: The term "Customer" is used throughout this document when no distinction between Player and Guest is needed. Customer is also used to describe the person responsible for a Tab (to be defined later). If you use the **Seat Editor** feature, each customer is also represented as a "Seat" within **Seat Editor**.

Tab: This is another type of charge unit used to host Items. A Tab can represent one of the bar tabs being managed by the bartender or can be a place to hold a customer's unpaid items. Items on a Tab can later be sent to **Register** to create a receipt. Unlike a Table that can host multiple customers, a Tab is usually used to host one single customer. In this program, a feature called **SuperTab** is used to manage all Tabs.

If your business is mainly service-oriented (e.g., poolroom or internet café) and you are more interested in the aspect of setting up time-dependent services, you may want to read the **Table Timer** section before the rest of this section.

The rest of this section discusses various setups. If you just want to see how this program works and do not want to spend too much time on setups at this time, you can skip this section and the program will use the default parameters for all settings.

If you choose to explore the following setups, it's recommended that you follow the descriptions provided here, along with the program running at the same time and the corresponding setup windows opened on screen. You can find matching terms within the program for all entry fields and option selections described in this section. In this program, all setups can be accessed from the program's **Menu Bar** under the **Setup** menu title.

3.1 Operation Style Setup

An operation style is a preprogrammed arrangement of several features. Such an arrangement presents to the users the frequently-used features in more accessible ways. Several operation styles are available: Classic Style, Register-First Style, TouchPad-First Style, Table Timer-First Style and Seat Editor-First Style.

Depending on how you operate your business, one of the operation styles may work better for you. If you have the multiple station network edition of this software, you can choose to use the same or a different operation styles at each station. For example, if you want a particular station to focus more on the restaurant-side of your business, you may want to use the TouchPad-First Style. This way, every time after an operator logs in, the **TouchPad** window is automatically brought to the front.

To select an operation style, use the **Operation Style Setup** feature from the program's **Menu Bar** under the **Setup** menu title. You can further customize the arrangement of features by repositioning and resizing their windows, depending on your preferences and the monitor screen size. For example, if you have a wide-screen monitor and elect to use the Register-First Style, a recommended customization would be to let the **Register** window occupy the right half or the screen. The program's **Main** window, the **Table Timer** window, and the **TouchPad** window can be overlapped and share the left side of the screen. You can then use the buttons near the upper-right corner of the **Register** window to control the view of the left side. You can find screenshots of such arrangement at http://www.timemagic.com/phm/style.htm

When a non-classic **Operation Style** is chosen, you can enable an option to have the program automatically enter "Standby Mode" after a period of time without activity. This is useful if you want to make sure the employees log in with their own passwords.

3.2 Receipt Printer Setup

This program supports any printer that is supported by Windows system. You can use any printer that comes with a Windows printer driver. Certain printers can also be used without a Windows printer driver.

If your printer is connected to a USB port, it may have come with a Windows printer driver on a CD supplied by the printer manufacturer. After installing the driver by using the CD, you can come to this program's **Receipt Printer Setup** to assign the installed driver to this program. To do this, in **Receipt Printer Setup**, change the option to **Windows Printer** then press the **Printer Setup** button to assign the installed driver. Also press the **Font Setup** button to choose a font you like (Courier New font is recommended).

If the printer doesn't print, first check the driver's settings to make sure the correct port was set. You will need to use your operation system's printer feature to check the driver's settings. Also check if the printer cable is securely connected to the port. If the printer prints but format is not right, then try the **M** button in this program's **Receipt Printer Setup** and experiment with different settings there (especially the "Use Raw Data format" option).

As mentioned, certain printers without a Windows printer driver can also be used. Such printers include parallel port (also known as printer port or LPT port) printers and serial port (also known as COM port) printers. To do this, in **Receipt Printer Setup**, change the option to **Other Printer** then assign the corresponding port there.

Regardless of the printer type, if you are using Windows XP or newer operation system, it's highly recommended that you use a Windows printer driver to operate. If the manufacturer of your printer doesn't provide a driver, you can create and try the Generic/Text Only driver by using Windows' "Add Printer" feature. Generic/Text Only driver is available on all Windows systems. Please e-mail us if you are not sure how to create a Generic/Text Only printer driver.

Please note that the printer setup discussed in this section is for "Receipt" printer only (typically a 3-inch width paper-roll printer). If you use a secondary printer (such as a letter-size laser printer) to print "Reports", the program will prompt to ask you to select a report printer on the fly during report printing.

3.2.1 Headers and Footers

Headers and **Footers** will be printed on your receipts. You may want to put information such as the name, address and phone number of your store in **Headers** and perhaps a "Thank You" messages as **Footers**.

3.2.2 Print Receipt by Printer

When you press either the **OK** button or the **Receipt** button in this program's **Register** (to be discussed later), an electronic copy of the receipt is always created in the program's **Receipt Log** (written to your computer's hard disk). However, a physical paper receipt will only be printed when the **Receipt** button is pressed. In **Receipt Printer Setup**, you can choose whether to make available the **OK** button, the **Receipt** button, or both in **Register** by selecting the "No", "Yes" or "Decide it at Register" option, respectively. For example, if you always print a physical paper receipt, then only the **Receipt** button is needed and therefore the "Yes" option is preferred here.

3.2.3 Next Receipt Number

This number must be between 0 and 99999999. Every time a receipt is printed, this number is automatically increased by 1. When it reaches 99999999, it restarts from 0.

If you have the Network Edition of the program, the **Network Host** uses the same numbering scheme (0 to 99999999). However, the **Network Terminals** use numbers as follows:

Terminal 1: 100000000 to 199999999
Terminal 2: 200000000 to 299999999
...
Terminal 9: 900000000 to 999999999

3.2.4 Item Description On Receipts

You can customize the descriptions of items shown on physical receipts. If you are using a 3-inch width paper-roll receipt printer, you may want to choose the two-line option or an option without the detail information. For service and playing charges, the detail information is the time played. For **Shop** or **Deli/Bar** sales (explained later), the detail information is the name of the item.

You can choose not to print the table time charge when its amount is zero. This is useful if you don't need to charge time-dependent services on some tables but still want to track their usages.

3.2.5 Printer Type

Choose **Windows Printer** option if you have installed a printer driver for your printer. If your printer does not come with a printer driver or the installed printer driver doesn't seem to work, then you can select **Other Printer** option. With the **Other Printer** option, try COM1 (or COM2) and "9600, N, 8, 1" settings first if you are using an Epson TM or Star printer.

You can also try the "Generic/Text Only" driver mentioned earlier with the **Windows Printer** option.

3.2.6 Print Setup

If you have chosen the **Windows Printer** option, this feature allows you to change the printer, paper orientation, paper size and various settings available from your printer driver.

3.2.7 Font Setup

If you have chosen the **Windows Printer** option, this feature allows you to specify the font, its style and size. If you are using a paper-roll receipt printer, you may want to choose a smaller font size. Some fonts, such as "Courier New", will give you better alignment.

3.3 Cash Drawer and Pole Display Setups

You can connect up to five cash drawers to your computer. The **Multi-drawer Operator Assignment** button allows you to assign drawers to certain operators at different time during the week.

In addition to cash drawers connected to COM, LPT and USB ports, cash drawers connected directly to the receipt printer can also be used. A cash drawer designed to connect directly to a receipt printer usually has a RJ11 (telephone) connector.

Direct supports for some popular cash drawer types are provided. For others, please refer to your cash drawer document for the correct port setting. If your cash drawer is connected to the COM port or LPT port, you may want to try "9600, N, 8, 1" first if your cash drawer was made in recent years or try lower speeds such as "300, N, 8, 1" if it's a very old cash drawer. If your cash drawer is connected to the COM port, usually any Data Type and Data can open it. However, try to use two or more characters for Data if a single character doesn't work.

To improve operation speed, you may want to use the "Use a printer driver to operate" option and enable the "Use Raw data format" (if available). Before doing this, you will need to create a Windows printer driver first (e.g., a Generic/Text Only printer driver) by using Windows' "Add Printer" feature.

If your cash drawer is connected to a USB port, then using the "Use a printer driver to operate" option may be necessary.

If your cash drawer is connected to the receipt printer, please make sure that the receipt printer can print before attempting any cash drawer setup. If you are buying a cash drawer to be connected to a receipt printer you already have or are buying, consult the vendor to make sure that the printer-drawer combination is a compatible one. You will also need to refer to the printer document to find the command code for drawer opening.

You can also use the cash drawer program or batch file command that comes with your cash drawer to open the cash drawer. Enter the program or batch file path and this program will run it automatically when it needs to open the cash drawer. The following is an example of batch file that works for certain cash drawers:

```
MODE COM2:9600,N,8,1
ECHO>COM2
```

Note that it assumes the cash drawer uses COM2 (Serial Communication Port #2). Put these two lines in a text file named, for example, "**openit.bat**" and put this file in a folder. Enter path of that file as the batch file path in the **Cash Drawer Setup** window. Under some older versions of Windows systems, the batch file has to be set to "Close on Exit". Right click on the batch file you wrote, select **Properties**, select the **Program** tab (if exists) then check the "Close on Exit" box (if exists).

Once the cash drawer is correctly set up, this program can open the cash drawer automatically every time you use this program's **Register** window to conclude a transaction.

Sometimes you need to do a no-sale drawer opening (opening the cash drawer without having a transaction). No-sale drawer opening requires the use of a **Function Key** or **Function Button**. To assign a feature to a function key (or function button), select the **Function Key Panel** under the **FKey** menu title and click on the **Setup** button. If you login as a master user, you can set up such no-sale drawer opening to require a password. All no-sale drawer-opening activities will be logged and reported.

You can configure the program to open a different cash drawer (or not to open any cash drawer) when "Credit is selected as the payment type. To set up such, press the **More Options** button in the **Cash Drawer Setup** window.

Pole Display Setup is similar to **Cash Drawer Setup**. Currently pole displays using "Logic Controls Command Set" and "Logic Controls Pass-Thru Command Set" are supported. A Pass-Thru style pole display connects directly to the computer and has another device (a printer or a cash drawer) connected to it. If you have a Pass-Thru style pole display but do not have another device connected to it, please choose "Logic Controls Command Set" in this **Pole Display Setup**. Logic Controls Command Set works for most pole displays.

Instead of the COM or LPT port options, you can choose to use the "Use a printer driver to operate" option and select a Windows printer driver (e.g., a Generic/Text Only printer driver) to operate the pole display.

Two-line support is available for certain pole displays. When two-line mode is enabled, one line is used to display name and price of the last rung-in item. The other is used to display total amount. Also when Two-line mode is enabled, pole display will show item's name and price when user selects (highlights) an item in **Register**'s list.

After finalizing a sale, pole display will show payment change. You can decide how long the result remains in display after each **Register** transaction.

You can also configure the pole display to display an item's name and price when it is sent to **TouchPad** (a feature to be discussed later) or **Basket**.

3.4 Light and Power Control Setup

With the **Light and Power Control** feature, **Table Timer** can automatically turn on/off pool table lights and any devices connected to your power line (e.g., TV, game console, monitor, treadmill…) whenever customers are sent to or away from tables. The **Table Timer** feature will be explained in a later section in this document.

You can also use the **Light Switches** feature (explained later) to control lights and devices manually.

Certain X10 or Insteon devices are needed for light/power controlling to work. If you are not familiar with X10 and Insteon, please e-mail us for details and for supported models. You can also try the following web sites for general information related to X10 and Insteon devices:

http://www.smarthome.com
http://www.x10.com

Light and Power controlling feature can be enabled or disabled from **Light and Power Control Setup**.

If you have the **Network Edition**, all stations can share the same light controller attached to one of the stations. This feature is useful if some stations at certain area of the building cannot provide clear and strong light control signals due to interference.

3.5 Network Setup

If you are using the network edition of this program, it is recommended that one of the computers (stations) be set up as the **Network Host**. Other computers with this program installed on the network will later be set up and used as **Network Terminals**. **Network Terminals** access data resided on the

Network Host through a peer-to-peer type network (A client-server type network can also be used as long as the **Terminal** can read/write data on the **Host**).

In short, one computer holds the data and all computers access this same set of data via the network.

If you don't have networked computers or choose not to network them, each computer will hold and create its own set of data and will not communicate with other computers. Therefore when one computer is used to check in a customer, only this particular computer knows this customer's existence and later only this computer can be used to check out the same customer. Also at the end of the day, you will have to deal with several sets of reports (one from each computer).

Using each computer independently might be preferable if you want to have separate accounting by each computer. For most businesses however, the "Host and Terminals with a single set of data" approach is much more convenient.

After you install this program on each of the computers, each computer by default has it's own data and doesn't communicate with other computers. The first step is to choose one of the computers to be used as the **Network Host**. In general, you want to use the fastest or the most reliable one as the **Network Host**.

On this chosen **Network Host** computer, locate the folder on which this program is installed. Enable **Full Read/Write Sharing** on this folder (more about this later).

Other computers will be used as **Network Terminals**. Go to each of the **Network Terminals** and start this program. From within this program at each **Network Terminals**, select **Setup** from the **Menu Bar** and then select **Network Setup**. Change the option to "Use this station as a Terminal", enter the **Host Directory** and select a **Terminal ID**. Please make sure that each **Network Terminal** uses a unique **Terminal ID**.

An example of the **Host Directory** is provided as follows:

\\MyPCName\PHM

In this example, the name, "MyPCName" is the computer name of your **Network Host** computer. You can find this computer name from the host computer's **System** or **Network** Control Panel (part of Windows system). Computer name is also displayed in the host computer's **Network Setup** window (via this program's **Menu Bar**).

On the **Network Host** computer, the program is by default installed on the C:\PHM directory (folder). Therefore you need to have "\PHM" as part of the **Host Directory**. Also don't forget to add "\\" to the beginning of the **Host Directory**.

As mentioned, from the **Network Host** computer, you need to enable **Full Read/Write Sharing** on the **PHM** directory. Depending on the version of Windows your are using, you can enable sharing by right clicking on the **PHM** folder icon and select **Sharing**, **Properties** or **Sharing and Security**. Then select options to enable **Full Read/Write Sharing**. Different versions of Windows provide different configuration options at this point. Please contact us if you are not sure how it works. You can also search your Windows system's on-line help for instructions.

If you are shopping for network hardware, the most common and economical way to set up a peer-to-peer network is a LAN (Local Area Network) with multiple Ethernet card equipped Windows computers connected to a central Network Hub, Switch or Router. You can enable sharing on particular hard disks (hard drives) or directories (folders) so other computers can see them over the network. There is no need to create any expensive computer "Network Server" for this program. As long as you can mount and see the hard disk or directory on the other computer via sharing, this program's network edition can use it.

If you have high-speed Internet (e.g., Cable or DSL) on both ends, it's possible to use the network edition remotely for monitoring purposes. Please consult your system's on-line help for accessing folders over such a connection.

There are several benefits when using the network edition with multiple stations. During the busy hours, you can have two or more operators working simultaneously to check in/out customers. This can reduces customers' waiting time. Also if any station stops working, other stations can continue to work before you have a chance to repair the damaged one. The network edition also allows the manager (in the office) to see what the operator (in the store) is seeing on screen.

The following is a summary of the discussions about **Network Setup**:

1. Install the program on each of the computers.
2. Choose one of the computers to be used as the **Network Host**. In general, you want to use the fastest or the most reliable one as the **Network Host**.
3. On the **Network Host** computer, locate the folder on which this program is installed. Enable **Full Read/Write Sharing** on this folder.
4. Other computers will be used as **Network Terminals**. Go to each of the **Network Terminals** and start this program. From within this program, select **Setup** from the **Menu Bar** and then select **Network Setup**. Change the option to "Use this station as a Terminal", enter the **Host Directory** and select a unique **Terminal ID**.

3.6 Password Setup

This program allows two **Master Users** and **100 Operators**. **Master Users** have access rights to all features. **Operators** only have certain access rights given by the **Master Users**. Some features, such as **Password Setup** and **Backup Setup**, are reserved for master users only.

The **Username** and **Password** combo are used to identify a user during login. **Full Name** is not needed during login, but will appear in some reports and on **Status Bar** (the bottom portion of the program) after login.

Full Name, **Username** and **Password** must be at least one character long. The maximum lengths for **Full Name**, **Username** and **Password** are 15, 7 and 7 characters, respectively.

3.6.1 Master Passwords

Full Names, **Usernames** and **Passwords** of two **Master Users** are entered here. You have to memorize the **Username** and **Password** of at least one **Master User**. Otherwise you won't be able to change the settings of the program again.

If you login as a **Master User**, you have access to all functions and settings of this program. It is highly recommended that these two **Master Logins** be used only for setting up purposes. Always use an **Operator Login** during normal selling operations so the settings cannot be altered without authorization.

In the **Master Password Setup**, you can elect to bypass the username and use only the password to login. In a multi-operator store, this can speed up the login process. Using short passwords also can speed up the login process.

You can also elect to bypass the entire **Operator Login** window when the program starts. You can choose to let the program log itself in automatically as the first master user or as the first operator. Automatic login is not recommended if you have many operators and want the program to record the usage of this program by each operator.

You can also specify whether or not to encrypt **Operator Logs** and **Receipt Log**. More details about security and encryption will be discussed later.

If you use a touch-screen monitor or prefer to use the mouse for text entry, you can enable the "Touch screen friendly" option. You will later get a large **Operator Login** window with on-screen keypad. In this keypad, you can press the **Style** button to choose an on-screen key layout.

If you have several operators (e.g., cashiers) using the same station at the same time and want this program to record **Register** transactions handled by each individual operator, you can enable the **Auto-Stand By** option here. When this option is enabled, the program enters "Standby Mode" automatically after each **Register** transaction. This way, the next operator won't forget to login with his/her own password.

If you have the optional **TouchPad** feature (to be discussed later), it also has a "Standby Mode" option. When it is enabled, **TouchPad** will enter "Standby Mode" whenever an operator or a wait staff member uses **TouchPad** to send items to **Table Timer** or **SuperTab**. This Standby Mode in **TouchPad** is more suitable for recording wait staff performances and responsibilities. To enable "Standby Mode" in **TouchPad**, please refer to the discussions later in **TouchPad** section.

3.6.2 Operator Passwords

Unlike a **Master Login**, an **Operator Login** does not give full access rights to the user. When a user logs in as an **Operator**, some settings are not changeable in order to prevent unauthorized configurations. Access rights to certain functions, such as viewing reports and voiding sales, can be customized for each operator. To grant the operators certain access rights, check the appropriate boxes. You can also create special logins for persons in charge of cleaning tables or for general timecard time stampings.

3.6.3 Authorization Passwords

Authorization Passwords cannot be used to login. They are used in the following situations:

Adding Flat Rate Players: Normally there is no restriction on adding flat rate players. However, if you check the "Require authorization password to use Flat Rate" checkbox in the **Flat Rate Setup** window (to be discussed in the **Table Timer** section), a password will be needed when adding flat rate players to a table. You can use one of the two master passwords in such situations. However, using an Authorization Password is safer because you won't risk revealing the master passwords that can be used to alter entire program setups.

Giving Credit/Discount: There is no restriction on giving credit/discount (in **Register**) if you login as a master user or as an operator who has access right to give credit/discount. The operators without such access right will need a password to give credit/discount. You can use one of the two master passwords in such situations. However, using an Authorization Password is safer. You can change or delete the Authorization Password(s) the next day or later if you decide that you no longer want to give such rights to operators.

Voiding Items: There is no restriction on voiding sales items (in **Register** and **Table Timer** windows) if you login as a master user or as an operator who has access right to void items. The operators without such access right will need a password to void items. You can use one of the two master passwords in such situations. However, using an Authorization Password is safer.

Viewing Playing Logs: Normally there is no restriction on viewing playing logs. However, if you check the "Operators need Authorization Password to view Playing Logs" checkbox in the **Authorization Passwords Setup** window, a password will be needed when an operator tries to view the playing logs. You can use one of the two master passwords in such situations.

However, using an Authorization Password is safer. No password is needed to view the playing logs if you login as a master user. The **Playing Log** feature will be explained later in the **Reports** section.

3.7 Backup Setup

3.7.1 Backup Setup Files

Business programs demand better reliability because any downtime of a program may result in profit loss or a dispute with the customers. Like most computer programs, this program saves the setup settings in files. Like any other program, a data file may become corrupted. This may happen when the power is accidentally turned off while a computer program is writing its data to a file. The chance of this is very small, because most of the time this program is not writing data to a file. However, if it should happen, it's good to have a backup to go back to.

Let's say the power was accidentally turned off while this program was writing files. You then restart Windows and start this program. During this startup, this program will check all the setup data. If any file looks bad, it will then regenerate the file based on your backup copy. If the backup copy doesn't exist or is also bad, it will then regenerate one using the default values and inform the operator to modify these values. Even if your operators are computer experts, this feature can still reduce the time they spend to get the program back on line.

You can elect to have this program backup the setup files every time you quit it. You can also click on the **Backup Now** button to backup those files right away.

3.7.2 Backup Logs

Many business owners prefer to copy results of the day to a floppy disk or a small flash drive and take it home or to another computer for analyzing or bookkeeping purposes. The **Copy Logs** feature can be used for such occasions. If you want to copy older logs, you can do it from the Windows environment. The logs are saved in a folder named **"UserData"** located inside the folder where this program is installed.

3.7.3 Delete Logs

If you do not want to leave the logs on the computer's hard disk, you can delete the log files from here. Make sure you have backed up these files before deleting them.

3.7.4 Automatic Fail-Safe Backup

If you have the **Network Edition**, you can further improve the data safety by using the **Automatic Fail-Safe Backup** feature. Once **Automatic Fail-Safe Backup** is enabled, critical files and logs can be maintained on two or more computers. In the event that the **Network Host** fails, a **Network Terminal** can be re-configured to become the new **Network Host** in a few clicks. All settings, open table/tab info and logs will be in place automatically and the business can continue without being interrupted. To enable this feature, press the **Automatic Fail-Safe Backup** button in **Backup Setup**. This option is available only from a **Network Terminal**.

3.8 Advanced Security Setup

3.8.1 Program-Only Operation

You can disable Windows and let this program be the only thing remained on screen. This would block the access to the Windows file system. A user won't be able to view, copy or delete your data or run other programs from Windows. This feature can be enabled from within this program if you are using Windows 98/Me. For other systems (such as Windows XP Professional), please e-mail us for information.

If you choose to hide Windows, the next time your computer is restarted, this program will be automatically loaded and neither the Windows desktop icons nor the Windows Taskbar will appear. A non-master operator won't be able to access the Windows file system. However, a master user can access this **Advanced Security Setup** feature. This master user can then run programs or view files by using the **Run Explorer** button. He/She can also elect to restart Windows back to normal mode.

For Windows 98/Me, if you choose to hide Windows, do not restart the computer until you have prepared a **Startup Disk**. If the computer cannot load this program after you restart it, you will need to (1) Restart it again by using the Startup Disk in Drive A, (2) Delete **"system.ini"** file in the Windows folder, (3) Rename **"system.phm"** to **"system.ini"** and (4) Remove the Startup Disk and restart again. Step 2 and 3 require the use of DOS commands. **Do not use this hide Windows feature under Windows 98/Me if you are not sure how to do these**.

Please note that old systems such as Windows 98/Me are no longer being supported by their manufacturer.

3.8.2 Integrated Security

This feature is for certain Windows editions that have account-based security features. This feature also requires knowledge of Windows security and account privilege (permission) settings. The accounts mentioned here are Windows Logon accounts (administrator and user accounts), which are not the same as this program's own master and operator login accounts.

Under certain Windows editions, if you log in as an administrator, you can create other Windows user accounts with fewer access privileges. For example, you can create a user account that restricts the access to the UserData folder inside the program's installation folder. This would prevent others from viewing or altering the sales information when the system is running under this restricted Windows user account.

If you use Windows XP, you might find that it's easier to work with user and folder privilege settings if you disable Windows XP's "Simple File Sharing" feature (changeable via any folder's menu bar). To restrict access to a folder, make sure you are still using the administrator account, right click on that folder and select "Sharing and Security: Please refer to Windows on-line help for details.

Under the restricted Windows user account, access to the UserData folder is denied. At the same time, however, it also prevents this program from accessing the UserData folder. This program will not operate without access to all sub-folders inside the installation folder. The solution to this is to use this program's **Integrated Security** settings. In the **Integrated Security** settings, enter the account name, account password and domain (blank in most cases) of the Windows Administrator account (the one that still has access to the UserData folder). You will have to do this before you re-login with the restricted Windows user account.

Once you re-login with the Windows user account that has fewer privileges, you (and other users) cannot access the UserData folder from the normal Windows environment (desktop/folder browser). Therefore it accomplishes your goal of improving data security. On the other hand, this program can still see the UserData folder because, within this program, it operates under the Administrator account.

In addition to the UserData folder, you may also want to restrict access to other sub-folders inside the program's installation folder. However, do not apply the access restriction on the installation folder (that is, only on sub-folders inside it, but not on itself).

3.8.3 Startup Function Keys

This feature is applicable only on older systems such as Windows 98. Windows 98 has a function key feature that allows a user to load DOS after a restart. Once DOS is loaded, this user can then access the files or programs (under DOS). You can disable this function key feature from here.

Anyone with a DOS startup disk can still boot to the DOS mode even you have disabled the function key feature. However, for most modern computers, you can disable booting from floppy drive by modifying the BIOS (CMOS) settings. Consult you hardware document for such BIOS features. You can also use a floppy drive entrance lock to block the access.

3.8.4 Only Allow Master Users to Quit Program

If you check this box, any non-master operator won't be able to quit this program.

3.8.5 Pause all and turn off all table lights at pre-set time

This feature comes with the **Table Timer** feature. This can be useful if your local regulation doesn't permit business to stay open after certain hours. For example, if the time is set to 02:30, then at 2:30 AM, the program will pause all players from table 1 to the last table. Lights will be turned off one by one as a result. Program has to be running for this to work. If program is not running, but is started within 10 minutes of the pre-set time (i.e., before 2:40 AM), it still will work. After players are paused, you can still resume them and the program will not re-pause them (unless you quit and restart the program within 10 minutes of the pre-set time).

3.8.6 Operator Login Time Verification

This feature can be used to limit individual operator's login to certain time frames. Instruction is available within this program. If you have the **Network Edition**, different stations can have different time frame settings.

3.9 Tax Rate Setup

Your local tax rate can be entered here. If you use different tax rates on different items, you can define up to five tax rates here.

If you select the **Single Tax Rate** option here, later you will see a taxable/non-taxable checkbox in the **Shop Sale** and **Deli/Bar Sale** windows from which the items are to be sold. If you select the **Multiple Tax Rate** option, you will be presented a selection of five tax rates in the **Shop Sale** and **Deli/Bar Sale** windows. However, it may not be efficient for the operator to select a tax rate every time an item is being sold. The **Tax** property in your item list can be used to overcome this. Please refer to the **Item List** section for details.

Canadian users can also set up multiple tax types (e.g., GST, PST, LST and HST) to appear on receipts. Press the **Tax in Canada** button and activate four extra tax types: GST, PST, LST and HST. Canadian daily and monthly tax breakdown can be accessed from the **Show Data in Numbers** feature under **History Report** (to be discussed later).

In certain area of Canada, PST can be waived if the purchase is less than a certain amount. The program can handle this automatically. Press the **Tax in Canada** button to customize this.

You can also specify whether or not to collect tax on time-based service charges (from using the **Table Timer** feature). By default, the first tax type (Type T) is used for tax on time-based service charges. You can change it to a different type, however. For example, in Canada, you can use GST (Type G) if you prefer this tax to be reported together with taxes for other GST-based items.

More configuration options can be accessed via the **More** button. It allows you to decide how the tax is calculated:

- Standard Mode (Combining before Rounding): The tax for each individual item is first calculated without any lost of accuracy due to sub-penny rounding-off. The combined tax of all items is then rounded to the nearest penny. For example, if you sell a hotdog for 0.94 before tax and the tax rate is 6%, the total amount with tax will be 9.964 if the customer buys 10 of them. The program then rounds it to the nearest penny and displays a payable amount of 9.96.
- VAT Mode (Rounding before Combining): The tax for each individual item is first calculated and rounded to the nearest penny. The combined tax of all items is a sum of these already-rounded individual tax amounts. For example, if you sell a hotdog for 0.94 before tax and the tax rate is 6%, the total amount with tax will be 0.9964 for each hotdog. The program then rounds it to the nearest penny to make it 1.00. If the customer buys 10 of them, the total amount with tax will be 10 dollars.
- Mixed Mode (Selected Items): You can select certain items to use VAT Mode. This is useful if you advertise some of your items at prices that include taxes. Press the **Select Items** button to add such items to the VAT List (by placing checkmarks). When an item is included in the VAT list, the per-item amount (with tax included) will not be affected by the purchase quantity.

Also accessible via the **More** button, the word “Tax” shown on receipts can be changed to something else, such as “VAT”.

3.10 Miscellaneous Setup

<u>3.10.1 Voiding a Player</u>

If an operator accidentally adds too many players, he/she can remove the player(s) within the time specified here. A voiding record will be written to the **Operator Log** (discussed later in the **Reports** section) every time this occurs.

<u>3.10.2 Beginning of a day</u>

If your business hours are from 10 AM to 2 AM, you can define 2 AM (or 5 AM) as the **Beginning of a day**. This way the activities and transactions between midnight and 2 AM will be written to the reports and logs of the previous day (the day before midnight). In this case, Monday 2 AM to Tuesday 2 AM will be considered Monday and Tuesday 2 AM to Wednesday 2 AM will be considered Tuesday. This feature makes counting cash easier for a business day. This setting also changes the beginning and the end of a day in the **Rate Setup**.

<u>3.10.3 Row Heights</u>

Row heights for many windows with data table can be enlarged. This can make using touch-screen monitor easier

<u>3.10.4 Non-Member Category Name</u>

The default non-member category name can be changed. The non-member category name is printed to the receipt when you add a player from the **Table Timer** window without using the **Customer/Member List**. If you add a player using the **Customer/Member List**, the category name will be the one you provided on the **Customer/Member List**. This category name will be shown on the “detail description” portion of the receipt and can be used to customize your sales reports (via the **Define Categories and Codes** function). **Table Timer** operations, **Customer/Member List** and customization of reports will be discussed later.

3.11 Customizing Your Working Environment

This is a program you and the staff use every day and maybe even every few minutes during busy business hours. The appearance of the program does affect user experience and may also affect productivity. We have made a tremendous effort to make this program look great even if you are still using an old system such as Windows 98. We want you to enjoy using the program. In this section, we will discuss some interface customization features, mostly available from the program's **Menu Bar** under the **Window** menu title.

3.11.1 Tool Bar and Status Bar

You can enable or disable the **Tool Bar** and **Status Bar**. You can also show or hide selected buttons on **Tool Bar** by using the **Customize Tool Bar** menu item.

There are also **Icon Sets** to choose from for customizing the **Tool Bar**. The icon sets require external icon data files placed in the "Themes" folder located in the same place where this program is installed. If you don't see the options of **Icon Sets** under the **Window** menu title, you can contact us to obtain the icon data files.

3.11.2 Windows Sizes and Positions

The main program window and many of its sub-windows can be resized and moved to different area of the screen. The program will remember their sizes and positions and will open them the same way the next time you access them. If you have a large screen, you may want to open up those you use most often and align them the way you like.

3.11.2 Background Color and Background Graphic File

The background color can be changed to your preference by using the **Background Color** feature from the program's **Menu Bar** under the **Window** menu title. Besides, you can supply a background file named "**phm.bmp**", "**phm.gif**" or "**phm.jpg**" in the same directory (folder) where this program was installed. You can put your business logo or a nice picture in this file and perhaps use it as a reminder pad for the operators, too.

We have covered many program configurations and customizations in this **Setups** section. You may have noticed that some setups available in the program (e.g., Member Discount/Surcharge Setup) have not been explained. We will visit them in later sections after we discuss other aspects and related features of this program.

4. Register

Register is the most frequently used portion of this program. In most cases, the **Register** window is invoked automatically. Occasionally, the user needs to bring the **Register** to the front and he/she can do so by pressing the **Register** button on the **Tool Bar**.

The **Register** window includes a **Register List** (for holding receipt items), total and payment fields, and several operation buttons. The main purposes of **Register** are:

- To collect the items sent from various sources, such as the item list, the basket, tables and customer's tabs. The program automatically uses the collected items to create a receipt for the customer(s).
- To allow the operator to modify the receipt if needed.
- To allow the operator to enter the payment received from the customer(s).
- To print the receipt, open the cash drawer and finalize the sale.
- To record the transaction to program logs.

One of the design goals of this program is Integration of Features. Features can interact with one another so the user does not have to take unnecessary steps to accomplish tasks. For example, you can send items from various sources (e.g., Deli, Shop, Basket and the optional Tab and Table features) to **Register** to create a single receipt so multiple transactions can be accomplished as one if needed. This approach maximizes the flexibility and lets you use the program the way you like.

4.1 Total and Payment Display

After you send the items to **Register** (e.g., from a table or a customer's tab), the program does the total and tax calculation for you. The results are displayed in the **Register** window.

4.2 Receipt Modifier Buttons

After you send the service fees (table time charges) and for-sale items to **Register List**, several "Receipt Modifier" buttons can be used to adjust or add additional charges to the receipt if needed. These include:

4.2.1 Add Charge

You can use this button to add extra charges. You can enter an optional reason of this extra charge. You can also change the Department, Category and Code of this extra charge. Department, category and code affect where this charge will show up in your reports (explained later in **Reports** section). You can also decide whether tax is to be collected and the tax rate if it is.

4.2.2 Credit

This is the opposite of "Add Charge". The amount entered will show up as an item with negative price in **Register List**. If you log in as a master user, you can use the **Options** button to add security to the ways such credits are given.

4.2.3 Discount

This is similar to the **Credit** button except for an additional percentage setting. If you want to give discount as a percentage of the price of a particular item, click and highlight this item on the **Register List** first. After you press the **Discount** button, the price of the selected item will be automatically entered. You can then enter the discount rate.

If you want to give discount as a percentage of the total amount of the entire receipt, click on the "Total" price box in **Register** first. After you press the **Discount** button, the total amount will be automatically entered.

After you press the **Discount** button, you can find a **Calculate** button next to the price entry field. When you are preparing a receipt and need to apply a discount to certain items within that receipt, you can use this feature to select the desired items and it will calculate the total amount for you. For example, your **Register** may include multiple juice items along with multiple liquor items. If you want to apply discount to the juice items but not the liquor items, you can press the **Calculate** button and then the JUICE category button to calculate the combined amount of all juice items.

4.2.4 Coupon

To use this feature, coupon items have to be created first. A coupon item is created in **Shop Sale** or **Deli/Bar Sale** window just like other items. The only difference is that the "Item Type" property (to be discussed later) of the item has to be set to "Coupon".

Once coupon items are created, they will show up in a window after you press the **Coupon** button (the **C** button) in **Register**. To use it, selected the desired coupon and press the **OK** button.

Please refer to the **Item List** section for details about different types of coupons. Also refer to the **Reports** section for reports that summarize usages of coupons.

4.2.5 Adjustment and Payout

To use this feature, adjustment and payout items have to be created first. An adjustment or payout item is created in **Shop Sale** or **Deli/Bar Sale** window just like other items. However, the "Item Type" property of the item has to be set to the corresponding type.

Once adjustment and payout items are created, they will show up in a window after you press the **Adjustment** button (the **A** button) in **Register**. In addition to selecting from the pre-created Adjustment and Payout items, you can also enter an adjustment or payout amount in the entry box near the top this window.

Please refer to the **Item List** section for details about creating Adjustment and Payout items. Also refer to the **Reports** section for reports that summarize usages of adjustments and payouts.

4.2.6 Voiding Item

If an item is sent to **Register List** by mistake, you can use this button to void it. The quantity will be credited back to inventory.

In later sections, we will introduce an **Undo** feature. In certain situations, undoing an action is preferred over voiding items. Please refer to the **Table Timer** and **SuperTab** sections for details.

4.2.7 Refund

The **Refund** feature is used when the sale had been finalized (that is, a receipt has been created and given). If the sale has not been finalized and the item is still in **Register List**, please use the **Void** button instead.

To do a refund, press the **Refund** button (the **R** button) first. The color of this button is changed to indicate a "Refund Mode". Any item sent to **Register List** while in refund mode will become a refund item. A new receipt with the refund items will be created and the quantities will be added back to inventory.

To go back to the Normal Mode from Refund Mode, press the **Refund** button again.

Alternatively, you can hold down both Shift and Ctrl keys simultaneously while you send an item from item list (or **TouchPad**) to **Register**. When these two keys are held down, the program will ask if you want to do a refund.

4.2.8 Tip

This allows you to add tips to the receipt. A short memo can also be attached.

4.2.9 Gift Card

To use this feature, gift card items have to be created first. A gift card item is created in **Shop Sale** or **Deli/Bar Sale** window just like other items. However, the "Item Type" property of the item has to be set to the corresponding type.

Once gift card items are created, they will show up in a window after you press the **Gift Card** button (or the **GC** button), followed by the **Fund Card** button, in **Register**.

Please refer to the **Item List** section for details about creating gift card items.

4.2.10 Payment Type

The **Cash/Credit/Check** selection allows you to mark the payment method on receipts. The total earnings from each payment method will show up in various reports (see the **Reports** section for more about payment methods).

If the three **Cash/Credit/Check** methods are not enough for you, you can enable **Extended Payment Types** that allows up to 30 payment methods. To do this, select **Extended Payment Types** from the **Menu Bar** under **Setup**. When enabled, additional payment type selections will be available when the **Cash/Card/Check** button in **Register** is pressed. Each extended payment type will be identified by a three-digit number, which will be inserted to the first line of each receipt. Later in the **Reports** section, we will explain how to create reports that summarize sales from selected payment methods.

The **Extended Payment Types** feature can also be used for tracking wasted or destroyed products, as well as the For-Store-Use items. For example, you can define For-Store-Use as one of the payment types in **Extended Payment Type Setup**. After your store consumes a For-Store-Use item, you send the item from item list to **Register**, choose this For-Store-Use payment type and finalize it as if it's a regular sale. Later, you can use reports to show you the usages of such items.

4.3 Entering Payment

Below the displayed total charge amount, you can enter the payment received from your customer. The program first assumes the payment amount is the same as the total charge. Therefore no entry is needed if the customer is paying by credit card. However, if the customer is paying cash, the payment amount is usually higher than the total charge. In such a case, you can type the new amount over the original amount.

If you use mouse or touch-screen monitor, you can click on the **Payment** button (a button with a green icon inside) and enter the payment amount via the on-screen keypad. You can also access this on-screen keypad by pressing the Space key on the keyboard.

As soon as payment is entered, the payment display also shows the "Change" amount. This change amount remains shown after the sale is finalized so the operator knows how much to take out from cash drawer and to give to customer as changes.

4.4 OK, Receipt and CC Buttons

Once a receipt is prepared, the **OK** button or the **Receipt** button (or both, depending on your **Receipt Printer Setup** as explained in the **Setups** Section) shows up for you to finalize the sale. The **OK** button saves the receipt onto the **Receipt Log**. The **Receipt** button is the same as the **OK** button except that it also prints a physical receipt by printer. One of these two buttons must be pressed, or the program cannot be closed.

If you have the optional free **Integrated Credit Card Processing** feature, a **CC** button is also available for you to process the payment by your customer's credit card or debit card. The Integrated Credit Card Processing feature simplifies the process because you don't have to re-type the amount and other info onto a separate credit card device or software. You can also use the "End" key on the keyboard to access the Integrated Credit Card Processing feature.

After you press the **OK** button, the **Receipt** button or the **CC** button to finalize the sale, the total amount is automatically copied to Windows system's clipboard memory. This can be handy if you need to paste the amount to another program (e.g., a non-integrated payment processing software).

4.5 Sub-Registers

The **Register** window has five sub-registers. Each of the sub-registers can hold an individual receipt. You can click on the A, B, C, D and E tabs in the **Register** window to make "active" another sub-register when the current one is awaiting customer's payment. Customers and items sent to the **Register** window will then be placed in the active sub-register.

Sometimes a customer needs to collect belongings or go to washroom after you send his/her purchased items to **Register**. Sometimes you need to wait for the employee to go to the product shelf to verify sticker price. Having multiple sub-registers will allow you to continue using the **Register** for other customers in such cases.

Names of customers (if applicable) are shown in the upper left corner of a sub-register. If you send multiple customers to the same receipt, you may have several names. If not all names are shown (due to space limitation), you can click on the name field to display more names. This is useful when you are working on several receipts at the same time and need to identify customers/receipts.

If you want to disable the sub-register feature, choose **Register Options** from the menu bar under **Setup**.

4.6 Recent Receipts, Split, Re-Tender and Re-Print

The **More** button allows you to view the most recent 100 receipts. You can choose to print any of these receipts. This is useful if a receipt was not printed correctly due to paper jam or ink cartridge change. If you need to view receipts older than those shown here, please use the **Report** features.

If you have the Multiple Station Network Edition, each station will have its own set of 100 recent receipts.

The **Split** button allows you to remove portion of the charge from the current receipt. The removed portion will then be used to create a second receipt. This feature can be used to split payment for two paying customers. It can also be used if the customer wants to pay by two different payment methods (e.g., some by cash and some by credit card). The second receipt will be placed under one of the five sub-registers.

The **Split** button becomes a **Re-Tender** button when you select a previously finalized receipt. You can use it to correct balances when a transaction was finalized by wrong payment type.

If you have the optional free **Integrated Credit Card Processing** feature, a **Force** button is also available here for you to process the pre-authorized transactions by your customer's credit cards. This is a common practice if your business is a dine-in restaurant and your customers write tips on credit card receipts.

4.7 Customizing Register and Buttons

The **Register Options** (available from the program's **Menu Bar** under the **Setup** menu title) allows you to customize the following **Register** settings:

- How the payment amount is entered.
- How the **Register** responds when Enter key is pressed.
- How the items are displayed in the **Register List**.
- Whether certain buttons are to be shown.

4.8 Register and Non-Classic Operation Style

When a non-classic **Operation Style** is chosen, a larger **Resizable-Style Register** window will appear in place of the original compact-style **Register** window. This new **Register** can be resized to full screen or preferred size and still provide good button sizes, even if you are using a small monitor. This can be useful if you are using a touch-screen Windows Tablet with small screen size.

The **Resizable-Style Register** window supports barcode reading as an additional way to sell items. This **Register** has a **Ready/Once/Manual** button. The operator can toggle the **Ready/Once/Manual** modes by clicking on this button or by pressing the ***** key on the numerical keypad of the keyboard.

If the operator wants to operate with a barcode scanner in continuous mode, he/she can use the **Ready** mode. To sell an item, scan the barcode on the item. If the barcode is found among these that had been set up, the corresponding item will be added automatically to the **Register List**. If the barcode is not found, a message will be displayed below the **Register List**. When using this continuous **Ready** mode, there is no need to go back to mouse or keyboard between items.

The **Once** and **Manual** modes are used when the operator has to enter barcodes manually by using the numerical keypad of the keyboard. This is useful if the item doesn't have barcode printed on it.

When **Register** is set to the **Once** mode, it will automatically switches itself back to the **Ready** mode after the operator manually enters the barcode (on the numerical keypad), followed by the Enter key.

If the operator has to sell multiple barcode-less products by using keyboard, he/she can use the **Manual** mode instead. In **Manual** mode, the program doesn't switch itself back to the **Ready** mode so there is no need to keep pressing the ***** key to start manual entry for each item.

The **Resizable-Style Register** features two "Quantity" buttons. The upper one displays the quantity of the highlighted item already in the **Register** window. The other one displays the quantity of the all items already in the **Register** window. The upper button can be used to duplicate the highlighted item.

The **Resizable-Style Register** hosts all FKey buttons. To customize these buttons, use the **Function Key Panel** feature from the **Menu Bar** of the program (under the **FKey** menu title) and press the **Setup** button.

5. Item List

Before you can sell your products with this program, data (names, codes, categories, prices…etc) for these products have to be created in the Item List. Two item lists are available in this program: The **Shop Sale** window and the **Deli/Bar Sale** window.

From the program main window's **Menu Bar** or **Tool Bar**, you can bring up the **Shop Sale** window or **Deli/Bar Sale** window. The **Shop Sale** window and **Deli/Bar Sale** window are very similar. Each row contains data for one single item. You can sort items by clicking on the caption of each column. The width and height of the window and the widths of the list columns can be resized and the program will remember them when you open the window next time.

Later in the **Departmental Management** section, you will learn that **Shop Sale** and **Deli/Bar Sale** are treated as two separate "Departments". The department names for them are "SHOP" and "DELI", respectively. Depending on the natural of your products, you can elect to use either or both of them. For example, you can put all your products in **Deli/Bar Sale** list, and keep the non-tangible items (e.g., membership, tournament entry and administrative fees) in **Shop Sale** list.

5.1 Basic Item List Operations

In a later sub-section, we will explain the data properties of an item and how you can expand and modify the item list. For now, let's use the existing item data to explore some of the item list's basic operations.

From within either of the two item lists (**Shop Sale** and **Deli/Bar Sale** windows), the operator can send items to **Register**, **Table Timer** and **Basket** by using the **Register**, **Table** and **Basket** buttons, respectively.

For example, if a customer is buying and paying right away for a "7 Up" item, the operator can select this item from the list and then press the **Register** button to send it to the **Register** window. As explained in the earlier **Register** section, the **Register** creates a receipt automatically for the operator to finalize the sale.

On the other hand, if you allow your customers to order first and pay later, the operator can elect to send the items to **Table Timer** or **SuperTab**. The **Table Timer** and **SuperTab** features, as well as the **Basket** feature, will be explained in later sections.

After an item is sent to **Register** or other windows, the program automatically reduces the "Stock" value (the Stock field in the item list) of the corresponding item. At the same time, the "Sold" value in the item list is increased. The sold values give a quick view of the items' popularities. However, for quantities sold during a defined period of time, such as a particular day or week, please refer to the discussions later in the **Reports** section.

The **Reset Sold Quantities** feature (via the **More** button) can be used to reset the Sold values to zeros. Only **Master Users** and operators with rights to modify data can access this feature.

5.2 Selecting an Item Quickly

You may find it inefficient as you try to find and select an item from the item list by scrolling the list up and down, especially if you have a long list. To make the process faster, you can use the **Search** box to find an item more quickly. In the **Search** box, if you enter the leading letters of the item's name or code, the list will scroll automatically to the first match found. To find the next match or if the entered ones are not the leading letters, you can press the **Search** button repeatedly until the right item is found.

For popular items, you can press the **More** button to enter some pre-set search criteria for the **Search** command.

This **Search** box/button is fairly fast in finding an item if you use mouse and keyboard regularly. However, depending on your business types, you may want to consider one of the following methods to make the process even faster:

- If you have a touch-screen monitor and want to avoid using the keyboard, the **TouchPad** feature is a better choice for selling items. You can also operate **TouchPad** with mouse. **TouchPad** is especially efficient in a restaurant-type setting. Please refer to the **TouchPad** section for details.
- The **Shop Sale Express** and **Deli/Bar Sale Express** windows are smaller versions of the regular **Shop Sale** and **Deli/Bar Sale** windows. If you are proficient with keyboard, you can try them to see if they can be more efficient.

5.3 Creating and Expanding Item List

The program comes with only a few sample items. You can delete or modify these sample item data. You still have to create most of your item data from scratch. If you have existing data stored in comma-delimited format, you can use the **Import List** function (accessed by clicking on the **More** button) to convert them to the format required. Any commercial spreadsheet program (e.g. Microsoft Excel) can read and write data in comma-delimited format. If you decide to import data, you may want to try the **Export List** function first to learn the field arrangements of the comma-delimited file. If you have problem converting data, please contact us.

For each item, there are several fields of properties. Only the first five properties are mandatory. They are Code, Name, Category, Price and Stock. For each item, these five properties have to be entered before that item can be sold. Except for Tax and Barcode, the rest of the properties are used mostly for creating special items (e.g., coupons) or for management, reporting and information purposes.

To edit the item data in item list, click on the **Modify** checkbox to enable Modify mode. Modifying the list is not allowed if the operator does not have the access right given by the **Master Users**. If you are using the network edition, the **Modify** checkbox is available on the **Network Host**, or on a **Terminal** if you log in as a master user.

To add more items, enable Modify Mode and press the **Add Rows** button to create some blank ones first.

5.4 Item Data Properties and Item Details Window

In addition to entering data directly in the spreadsheet-like **Shop Sale** list or **Deli/Bar Sale** list, you can also bring up the **Item Details** window for editing by using one of the following methods:

1. In **Shop Sale or Deli/Bar Sale** window, press the icon in the lower left corner.
2. In **Shop Sale or Deli/Bar Sale** window, enable Modify Mode and press the **Details** button.
3. In **Receiving** window, press the **Details** button.
4. In **Receiving** window, if an item is already in **Receiving List**, you can select that item on the **Receiving List**, press **Edit** button and then press **Edit More** button in **Edit** window.

The last two methods are related to receiving items from vendors, so we will not talk about them until later in the **Receiving** section.

The following is a list of all properties (fields) that define an item. As mentioned earlier, only the first five (Code, Name, Category, Price and Stock) are mandatory.

Code:

This property can have up to 6 characters. This field is mandatory. However, you can leave this field blank to create an open-code item. The program will ask the user to enter the Code when an open-code item is being sent to **Register**. Using open-code items may make reports less readable and is in general not recommended. The following rules are important when assigning Codes:

1. Each item MUST have a unique Code. For example, if a code is already used in **Deli/Bar Sale** window, don't use it again in **Deli/Bar Sale** window or **Shop Sale** window.
2. Do not use any space in a code (or category mentioned later). For example, "A10" is a valid code, but "A 10" (with a space after letter A) is not.
3. Code (or category mentioned later) is case-sensitive, so "A101" and "a101" are two different codes. However, do NOT use "a101" if "A101" already exists.
4. Do not use these characters in code or category: \ / : * ? " < > | , ; '
5. Avoid using characters other than alphabetical ones and numbers if possible.
6. Many items can have the same "category" name.
7. Some report/log features use Codes and categories to identify items, so avoid changing Codes or categories once you start using them.

Name:

Up to 15 characters unless left blank. It becomes an open-name item if it is left blank.

Category:

Up to 6 characters unless left blank. It becomes an open-category item if it is left blank. Using open-category items may make reports less readable and is in general not recommended.

As mentioned in the discussions for Code, certain rules also need to be followed when assigning Categories. Multiple items can be placed under the same category. For example, "JUICE" can be the category for 10 different juice products. However, please remember that, while sharing the same "Category", each of these 10 juice products still must have a unique "Code".

Price:

This is your retail price, the price your customer will pay for the product. It can have up to 7 characters unless left blank. It becomes an open-price item if it is left blank. For not-for-sale items, use an "N" character in this field. For free items, enter "0.00" as the price. If the item has an optional Dynamic Pricing Schedule (to be explained later), the program automatically attaches an "s" character to the price.

One handy way of giving discount is to create an item with a negative price. You can use the item's "Name" field as the reason of discount (You have to select certain options in **Receipt Printer Setup** and **Register Options** for the Name field to appear on receipts).

If you want to make the discount value flexible, you can create an open-price discount item by leaving the price field blank. The program will ask the operator to enter the discount value when he/she sends the open-price discount item to **Register**. You can also use a Code that ends with a minus sign. With the minus sign in Code, the operator won't have to enter the minus sign when sending the discount item to **Register**.

Stock:

For each item, the Stock is a number updated in real time whenever there is a transaction or re-stocking event. This number allows the program to quickly decide whether the next sale can be executed with sufficient stock quantity. However, it is not recommended that this number be used when accurate inventory count is demanded. When accurate inventory count is required, the user is advised to use the **Inventory Report** that calculates the numbers based on series of transactions and re-stocking activities, similar to the way a bank calculates the account balance. For more details, please refer to the discussions in the **Inventory Control** section.

Sometimes the stock values need to be adjusted due to, for example, missing or broken items, improper refunds and incorrect voiding methods. Although you can enable the Modify Mode and adjust the stock values directly, a better way that encourages record keeping will be introduced later In the **Inventory Control** section.

If you do not want to track particular items' Stock values (e.g., for items such as ketchup and water), enter "ok" (instead of a number) in this field.

<u>Sold:</u>

This is a number automatically updated by the program in real time. Certain activities, such as broken items, improper refunds and incorrect voiding methods, can affect the accuracy of the "Sold" count. Therefore this number is for reference only. Please use various sales reports for actual sold quantities during the day, month or certain period of time. Such sales reports will be explained in the **Reports** section later.

<u>Comment:</u>

Optional.

<u>Barcode:</u>

The Barcode property can be left blank. However, if you do provide a barcode, the barcode has to be unique. Otherwise the scanning or searching function may direct you to the wrong item. For items without barcodes imprinted on the products' packaging (such as hotdog or cup of coffee), you may want to use shorter barcodes or Codes (e.g., "15" or "a1") in this program to speed up manual searching.

<u>Division:</u>

Optional. Division, similar to category, is a way to group several different items under the same set. However, unlike category, division is not a mandatory field and is not used as part of an item's identity. The use of divisions is solely for reporting purposes.

For example, you may have three alcohol-related categories called BEER, WINE and LIQUOR. You can assign the same division name to all items under these three categories. This will give you a way to view the sales of the combined alcohol-related items.

In addition to using a division to report sales from multiple categories, you can also use a division to report sales from multiple items within the same category or from several unrelated categories.

When an item's Division property is provided, the Division Report (discussed later in the **Reports** section) will display sales of this item.

<u>Tax:</u>

The Tax property is used to assign one of the tax rates pre-defined in **Tax Rate Setup** (from **Menu Bar** under **Setup**) to the item. Please refer to the **Tax Rate Setup** section for details about tax rate types.

If an item's Tax field is left blank (not recommended), its tax rate will be determined by the following:

1. If the item is being sent to **Register** from an item list (e.g., **Shop Sale**, **Deli/Bar Sale**, **Shop Sale Express** or **Deli/Bar Sale Express** window), the tax rate is determined by the tax selector near the lower left corner of the item list window. This can be useful if different tax rates are used at different time for the same item.
2. If the item is being sent to **Register** from **TouchPad**, the tax rate is determined by the tax selector near the right edge of the **TouchPad** window.

If you enable Multiple Tax Rates or Canadian Tax in **Tax Rate Setup**, additional tax type selections will be available for the Tax field here.

If tax is not applicable for an item, it is recommended that its Tax field be set to "N".

<u>Department:</u>

This is used to change the department name (e.g., DELI or SHOP) from the default one. For example, you may have an item called "Tournament Entry Fee" in the **Shop Sale** list. The department name for this item is SHOP if the department field is left blank. If you prefer to have the sales of this item reported under the Pool department, you can enter POOL in this Department field.

<u>Item Type:</u>

Optional. You can designate the item as one of the following types:

1. Standard Item. Most of your for-sale products are of this type.
2. Coupon Item. Such items will show up in the **Coupon** window and in several special reports. More about coupons will be discussed in a sub-section later.
3. Adjustment Item. Such items will show up in the **Adjustment** window and in several special reports.
4. Payout Item. Such items will show up in the **Payout** window and in several special reports.
5. Alias Item. Using alias allows the same product to show up in two or more places. For example, if a particular drink is popular, you can create an alias for this drink and have it appear in the "Popular" page within the **TouchPad** window for quicker sell. Another use of alias is to sell a product that has multiple revisions with different barcodes. More details about these will be provided later.
6. Prepaid Item. Selling such items to a member will add certain credits to the member's record. Such credits can then be redeemed in the future. This will be discussed later in details in the **Member Prepaid Program** section.
7. Modifier Item. If you don't want an add-on ingredient (such as onion or ketchup) to appear on receipts, you can designate it as a modifier item. Such items won't appear in **Register** or receipts, but will still show up in **Table Timer**, **SuperTab** and **SalesMonitor**. More information about Modifier Items will be provided later.
8. Information Item. Information items will appear in both **Register** and receipt, but will not have a price field. This is useful if you want to add extra information or messages to the receipt.
9. Message Item. When a message item is being sent to a table or tab or to **Register**, the program will ask the user to enter a message to **SalesMonitor**. The kitchen or bar that is using the **SalesMonitor** program will receive this message in a few seconds. More information about Messages will be provided in the **Linking Items** section and **SalesMonitor** section.
10. Gift Card Item. Gift card items can be purchased and later redeemed by your customers. To sell or redeem a gift card, use the **Gift Card** or **GC** button in the **Register** window.
11. Tip Item. Use "Tip" as the "Item Type" property and using 0.00 as the price. Then press the **Tip** button to set the tip percentage. When this tip item is sent to the **Register** window, the tip

amount of the receipt will be changed to the specified percentage of the total DELI purchase amount.

If an item's Item Type field is left empty, that item is considered a Standard Item.

Markup (%):

Optional. If provided, it will be used to calculate retail price based on the cost entered during the Receiving operations. Do not include the % sign in this field (i.e., enter only 50 for 50% markup). The **Receiving** features will be explained later in the **Receiving** section.

Cost:

The cost of item paid to the vendors.

Note:

Optional. In **Receiving** window, this can be used as one of the sorting/search criteria.

Low Stock Notification:

Optional. You can setup a Low Stock Notification (LSN) number so the program can give you a warning when the current stock is less than this number.

Picture:

Optional. You can attach a digital picture/photo to the **Item Details** window. To select a picture file, first enable Modify Mode and then press the **Photo** button. The Picture field will then record the picture's path (file name along with its location).

Functions:

Optional. It the item is designated as a "Prepaid Item", certain programming needs to be provided here. This will be discussed later in details in the **Member Prepaid Program** section.

5.5 Coupons

Coupon offering is an important way of marketing to help your business stay competitive. To use this feature, coupon items have to be created first. A coupon item is created in **Shop Sale** or **Deli/Bar Sale** window just like standard shop and deli/bar items. However, we'd recommend setting the "Item Type" property to 'Coupon". This way, the coupon items will show up in the **Coupon** window (invoked via the **Coupon** button in **Register**) for faster access. Setting "Item Type" property to 'Coupon" also allows you to create "Smart Coupons". A Smart Coupon can automatically adjust its own discount value according to certain pre-set rules.

In the **Item Details** window, you can change the "Item Type" property to "Coupon" by clicking on the "Item Type" field and select 'Coupon" from the drop-down menu. A **Coupon** button will then appear in the **Item Details** window. Press the **Coupon** button and you can select one of the following "Smart Coupon" options:

Type1: Coupons for table/service time with pre-set maximum free minutes

This is for discounting fee of table time (service time) only and its discount value will not exceed a pre-set number of minutes. It has no effect on purchased deli or shop items. This type of coupon is useful only when you use the **Table Timer** feature.

In the **Item Details** window, leave the Price field empty, use a large Stock number to track the coupon usage and change the "Item Type" property to "Coupon". Then press the **Coupon** button in the **Item Details** window to choose this option and set the maximum free time (in minutes).

For example, a maximum free time of 60 means this coupon will give the customer up to 60 minutes of free table/service time when this coupon is sent to **Register** together with the player's table charge. You can send this coupon before or after you send players to **Register**. You can also attach this coupon to the player in **Table Timer** when he/she checks in. The effect of the coupon will be initially "0.00" in **Table Timer**, but will become a negative number (discount) when it is in **Register** with table charges.

If you also enable the "Member Free Hour Earning" Program (explained in a later section), the total combined discount of redeemed member free hours and such coupons won't exceed the total table/service time charges.

<u>Type2: Coupons for table/service time with a pre-set maximum dollar amount</u>

This coupon is the same as a Type1 coupon except that the maximum value given to the customer is limited by a dollar amount, instead of by table time minutes.

In the **Item Details** window, enter a negative number (the maximum coupon value) onto the Price field, use a large Stock number to track the coupon usage and change the "Item Type" property to "Coupon". Then press the **Coupon** button in the **Item Details** window to choose this option.

For example, using -2.00 in Price field means this coupon will apply up to $2.00 of table/service time discount when this coupon is sent to **Register** together with the player's table charge.

In addition to using it as a discount coupon, this type of coupon can also be useful if you require your customers to pre-pay an upfront **Table Timer** fee. The coupon value will balance out the table fee, up to the pre-paid amount.

<u>Type3: Coupons for Shop and Deli purchase with a pre-set percentage discount</u>

This coupon can be used for item purchase and its discount amount is a percentage of the amount of all shop items, all deli items, or all combined shop and deli items in **Register.**

In the **Item Details** window, enter 0.00 onto the Price field, use a large Stock number to track the coupon usage and change the "Item Type" property to "Coupon". Then press the **Coupon** button in the **Item Details** window to choose this option and set the discount percentage.

For example, using 25 as discount percentage means 25% discounts will be applied to all shop and deli items in **Register** when this coupon is sent to **Register**.

<u>Type4: Coupons for any purchase with a pre-set fix dollar amount</u>

This type of coupons can be used for any purchase and its discount amount is the exact amount pre-set in the Price field.

For example, using -2.00 in the Price field means this coupon will apply exactly $2.00 of discount when it's sent to **Register**. You can also leave the Price field empty to create an open-value coupon. The operator will be asked to enter the price when he/she tries to redeem an open-value coupon. If you create an open- value coupon item, you can use a minus sign as the last letter of this item's code (e.g., CPN5-). With this minus sign, the price you enter when redeeming the coupon will be automatically changed to a negative amount.

<u>Type5: Coupons for table/service time with pre-set hourly discount amount</u>

This is for discounting fee of table time (service time) only. The discount amount is proportional to the table time. It has no effect on purchased deli or shop items. This type of coupon is useful only when you use the **Table Timer** feature.

In the **Item Details** window, use 0.00 for Price, use a large Stock number to track the coupon usage, and change the "Item Type" property to "Coupon". Then press the **Coupon** button in the **Item Details** window to choose this option and set the hourly discount amount.

For example, if the hourly discount amount is set to 2.40, a discount of 4.80 will be applied if the table time is two hours, and a discount of 1.20 will be applied if the table time is 30 minutes.

<u>Type6: Coupons or Ticket for next visit or another area</u>

This is not a coupon redeemable within the program. Instead, it is a printed coupon (or ticket) to be used later or elsewhere.

Once coupons (Types 1-6 as described) are created, you can access them via the **Coupon** button in **Register**. You can also send coupons to **Register** by the same methods you use to sell regular items.

Please note that, to prevent over-discounting table/service time charge, only one single Type1, Type2 or Type5 coupon is allowed on the same receipt. For example, if one Type1 coupon is already in **Register** window, any Type1, Type2 or Type5 coupon subsequently sent to **Register** will have no discount value. Similarly, to prevent over-discounting item purchase, only one single Type3 coupon is allowed on the same receipt. There is no limit on number of Type4 coupons you can send to **Register**.

Later in the **Dynamic Pricing Schedule** section, we will introduce a feature to set date, time, member and other rules to shop and deli items. A coupon, like regular shop and deli items, can also be coupled with a Dynamic Pricing Schedule to limit its applicability. For example, you can set up a Type4 coupon to give $5 discount. Then use the Dynamic Pricing Schedule feature to make this coupon applicable only when one or more the following criteria are satisfied:

- Coupon is redeemed during certain days of the week
- Coupon is redeemed during certain days of the month
- Coupon is redeemed during certain months
- Coupon is redeemed during a pre-defined range of days
- Coupon is redeemed during certain time during the day
- Coupon is redeemed with presence of any one of several pre-defined member categories
- Coupon is redeemed with presence of any one of several pre-defined shop or deli items

If the required criteria pre-set in the coupon's Dynamic Pricing Schedule is not satisfied, this coupon will have zero discount value in **Register**. Please refer to the **Dynamic Pricing Schedule** section for more information.

5.6 Efficient and Automated Operations

The **CrossLink** feature (available only in Modify mode) can be used to track consumed ingredients and to create combo items. You can also use it to create "Pending" links to other items such as add-ons, sides, modifiers and message items. When such a main item is being sent to **Register**, the program will automatically prompt the questions for the operator to choose the pre-programmed linked items.

You can find more information and examples about the **CrossLink** feature in the **Linking Items** section.

The **Schedule** feature (available only in Modify mode) is used to assign special pricing schedules to your products. For example, the price of an item can change automatically according to time, day, date, month, year, holiday, quantity, member qualification and even presence of another item on the same receipt. This feature will be explained in details later in the **Dynamic Pricing Schedule** section.

6. Linking Items

In the **Item List** section, we explained how the items are created. In the earlier **Register** section, we also mentioned that items are sold by being sent to the **Register** window. In this section, we will introduce the **CrossLink** feature that can be used to perform additional tasks when items are sold or in the process of being sold.

Before we explain what a CrossLink is, let's define the following terms:

For-Sale Item: An item (product) that has a price and is to be sold to your customers.
Ingredient Item: An item that may or may not have a price. You don't normally sell this item to customers. The "Price" field may be set to "N" to prevent it from being sent to **Register**.

Obviously you must have at least some For-Sale Items if you are using this program to sell products. The use of Ingredient Items, however, is optional. The most common use of Ingredient Items is to track the consumptions of ingredients and raw materials that are used to produce certain final products (For-Sale Items) for your customers.

The **CrossLink** feature can be used to perform the following tasks:

- To track consumed ingredients and raw materials.
- To sell combo items more efficiently.
- To add modifiers, add-ons, sides and message items more efficiently.
- To create alias items and alias buttons.

In the following sub-sections, we will discuss each of these tasks.

6.1 Consumed Ingredients and Raw Materials

As defined earlier, an Ingredient Item is an item that you don't sell to your customers. The procedure illustrated in this sub-section is used only if you intent to track the usages of Ingredient Items.

Pleas note that, unlike Ingredient Items, the stocks of the For-Sale Items are tracked automatically. Therefore if a For-Sale Item has no associated ingredient or if you have no need to track its associated ingredients, then the procedure explained here is not needed.

For example, a hamburger is a For-Sale Item. If your restaurant purchases whole pre-made hamburgers from the vendor, then no ingredient or material is involved. On the other hand, if you purchase cheese, beef patties and other ingredients to make the hamburgers yourself, then cheese, beef patties are "Ingredient Items" in this case.

You don't want to sell raw beef patties to your customers. For that, you can set its price to "N" to prevent it from being sent to **Register** (If you use the **TouchPad** feature, you can hide such items). However, you may want to track the usage of beef patties so you know when to re-order more from vendor. The **CrossLink** feature can be used for such purposes.

In this program, you can cross-link a For-Sale Item to one or more Ingredient Items. When a For-Sale Item is sold, the stock of this For-Sale Item is reduced. At the same time, the stock for each of the cross-linked Ingredient Items is also deducted (by a quantity you specified). In this case, each of the Ingredient Items is called a "CrossLink Item". We will use the next two examples to illustrate this.

Now, let's assume that the following items are in the **Item List** of your **Deli/Bar Sale** window. If these items do not exist, you may want to create them first (as shown here), so you can follow the examples being explained here.

Code	Name	Category	Price	Stock
B101	Hamburger	Food	2.50	500
B102	Cheeseburger	Food	3.00	500
C501	5 Burger Combo	Food	0.00	500
D250	$2.50 Discount	Food	-2.50	500
L101	Liquor A	Liquor	2.00	500
L102	Liquor B	Liquor	2.00	500
L103	Liquor AB Mix	Liquor	2.50	500
Z101	z Beef Patty	zRaw	N	3000
Z102	z Cheese	zRaw	N	OK
Z501	z Liquor A	zRaw	N	400
Z502	z Liquor B	zRaw	N	400

In this list, the last 4 items are Ingredient Items and the rest are For-Sale Items. We prefix a “Z” letter to each of the last 4 items because we prefer to have them stay at the bottom of the list. Also notice that we use an “N” as the price for the last 4 items so these items cannot be sold. If you have the **TouchPad** feature, you can hide the zRaw category so the Ingredient Items cannot be sold.

If you don’t need to track stocks of certain items, enter “OK” in the **Stock** field and the program will never bother you with low stock warnings (see the z Cheese item in this example).

In order to “Link” the Ingredient Items to a For-Sale Item, you need to create a “Cross-Link”. To do this:

1. Open the **Deli/Bar Sale** window.
2. Check the “Modify” checkbox in the upper left corner to enable Edit Mode. Only master users and certain operators have access right to do this.
3. Select the item by clicking on the row of a For-Sale Item.
4. Press the **CrossLink** button to bring up the **Edit CrossLink Items** window.
5. The **Edit CrossLink Items** window allows you to enter up to 100 CrossLink Items (Ingredient Items in this example). For each ingredient item, enter its Code, Quantity (to be deducted) and LSN (Low Stock Notification, the program will notify the operator if the stock is equal to or less than the LSN number you provide here). These will become clear after you read the following examples. The value of the Type column is set to 1 by default. For Ingredient Items, let’s keep using Type 1. We will explain Type 2 in the next sub-section.

Important: The “Code” for each and every item is used to identify the “link”. Therefore if you ever have to change the “Code”, make sure you also check and modify the “CrossLink”. Also remember that Code is case-sensitive; so if you use “Z501” in **Deli/Bar Sale** window, make sure it’s also “Z501” (not “z501”) when you enter it in the **Edit CrossLink Items** window. Please refer to the **Item List** section regarding other restrictions of item codes.

Example 1:

Let’s say you want to monitor the stocks of raw beef patty (Z101) and cheese slice (Z102). Each of the first 2 for-sale items (B101 and B102) uses one raw beef patty. The second item (B102) also uses a slice of cheese. To accomplish this:

1. Click on the first row (B101) and press the **CrossLink** button.
2. Enter Z101, 1 and 50 to the first row. The third value (50 here) is optional. In this example, if the stock of Z101 goes down to 50 or less, the program will notify the operator.
3. Press **OK** to close the **Edit CrossLink Items** window. From now on, whenever you sell a

B101, the program also deducts the stock of Z101 (Beef Patty) by one.
4. Click on the second row (B102) and press the **CrossLink** button.
5. Enter Z101, 1 and 50 to the first row. Enter Z102, 1 and 50 to the second row.
6. Press **OK** to close the **Edit CrossLink Items** window. From now on, whenever you sell a B102, the program also deducts the stocks of both Z101 (Beef Patty) and Z102 (Cheese) by one.

You may have noticed the "5 Burger Combo" item in the list and wondered why it's not included in the example. Combo items involve both ingredient items and other for-sale items and can be programmed differently. In the next sub-section, we will use an example for combo items.

Example 2:

Your bar sells beverages made by mixing liquor from several different bottles. In the Item List, you have two types of original liquor, Z501 and Z502. You have 10 bottles of Z501 and 10 bottles of Z502. Each bottle is divided into 40 counts (doses). Therefore the beginning stocks for Z501 and Z502 are both 400. For the sellable liquor items, you have L101 that is 4 counts of Z501, you have L102 that is 4 counts of Z502 and you also have L103 that is made by 1 count of Z501 and 3 counts of Z502.

1. Click on row L101 and press the **CrossLink** button.
2. Enter Z501, 4 and 40 to the first row. The third value (40 here) is optional. In this example, if the stock of Z501 goes down to 40 (One bottle) or less, the program will notify the operator.
3. Press **OK** to close the **Edit CrossLink Items** window. From now on, whenever you sell a L101, the program also deducts the stock of Z501 by 4.
4. Click on row L102 and press the **CrossLink** button.
5. Enter Z502, 4 and 40 to the first row.
6. Press **OK** to close the **Edit CrossLink Items** window. From now on, whenever you sell a L102, the program also deducts the stock of Z502 by 4.
7. Click on row L103 and press the **CrossLink** button.
8. Enter Z501, 1 and 40 to the first row. Enter Z502, 3 and 40 to the second row.
9. Press **OK** to close the **Edit CrossLink Items** window. From now on, whenever you sell a L103, the program also deducts the stock of Z501 by 1 and deducts the stock of Z502 by 3.

Later in the **Report** section, we will discuss ways to track the daily usages of ingredient items by using the **Daily Shift Balance** report and **Daily Consumed Ingredients** report. For the current inventory of the ingredient items, please refer to discussions later in the **Inventory Control** section.

6.2 Combo Items

In the previous sub-section, an ingredient item is defined when it's set as a Type 1 CrossLink item. If you change it from Type 1 to Type 2, then it's no longer an ingredient item. Instead, it will instruct the program to sell another For-Sale Item. That is, you can cross-link one or more For-Sale Items to a For-Sale Item.

Example 3:

Your restaurant sells Hamburger for $2.50 each (Item B101 in the list). It also sells a "5 Burger Combo" for $10.00. There are several ways to handle this. You can send 5 Hamburgers to **Register** for a total of $12.50 and then send a –2.50 discount (Item D250 in the list) to reduce the total price to $10.00. Another way is to use the Group Pricing feature (discussed later in the **Dynamic Pricing Schedule** section) to automatically reduce the price of the fifth Hamburger to zero.

A faster way is to create a "5 Burger Combo" item that allows you to sell the five Hamburgers as if it's one single item, as explained in the following example:

1. If row C501 (5 Burger Combo) does not exist, create it first as shown in the list.

2. Click on row C501 in the list and press the **CrossLink** button.
3. In the **Edit CrossLink Items** window, enter B101 and 5 to the first two fields of the first row. Change its type to Type 2. With this, when you sell a C501, the program will instead send 5 B101 Hamburgers to Register.
4. Enter D250 and 1 to the first two fields of the second row. Change its type to Type 2. This will cause a –2.50 discount to reduce the price to 10.00.
5. Enter Z101 and 5 to the first two fields of the third row. Keep its type as Type 1. This will tell the program to reduce the stock of raw Beef Patty by 5.
6. Press **OK** to close the **Edit CrossLink Items** window and finish the programming.

The same method illustrated by this example can be used for any variety of combinations, not just multiple items of the same kind. Notice that we set the price of the C501 item to “0.00”. That’s because the Type 2 items defined in the **Edit CrossLink Items** window already carry prices. You can set the “Item Type” property of this C501 item to “Information” if you prefer not to print the “0.00” price on receipts (Please refer to the **Item List** section of this document for details about “Item Type” properties).

Later in the **Report** section, we will discuss ways to track the daily usages of for-sale items by using the **Daily Shift Balance** report and **Daily Consumed Ingredients** report. For the current inventory of the for-sale items, please refer to discussions later in the **Inventory Control** section.

CrossLink programming can be a tool to help produce reports in formats you like. In the example just shown, quantities for both C501 and B101 will appear in **Daily Consumed Items** report. You can view the B101 quantity as the overall Hamburgers sold (via any deal) and view the C501 quantity as the Hamburgers sold only via the “5 Burger Combo” deal.

On the other hand, depending on the formats of reports you prefer, you may not want to add the quantity of the Hamburgers sold via the “5 Burger Combo” deal to the quantity of total Hamburgers sold. If that’s the case, you will have to program the “5 Burger Combo” without using Type 2 CrossLink items. You can still use Type 1 CrossLink items to track usages of raw ingredients (as shown in Example 1).

6.3 Group Questions for Modifiers, Add-ons, Sides and Message Items

In addition to tracking consumed ingredients and selling combo items, you can also use the **CrossLink** feature to create “Pending” links to other items such as modifiers, add-ons, sides and message items.

A link is called “Pending” if you want your operator to be able to decide, during the process of selling, whether the linked items should be included.

For example, you can create a pizza combo with four groups of items: Toppings, Drinks, Sides and Extra Messages. When an operator is selling this pizza combo, the program will ask four preprogrammed “Group Questions” that allow selections of items from within these four groups.

You can also set quantity limits on individual items and on items within groups.

Example 4:

In this example, we want to create an item called “X-Pizza” in **Deli/Bar Sale** window. X- Pizza can have up to 4 extra toppings. The customer can choose these 4 toppings from 6 possible selections. Some topping selections (Mushroom, Meatball and Sausage) can be chosen twice (counted as two toppings) if desired. Other topping selections (Green Pepper, Onion and Cheese) can be chosen up to three times (counted as three toppings) if desired.

1. In **Deli/Bar Sale** window, enable Modify Mode and press the **Details** button.
2. In the **Item Details** window, press the **Add Item** button to create a new item. Use “Mushroom

Top", TP101 and Food as name, code and category, respectively for this new item. Set the price to zero and enter "ok" as stock. Also set the Item Type to the "Modifier" type.

3. Press the **Add Item** button again to create a new item. Use "Pepper Top", TP102 and Food as name, code and category, respectively for this new item. Set the price to zero and enter "ok" as stock. Also set the Item Type to the "Modifier" type.
4. Press the **Add Item** button again to create a new item. Use "Onion Top", TP103 and Food as name, code and category, respectively for this new item. Set the price to zero and enter "ok" as stock. Also set the Item Type to the "Modifier" type.
5. Press the **Add Item** button again to create a new item. Use "Meatball Top", TP104 and Food as name, code and category, respectively for this new item. Set the price to zero and enter "ok" as stock. Also set the Item Type to the "Modifier" type.
6. Press the **Add Item** button again to create a new item. Use "Sausage Top", TP105 and Food as name, code and category, respectively for this new item. Set the price to zero and enter "ok" as stock. Also set the Item Type to the "Modifier" type.
7. Press the **Add Item** button again to create a new item. Use "Cheese Top", TP106 and Food as name, code and category, respectively for this new item. Set the price to zero and enter "ok" as stock. Also set the Item Type to the "Modifier" type.
8. This step is optional. In addition to the 6 toppings, you may want to create a "Message Item". Press the **Add Item** button to create a new item. Use "Message Pizza", MS001 and Food as name, code and category, respectively for this new item. Set the price to zero and enter "ok" as stock. Also set the Item Type to the "Message" type. Then press the "Message" button and set the message type to "Type 3". You can also customize it to have pre-set keywords.
9. We have just created 6 possible toppings and 1 message for the pizza. Now, for the main pizza, press the **Add Item** button to create a new item. Use "X-Pizza", PZ101 and Food as name, code and category, respectively for this new item. Set the desired price and use a large number as stock.
10. Within this pizza item's settings, press the **CrossLink** button. Now we will configure the involved toppings and message.
11. For "Mushroom Top", enter TP101 as code and 2 as quantity to the first row and change its Type to 2. Also change the "Pending" field to "Yes".
12. For "Pepper Top", enter TP102 as code and 3 as quantity to the second row and change its Type to 2. Also change the "Pending" field to "Yes".
13. For "Onion Top", enter TP103 as code and 3 as quantity to the third row and change its Type to 2. Also change the "Pending" field to "Yes".
14. For "Meatball Top", enter TP104 as code and 2 as quantity to the fourth row and change its Type to 2. Also change the "Pending" field to "Yes".
15. For "Sausage Top", enter TP105 as code and 2 as quantity to the fifth row and change its Type to 2. Also change the "Pending" field to "Yes".
16. For "Cheese Top", enter TP106 as code and 3 as quantity to the sixth row and change its Type to 2. Also change the "Pending" field to "Yes".
17. For the "Message Item" enter MS001 as code and 1 as quantity to the seventh row and change its Type to 2. Also change the "Pending" field to "Yes".
18. Press **OK** to close the **Edit CrossLink Items** window.

In the CrossLink settings, we set the "Type" field to 2 and "Pending" field to "Yes". These instruct the program to prompt a dialog window, during the process of selling the X-Pizza item, to ask the operator for further entries. The operator will be able to select each of the same topping up to 2 or 3 times, as set in the "Quantity" field.

If you have a standard or popular topping configuration, you can enter the quantities onto the "Auto-Add" fields. For example, if you set the Auto-Add field to 1 for both "Sausage Top" and "Pepper Top", then the dialog window will start with these two toppings automatically added. The operator will still be able to change the selections if needed.

We didn't change the "Group ID" away from the default value of 1 in the settings. However, you can use different Group IDs if you prefer to have the program ask the operator multiple questions. For example, if the Group IDs of Pepper and Onion toppings are set to “2”, then these two toppings will appear in a second dialog window. If you have other groups of items (such as sides, drinks and free kids’ toys) that may go with the pizza order, you can set them up in the same way you did with toppings, but by using different Group IDs.

If you want to set lower and upper limits on number of items within a group, you can press the **Groups** button to access additional settings. For example, if you set the “Group Max” field of Group 1 (the first row) to 4, then the total number of toppings in the example will not be allowed to exceed 4. If you also set the “Group Min” field to 2, then the operator will have to select at least 2 toppings. You can set the “Group Title” to a phase such as “Select Up to 4 Toppings” and it will be displayed in the dialog window to remind your operator what to do.

When prompted to ask the operator further entries, the dialog window will use large buttons for easy mouse or touch-screen operation. If you have customized the buttons under **TouchPad**, it will display the button sizes and graphics accordingly. Button customizations will be discussed later in the **TouchPad** section.

In the example, we also created a “Message Item” and added it to the CrossLink settings of the pizza item. The purpose of such a message item is to give the operator a chance to send extra information (if needed) or a customer’s unexpected request to the kitchen that is running the **SalesMonitor** program. For example, a customer may ask for the onion to be sliced, instead of diced.

When you create a message item, you can customize it to have up to 30 keyword buttons. Your operator will be able to use these keyword buttons (in addition to the keyboard and an on-screen keypad) to quickly enter messages. It can be an efficient way to send a message such as “Chicago Rare, Extra Cheese, Pickles Outside, No Mustard” to the kitchen.

Message items can also be used as Modifiers if stock tracking and prices are not needed. More information about messages and the **SalesMonitor** program can be found in the **SalesMonitor** section.

In the **CrossLink** window, you can use the **Copy Links** button to copy links from another item. This is useful if you have several items that have the same or similar modifiers, add-ons, sides and message items.

6.4 Packages

The **Packages** feature comes with the optional **TouchPad** feature. For related information, please read the discussions about **TouchPad**, **CrossLink**, and **Group Questions**.

This feature improves the **Group Questions** feature by adding the ability to edit item selections, even after they have been sent to the shopping list on the right hand side of the **TouchPad** window. For example, after answering the four group questions of choosing Toppings, Drinks, Sides and Extra Messages, if the customer changes his/her mind (about toppings, for example), the operator can click on any item of the package (in the shopping list of the **TouchPad** window) and press the **Edit Selected** button to go back to the corresponding group question to modify items within the package.

The **Remove** button can be used to remove the entire package. The **New** button can be used to quickly add another of the same (or similar) package.

The **Packages** feature also makes the item selections more readable in the shopping list of the **TouchPad** window.

To set up a package, you still need to configure your item groups with Pending Links and Group IDs in the **CrossLink** window. After that, simply enable the “As a Package in TouchPad” option.

If you have the optional **SalesMonitor** program, The **Packages** feature will also make the printout and screen output of **SalesMonitor** program more readable.

6.5 Conditional Group Questions

When selling a combo or package that allows the customers to choose from groups of modifiers, add-ons, sides and message items, the operator often wants to skip irrelevant group questions.

For example, you may have a first group question that allows the operator to choose between Baked Potato and French Fries. You may then have a second group question that allows the operator to choose between sour cream and cheese that are intended only for Baked Potato. In such a case, you can preprogram it so that if the operator does not choose the Baked Potato in the first question, the second group question wouldn't come up at all.

To set up such **Conditional Group Questions**, press the **Groups** button in the **CrossLink** window to access the **Group Settings** window. Each row/group in this **Group Settings** window has a "Require" field. This "Require" field allows you to supply a conditional code for the corresponding group.

If this "Require" field is left empty, the corresponding group question will always be invoked. If this field is supplied with an Item Code, the corresponding group question will be invoked only when the said item was chosen from any of the earlier group questions.

Note that the first group question is always invoked regardless of the entry in its "Require" field.

6.6 Quantity-Dependent Ingredients

Earlier we mentioned that consumptions of ingredients can be tracked via the use of Type 1 setting in the **CrossLink** window. However, if the consumption of such a Type 1 item (Ingredient) is dependent on the sale of a "Pending" item in the same group, then you need to provide a "Qty-Depend" code to this Type 1 item.

Example 5:

In the following example, several liquor items are shown. Note that the prices of the last three items are set to "N" to indicate that they are not-for-sale ingredients. These three "Vodka Bottles" are created only for the purpose of tracking stocks.

Code	Name	Category	Price
VodX	Vodka Choices	Liquor	0.00
Vod1	Vodka 1	Liquor	2.00
Vod2	Vodka 2	Liquor	2.25
Vod3	Vodka 3	Liquor	2.50
Vod3Lg	Vodka 3 Large	Liquor	4.00
IceW	Ice Water	Liquor	0.00
VBot1	Vodka 1 Bottle	Liquor	N
VBot2	Vodka 2 Bottle	Liquor	N
VBot3	Vodka 3 Bottle	Liquor	N

The **CrossLink** settings for VodX (the first item) are as follows:

Code	Quantity	Type	Pending	Group ID	Qty-Depend
Vod1	100	2	Yes	1	
Vod2	100	2	Yes	1	
Vod3	100	2	Yes	1	
Vod3Lg	100	2	Yes	1	

IceW	1	2	No	1	Vod3Lg
VBot1	3	1	No	1	Vod1
VBot2	3	1	No	1	Vod2
VBot3	3	1	No	1	Vod3
VBot3	6	1	No	1	Vod3Lg

Note that the "Pending" fields of the first four items are set to "Yes" and the "Type" fields of them are set to "2" to enable the **Group Question** feature.

With this **CrossLink** setting for VodX, the operator will see a **Group Question** window with a selection of four items (Vod1, Vod2, Vod3 and Vod3Lg) after he/she selects the VodX item during a selling operation.

The quantity 100 indicates that the operator will be able to sell up to 100 of the corresponding item from within the **Group Question** window.

The operator won't see the not-for-sale items (the last four) in the **Group Question** window, because their "Type" fields are set to "1" to indicate that they are ingredients.

For a Type 1 item (Ingredient), if the "Qty-Depend" field is left blank, the consumed ingredient quantity (when a VodX is sold) will be the number provided in the "Quantity" field (e.g., 3 in the case of VBot1, and 6 in the case of VBot3).

However, if the "Qty-Depend" field of a Type 1 item is supplied with the item code of a "Depended Item" from the same group, this Type 1 item then becomes a Quantity-Dependent Ingredient. In the example, the "Qty-Depend" field of VBot1 is now given as "Vod1", which is the first item.

In such a case, the consumed ingredient quantity (of a Quantity-Dependent Ingredient) will then be the number provided in the "Quantity" field multiplied by the chosen quantity of the depended item. For example, if, while in the **Group Question** window, the operator chooses to sell 7 of the Vod1 item, then the consumed quantity of VBot1 ingredient will be 21 (that is, 3 multiplied by 7).

Please note that, for the Quantity-Dependent feature to work, a Dependent ingredient (e.g., VBot1) and its associated Depended item (e.g., Vod1) must use the same Group ID.

If you have the optional **TouchPad** feature, you will see an "As a package in TouchPad" option in the **CrossLink** setup window. It's recommended that this "Package" option be enabled in any **CrossLink** setting that has multiple Type 2 linked items.

Example 6: Another Example of Quantity-Dependent Ingredients

The following is an example of a similar application:

Code	**Name**	**Category**	**Price**
BUD	BUDWEISER	DRAFT	0.00
BUD16	BUD 16 oz	DRAFT	2.50
BUD22	BUD 22 oz	DRAFT	3.00
BUD32	BUD 32 oz	DRAFT	4.00
BUD60	BUD 60 oz	DRAFT	7.00
BudInv	BUD Inventory	DRAFT	N

The **CrossLink** settings for BUD (the first item) are as follows:

Code	**Quantity**	**Type**	**Pending**	**Group ID**	**Qty-Depend**

BUD16	100	2	Yes	1	
BUD22	100	2	Yes	1	
BUD32	100	2	Yes	1	
BUD60	100	2	Yes	1	
BudInv	16	1	No	1	BUD16
BudInv	22	1	No	1	BUD22
BudInv	32	1	No	1	BUD32
BudInv	60	1	No	1	BUD60

With this **CrossLink** setting for BUD, the operator will see a **Group Question** window with a selection of four items (BUD16, BUD22, BUD32 and BUD60) after he/she selects the BUD item during a selling operation.

In this example, BudInv is an ingredient item created only for the purpose of tracking stock. Depending on the item and quantity the operator chooses in the **Group Question** window, the stock of BudInv will be reduced accordingly.

For example, if the operator sells one BUD32, then the BudInv stock will be reduced by 32. If the operator sells two BUD32, then the BudInv stock will be reduced by 64. If the operator sells two BUD60, then the BudInv stock will be reduced by 120.

If you have the **TouchPad** feature, you can hide the BudInv button since it's not a for-sale item. You can also hide the BUD16, BUD22, BUD32 and BUD60 buttons since the operator can already sell these four items by pressing the BUD button. To make buttons invisible in **TouchPad**, please use the **Button Designer** feature. For details, please refer to the discussions in the **TouchPad** section.

6.7 Quantity-Dependent Type 2 Items

Although Type 2 items are for-sale items (instead of ingredients), you can also make it quantity-dependent.

In the earlier example, the IceW (Ice Water) item is a non-pending Type 2 item. Non-pending means its "Pending" field is set to "No". Its "Qty-Depend" field is supplied with the code Vod3Lg, which means the quantity of IceW sold will be dependent on the quantity of Vod3Lg chosen in the **Group Question** window.

When a Type 2 item is set as non-pending, it will be automatically included as part of the sale without user interaction. That is, the operator won't see it in the **Group Question** window. In the example, the operator won't see the Ice Water in the **Group Question** window, as an Ice Water is automatically included as part of the sale whenever a Vod3Lg is ordered.

6.8 Alias Items and Alias Buttons

The **CrossLink** feature described in this sub-section can be used to create "Alias" items, which will appear in **TouchPad** as Alias buttons. Its main purpose is to improve operating efficiency of the **TouchPad** feature. You may want to read the **TouchPad** section first if you are not already familiar with the **TouchPad** feature.

In the **TouchPad** window, items are separated into pages according to categories. Therefore the way you define the categories for your items has a great impact on the overall selling experience. Items will be easier to find if they are separated by categories in a logical way. On the other hand, if too many categories are created, you may find yourself switching from page to page too often, which slows down the selling operations. In general, we recommend 10 to 30 items per category.

If customers tend to orders certain items together, putting them in the same category page can reduce page switching and therefore speed up operations. This is not always possible, though. For example, you may not like to put soda and pizza in the same category even they often appear in the same order. The solution is to create a special item call “Alias Item” so the same item can appear in two or more different pages. This is explained in the following example:

Example 7:

In this example, we want to create a page called “Popular Items” in **TouchPad**. This “Popular Items” page can be used to host many popular items from various categories. To simplify the procedure, we only show you the steps to add one item (ORANGE from the JUICE category) to the popular page. The code for this ORANGE item is JUICE2 and it’s under category JUICE. This is one of the sample items that come with this program. If you already deleted this item, you can practice the following procedure with another item instead.

1. In **Deli/Bar Sale** window, enable Modify Mode and press the **Details** button.
2. In the **Item Details** window, press the **Add Item** button to create a new item. Use “Orange Juice”, P1 and PPLR as name, code and category, respectively for this new item. Use 0.00 as price and “OK” as stock.
3. Click on the “Item Type” field and select “Alias” from the drop-down menu.
4. Press the **CrossLink** button. Enter JUICE2 as code and 1 as quantity to the first row and change its Type to 2.
5. Press **OK** to close the **Edit CrossLink Items** window.
6. Upon starting **TouchPad**, you will see a new category button “PPLR”. If you don’t like this name, you can use the “**Edit Mode**” (described in **TouchPad** section) to change it to, for example, “Popular”.
7. Press this button to go to the PPLR page. You can find the “Orange Juice” item inside. Selling this item from within this Popular page is the same as selling it from its original JUICE page.

The procedure above creates an Alias item for ORANGE that now appears in two different categories. In the **TouchPad** window, this item will appear in two different pages: Its original JUICE page and the Popular page. You can use the same procedure to add other Alias items to the Popular page or other pages.

You can also use an Alias item to point to multiple items by entering multiple item codes in the **CrossLink** window (use one row for each item code). This enables you to sell a bundle (or combo) of items more quickly. For example, similar to the “5 Burger Combo” CrossLink created in an earlier sub-section, you can create another CrossLink for the same “5 Burger Combo”, use a different code, use PPLR as category and set it as an Alias. It will then appear in the Popular page in **TouchPad**.

7. Dynamic Pricing Schedule

The Dynamic Pricing Schedule feature allows a schedule of prices (instead of a single fix price) to be assigned to an item. A schedule can include Time-Dependent Pricing, Group Pricing and Extra Member/Item Verifications. This feature comes with the optional **TouchPad** feature.

With Time-Dependent Pricing, the price of an item can change automatically according to time, day, date, month, year and holiday. With Group Pricing, the price of the item depends on quantity of items (can be the same, similar or totally different items) on the same receipt. With Extra Member/Item Verifications, the price of the item depends on the presence of certain members and/or purchase of certain items.

By using combinations of these three types of tools, you can create promotional programs such as "Happy Hours", "Buy-2-Get-1-Free" and "Member Coupons" which can be helpful for your business to become more competitive.

To set up a "Price Schedule" for an item, you need to use the **Schedule** button available in one of the following windows:

1. In **Shop Sale** or **Deli/Bar Sale** window, enable Modify Mode and press the **Schedule** button.
2. In **Shop Sale** or **Deli/Bar Sale** window, press the **Details** button, enable Modify Mode and press the **Schedule** button.

The **Schedule** button brings up the **Price Schedule** window. Once you are in the **Price Schedule** window, check the **Enable Schedule** checkbox (if not already checked) and press the **Add Row** button to add a new row. If you hold down the keyboard's Option button while pressing the **Add Row** button, a row will be inserted above the selected row.

You can then edit this row to become a "Scheduling Rule". You can add more rows if more scheduling rules are desired. Each Shop item or Deli/Bar item can has its own price schedule. A price schedule can hold multiple scheduling rules (i.e., multiple rows).

After adding a row of scheduling rule, you will notice that the row itself includes time-dependent settings. Please note that, even if your price is not time-dependent, adding scheduling rule(s) is mandatory in order to use Group Pricing and/or Extra Member/Item Verifications. If your price is not time-dependent, you can set the Date to Everyday and Time to "0:00 to 0:00" (i.e., all day) in the row of scheduling rule.

For each row of scheduling rule, you can provide the optional settings for Group Pricing and Extra Member/Item Verifications. These will be explained later.

7.1 Time-Dependent Prices

A scheduling rule describes a price and a time period within which the price is activated. We will use the following example to illustrate this.

Day, Date or Month	Begin Time	End Time	Price
Saturday	16:30	21:00	2.00
Everyday	7:00	10:30	1.50
March	10:00	14:00	4.00
15	16:30	21:30	3.50
1-5	16:30	21:30	3.00

DateTime	1/1 0:00	1/3 0:00	1.00
DateTime	2008/7/10 18:00	2008/7/10 20:00	0.00
DateTime	7/10 18:00	7/10 20:00	2.50

This example shows a price schedule for a particular item. Eight scheduling rules are included in this price schedule.

- According to the first scheduling rule, the price becomes 2.00 every Saturday between 16:30 (4:30 PM) and 21:00 (9 PM).
- According to the second scheduling rule, the price becomes 1.50 everyday between 7:00 (7 AM) and 10:30.
- According to the third scheduling rule, the price becomes 4.00 in any day during March of any year between 10:00 and 14:00.
- According to the fourth scheduling rule, the price becomes 3.50 in the fifteenth day of any month between 16:30 and 21:30.
- According to the fifth scheduling rule, the price becomes 3.00 in the first five days of any month between 16:30 and 21:30.
- The last three scheduling rules use the keyword "DateTime". When DateTime is used, you need to provide not only the time but also the date in the second and third entry fields.
- According to the sixth scheduling rule, the price becomes 1.00 from 0:00 January 1 to 0:00 January 3. Note that the date is provided in the second and third entry fields. The "Year", however, is not provided, so this rule is valid in any year.
- According to the seventh scheduling rule, the item is free from 18:00 to 20:00 on July 10, 2008. Note that the year (2008) is provided here, so this rule is valid only in Year 2008.
- According to the eighth scheduling rule, the price becomes 2.50 from 18:00 to 20:00 on July 10 every year.

If multiple scheduling rules are satisfied at the same time, only the highest one is applied. For example, if the current month is March, both the second and third scheduling rules are satisfied if the current time is between 10:00 and 10:30. In this case, only the first encounter (the second scheduling rule in this example) is applied.

At any time, if none of the scheduling rules is satisfied, then the "Base Price" is used. The Base Price is the price you entered in the Price field of the **Item List** in the **Shop Sale** or **Deli/Bar Sale** window. After you close the **Price Schedule** window, an "s" will be appended to the Base Price to indicate that a price schedule has been set. Deleting this "s" will disable the price schedule for this item. When a price schedule is disabled, the Base Price will be used at all time. If the Base Price is left empty, a window will appear for you to enter the price when you try to sell the item.

When you are using the **Shop Sale** window or the **Deli/Bar Sale** window, if you are not in "Modify" mode, you can press the F10 key to bring up the **Price Schedule** window for price checking. If you are using **TouchPad**, right click on an item button and the current activated price will be shown on the status bar.

7.2 Group Prices

You can set up one Group Pricing scheme that is automatically activated during a pre-set time period (as set in one row of scheduling rule). You can also set up multiple Group Pricing schemes for the same product for use in different time periods (by using multiple rows of scheduling rules).

Group Pricing works at the **Register** level. When multiple items from the same group are sent to or voided from **Register**, their prices in **Register** are adjusted according to your settings.

For each row of scheduling rule, you can replace the price with a set of group prices. To do this, place a checkmark on “Enable Group Pricing” checkbox first and then enter a series of group prices. When enabled, Group Prices will supersede the price set in the row of scheduling rule.

If your group pricing is not time-dependent, you can use an “Everyday” scheduling rule and set both the begin time and end time to “0:00”.

You can change the size of group by using the **More** and **Less** buttons, then enter the prices for each of the items in the group. For example, if you sell one candy bar for $1, two for $1.75 and three for $2.25, enter 1.00, 0.75 and 0.50 in the first, second and third lines, respectively.

If the “Repeat group prices” option is enabled, the fourth candy bar will be 1.00 again and the fifth and sixth will be 0.75 and 0.50, respectively. If the “Repeat last price” option is enabled, all after the third one will be priced at $0.50.

If the items in the same group don’t have the same “Code”, you can use “Name” as an alternative criterion. For example, if you track the Blue candy bar and Red candy bar sales separately by using two different codes, you can set the Code criterion to “Anything” and set the Name criterion to “Ends with” “candy bar”.

It may be time consuming to set up group prices. For a quicker setup, try the **Multi-Pack** button or **10-Pack** button to create a base set and then modify it if needed.

7.3 Extra Member/Item Verifications

For each “Scheduling Rule” you defined, you can supply additional verifying criteria to limit its applicability. Two types of verifying criteria can be used: “Member Verifications” and “Item Verifications”.

In the case of Member Verifications, “Member(s)” are used as verifying criteria. For example, you may have set up an item to have a cheaper price on Wednesday. If you decide that this special price is only intended for particular categories of member, you can enter these member categories in the “Members” field of Extra Verifications as verifying criteria.

Please note that member categories are cast-sensitive; so be sure to check the **Customer/Member List** window to ensure correct entries.

In the case of Item Verifications, “Item(s)” are used as verifying criteria. For example, if you decide that a 50% off for a particular soda is offered only when at least one of several pizza items is purchased on the same receipt, you can enter the “Item Codes” of these pizza items in the “Items” field of Extra Verifications as verifying criteria.

Item Codes are cast-sensitive, so be sure to check the **Deli/Bar Sale** and **Shop Sale** windows to ensure correct entries.

Using Extra Verifications (Member Verifications or Item Verifications, or both) also allows you to create smarter coupons. For example, you can create an item in **Shop Sale** or **Deli/Bar Sale** window, name it “Burger Coupon” and set the normal price to zero. Then, create a scheduling rule (see previous discussion) for this “Burger Coupon”, set the price (coupon value) to “-2.00” and set the date to Monday. Also in the “Items” field of Extra Verifications, enter “Item Codes” of those kinds of burgers that you want to allow the coupon discount to apply to.

When this Burger Coupon is sent to **Register**, the program will check the scheduling rule and know that this coupon will have zero discount value unless it’s Monday. Furthermore, the program will check the “Items” field of Extra Verifications and know that this coupon will have zero discount value unless at least one of the burgers defined in the “Items” field is on the same receipt.

If needed, you can add member categories to “Members” field of Extra Verifications to further limit the usage of this coupon to certain members. Only when all criteria (time, date, month, member, accompanied item…) are satisfied, this coupon will have the intended “-2.00” discount value.

In the **Price Schedule** window, you can use the **Copy Schedule** button to copy schedules from another item. This is useful if you have several items that have the same or similar schedules.

Please note that Dynamic Pricing (Time-Dependent Pricing, Group Pricing and Extra Verifications) won’t happen until the items are sent to **Register**. So if items are still in **Table Timer** or **SuperTab** (to be discussed later), the regular prices are still shown. If you want to know the receipt amount with Dynamic Pricing factored in, please use the “Check Preview” features in **Table Timer** and **SuperTab**.

8. Receiving

The **Receiving** feature is used to receive items purchased from the vendors. The inventory is updated automatically when this feature is used. You can bring up the **Receiving** window from the program's **Menu Bar** under the **Sale** menu title. The left side of this window is an **Item List** (same set of items as described earlier in the earlier **Item List** section), and the right side is the **Receiving List**.

When an incoming shipment arrives, the user uses various methods (described in this section) to add items to the **Receiving List**. Then the **To Inventory** button is used to commit the items on the **Receiving List** to inventory.

8.1 Creating Receiving List

To create a new receiving list, first select "New Receiving List" from the **Receiving** window's **Menu Bar** under the **List** menu title. You then enter the title of this receiving list and the expected arrival date of the incoming shipment. After a new receiving list is created, the **Receiving List** (the right hand side of the **Receiving** window) is initially empty.

The **Receiving** window has two operation modes, Manual and Scan, for data entry. In Manual mode, the user can select items from the **Item List** and press the **To List** button to send the selected item to the **Receiving List**.

Alternatively in Manual mode, the user can use the **Search** function to find the item. For example, typing the first few letters of the barcode will cause the **Item List** to scroll to a matched item. The user can press the **Search** button repeatedly to find other items that match the entered letters. Once the desired item is found, the user can press the **To List** button (or the **Enter** key on the keyboard) to send this item to the **Receiving List**.

In Scan mode, any input from keyboard or scanner is redirected to finding the item. The difference between Manual Mode and Scan mode is that, in Manual mode, the user has to remember to click on the search box first for the text searching feature to work and the **To List** button has to be pressed manually to send the item found on the **Item List** to the **Receiving List**, whereas in Scan mode, found items are automatically added without further interaction.

You can create a receiving list as soon as the incoming shipment arrives. You can also create receiving lists prior to the arrival dates. For example, if you are expecting five incoming shipments in the coming week, you can create these five receiving lists now. They will be saved by the program and accessible from the **Receiving** window's **Menu Bar** under the **Arriving** menu title. When any of the five shipments arrives, you can select it from the **Menu Bar** and modify it if needed.

8.2 Editing Receiving List

Before you can commit the **Receiving List** to inventory, you need to enter receiving quantity for each of the items on the list. Negative value is allowed as the receiving quantity. In such a case, the program does a reverse receiving and stock is reduced. This can be used to handle stale items returned to the vendor.

If the **Receiving List** is set to Manual mode, after items are placed on the **Receiving List**, you can click on an item on the **Receiving List** first and enter the quantity directly by using the following keys:

- 0 to 9 keys (on Num keypad): Enter quantity directly.
- Division key (on Num keypad): Start over.
- Minus key (on Num keypad): Negative quantity

- Backspace (on Main keypad): Backspace

Sometimes the cost (the amount charged by the vendor) or retail price of an item has to be changed. To do this, you will need to bring up the **Edit** window. You can bring up the **Edit** window by pressing the **Edit** button or by double-clicking on an item on the **Receiving List**. The **Edit** window can be used to enter/edit Quantity, Cost, Markup and Retail Price.

You can attach "/n", "/d", "/q" or "/b" to your Markup entry to have the decimal portion of the calculated retail price automatically rounded up to the closest nickel, dime, quarter or dollar, respectively. For example, if the Cost is 7.09 and the Markup is 6, the calculated retail price will be 7.52. However, if the Markup is 6/q, the calculated retail price will be 7.75.

If other properties need to be changed, the user can press the **Edit More** button in the **Edit** window.

In the **Receiving** window, if the **Prompt Edit** option (a checkbox in the lower left corner) is enabled, the **Edit** window will come up automatically whenever an item is added to the **Receiving List**.

If you need a printout of the receiving list currently shown, you can use the "Print List" function, available from the **Receiving** window's **Menu Bar** under the **List** menu title.

8.3 Recurring Shipments

For recurring shipments with same or similar items, you can create a "Draft List" first and later use the "Save as Receiving List" function to duplicate it into one or more receiving lists. This way you don't have to re-enter all the items for the recurring shipments. You can access the draft-related features from the **Receiving** window's **Menu Bar** under the **Draft** menu title.

You can also create new receiving lists by duplicating an existing receiving list.

8.4 Editing Item Properties

The **Details** button is used when the user needs to look-up, add, delete items or edit additional information on the **Item List**. Double-clicking on an item on the **Item List** also brings up **Item Details** window. The **Item Details** window contains all properties of the selected item. Please refer to the **Item List** section for details.

8.5 New Item and New Barcode

Occasionally you have to receive an item not yet created in your **Item List**. When an incoming item is a new item, you need to use the **Details** button to add the item first. Note that how you classify "New" Items is up to you. If it's the same item you have been selling, but the barcode is different, you can do one of the following:

1. Treat it as a new item. This is recommended if you still have items with the old barcode in inventory. You will have to create a new item in **Item List** and give this item a new Code because the program uses Code to identify an item. Every item must have a unique Code. Unlike Barcode, Code has to be one to six characters (no space allowed).
2. Treat it as the same item. By using this method, you replace the same item's barcode with a new barcode but keep the same Code. All the reports will still see this item as the same item because Code remains the same.

8.6 Vendor List

From the **Receiving** window's **Menu Bar** under the **List** menu title, you can use the "View Vendor List" feature to prepare a list of vendors you buy items from. The vendor information will be needed as part of a receiving list.

8.7 Purchase Order

If you don't have other systems to order items from your vendors, you may want to try the "Print as Purchase Order" feature available from the **Receiving** window's **Menu Bar** under the **List** menu title. This feature creates a printable purchase order based on your receiving list. In the **Purchase Order** window, you can press the **Options** button to customize the purchase order.

Also from the **Menu Bar** under the **List** menu title, you can use the **Export Lists** feature to export receiving, draft or fulfilled lists to an accounting program such as QuickBooks. The exported data can also be copied to a spreadsheet program such as Excel. When exported to QuickBooks, the data are converted to bills. You may need to edit the exported data before they can be successfully imported into your accounting program. Therefore certain knowledge of the data format may be required.

If you use another program (such as a spreadsheet program) to create purchase orders or reports, you can use the "Copy List to Clipboard" feature first, then switch to that program and use its "Paste" function to move the data over. This feature is also available from the **Receiving** window's **Menu Bar** under the **List** menu title.

8.8 Committing Receiving List

After a receiving list is properly prepared, you can use the **To Inventory** button to commit the items on the receiving list to inventory. Ideally this is performed right after the shipment arrives so the stocked values are immediately updated.

When you press the **To Inventory** button, you will be asked to choose a vendor and enter an "Order/Invoice Number". The vendor can be one of those you already created on the vendor list, or can be created here by using the **New Vendor** button. If no vendor is to be specified, you can choose the 'General Purchase" option. You can enter anything as the "Order/Invoice Number" or press the **New Number** button to have the program create one for you based on the previous number.

Once the list is committed, the program will update the stock values of the listed items. If the user modified any Cost or Markup during the receiving process, the program will also update the corresponding value.

The program will also ask the user if a summary printout of the receiving activities is required. If needed, the user can later press the **Log** button to review or re-print this summary. This log is also available from the **Report** feature (to be explained later in the **Reports** section).

Another way to re-visit the already-committed receiving list is to use the "View Fulfilled List" feature from the **Receiving** window's **Menu Bar** under the **List** menu title.

9. TouchPad

The **TouchPad** feature and the **SuperTab** feature described in the next section are available in certain packages. These two features provide:

1. Faster sales, especially for delis, bars, and restaurants.
2. Better touch-screen monitor support (You can still use mouse).
3. Customizable item buttons.
4. Intuitive and easy-to-learn user interface.

TouchPad is most ideal for restaurants and bars, though other types of business can also use it to sell products. The graphic interface works well with both mouse and touch-screen monitor. Once its product pages (categories) are properly organized and customized, **TouchPad** can improve selling speed, provide better user experiences and reduce mistakes.

9.1 Preparing TouchPad

TouchPad window hosts the same items you created for the **Deli/Bar Sale** and **Shop Sale** windows. Please refer to the **Item List** section for information about creating items. The program automatically converts the created items to buttons in the **TouchPad** window.

When you create items in the **Deli/Bar Sale** and **Shop Sale** windows, please make sure each item has a unique **Code**. However, you need to use the same **Category** for a group of items if you want them to appear on the same page in the **TouchPad** window. In other words, an item "Page" in **TouchPad** is a "Category" of your products.

You may also want to read earlier discussions about Alias Items and Alias Buttons. They will provide extra flexibility for your menu design.

9.2 Using TouchPad

After items are prepared, you can start **TouchPad** by selecting it from the menu bar or from the tool bar of the program's main window. The item data you prepared for the **Deli/Bar Sale** and **Shop Sale** windows are automatically converted to the following in the **TouchPad** window:

Category Menu for the **Deli/Bar** department: A set of category buttons, each represents a single **Deli/Bar** category. Clicking on a category button will open an **Item Page**, which is a group of **Deli/Bar** items under the same category. You can then click on any item button to send it to customer's shopping list on the right hand side of the **TouchPad** window.

Category Menu for the **Shop** department: A set of category buttons, each represents a single **Shop** category. Clicking on a category button will open an **Item Page**, which is a group of **Shop** items under the same category. You can then click on any item button to send it to customer's shopping list on the right hand side of the **TouchPad** window.

The background color of the **TouchPad** window indicates the **Category Menu** or **Item Page** you are currently at:

Light-green background: **Category Menu** for the **Deli/Bar** department.
Dark-green background: **Item Page** of a category in the **Deli/Bar** department.
Light-blue background: **Category Menu** for the **Shop** department.
Dark-blue background: **Item Page** of a category in the **Shop** department.

Please note that these are default colors. The backgrounds may look different if you had customized them with colors, pictures or textures.

Clicking on the green/blue area (background area) or the status bar near bottom allows you to reach the **Category Menu** of the **Deli/Bar** department or **Shop** department. To enter the **Item Page** of a certain category, click on one of the category buttons. To come back to the **Category Menu** from an **Item Page**, also click on the green/blue area (background area) or the status bar near bottom.

For example, to use the **TouchPad** to sell a Pepsi and a Budweiser to a customer, you

1. Keep clicking on (or touching) the green (or blue) background area or the status bar until you reach the light-green **Category Menu** for the **Deli/Bar** department.
2. Click on the **Pop** category button to open the **Item Page** of the **Pop** category.
3. Click on **Pepsi**. Notice that this item is now shown on the customer's shopping list on the right.
4. Click on the dark-green area or the status bar to go back to light-green **Category Menu**.
5. Click on the **Beer** category button to open the **Item Page** of the **Beer** category.
6. Click on **Budweiser**. Notice that this item is now shown on the customer's shopping list on the right. Visual feedback of added items is also displayed on the title bar of **TouchPad**. This can be helpful for the operator to make sure the correct numbers of items are added to the list.
7. Click on **To Table**, **To Register** or **To Tab** button to send the items from the shopping list to the **Table Timer** window, the **Register** window or the **SuperTab** window, respectively. Alternatively, holding down the **Control** key on the keyboard while pressing the **To Register** button allows you to choose any of the five sub-registers.

If you use mouse or touch-screen monitor with **TouchPad**:

Left click:	Send this item to the customer's shopping list on the right.
Shift left click:	Holding down the Shift key while left clicking on an item will display detail information and picture of that item.
Control left click:	Show information (such as price) on the status bar.
Right click:	Same as Control left click.

When you are sending items to the customer's shopping list on the right, you can insert items to any position on the list. This way the modifiers or add-on ingredients (such as onion, ketchup...) can be placed right below the main item (such as a burger). If later this info is read by kitchen (via printout, **SuperTab** or the optional **SalesMonitor**), it will be easier to tell what items the add-on ingredients are added to. To do this, select an item on the list, the next item added to the list will be put right below the selected item.

To make add-on ingredients even more readable, you can use names such as "--- Onion". The extra dashes could make such items more distinguishable among other items in **SuperTab** or **SalesMonitor** window (to be discussed later) for the kitchen. The names of items can be edited from within the **Shop Sale** and **Deli/Bar Sale** windows.

If you don't want the add-on ingredients (such as onion, ketchup...) to appear on receipts, you can use "Modifier" as the Item Type (discussed earlier in the **Item List** section). Modifier items won't appear in **Register** or receipts, but will still show up in **Table Timer**, **SuperTab** and **SalesMonitor**.

You may want to use "Information" as the Item Type for certain add-on items. Information items will appear in both **Register** and receipt, but will not have a price field. This is useful if you want to add extra information or messages to the receipt.

In **TouchPad**, if you have to send the same item in larger quantity to the shopping list, you can click on the same item button multiple times. This, however, may not be efficient if the quantity is more then five. Instead, you can use the "Quantity Modifier" feature to change the quantity of an item already on the shopping list. To do such, send the item to the list (or highlight it if it's already there), and then press the “Q” or “-” key on keyboard to access the Quantity Modifier. In Quantity Modifier, you can use mouse or keyboard arrow keys to operate. If you don't use keyboard, you can double-click on the item on the shopping list or left-click on the **Void** button to access the Quantity Modifier.

If the item in the shopping list is a “Message Item”, you can highlight it and press the “Q” or “-” key to modify the message.

The **To Table** button in **TouchPad** displays a tag that shows the current active table number. The operator can click on this tag to access that table.

9.3 Customizing TouchPad

You can customize all category buttons and item buttons in the **TouchPad** window. In the **Category Menu**, press the **Options** button and check the “**Edit Mode**” checkbox. You can then right click on a button to access the **Button Designer**. Color, alignment, font style, caption, size and location of a button can be edited. You can also add your own icon or picture to a button.

If needed, you can make a button invisible. This is useful if you want to disable selling that category or item but do not want to delete its record.

Another way to change the positions and sizes of the buttons is by mouse dragging. In the **Category Menu**, press the **Options** button and then press the “**?**” button for instructions.

Background of a **Category Menu** or an **Item Page** can also be customized. Right click on the background to bring up the **Background Designer** and use it to change the color or to assign a background picture or texture. If you use a texture file, select “Repeated” as the Scale option.

Color and images can make buttons easier to identify and can speed up the selling process. Graphic files with **.bmp**, **.gif**, or **.jpg** extension are supported. For **Button Designer** and **Background Designer** to use these graphic files, you must put them in the “PadSkin” sub-folder located inside the folder where this program is installed. Please keep in mind that displaying graphic files consumes your computer’s memory and requires processing time. If switching from page to page becomes slow, try to reduce the sizes and number of graphic files used.

If you have **Network Edition** with **TouchPad**, you can copy customized buttons (graphics, sizes and positions…) and customized backgrounds from the **Network Host** to a **Network Terminal**. To do this, log in as a master user, press the **Options** button in **TouchPad** and then press the “**Copy button graphics, sizes and positions from Host computer**” button. This button is available only from a **Network Terminal**.

TouchPad also has a “Standby Mode” option. When it is enabled, **TouchPad** will enter “Standby Mode” whenever an operator or wait staff member sends items to **Table Timer** or **SuperTab**. When the program is in use by multiple operators simultaneously, this feature ensures that the next operator won’t forget to enter his/her own username. To enable “Standby Mode” option, press the **Options** button in the **Category Menu**.

The width and font size of the shopping list (the right-hand side of **TouchPad)** can be customized. To do such, log in as a master user, press the **Options** button in **TouchPad** and use the **List Size** selection.

10. SuperTab

The **SuperTab** feature comes with the optional **TouchPad** feature (see the previous section). It can be used to run customer tabs. For restaurants and bars, using **SuperTab** together with **TouchPad** is highly recommended. For other types of businesses, it can also be useful if you allow your customers to purchase and pay later.

Please note that, in this program, two features can be used to hold a collection of items for the same customer or the same group of customers. One such feature is **SuperTab** discussed in this section and the other is **Table Timer** (to be discussed later). In **SuperTab**, a "Tab" is usually assigned to one single paying customer. You can, however, divide one tab into multiple tabs if multiple customers initially share the same tab and later decide to pay separately. In **Table Timer**, a "Table" can be assigned to one or multiple paying customers.

10.1 Creating a Tab in SuperTab

To open **SuperTab**, select it from the tool bar or menu bar. However, you don't need to open **SuperTab** first in order to use it. You can create a tab at the same time you send items to it from the following sources:

- From the **To Tab** button, available in **TouchPad**. Most of the time, the **TouchPad** feature is used to create new tabs. That is, items are prepared (as customer orders) in **TouchPad** first and then sent to **SuperTab** (as a new tab or to an existing tab).
- From **Table Timer (**by clicking on the **Transfer Selected** button while holding down the Control key on the keyboard). This method is useful when a customer is done using a **Table Timer** table and you decide to transfer his/her items from **Table Timer** to **SuperTab**.

When items are sent to a tab in **SuperTab**, the name of the operator is also recorded along with the items. The program will display a warning message if later a different operator tries to modify that tab.

The **SuperTab** window allows you to view 10 tabs on one page at once. The buttons near the bottom of **SuperTab** are used to switch to other pages. The button will display a red dot if the associate tab is not empty.

If you sent a wrong item to a tab, you can use the **Void Selected** button to remove it. As soon as the item is removed from the tab, stock value of this item is adjusted back.

To change customer's name on a tab under **SuperTab**, click on the **Void Selected** button while holding down the **Control** key on the keyboard.

10.2 Finalizing a Sale

To finalize a sale associated with a tab, click on that tab to select it first and use the **To Register** button to send the items within it to the **Register** window. If you hold down the **Control** key on the keyboard while pressing the **To Register** button, you will be asked to choose one of the five sub-registers.

Instead of finalizing the sale, you can choose to transfer a customer's items from a tab in **SuperTab** to a table in **Table Timer**. For example, a customer came in for a drink, so you created Tab 12 in **SuperTab** for this customer. Later, if this customer decides to use game equipment assigned to Table 5 of **Table Timer**, you can use **SuperTab**'s **To Table** button to move his/her items from Tab 12 to Table 5 so all charges can be kept together.

You can still keep the items on Tab 12 if you want to. If you decide to keep them on Tab 12, you can use the same **To Table** button to create a "Link" between Tab 12 and Table 5. This link will serve as a reminder so later operator won't forget to send charges from both places to **Register**.

10.3 Check Preview

To view the purchase total of a tab, click on that tab and the subtotal and the total with tax will be displayed on the right side of **SuperTab** window.

Certain special coupon items and items with group pricing schedules do not reflect the final discount values while still in **SuperTab**. Such discount values will be finalized after the tab is sent to **Register**. If you have to know the finalized discount values before you send the tab to **Register**, you can use the **Check Preview** button to display them.

10.4 Special Functions

Several additional features are available via the **Special** button in the **SuperTab** window.

Sometimes a wrong tab is sent to **Register** by mistake. With the **Undo** feature, you can bring items back from **Register** to the same tab in **SuperTab** if those items are still in **Register**. To perform an **Undo**, click on the same tab that the items were originally in first, press the **Special** button and then press the **Undo Sent** button.

By using the **Transfer Items** and **To Register** buttons, you can select some or all items in a tab and then transfer them to another tab or send them to **Register**. This is useful if multiple customers initially share the same tab and later decide to pay separately.

The name of the wait staff member (or operator) who first created the tab is shown here in the **Special Function** window. This information can be useful in avoiding confusion when you have multiple wait staff members handling multiple tabs at the same time.

You can also change the name of the customer or add a memo to the tab.

10.5 Extra Information

Any **Shop** or **Deli/Bar** Item in **SuperTab** includes extra information such as time when the item was added, tracking number, name of the operator who added the item and station ID (available with **Network Edition**) that added the item.

To view it in **SuperTab**, hover the mouse pointer over that item (but don't click), wait about 5 seconds and the information will come up. This information can be useful when you have to correct mistakes after discovering that wrong items have been sent to wrong table or tab. After the items are paid for, same information will be recorded in **Receipt Log**.

If you have the optional **SalesMonitor** program, this information is also available in it.

10.6 Find Customer

If you are in the program's main window, you can access the **Find Customer** feature by pressing the **Find** button on the tool bar. In **SuperTab**, a **Find** button is also provided. You can also use the assigned function key on the keyboard. Please refer to the **FKey Setup** section for details.

The **Find Customer** window lists the active tables (from the **Table Timer** feature) first and then the active tabs. For each active tab, it shows the customer's name as well as the operator who sent the first item to that tab. Therefore you can also use this feature to find tabs that are being handled by a particular operator or wait staff member.

When you double-click on a customer on the list in the **Find Customer** window, the program will bring up the **SuperTab** window and automatically highlight the corresponding tab.

10.7 Evaluating TouchPad/SuperTab

If you are a current user and want to evaluate these two features, please download the demo upgrade. Please make sure you put the demo version (the "PHM.exe" file) in a new folder or a folder other than the one you used to install the purchased version of this program. Running the demo from a separate folder will not overwrite the settings in your purchased version.

Screen shots of **TouchPad** (with color icons) and **SuperTab** can be found at www.timemagic.com/phm/ts.htm

11. Table Timer

The **Table Timer** and its supporting features provide the following benefits:

1. On-screen tables to represent your floor table layout.
2. Table features for accommodating guests.
3. Table features to host items for customers to pay for later.
4. Rate-based and Time-based services such as gaming, equipment usage and rental.
5. Membership programs when used with the **Member List** feature (explained in next section).

Like **SuperTab** described earlier, **Table Timer** can also be used to run customer tabs. However, **Table Timer** includes features for charging time-based services that are not available in **SuperTab**. The following are examples of such time-based services:

- Internet cafés, video game cafés and LAN party cafés.
- Kid's gym and game rooms.
- Tanning salons.
- Board and card game tables.
- Pool and billiards tables.
- Equipment rentals.

The **Table Timer** feature can interact with other features. If you have the optional **TouchPad** and **SuperTab** features, you can send/transfer items from **TouchPad** to **Table Timer**, from **SuperTab** to **Table Timer**, and from **Table Timer** to **SuperTab**.

Two styles of **Table Timer** are available. The "Compact Style" is used by default. If you use a touch-screen monitor, you may want to choose the "Resizable Style" instead. **Table Timer** "Resizable Style" can be selected from the program's **Menu Bar** under the **Table** menu title. With "Resizable Style", you can resize it by clicking and dragging from the lower right corner.

However, when a non-classic **Operation Style** (described earlier in the **Setup** section) is chosen, a larger **Resizable-Style Table Timer** window will appear in place of the original **Table Timer** window.

Several terms are defined here to help explain the features of **Table Timer**. These terms had been introduced earlier in the **Setups** section and mentioned throughout this document. However, since the **Table Timer** feature is a major interest of those using this program, many of you may have skipped the earlier sections. Therefore we'd like to re-emphasize them here before we continue with the rest of this section.

Register: This is the place where all transactions are finalized. That is, the operator prepares a receipt in **Register** window and uses it to conclude a sale.

Table: This is a service or charge unit used to host one or more Customers (to be defined later) and Items (to be defined later). Depending on types of you business services, a Table can represent a dinning table, a sports system, a pool table, an Internet computer, a game console, a poker table, a tanning station, a treadmill… etc. Customers and Items at a Table can later be sent to **Register** to create a receipt. In this program, the **Table Timer** feature is used to manage all Tables.

Service: A time-dependent service your business provides to your customer for a fee. For example, A Service can be "Ten dollars fix charge for using the computer to access the Internet for the entire afternoon" or "Three dollars per hour for playing at a pool table". For a Service to be time-dependent, it must be attached to a Player (to be defined later) at a Table.

Table Charge: This is the fee rendered as a result of Services that occur at a Table. Although a Table may also host other non-service type products (e.g., foods and drinks), the term "Table Charge" is only used to describe fees for time-dependent services.

Service Charge: Same as Table Charge.

Item: A non-service type product (e.g., food or drink).

Player: A Player is a specific type of customer who is hosted by a Table for a time-dependent Service. More than one Player can be hosted at the same Table. For example, a customer paying an hourly fee to use a game console or tanning equipment is a Player. In addition to the time-dependent Service, the operator can also attach Items (e.g., foods and drinks) to the Player and later charge the Player for the items he/she purchased along with the time-dependent Service.

Guest: A Guest is another type of customer. No time-dependent Service is attached to a Guest. When a guest is sent to a Table, no ongoing fee is rendered. The only purpose of adding Guests to a Table is to hold Items. That is, the operator can attach Items (e.g., foods and drinks) to a Guest at a Table and later charge the Guest for the items he/she purchased. For example, if a particular Table is used to represent a dinning table, then Guests can be sent to seats of this Table. More than one Guest can be hosted at the same Table. Guests and Players can also be hosted at the same Table at the same time.

Member: A Member is a customer who can be either a Player or a Guest. The two main purposes of using Members are to maintain individual purchase records and to apply certain discounts. Members are first created in the member list (explained in the **Member List** section) and can be sent to Tables as needed.

Customer: The term "Customer" is used throughout this document when no distinction between Player and Guest is needed. Customer is also used to describe the person responsible for a "Tab" (as explained in the **SuperTab** section). If you use the **Seat Editor** feature (to be described later), each customer is also represented as a "Seat" within **Seat Editor**.

As described in the **Setups** section, the **Table Timer** feature can be used to turn on and off devices such as table lights and computer monitors. More about setting up the **Table Timer** are provided in this section. These setting-up features can be accessed from the program's **Menu Bar** under the **Setup** menu title.

11.1 Table Layout Setup

Most table features in this program are not accessible until you have created at least one table by using **Table Layout Setup**. **Table Layout Setup** can be accessed from the program's **Menu Bar** under the **Setup** menu title. It provides the following functions:

- To add tables, click on the **Add** button then start clicking on area inside the **Table Layout Setup** window to add tables.
- To delete a table, click on the **Delete** button first then click on the table you want to delete.
- To move a table, click on the **Move** button then click on the table to be repositioned. While holding down the mouse button, drag the table to the desired location.
- To rotate a table, click on the **Rotate** button then click on the table to be rotated.
- To change the table shape, click on the **Shape** button then click on the table to be changed. There are five table shapes to choose from. Keep clicking on the table until it reaches the shape you like. You can use different shapes to distinguish game tables, dinning tables, equipments and others.
- Instead of using the **Shape** and **Rotate** buttons to customize the look of a button, you can use

the more flexible **Image** button. With it, you can use your own pictures and photos to represent tables. Your package may have included some sample pictures. If not, you can contact us to obtain them. If you want to use your own pictures, you have to copy them to the "Layouts" folder (a sub-folder within the folder where this program is installed).

- To align all tables, click on the **Align** button.

The table layout you design here will later be used as a way to access **Table Timer**. Each table you create can hold up to 30 players, 30 guests and 32000 Shop/Deli/Bar items.

In addition to tables, you can add "Spot" icons (or pictures) to the **Layout** window. A "Spot" is similar to a table, except that it cannot be used to hold customers. "Spots" can be useful when you are selling certain items by sending them directly to the **Register** window (that is, without going to **Table Timer** or **SuperTab** first). When such items are finalized in the **Register** window, the program will display the **Layout** window for the operator to choose a spot.

If you have the optional **SalesMonitor** program, this information is then displayed on **SalesMonitor** screen or printed by **SalesMonitor**. The kitchen can then use this spot information to decide where the items should be delivered. Therefore, spots can be viewed as Delivery Points or customers' Waiting Areas.

To create Spots in **Table Layout Setup** window, use the **Spot** button. You also have to tell the program what types of items are to trigger the **Layout** window for the spot selection. To do so, select **Register Options** from the **Menu Bar** of the program (under the **Setup** menu title), and press the **Delivery Point** button.

You can further customize the background of the table field by supplying a valid graphic file named "**layout.bmp**", "**layout.gif**" or "**layout.jpg**". Put this file in the same directory where this program is installed. This layout background can include, for example, various graphical representations or outlines of your facilities such as register, doors, shop and bar. You can create such a layout background file by using Windows' **Paint** program or your own photo editing software.

11.2 Table Rate Setup

All rate setting features can be accessed from the program's **Menu Bar** under the **Setup** menu title. This program has a very flexible table rate system for time-based table/service charges. You can have up to 20 pre-set schedules (called **Regular Rates**). These allow you to set up at least 20 types of tables. Each schedule can have a totally different set of rates and happy-hour rate periods. Even if you have only one type of table rate, you can use the other 19 sets of schedules for special occasions and holidays.

This section assumes that you want to assign these schedules to tables, not members. Assigning schedules to members will be discussed later in the **Member List** section.

Each of the 20 regular rate schedules is a 7-day (Monday to Sunday) schedule. For each of the 7 days, you can have up to three different rate periods (for example, regular hours, happy hours and regular hours again). Any day of the week can be different (even different starting and ending times for rate periods). The rate can also be dependent on the number of players playing at the same table.

If this sounds like a lot of data to enter, you will find a button to copy Monday (or any day) to other days. There is also a button to copy a schedule to other schedules. Copying from an existing schedule before changing its data may reduce the amount of modifications needed. Also remember that, if you have only one type of table or if all tables have the same rates, you only have to prepare Schedule 1.

In addition to these 20 pre-scheduled **Regular Rates**, this program also allows several types of **Flat Rates** that can be use to assign non-scheduled rates or on-the-fly rates. If **Regular Rates** and **Flat Rates** cannot cover all you need in terms of rates, please refer to the discussions later regarding Rental, Member Discounts and Rate Adjustments. You can also e-mail us your rate requirements and we will recommend a configuration.

Before you start setting up the rates, it's important to decide the "Beginning of a day", which is also the end of a day. By default, the program sets the "Beginning of a day" to midnight. If your business stays open after midnight, you may want to change it. You can change the "Beginning of a day" by using **Miscellaneous Setup**. Please refer to the **Setups** section for details.

Note that for the **Simple Rate Setup** and **Advanced Rate Setup** discussed later, you only have to use one of them, not both. Use **Advanced Rate Setup** if the rate is dependent on the number of players playing at the same table. Whether you use **Simple Rate Setup** or **Advanced Rate Setup**, you will have to set up both the **Regular Rate** and **Flat Rate**. **Regular Rate** and **Flat Rate** are explained further in the following two sub-sections.

11.2.1 Regular Rate

Regular Rate (Scheduled Rate) is a pre-set schedule that automatically adjusts the rates of the regular rate players (even after they are checked in) according to the following factors:

- **Day of the week.** Each day from Monday to Sunday can be different.
- **Time of the day.** Each day can have up to 3 different rate periods.
- **Numbers of players.** The per-person rate can be different depending on the number of players at the same table.
- **Table number.** You can assign one of the 20 schedules to any table. You can also assign a percentage adjustment to any table.

When any of these factors changes, the rate is adjusted automatically.

Example 1: A player's playing time is 3 hours that covers two different rate periods. The first hour is at $3 morning rate and then two hours at $5 afternoon rate. The total charge will be $13 dollars.

Example 2: A player plays alone for 1 hour (at $3 one-player rate). Then his friend joints him and they play for 5 hours (at $2 two-player rate for each of them). The total charge will be $23 dollars.

11.2.2 Flat Rate

The term "Flat Rate" is often interpreted differently. This program can handle the following two types of flat rates:

- **Fix Charge.** A charge that won't change regardless of the day, time, playing hours, number of players and table number. Only member discount can affect this charge. You can pre-set this charge amount or decide the charge amount on the fly when a player checks in. For example, some game rooms give practice sections during the non-busy hours for a fix charge.
- **Flat Hourly Rate.** Service fee is charged hourly. You can pre-set this rate or decide the rate on the fly when a player checks in. Note that **Regular Rate** and this **Flat Hourly Rate** are both charged by hour. However, unlike **Regular Rate**, the **Flat Hourly Rate** doesn't separate a day into three rate periods. Its rate doesn't change unless you change it manually by using the **Change** button in **Table Timer**. The **Flat Hourly Rate** can be useful if you have to charge a special non-scheduled rate for certain tables or certain groups of customers.

In **Simple Rate Setup** or **Advanced Rate Setup** window, press the **Flat Rate Setup** button to set up flat rates. You can then decide whether a flat rate is a fix charge or a flat hourly rate. If you have several types of flat rates, you can press the **Edit Flat Rate List** button to configure up to 10 different rates.

If you don't want certain operators to be able to give flat rates to customers, you can use **Operator Password Setup** (discussed earlier) to selectively block accesses to the flat rate feature.

Both Regular Rate and Flat Rate are per-player rates. If your rate is a per-table rate that remains the same regardless of the number of players, you can add the first player as either a regular rate player or a flat rate player, and then add the rest of the players as guests.

11.2.3 Simple Rate Setup

If your table rates are not dependent on the number of players, it's much faster to set up if you use this **Simple Rate Setup** method. Note that the rate period you enter here is the second period. For example, if it is from 12:00 to 18:00, then the first period is automatically set to 00:00 to 12:00 and the third period is automatically set to 18:00 to 00:00. Here 0.00 is the "Beginning of a day". As mentioned earlier, you can change "Beginning of a day" by using the **Miscellaneous Setup** feature from the program's **Menu Bar** under the **Setup** menu title.

If you need to set up more than one schedule, use the drop-down menu in the upper left corner.

11.2.4 Advanced Rate Setup

The **Advanced Rate Setup** method allows you to vary the rates according to number of players at a table. Each day has three time periods. You only need to change the starting time and ending time of the second period. The ending time of the first period and the starting time of third period will be adjusted accordingly.

The starting time of the first period and ending time of the third period are the "Beginning/End of a day". You can change "Beginning of a day" by using **Miscellaneous Setup**.

Note that any rate you enter is for EACH player, not all players. For example, if you charge 10 dollars for 3 players altogether, enter 3.33 onto the 3-player row.

All seven days of the week have to be configured. To access Friday, Saturday and Sunday, use the horizontal scroll bar or the arrow buttons.

If you need to set up more than one schedule, use the drop-down menu in the upper left corner.

11.2.5 Minimum Charge

In **Simple Rate Setup** or **Advanced Rate Setup** window, you can assign a "Minimum Charge". With this setting, the player still has to pay a minimum fee even when the table/service time is only a few minutes. The minimum charge can be either a fix amount of charge or an amount based on the minimum playing time you specify here.

Note that if you select the minimum playing time option (the second option), the minimum charge will vary according to the rates you set for different rate periods. For example, if your rate is one dollar before 6 PM and two dollars after 6 PM, a 60-minute minimum charge will be 1.5 if the player checks in at 5:30 PM. It will be 1.66 if the player checks in at 5:40 PM (0.33 for the first 20 minutes). If you feel that such variations in minimum charge can lead to confusions, then the minimum playing time option is not recommended.

You can press the **M** button to set up additional rules for minimum charges. The rules you enter allow you to use different Minimum Charges and Minimum Minutes during different time of the week. If the start time of a table's service time matches one of these rules, the Minimum Charge/Minutes provided in that rule will be used. Otherwise, the Minimum Charge/Minutes provided in the **Simple Rate Setup** or **Advanced Rate Setup** window will be used.

11.2.6 Rate Schedules and Adjustments

If you have different types of tables, you can apply percentage rate adjustments to these tables. For example, if you specify 50% for Table 1, any rate you specified in the **Simple Rate Setup** or **Advanced Rate Setup** will be cut in half. However, this percentage adjustment does not affect the **Flat Rate** or **Minimum Charge**.

As discussed earlier, if you have set up more than one schedule, you can assign any of the schedules to any of the tables here. For example, to use Schedule 1, enter 1 onto the Schedule column. You can set up each table to have a different schedule or set up all tables to have the same schedule. If, for instance, you decide to use Schedule 17 for all tables for a particular holiday, simply choose the "Setup all tables" option and enter 17 onto the **Schedule** field.

Some businesses adjust their rates during different seasons in order to maximize the profits. You can set up a schedule for each and every season so switching season rate is always easy and does not require changing the rate amounts back and forth.

11.2.7 Member Discounts

For member discounts or surcharges, please refer to discussions in later sections about **Member Discount/Surcharge Setup** and **Customer/Member List**.

11.2.8 Table Charge Notice

If the **Table Charge Notice** feature is enabled, a notice will be displayed when the service time charge of a table reaches a pre-set amount (or a multiple of it). To set up, select **Extra** from the **Menu Bar** and then select **Show Alarm/Memo**. Select the **Notice** tab and press the **Setup** button. Enable the **Table Charge Notice** feature and provide an amount

11.3 Using Table Layout

You can open the **Table Layout** window from the program's **Menu Bar** under the **Table** menu title, or by clicking on the **Layout** icon on the program's **Tool Bar**. The **Table Layout** window has the same appearance as the one you designed by using the **Table Layout Setup**. You can use **Table Layout** window to bring up the **Table Timer** by either single clicking or double clicking (depending on your setting via the **Options** button) on a table icon/image in this window. If your business hosts a large number of tables and equipments, the **Table Layout** window can be useful in helping the operator to quickly access the desired table in **Table Timer**.

On the other hand, if an operator is already familiar with the table numbering and the associated physical tables and equipments, it might be faster if he/she opens **Table Timer** directly and switches to the desired table (without going through the **Table Layout** feature).

Also if a table already has customers, using the **Find Customer** feature (to be explained later) to access the table is often easier if the operator knows at least one name of the customers at that table.

The **Playing Log** feature in the **Table Layout** window will be explained later in the **Reports** section.

When a table has customers, the program may attach the following small icons to the table icon/image to indicate the condition of a table:

- Clock icon. This table has players (with time-based services). A red checkmark will be placed on top of the Clock icon if this table has paused players.
- Gift icon. This table has Shop items.
- Beer icon. This table has Deli/Bar items.

- Marble icon. This table has Rental items or Transferred Table Charges. A red checkmark will be placed on top of the Marble icon if this table has paused rental items.

As mentioned, the appearance of the **Table Layout** window is mainly determined by your design with **Table Layout Setup**. However, there are several additional customization features in the **Table Layout** window via the **Options** button:

- The "Show number of customers" checkbox allows you to show/hide the numbers of customers (which include players and guests).
- If the "Use different colors to show number of customers" checkbox is checked, table color will change according to the number of customers (orange for 1, red for 2, light blue for 3 and dark blue for 4 or more). However, this color feature is not available if you provided your own table images.
- The third checkbox allows you to show/hide the small icons used to indicate the condition of a table.
- The fourth option allows you to choose whether to use "Single Click" or "Double Click" to access a table. If you choose the "Single Click" option, you can use single-left click to open **Table Timer** and use single-right click (or single-left click with the **Control** key pressed down) to show the table information on the bottom status bar. If you choose the "Double Click" option, you can use double-left clicks to open **Table Timer** and use single-left click to show the table information on the bottom status bar. You can also single-left click a table icon first and then press the **Check In/Out** button to open **Table Timer**.
- The **Scale Table Layout** feature allows you to adjust the size of the images and icons inside **the Table Layout** window. If you use a small monitor at higher resolution (such as 1024 by 768), setting it to a larger one, such as 200%, will make the icons more accessible. This is useful especially if you have a touch-screen monitor.

The **Scale Table Layout** feature may look better at 100%, 200% or 400%. However, if you provide your own table images, you may want to instead use the image-scaling feature when you designed your table layout (via the **Image** button in the **Table Layout Setup** window) to achieve better picture quality. You can also use your own image/photo editing software to resize images.

11.4 Using Table Timer

The **Table Timer** window is the control center for all time-based service activities. You can access **Table Timer** from the **Table Layout** window as mentioned earlier. You can also bypass the **Table Layout** window and access it directly from the program's **Menu Bar** under the **Table** menu title, or by clicking on the **Timer** icon on the program's **Tool Bar**

<u>11.4.1 Table Selection</u>

To switch to another table, you can either use the **Table Layout** window or use the drop-down selection menu near the upper left corner of the **Table Timer**. You can also use the small **Quick Table Icons** near the bottom of the **Table Timer**. To customize the sizes of the **Quick Table Icons,** use the **Options** button in the **Table Timer** window.

<u>11.4.2 Activity List</u>

For each customer (player or guest) the **Activity List** reports information such as customer number, customer name and starting time. If this customer is a player, minutes played and a running total are also displayed.

All purchase items are listed below the customers. In **Table Timer**, every item has an associated customer so the operator knows which customer ordered the item, even when a table has multiple customers. However, an item's associated customer doesn't have to be the same customer to pay for that item later. The operator will be able to change the associated customer of any item if necessary. The operator will also have the option to decide whether one or multiple receipts are needed for the same table. More about these will be explained later.

11.4.3 Detail Charges

If the information displayed on the Activity List is not enough for you, you can double click on a customer on the Activity List (or press the **Details** button) to bring up the **Detail Charges** window. The **Detail Charges** window gives you extra information such as a rate-calculating history and all items purchased by the same customer.

Imagine that one player checked in alone at 5:15 PM. At 6 PM, the table rate changed due to change of rate period. At 7:35 PM, the rate changed too because his friends joined him. At 8:20 PM, one of his friends was transferred to another table, and the rate changed again. This program has the ability to record each and every step and, for each step, it gives you information such as time, reason, number of players, table number, time played and charge added. If you have a varying table rate system, this **Detail Charges** window may help prevent confusion and dispute between your operator and your customers.

The **Detail Charges** window also allows you to send items or groups of items to **Register**. This is useful if a customer decides to pay for all or part of his/her item purchases but still wants to stay with the table. You can also use the **Paid By** button in **Detail Charges** window to transfer all or part of a customer's purchased items to another customer at the same or a different table.

If you double-click (or single-click while holding down the control key) on an item instead of a customer, the **Detail Charges** window gives you extra item information such as time when the item was ordered, tracking number, name of the operator who entered the item, and station ID (for **Network Edition** only) that entered the item. Such information can be useful when you have to correct mistakes after discovering that wrong items have been sent to wrong table. If the items are already paid for, same information will be recorded in **Receipt Log** (to be discussed later). If you have the optional **SalesMonitor** program, this information is also available in it.

11.4.4 Adding Players or Guests

To add (check in) a player to the Activity List in **Table Timer**, simply enter the optional name and click on the **Regular Rate** or **Flat Rate** button. Every time you add a customer to the Activity List, a unique customer number is automatically assigned and shown next to this customer's name. An "F" next to the customer number is used to denote a **Flat Rate Player**.

You can also add guests (non-playing customers) who may order food and drink. A "G" next to the customer number is used to denote a **Guest**. You can add **Guests** to a dinning table before they start ordering food and drink. The **Mbr** button is used to quickly add a member without going to the **Customer/Member List**. An "M" next to the customer number is used to denote a **Member**.

To add multiple customers, you can click on the same button multiple times. Another way is to right click (or left click with the **Control** key held down) on the same button to bring up the **Add Customer** window that allows adding multiple customers simultaneously.

11.4.5 Transferring Players or Guests

To transfer a customer (player or guest) to another table, first click on the customer on the Activity List. Then click on the **Transfer Selected** button. A window will appear to allow you to select a table. To transfer all customers to another table, click on the **Transfer All** button.

With **Table Timer's** flexibility, you can transfer part or all of the customers from a table to another table that may or may not have customers. If your time-based table/service rates depend on the number of players, the rate for the destination table will be adjusted automatically. The rate for the original table will also be adjusted if it still has remaining players after the transfer.

11.4.6 Sending Players or Guests to Register

To send a customer (player or guest) to the **Register** (i.e. checking out to finalize the sale), first click on the customer on the Activity List. Then click on the **Send Selected** button. If your table rates depend on the number of players, the rate for the table will be adjusted if it still has remaining players. The same method is used to send a guest to the **Register**.

To send all players and guests to the **Register** click on the **Send All** button.

When you select and send a customer to the **Register**, items attached to this customer (that is, food and drink purchased by this customer) will be automatically sent to **Register** at the same time to create a receipt. If you discover that one of the purchased items was mistakenly assigned to this customer, you can do the following to correct the mistake:

- If the item is already sent to **Register**, use the **Undo** feature (discussed later) to bring it back to **Table Timer**.
- Use the **Paid-by** button in **Table Timer** to change the owner of this item.
- Alternatively, select and send this item to **Register**. Then select and send the real owner of this item to **Register** to check him/her out first.

When sending customers/items from **Table Timer** to **Register**, right clicking on the **Send Selected** or **Send All** button (or left clicking with the **Control** key held down) allows you to choose any of the five sub-registers. If a sub-register is already in use, names and receipt number will be available here. This is useful if you are adding other customers or items to an existing receipt. Please refer to earlier discussions for more details about sub-registers.

By right clicking on the **Send All** button (or left clicking with the **Control** key held down), you can also send several customers to **Register** at once and have them placed in separate sub-registers (to create multiple receipts). This is a quick way to finalize the sales for the same table when its customers are paying for their items separately.

If you left click on the **Send Selected** or **Send All** button without holding down the **Control** key, customers/items are by default sent to the active sub-register.

11.4.7 Check Preview

When you right click on the **Send Selected** or **Send All** button (or left click with the **Control** key held down), you can access a **Check Preview** feature. It can be used to check the purchase total with tax, certain coupon discounts and group pricing factored in.

If you are using a non-classic **Operation Style**, a more extensive **Multi-View Check Preview** feature (to be described later) is recommended.

11.4.8 Voiding Players, Guests or Items

If the operator accidentally adds too many players, he/she may remove the player(s) within the time limit specified in **Miscellaneous Setup** (accessed from the program's **Menu Bar** under the **Setup** menu title).

A guest can be voided only if no item is attached to this guest. Shop and Deli/Bar items can also be voided and the stock number will be automatically adjusted.

11.4.9 Table Memo

This area allows you to enter information regarding this table or the customers at this table.

11.4.10 Schedule Number and Adjusted Rate

This schedule number and percentage adjustment, shown in the upper portion of the **Table Timer** window, are the table rate schedule and adjustment you have specified in the **Rate Schedules and Adjustments Setup**.

11.4.11 Special Functions

The **Special Functions** checkbox allows you to show/hide the **Special** window that hosts several features discussed in this section. This checkbox is not available if you elect to use the "Resizable Style" **Table Timer**.

11.4.12 Pause/Resume Players or Rental Item

Some businesses allow the players to temporarily leave the table (e.g. for a meal break) without checking out first. You can use this feature to pause/resume the playing/service clock. A "P" in the **Minutes Played** field of the Activity List indicates that this player is paused. Only players (customers with time-based services) and non-fix rate (hourly rate) **Rental** items can be paused.

This program can automatically pause all non-fix rate rental items rented by a player when you pause him/her. In the **Table Layout** window, a table with paused players will display a "Clock" icon with a red checkmark. A table with paused rental items will display a "Marble" icon with a red checkmark. In the "Compact Style" **Table Timer**, the small table icons with paused players are shown in different color.

You can change the action of the **Pause** button to "**Always Pause the entire table**". To enable this, press the **Options** button in **Table Timer**, press the **Pause-Resume Options** button and then enable **Always Pause the entire table**. Once this is enabled, pausing one player will cause all players at the same table to be paused and the table lights to be turned off.

You can also use the **Pause Time Limit** option to limit how long the time-based service (playing time) can be paused.

11.4.13 Transfer Charges

Sometimes a player wants to leave and have a staying customer pay for his/her fee. One way to handle this situation is to **Pause** the leaving player's clock. However, if there is more than one staying customer, the operator later won't be able to tell who is to be responsible for the fee.

A second way is to use the **Pay by** button. It converts the leaving player's playing charge to an **Item** that can be attached to the paying customer. This **Item** will be automatically sent to the **Register** when the paying customer finally checks out. The **Pay by** feature can also be used on **Shop** and **Deli/Bar** items.

11.4.14 Change Names, Start Time, Rate and Convert Players/Guests

The operator can use the **Change** (accessed via the **Change** button) feature to change a customer's name. During busy hours, the operator often doesn't have time to or may forget to enter customer names. This feature can be used at a later time to enter or correct names.

The **Change Start Time** feature can be used to move the start time of the playing/service section to an earlier time. For example, a player checked into a table and was later joined by other players who forgot to inform the operator. This feature allows backing up the latter players' start time so they were not playing for free for the time before the operator noticed them at the table.

You can also use the **Change** feature to change the accumulated rental time of a non-fix rate rental item.

If a player wants to stop playing, but is still not ready to check out, you can convert this player to a non-player guest. First select the player on the Activity List, click on the **Change** button and then click on the **Convert Player to Guest** button. If all players become guests, this table's lights will be turned off automatically.

Alternatively, you can use the **Pause** button mentioned earlier to stop the player's time clock. By default, a table's lights will be turned off when all players at the same table are paused. If you prefer table lights not to be affected by pausing players, click on the **Options** button in **Table Timer** to change the setting.

You can also convert a guest to a player. For example, a friend of a player was added to the same table as a guest so he/she could order food and drink. Later, this guest decided to join his friend as a player. The operator can use **Convert Guest to Regular Player** button or **Convert Guest to Flat Rate Player** button to do such a conversion.

For Flat Rate players, the operator can change the rate at any time if the program is configured (via **Flat Rate Setup**) to allow such. The rate for Regular Rate players has to follow the pre-set schedule and hence cannot be changed here.

You can also use the **Change** feature to change a non-member guest to a member guest, change a member guest to a different member guest, or change a member guest to a non-member guest. Member types associated with guests affect certain discounts (as mentioned in the **Extra Member/Item Verifications** section).

11.4.15 Rental

You can attach rental items to customers (players or guests) at the table. These rental items can be extra game equipments, accessories or anything that gets charged by an hourly or fix rate.

To setup rental items, first add a customer to the table, click on the **Rental** button, then click on the **Setup** button to open the **Rental Setup** window. You can define up to 90 rental items. You can even define an item with negative rate that can be used as a way to apply rate discounts.

Rental items can be automatically attached to the customer at the same time the customer is added to the table. In the **Rental Setup** window, you can specify the type of customer (regular rate player, flat rate player or guest) to whom the rental items will be automatically attached.

In the **Rental Setup** window, you can also set a "time limit" to any hourly rate rental item. Such a rental item will stop accumulating charges after the pre-set time limit is passed. The instruction for this is displayed in the **Rental Setup** window.

11.4.16 Quick Table Icons

Instead of using the **Table Layout** window or the drop-down selection menu near the upper left corner of the **Table Timer**, you can also use the **Quick Table Icons** near the bottom of the **Table Timer** to switch to a different table.

Although these icons do not form a graphical layout like the one presented by the **Table Layout** window, **t**hey are quick and easy to access. The color of a **Quick Table Icon** changes to orange when the table is in use and to pink when the table has any paused player (or paused non-fix rate rental item).

These **Quick Table Icons** are not available if you elect to use the "Resizable Style" **Table Timer**.

11.4.17 Options Button

The **Options** button allows you to hide some features that you don't need. For example, you can hide certain buttons if certain tables are used only as dinning tables.

It also allows you to decide whether and how the table charge is rounded off. Playing charge can be rounded off to, rounded up to or rounded to nearest a base unit ranging from 0.05 to 1.00. If you collect tax on service/playing charges, you can choose to have the rounding adjustment occur before or after tax is applied.

The **Next Customer Number** is the number to be assigned to the next customer (guest or player). Every time you add a customer to the Activity List in the **Table Timer** window, a unique customer number is shown next to this customer's name. This customer number is always between 1 and 99999. Whenever a customer is added, this number is automatically increased by one. When it reaches 99999, it restarts from 1. This number is also written to the **Playing Log** and **Receipt Log** (to be discussed later).

If you have the Network Edition of the program, the **Network Host** uses the same numbering scheme (1 to 99999). However, the **Network Terminals** use numbers as follows:

Terminal 1: 100001 to 199999
Terminal 2: 200001 to 299999
...
Terminal 9: 900001 to 999999

Based on the **Customer Number** shown on the Activity List in the **Table Timer** window, on a printed receipt or on the recorded logs, you can tell which terminal was used to add a particular customer.

Certain Pause/Resume features are available via the **Pause-Resume Options** button. You can change the action of the **Pause** button in the **Table Timer** window to "Always Pause the entire table". Once this is enabled, pausing one player will cause all players at the same table to be paused.

By default, a table's lights will be turned off when all players of the same table are paused. If you prefer table lights not to be affected by player pausing, disable the "Turn lights off when all are paused" option in the **Pause-Resume Options** window.

If you use a touch-screen monitor, you may want to enable the "Bring up KeyPad if name is not entered" option. Once it's enabled, a large keypad, suitable for touch-screen text entry, will pop up when you add customers to **Table Timer**.

Certain picture and icon in the **Table Timer** window can act as buttons to bring up certain windows or to toggle the effects of certain buttons. The "Toggle Special Add/Send Functions" selection can be useful if you use a touch-screen monitor.

Table Timer can be configured to close itself automatically after a pre-set period of idle time if you have the Network Edition. This allows other stations to access the same table.

The "Icon Size" scrollbar allows you to change the sizes of the **Quick Table Icons** in the **Table Timer** window. These **Quick Table Icons** are not available if you elect to use the "Resizable Style" **Table Timer**.

11.4.18 Undo Button

Sometimes wrong customers or items are sent to **Register**. To correct such a mistake, you can "Undo" a 'Send" action by clicking on the small **U** button (or **Undo** button) in the **Table Timer** window. For this to work, you must perform the undo from the same table from which the customers/items were originally sent.

Multiple steps of undo are possible as long as no new customer/item is added to or deleted from the same table. You can no longer undo the sent customers/items once the sale is finalized in **Register** (by using the **OK** or **Receipt** button).

11.4.19 Find Customer Button

You can locate a customer by name by using the small **F** button (or **Find** button) in the **Table Timer** window. When checking out a customer, this feature can be useful if the operator doesn't know the customer's table number.

This **Find Customer** window displays the numbers and names of all active customers at the entire store. When you double-click on a customer on the list, the program will bring up the **Table Timer** window, switch to the corresponding table and highlight the customer.

11.4.20 Light Re-Send Button

Under normal operations, there is no need to press any button to turn on/off the lights. Everything for the table lights is automatic. This **L** button (or **Light** button) is needed only when the lights do not respond automatically due to noise in the power line. It re-sends the "Lights On" command only when the table has at least one player and re-sends the "Lights Off" command only when the table has no player.

This button is not available when the "No light control" option is selected in **Light Control Setup**.

11.4.21 Remind Button

A customer came in and told you he wants to play for only two hours. You were asked to remind him when the time is up. Later on, the bar got busy and you forgot to tell him to stop playing. Now you don't know how to charge him.

You can solve such a problem by using the **Reminder** feature. It allows any customer to have his/her own reminder. When the time is up, a window will pop-up with flashing color, speaker beeps and the message to remind the operator about this particular customer.

You can also elect to have the program automatically "**Pause All Players**" of that table (and turn its lights off) when a pre-set charge or pre-set time is reached. This is useful if the operator is not with the computer all the time and may not notice the pop-up reminder.

A **Register Message** feature available here can be set up to remind the operator to return a player's deposit or ID at checkout time

11.4.22 F1, F2, F3 and Other Keys

By default, F1, F2, F3 function keys (on keyboard) for **Table Timer** are disabled because the same keys are defined for other features from the **Function Key Panel Setup** (via the **Function Key Panel** feature under the **FKey** menu title). To enable F1, F2 and F3 keys for the **Table Timer** window, select **FKey** from the menu bar and choose "Disable Function Keys".

When adding more than one regular rate players, the F1 key on the keyboard can be handy. When the **Add Player Name** field (the box where you enter the name) is empty, pressing the F1 key is the same as clicking on the **Add Player Name** field. This makes the **Add Player Name** field ready for entering a name. When the **Add Player Name** field contains a name or a space, pressing the F1 key is the same as clicking on the **Regular Rate** button. A regular rate player is added and the **Add Player Name** field is ready for entering the next name.

The F2 and F3 keys have the same effects except that they are for flat rate player and guest, respectively. The F1, F2 and F3 work only when the **Table Timer** window is active (on top of all other windows).

You can also use **Tab**, **Esc**, **Space**, **Enter**, **Arrow**, and **Page Up/Down** keys to navigate the **Table Timer** window. The /, *****, **-**, and **+** keys on the numerical keypad of your keyboard also give you quick access to certain functions. Click on the **H** button in the **Table Timer** window for details.

11.5 Multi-View Check and Seat Editing (Seat Editor)

To use the **Multi-View Check and Seat Editing** feature (also called **Seat Editor**), it is recommended that you choose a non-classic **Operation Style**.

This feature is an extension of the **Table Timer** feature. Time-based service charges (e.g., playing time) are also displayed. However, it’s main focus is on ordered items such as foods and drinks.

Multi-View Check and Seat Editing makes it easy for operators to manage items ordered by multiple customers of the same table. Each customer (player or guest) is viewed as a “Seat” of the table.

Often at the time the items are ordered, the operator doesn’t know whether these items will eventually be paid for by a single customer or by multiple customers. With this feature, the operator can initially send all items to Seat 1 (or any seat), and later use it again to quickly separate the checks if needed. This is especially useful when your restaurant becomes busy.

To move items to a different seat, select the items first and then press the **Move** button of the destination seat.

In addition to moving items, the operator can also “red-tag” a seat to designate that it will later be paid for by another seat. To “red-tag” a seat, press the Number Box near the upper-left corner of a seat.

If you are using the larger **Resizable-Style Table Timer** window (available with a non-classic **Operation Style**), you can press the **Edit Check** button to access this **Multi-View Check and Seat Editing** window. You can also access it via the **Edit Check** button in the **Detail Charge** window (accessed by double-clicking on a customer in **Table Timer**), or via the **Edit Check** button in the **Multi-View Check Preview** window.

11.6 Multi-View Check Preview

To use the **Multi-View Check Preview** feature, it is recommended that you choose a non-classic **Operation Style**.

The operator can use this feature to print/close any single seat, any selected seats, or all seats of a table.

If you are using the larger **Resizable-Style Table Timer** window (available with a non-classic **Operation Style**), you can press the **Close Check** button to access this **Multi-View Check Preview** window. You can also access it via the **Close Check** button in the **Detail Charge** window (accessed by double-clicking on a customer in **Table Timer**), or via the **Close Check** button in the **Multi-**

View Check and Seat Editing window.

11.7 Waiting List

You can open the **Waiting List** window from the program's **Menu Bar** under the **Table** menu title or from the **Tool Bar**. You can add customers to the waiting list, deleted customers from the waiting list, or send customers from the waiting list to **Table Timer**. The name shown on the top of the list has the highest priority (i.e., was added earliest).

The **Member** button can be used to add a member to the waiting list.

More settings are available via the **Options** button. If the "Auto-Show" option is enabled, the program will automatically display the waiting list whenever a table becomes available after a sale is finalized.

For Network Edition Only: Network edition has an extra **Refresh** button. Names added by other **Network Terminals** may not show up immediately. The **Refresh** button can update the list and bring those names up right away. The refresh is, however, automatically applied when you use the **Add**, **Delete** or **Send** function.

11.8 Phone Notification

The **Phone Notification** feature allows the operator to call a customer in the **Waiting List**. In **Member Management** window, press **Options**, then press the **More** button to add pre-defined cell info (e.g., cell phone suppliers). In the **Waiting List** window, press **Options** to activate the "Enable Phone Notification" option. Your system must be equipped with a modem for the phone line connection.

11.9 Table Status

You can open the **Table Status** window from the program's **Menu Bar** under the **Table** menu title. This window displays the numbers of regular rate players, flat rate players, guests, total number of customers and the open-table charge for each table. If your flat rate time ends at a certain time, you can use this **Table Status** feature to find out who the flat rate players are so you can inform them.

When you double-click on a table on the list, the program will bring up the **Table Timer** window and switch to the corresponding table.

You can also click on the green table icon on the **Status Bar** of the program main window to access this feature.

11.10 Viewing Table Rates

You can access this feature from the program's **Menu Bar** under the **Table** menu title. This window is the same as the **Advanced Rate Setup** window with the exception that the rates cannot be modified here.

11.11 Mark Down Tables

A table can be marked down for reasons such as repair work or parties so the operators won't accidentally access it. You can access this feature from the program's **Menu Bar** under the **Table** menu title.

11.12 Light Switches

You can access the **Light Switches** feature from the program's **Menu Bar** under the **Table** menu title. By default, only **Master Users** can access this feature. For an operator to be able to access it, the corresponding access right has to be given via **Operator Password Setup** discussed earlier.

Also please refer to the **Light and Power Control Setup** section (part of the **Setups** section) for light controlling hardware requirements and command settings.

You normally don't need this **Light Switches** feature because **Table Timer** can automatically turn on/off lights when you check in/out players. However, for special occasions such as parties, this feature can be handy because you can select multiple tables from the list and turn on/off all lights with a single click.

The **On…Off** button will turn on the first selected table, let it stay on for a specified period (default is 180 seconds), then turn it off and turn on the next selected table. The on and off process continues until all selected tables are enumerated. You can interrupt this process by clicking on the **Stop** button. This feature can be used during table cleaning. The **Delay Interval** is the time used to separate two light-controlling commands. Light controlling usually requires commends to be separated by a minimum of 2 seconds or the light controller may not respond properly.

Only a **Master User** can change the settings in the **Options** group.

11.13 Other Ways to Add Customers to Table Timer

Instead of using the **Table Timer** window to add customers, several features from the program's **Menu Bar** (under menu title **Customer**) allow adding customers in different ways. These features are easier to use if you don't like to use the mouse.

11.14 Show Member Discount/Surcharge

This feature can be accessed from the program's **Menu Bar** under the **Customer** menu title. It allows the operator to see (but not modify) the discount policy for time-based services.

11.15 Sending Items to Table Timer

The **Shop Sale**, **Deli/Bar Sale**, **Shop Sale Express** and **Deli/Bar Express** features can all be accessed from the program's **Menu Bar** under the **Sale** menu title. Two of them, the **Shop Sale** and **Deli/Bar**, can also be accessed from the **Tool Bar**.

From **Shop Sale**, **Deli/Bar Sale**, **Shop Sale Express** and **Deli/Bar Express** windows, you can send items to a customer in **Table Timer**. This feature can be handy if you don't want customers to pay every time they order food or drink (i.e., you are running a tab for each customer). The items are attached to a customer on the **Activity List** in **Table Timer** and can be automatically sent to the **Register** when the customers check out.

Another way to send items to **Table Timer** is to use the optional **TouchPad** feature. It is faster and easier to use if you have lots of items to sell. Please refer to the **TouchPad** section for details. If you don't have the **TouchPad** feature, consider using the **Basket** feature discussed in the next section.

11.16 Basket

Basket is a quick way to send items to **Table Timer** if you need to send several different items to the same customer in **Table Timer**. In such a case, using the **Basket** eliminates the need to select the same table and customer multiple times.

This feature can be accessed from the program's **Menu Bar** under the **Sale** menu title. **Basket** acts as a bridge between **Table Timer** and the **Shop Sale** or **Deli/Bar Sale** window. That is, you have to send items from **Shop Sale** or **Deli/Bar Sale** window to **Basket** first. After you have prepared in **Basket** all items that the customer ordered, you can transfer them from **Basket** to **Table Timer** altogether.

Holding down the **Control** key on the keyboard while pressing the **All to Register** button in the **Basket** window allows you to choose any of the five sub-registers. This is usually not necessary as most of the time, you will be using one sub-register (Sub-register A) only.

In addition to accessing **Basket** from the **Menu Bar**, you can right click on the **Basket** button in **Shop Sale** or **Deli/Bar Sale** window to bring up the **Basket** window (You can also use Left Click with the Control key held down for the same effect).

11.17 Active Customers

Once a customer is in **Table Timer** (or in **SuperTab**), he/she becomes active. That is, this customer has ongoing service charges (table time charges) and/or item purchases that are yet to be paid for and finalized. Sooner or later, the operator will have to check out this customer to finalize the sale, or to add more items to the table or tab. Therefore, it is important to be able to quickly locate any active customer by name or by table/tab number.

To locate an active customer, the **Find Customer** feature mentioned earlier can be used. It can be accessed from the program's **Menu Bar** (under the **Customer** menu title) or from the **Tool Bar**. This feature displays all active customers at the entire store. By default, the customers are listed in order of table/tab numbers. If preferred, you can change it to alphabetical order by customer name.

When you double-click on a table customer on the **Find Customer** list, the program will bring up the **Table Timer** window, switch to the corresponding table and highlight the customer. If the customer you are trying to find is in **SuperTab** instead of **Table Timer**, the program will bring up the **SuperTab** window, switch to the corresponding tab and highlight the customer.

You can also click on the blue man icon on the **Status Bar** of the program main window or the small **F** button (the **Find** button) in **Table Timer** to access the **Find Customer** feature.

11.18 Table Timer and Non-Classic Operation Style

When a non-classic **Operation Style** is chosen, a larger **Resizable-Style Table Timer** window will appear in place of the original **Table Timer** window. This new **Table Timer** can be resized to full screen or preferred size and still provide good button sizes, even if you are using a small monitor. This can be useful if you are using a touch-screen Windows Tablet with small screen size.

With this **Resizable-Style Table Timer** window, you can use the **Edit Check** button to access the **Multi-View Check and Seat Editing** window, and use the **Close Check** button to access this **Multi-View Check Preview** window.

12. Member List

The primary use of the **Customer/Member List** feature is to apply member-based discount and promotion programs. **Customer/Member List** interacts with and relies on the **Register**, **Table Timer** and **SuperTab** features for such discount and promotion programs to work. Therefore you may want to visit the related sections in this document before reading this section.

12.1 Basic Customer/Member List Operations

In a later sub-section, we will explain the member data properties and how you can expand and modify the **Customer/Member List**. For now, let's use the existing member data to explore some of its basic operations.

Customer/Member List is similar to the **Shop Sale** window. You can send a member to **Register**, **Table Timer** or **Waiting List**. If you have the optional **SuperTab** feature, you can also send a member to **SuperTab**. However, there is no **SuperTab** button in **Customer/Member List**. To send a member to **SuperTab**, you will need to use the **Customer/Member List Express** feature described later.

Depending on the place a member is being sent to, it may have different effects on the fees and information recorded. For example, a member can be sent to **Table Timer** or **Register**. When a member is sent to **Table Timer**, a "Member Tag" is created in a table within **Table Timer**, to indicate that this member is the customer who orders a time-based service (table time). When a member is sent to **Register**, a "Member Tag" is also created in **Register**, to indicate that this member is purchasing the items currently in **Register**.

In **Table Timer**, the member tags will affect the rates of time-based service charges (table time charges), whereas in **Register**, they may apply discounts to certain items. Of course, whether they are for time-based service discounts or for item discounts, their effects are based on the rules you set for particular categories of members and/or items. Details for setting up such rules will be provided in later sub-sections.

To send a member, click on the row of the member to select him/her first, then press the **Register**, **Table (R)**, **Table (F)**, **Table (G)** or the **Waiting** button. The **Register** button sends the member to the **Register** window. The **Table (R)** button sends the member to the **Table Timer** window as a regular rate player. The **Table (F)** button sends the member to the **Table Timer** window as a flat rate player. The **Table (G)** button sends the member to the **Table Timer** window as a guest. The **Waiting** button sends the member to the **Waiting List**.

If the operator tries to send a member with expired membership, a warning message will be displayed. You can disable this warning by using the **More** button.

12.2 Selecting a Member Quickly

You may find it inefficient as you try to find and select a member from the member list by scrolling the list up and down, especially if you have a long member list. To make the process faster, you can use the **Search** box to find a member more quickly. In the **Search** box, if you enter the leading letters of the member's name or code, the list will scroll automatically to the first match found. To find the next match or if the entered ones are not the leading letters, you can press the **Search** button repeatedly until the right member is found.

Other ways to select a member and to send a member to **Register**, **Table Timer**, **Waiting List** and **SuperTab** are available from the program's **Menu Bar** under the **Customer** menu title. For example, the **Customer/Member List Express** feature can be very efficient when used with either the keyboard or a touch-screen monitor. You can assign a keyboard function key to it for faster access. To do that, select **Function Key Panel** from the program's **Menu Bar** (under the **FKey** menu title) and click on the **Setup** button.

12.3 Creating and Expanding Customer/Member List

You can create your list from scratch. If you have existing data stored in comma-delimited format, you can use the **Import List** function (accessed by clicking on the **More** button) to convert them to the format required. Many commercial spreadsheet programs (e.g. Microsoft Excel) can read and write data in comma-delimited format. If you decide to import data, you may want to try the **Export List** function first to learn the field arrangements of the comma-delimited file. If you have problem converting data, please contact us.

For each member record, there are more than 20 fields of properties. Only four properties are mandatory. They are ID, First Name, Last Name and Category. These four properties have to be created before you can use the member information for discounts or promotions.

To edit the list, click on the **Modify** checkbox to enable Modify mode. Modifying the list is not allowed if the operator does not have the access right given by the **Master Users**. If you are using the network edition, the **Modify** checkbox is available on the **Network Host**, or on a **Terminal** if you log in as a master user.

To add more members, enable Modify Mode and press the **Add Rows** button to create some blank ones first.

12.4 Member Data Properties and Member Management Window

In addition to entering data directly in the spreadsheet-like **Customer/Member List**, you can also bring up the **Member Management** window for editing by using one of the following methods:

1. In **Customer/Member List**, press the icon in the lower left corner.
2. In **Customer/Member List**, enable Modify Mode and press the **Details** button.
3. In **Customer/Member List Express** (accessed via **Menu Bar**), press the icon in the lower left corner.
4. In **Table Timer**, press the **Mbr** button and then press the icon in the lower left corner.

The following is a list of all properties (fields) that define a member. As mentioned earlier, only some of them are mandatory.

<u>ID:</u>

This property is mandatory. This property (field) can have up to 6 characters. The following rules are important when assigning IDs:

1. Each member MUST have a unique ID.
2. Do not use any space in an ID (or category mentioned later). For example, "M10" is a valid ID, but "M 10" is not.
3. ID (or category mentioned later) is case-sensitive, so "M10" and "m10" are two different IDs. However, do NOT use "m10" if "M10" already exists.
4. Do not use these characters in ID or category: \ / : * ? " < > | , ; '
5. Avoid using characters other than alphabetical ones and numbers if possible.
6. Many members can have the same "category".
7. Some report/log features use IDs and categories to identify members, so avoid changing IDs or categories once you start using them.

First Name:

This can be First name, first initial or first/middle name of the member. If this field is left blank, then Last Name must be provided.

Last Name:

This is Last name of the member. If this field is left blank, then First Name must be provided.

Category:

This property is mandatory. Category is usually used to decide whether particular discounts can be applied to the corresponding members. You can use the same Category for multiple members.

Gender:

This info is used in certain reports. For example, you can print labels and marketing materials that target only one particular gender.

Address, Apt, City, State and Zip:

Optional. By using Customer Labels (see Special Reports in **Reports** section), you can use this info to print name/address labels for marketing purposes.

Phone:

Optional.

Company and Company Phone:

Optional.

Fax:

Optional.

E-Mail:

Optional. In Customer List Report (see Special Reports in **Reports** section), you can export e-mail and other info to certain e-mail programs (e.g., Outlook Express).

Birthday:

Optional. By using Customer List Report, Birthday Report and Customer Labels (see Special Reports in **Reports** section), you can use this info for marketing purposes. Use "yyyy/mm/dd" or "mm/dd/yyyy" as date format.

Serial No:

Optional.

Barcode:

Optional. If you use a barcode scanner or magnetic card reader to read membership cards you provided to your customers, this field must be provided.

Since:

Optional. The date the member is added to the list. Use "yyyy/mm/dd" or "mm/dd/yyyy" as date format.

Membership Expiry:

Optional. If this property is provided, the program will inform the operator when he/she selects a member with an expired membership. Use "yyyy/mm/dd" or "mm/dd/yyyy" as date format.

Comment:

Optional.

Actual Hours Played/Last Presence:

The program will automatically track the total **Table Timer** service/playing time a member has accumulated since he/she became a member. The most recent day this customer played is also recorded. The program updates this field automatically and only master users can modify it. Editing then field is in general not recommended. If you do need to edit it, please make sure the correct format (Hours Played, a hyphen, and then Last Presence date) is maintained.

W.C. Hours:

Weighted Credit Hours. This is the total weighted **Table Timer** service/playing time this member has accumulated since he/she became a member. By default, this is the "Actual Played Hours" divided by the number of players using the same table at the same time. You can also elect to use played hours not divided by the number of players. The program updates this field automatically and only master users can modify it.

Earned Hours:

This is the redeemable **Table Timer** service/playing hours earned by the member through the "Member Free Hour Earning" Program. The program updates this field automatically and only master users can modify it. Please refer to a sub-section later for details.

Hours till next W.C. Hour:

You can click on the title of the Member history area to display extra information such as additional W.C. Hours needed to earn another free hour.

Playing:

If the member is currently playing (i.e., currently in **Table Timer** as a player), a "Playing" message will be displayed in the **Member Management** window.

Prepaid Hours:

Pre-Purchased **Table Timer** service/playing hours (time-based services). The program updates this field automatically based on customer's purchases of specific prepaid items. Only master users can modify it directly. Please refer to a sub-section later for details about prepaid items and Member Prepaid Program.

Prepaid $:

Pre-Purchased dollar amount. The program updates this field automatically based on customer's purchases of specific prepaid items. Only master users can modify it directly. Please refer to a sub-section later for details about prepaid items and Member Prepaid Program.

History & Log:

The Member History box displays information regarding this member's past purchases and free-hour earning history.

If you use "Generic Members", such as "Senior Members" and "VIPs", you can disable this history logging by using "~" or "^" as the first character of the IDs of those generic members.

Memo:

Optional. The purpose of this field is similar to that for the Comment field. However, when Memo is provided, the program will display this memo as a reminder when the operator tries to send this member to a table.

Photo:

Optional. Member's photo pictures can be supplied as a way of verification. The picture can only be added or deleted when the Modify Mode is enabled. You can use the **Photo** button to assign photos to corresponding members.

If you have the Network Edition, it is recommended that the member photos be placed in Host's **PhotoX** folder. If your network is slow, you may place duplicated copies of member photos in each Terminal's local **PhotoX** folder to reduce network traffic. A Terminal of the Network Edition will first search its local **PhotoX** folder for a member's photo file. If it can't be found there, it will then search the Host's **PhotoX** folder for it.

If you have a camera or web cam attached to the computer, you can use the **Capture** button (under Modify Mode) to create the member photo.

Secondary Picture and Information File:

If one photo is not enough, you can attach a secondary picture to the member. However, this secondary picture has to be provided and set up externally within the Windows environment. To do this, use the member's ID as the picture's file name and put this picture in the "Pictures" directory. For example, if the ID is "A101", use "**A101.bmp**", "**A101.gif**", or "**A101.jpg**" as the file name of the picture.

In addition to the picture file, you can also put a text file in the "Pictures" directory. If the ID is "A101", use "**A101.txt**", "**A101.rtf**", or "**A101.doc**" as the file name of the text file. The files with "**rtf**" or "**doc**" extension must be a Rich-Text format or MS Word 6.0 format file. This additional text file is useful if you have to attach a lot of information to the member.

To access a member's secondary picture and text file, click on the member's **Photo** area in the **Member Management** window.

12.5 Table Time Percentage Discount for Members

There are many types of table time (service time) related discounts. This section describes a type of table time discount that is dependent on member categories (as defined in Category fields of members' data). For such a discount (or surcharge) to work, you need to have all of the following:

1. Member categories need to be defined in **Customer/Member List** (refer to the **Customer/Member List** section for details).

2. In **Member Discount/Surcharge Setup** (accessed from the program's **Menu Bar** under the **Setup** menu title), you need to define the member categories and their corresponding rate percentages in order to apply discounts or surcharges. The member categories have to be among those listed in the Category fields of the **Customer/Member List**. Please note that member category is case-sensitive. You can have up to 99 types of member discounts/surcharges. This member discount/surcharge feature can be enabled/disabled by checking/un-checking the checkbox near the bottom of the **Member Discount/Surcharge Setup** window.
3. When a customer checks in, the operator has to send him/her to **Table Timer** as a player AND as a member. You can do this by using the **Customer/Member List**, by using other methods mentioned earlier, or by using the **Mbr** button in **Table Timer** window.

After a member is sent to **Table Timer** as a player, an "M" next to the player number is used to denote a **Member Player**. The program will then check this member's category against the discount settings defined in **Member Discount/Surcharge Setup**. If a discount (or surcharge) is applicable to this member, the table time charge displayed in **Table Timer** will immediately reflect it.

You normally want to use the normal (non-member) rate for the majority of your customers. For example, if the rate for 80% of your customers is 6 dollars and the rate for 20% of your customers is 3 dollars, then use 6 dollars as the normal rate in the **Table Rate Setup** (refer to the **Table Timer** section for details) and enter 50% as the discounted rate for the corresponding member category (the 20% portion of the customers). On the other hand, if 80% of your customers are students who pay a 3-dollar student rate and the general public (20% of your customers) pays a 6-dollar non-student rate, you can use 3 dollars as the normal rate in the **Table Rate Setup** and enter 200% as the surcharged rate for the general public.

Note that if you only want to provide discounts to certain groups of customers and don't need to keep individual customers' records, you don't necessarily have to create a data record (a row in the member list) for each individual. Generic names, such as "Senior Members" and "VIPs", can be used to represent groups of members.

In the **Member Discount/Surcharge Setup** window, you will also find an option to let the program automatically change the member category when a member reaches certain age. For example, if your senior members enjoy lower rate than regular members, you can configure the program to change any regular member to a senior member when the member becomes 55. The change will happen when the operator accesses the member's record or tries to send the member to a table.

12.6 Alternative Table Time Rate Schedules for Members

In the earlier **Table Timer** section, we discussed ways to assign the 20 pre-set rate schedules to tables. Here, we introduce a method to assign these 20 pre-set rate schedules to members. Once a rate schedule is assign to a particular member category, the program will use this scheduled rate for any member player with matching category. Since a rate schedule is a 7-day schedule with up to 3 varying rates per day and all 7 days can be different, this method can be more flexible than the "Table Time Percentage Discount" method in terms of giving member discount.

For a member to use any of the 20 schedules, his/her member category (on the **Customer/Member List**) has to be a * sign followed by a number from 1 to 20. For example, a member with category *15 means this member will be charged according to Schedule 15, regardless of the table he/she is using. You don't have to do anything in the **Member Discount/Surcharge Setup** window. However, you can still use the **Member Discount/Surcharge Setup** window to further apply a percentage discount to this member if you want to.

We will now call such members **Star Members**. When you send a star member to the **Table Timer** window as a regular rate player, the original 7-day rate schedule is replaced by a different 7-day rate schedule assigned to this category of members.

12.7 Item Discount for Members

In addition to discount on table time charges (or any time-base services), a member can also receive discount on purchased shop and deli/bar items. For this to work, a member has to be sent to **Register** along with the purchased items on the same receipt. A member sent to **Register** appears in **Register** as a "Member Tag" that starts with an "=" character, followed by this member's category and name.

This member tag alone doesn't affect the receipt's payment amount. However, if any item with a matching "Member Verification" rule exists on the same receipt, the price of this item will be changed. For details about setting up Member Verification rules for items, please refer to the discussions of "Extra Member/Item Verifications" in the **Dynamic Pricing Schedule** section.

To use this feature, you can send a member to **Register** either before or after you send the purchased items to it. This may not be necessary if this member's purchases are sent to **Register** from **Table Timer** or **SuperTab** that already contains the member's information.

12.8 Member Free Hour Earning Program

This feature can be enabled from the **Options** button in the **Member Management** window. If this feature is enabled, the program will automatically give the members free redeemable **Table Timer** service/playing hours based on the service/playing time they already purchased.

Every time a member pays for the **Table Timer** service/playing time, the program adds credit to this member's W.C. Hours (Weighted Credit Hours) field. . By default, W.C. Hours is the "Actual Played Hours" divided by the number of players using the same table at the same time. You can also elect to use played hours not divided by the number of players.

The program then uses W.C. Hours and your settings in the **Options** window to calculate the number of free hours (earned hours, redeemable later) to give to the member.

When a member finishes playing and is sent from **Table Timer** to **Register**, the program automatically displays a window with available redeemable earned hours (if any). The operator can then choose the number of hours to redeem.

If a member is already playing, you can choose whether or not to allow this same member to be sent to a table again. This setting, however, has no effect on "Generic" members. A generic member can always be sent to tables multiple times. You can designate a member to be a generic member by enabling the "Generic" checkbox in the **Member Management** window.

If you use "Generic Members", such as "Senior Members" and "VIPs", you can disable their Free Hour Earning Program by using "~" as the first character of the IDs of those generic members.

You can decide whether the time a player just played should be included in calculating the free redeemable hours right away or till next visit.

12.9 Member Prepaid Program

A Member Prepaid Program allows you to accept and record payments from your customers before the services are rendered or before the items are purchased.

For example, a customer can spend $100 now to buy a prepaid item. This prepaid item is not a tangible product but it gives this customer $120 worth of credit for future services (table time) and/or future purchases.

The purchase of such a prepaid item adds credit to customer's data record under the "Prepaid Hours" or “Prepaid $” field. Either field can be viewed from within the **Member Management** window. In the future, when the same customer purchases items or services (table time), the program will automatically display a window with available redeemable “Prepaid Hours” and/or “Prepaid $” credit. The operator can then enter an amount to redeem.

Before your customer can purchase them, prepaid items need to be created and configured in **Shop Sale** or **Deli/Bar Sale** window. You can create prepaid items the same way you create regular shop and deli/bar items (please refer to the **Item List** section for information about creating items). However, the “Item Type” property of a prepaid item needs to be designated as “Prepaid”. To do this, follow these steps:

1. Open the **Shop Sale** or **Deli/Bar Sale** window.
2. Enable Modify Mode by using the checkbox in the upper left hand corner.
3. Press the **Details** button to open the **Item Details** window.
4. Click on the “Item Type” field and use the drop-down selection menu to change the type to “Prepaid”.

Once an item is designated as a prepaid item, a **Prepaid** button appears. Press this **Prepaid** button and you can select one of the following prepaid types:

<u>Type1: Prepaid table/service time</u>

A member can purchase such items and the “Prepaid Hours” data property of this member’s record will be credited with table/service hours that can be redeemed in the future. For example, if the Price field of such a prepaid item is $100 and its value is set to 30 hours (via the **Prepaid** button), it will cost the customer $100 to purchase this prepaid item and, after the purchase, this customer will be credited 30 hours of table/service time redeemable in the future.

<u>Type2: Prepaid amount</u>

A member can purchase such items and the “Prepaid $” data property of this member’s record will be credited with dollar amounts that can be redeemed in the future. For example, if the Price field of a prepaid item is $50 and its value is set to 60 (via the **Prepaid** button), it will cost the customer $50 to purchase this prepaid item and this customer will be credited 60 dollars redeemable in the future.

<u>Type3: Prepaid amount (flexible pricing)</u>

This is similar to Type2 except that a “Value Factor”, instead of a fix dollar amount, is provided. For example, if the Price field of a prepaid item is $20 and its value factor is set to 1.2 (via the **Prepaid** button), it will cost the customer $20 to purchase this prepaid item and this customer will be credited 24 dollars redeemable in the future. That is, the credited amount will be the amount in price field multiplied by the value factor.

A prepaid item can also be an open-price item. For example, if the Price field of a prepaid item is left empty and the prepaid item is of Type3 with a value factor of 1.2, the program will ask the operator to enter a price when it’s being sent to **Register**. If 40 is entered, it will cost the customer $40 to purchase this prepaid item and this customer will be credited 48 dollars redeemable in the future.

Please note that a prepaid item can only be sold to a member. Therefore before or after you send a prepaid item to **Register**, you need to also send a member to **Register** from the **Customer/Member List** so the program knows who purchases the prepaid item and can add credit to this member’s record accordingly. Another way for a member to purchase prepaid items is to use the **More** button in the **Member Management** window.

When in the future this member is redeeming the credit, the operator also needs to send the member to **Register** so the program can use and update the correct member’s credit balance. This procedure of sending member to **Register** may not be needed if this member's purchases are sent to **Register** from **Table Timer** or **SuperTab** that already contains the member's information.

13. SalesMonitor

SalesMonitor is a separate and optional program. The purpose of using **SalesMonitor** is to monitor and/or print the orders issued from the **Pool House Manager (PHM)** program (running on one or multiple stations). The information displayed by **SalesMonitor** can be used by the chef or by the manager as a way to verify the orders. When the operator sends an item to **Register**, **Table Timer** or **SuperTab**, this item will automatically be shown on **SalesMonitor's** scrolling list. If you want to, you can also set up a regular printer or a receipt printer for **SalesMonitor** and it will print the items **automatically** whenever a new order is placed.

In addition to showing the ordered items, **SalesMonitor** can also pick up messages sent from operators. **SalesMonitor**, however, does not display time-based service charges (table time charges) added from within **Table Timer**.

13.1 Typical Configurations

Type1: One Computer

If you have only one computer, **SalesMonitor** can be used on the same computer on which **Pool House Manager** is running. In such a case, since the **Pool House Manager** program is already using the screen, an added printer is preferred for the monitoring function provided by **SalesMonitor**. You can use a long printer cable or a wireless printer server and place the printer (preferably a receipt printer) in the manager's office or in the kitchen.

Type2: Two or More Networked Computers

SalesMonitor can be used on a network computer to monitor **Pool House Manager** running on a different computer. The manager or the chef can watch the on-screen **SalesMonitor** scrolling list which can be set to auto scrolling. If you have a receipt printer connected to this computer, hard copy list can also be printed automatically. An ideal configuration can be as follows:

Game room/Bar:	The first computer with **Pool House Manager** running. This computer may have its own printer to print the receipts for customers.
Office:	A second computer with **SalesMonitor** running.
Kitchen:	The third computer with **SalesMonitor** running, or a receipt printer connected to the first or second computer.

Pool House Manager on the first game room computer can be used for all selling operations (such as table time, service charges, pro shop sales and bar/restaurant sales). However, if you have a busy game room/bar, you might want to purchase the network edition that allows you to run multiple copies of **Pool House Manager** on different computers while sharing the same data. Network edition also allows the manager (in the office) to see what the operator (in the game room/bar) is seeing on screen.

A Windows compatible network is needed for this type of configuration. In short, if you can mount and see the hard disk or directory (folder) on the other computer, **SalesMonitor** and **Pool House Manager** Network edition can use your network.

13.2 SalesMonitor Installation

SalesMonitor runs on most editions of Windows. To install **SalesMonitor** program from the installation CD, insert the CD, run the Setup program within the CD and follow the on-screen instruction.

To start **SalesMonitor**, go to the installed directory and double click on the "SalesMonitor" (or "SalesMonitor.exe") icon.

13.3 SalesMonitor Setup

13.3.1 Directory Setup

From within **SalesMonitor**, click on the **Setup** button. Enter the directory on which you installed **Pool House Manager** so **SalesMonitor** knows where to find the data produced by **Pool House Manager**. If **Pool House Manager** is installed on a different computer, you need to enter the network directory (same as the **Host Directory** if you are using the Network Edition of **Pool House Manager**). An example of the network directory is:

\\MyPCName\PHM

In this example, the name, "MyPCName" is the computer name of the computer on which **Pool House Manager** is installed. You can find this computer name from the **System** or **Network** Control Panel (part of Windows system).

On the **Pool House Manager** computer, the **Pool House Manager** program is by default installed on the C:\PHM directory (folder). Therefore you need to have "\PHM" as part of the **Directory**. Don't forget to add "\\" to the beginning of the **Directory**.

Also on the **Pool House Manager** computer, you need to enable **Full Read/Write Sharing** on the **PHM** directory. For information about **Full Read/Write Sharing** and other network-related issues, please refer to the discussions in the **Network Setup** section (part of the **Setups** section) in this document.

13.3.2 Department and Category Options

Select whether you want **SalesMonitor** to display all items or just items from certain departments or categories. Normally, items sent from the **Deli/Bar Window** are under the "DELI" department and items sent from the **Shop Sale Window** are under the "SHOP" department.

13.3.3 Customer Options

Select whether you want **SalesMonitor** to display items sent to **Register, Table Time** and/or **SuperTab**.

13.3.4 Display Options

You can adjust the color and size of the **SalesMonitor** list here.

13.3.5 Printer Setup

Choose **Windows Printer** if you have installed a Windows printer driver for your printer. If your printer does not come with a printer driver or the installed printer driver doesn't seem to work, then you can select **Other Printer**. If you are using an Epson TM or Star printer, try COM1 (or COM2 and COM4) and "9600, N, 8, 1" first.

Even if **Windows Printer** works, you might still want to try the **Other Printer** option. Sometimes a **Windows Printer** prints unwanted blank lines that cannot be disabled from the printer's own setup.

For more information about printer-related issues, please refer to the discussions in the **Receipt Printer Setup** section (part of the **Setups** section) in this document.

13.3.6 Sound Options

This option allows you to use a simple beep or a sound file (wave format) to alert the person who is using **SalesMonitor** that new order has arrived.

13.4 How it Works

You can keep **SalesMonitor** running all the time. You can also quit **SalesMonitor** any time. You won't miss any items even if you quit and restart **SalesMonitor** hours later. The program always shows you all items from yesterday and today. If you want to view the data older than two days, open your **Pool House Manager** program's SMonitor folder (a sub-folder within UserData folder) and open the files with a text editor.

New sales issued by **Pool House Manager** will be automatically appended to the **SalesMonitor** list in five seconds. If you left mouse-click on the last row of the list, the list will be set to auto scrolling. This allows a hand-free operation that is preferred if the monitor is placed in the kitchen. If you want to page-up to see earlier items, it is recommended that you first click on a row other than the last one to disable auto scrolling. For each item, a checkbox is provided. The chef can use it to mark certain orders.

When new items arrive, **SalesMonitor** will also display a small flashing red box in the upper right hand corner of the screen. This red box is visible even if the **SalesMonitor** program is hidden behind other programs. You can then click on this red box to access **SalesMonitor**. This is useful if you use **SalesMonitor** and **Pool House Manager** on the same computer. This red box notifies you the arrival of new items when you can't see the **SalesMonitor** program.

You can resize the **SalesMonitor** window by clicking and dragging the lower right hand corner of the window.

A **Pool House Manager** operator can send a message to the **SalesMonitor**. To do this, select **Message to SalesMonitor** from the **Menu Bar** of the **Pool House Manager** program (under the **Extra** menu title). You can enter this message by keyboard, by an on-screen keypad or by the keyword buttons. You can prepare up to 100 sets of keywords. Each set can have up to 30 keywords. When this feature is used together with the **Message Item** and **CrossLink** features (discussed in earlier sections), it can be an efficient way to send a message such as "Chicago Rare, Extra Cheese, Pickles Outside, No Mustard" to the kitchen.

When an item is voided from **Register**, **Table Timer** or **SuperTab**, a "VOIDED" message will be sent to **SalesMonitor** automatically.

14. Reports

Over 40 reports of are available within this program. Some of them, such as **Shift Summary**, **X-Out Report** and **Z-Out Report**, are designed for the current operator to view his/her own sales figures of the day. The operator doesn't need extra permission to access such reports, but cannot view results of sales beyond his/her own shift(s).

For other more comprehensive, multi-day, multi-operator and special reports, you will have to log in as a **Master User** in order to view them. A regular operator, however, can also access such reports if the master user had given him/her the access rights (via **Operator Password Setup**) to do so.

There are many ways to bring up the reports (or logs). **Shift Summary**, **X-Out Report** and **Z-Out Report** are accessible from the program's **Menu Bar** under the **Report** menu title. For other reports, you can access them by pressing the **Report** button on the **Tool Bar**, or by using the **Report** menu title from the **Menu Bar**. If you use a touch-screen monitor, you can use the **Function Key Panel** feature (under **FKey** menu title from the **Menu Bar**) to add additional ways to access certain reports.

Although many reports are provided in this program, you don't need to use all of them for your daily operations. Some users prefer the simple summaries available within **Operator Log Viewer**. Others like the extra information provided by **Special Reports**. Some of the reports can be exported to files in comma-delimited format that can be read from and edited within a spreadsheet program. All reports are printable, but the reports in **Special Reports** are better optimized for letter-size paper.

14.1 Shift Summary

The **Shift Summary** feature reports the cash/credit/check earnings and departmental earnings (Time-based service, Shop, Deli, … etc.) handled by the current operator (the one who currently logs in). The current operator can only view his/her own sales figures of the day (one or multiple shifts by the same operator). For other operators to view their own earnings of the same day, they will have to log in with their own usernames and passwords.

To view the earnings by each and every operator and all operators, you need to have the access right to open the **Report/Log** window (to be discussed later).

Shift Summary also serves as a **Cash Drawer Calculator**. A bill/coin counter is provided to help you count the amounts inside the drawer. The result of the bill/coin count can be used to check against the shift earnings reported. You can also send the counted amount to the payment field in **Register** window by clicking on the picture icon in the **Shift Summary** window.

14.2 X-Out and Z-Out Reports

X-Out and Z-Out are terms derived from the reporting functions of certain traditional non-computer-based cash register machines. This program borrows these terms so users who had experiences with such registers know what they are. However, this program's X-Out and Z-Out features can display more details and have more options than those offered by traditional cash register machines.

In this program, **X-Out** provides sales information similar to that from **Shift Summary**, except the following:

- In addition to total cash/credit/check earnings and departmental earnings (Time-based service, Shop, Deli, … etc.), **X-Out** also provides sales information for individual items.
- Like **Shift Summary**, **X-Out** also gives you a bill/coin counter. However, if you log in as a master user, this bill/coin counter is not available.

- **Shift Summary** separates shifts by logins. You can do that with **X-Out** too. However, **X-Out** can also separate shifts by **Z-Out** checkpoints (to be explained later).
- Like **Shift Summary**, **X-Out** allows an operator to view only his/her own shift. However, if you log in as a master user, you will be able to select and view results of sales conducted by each and every individual operator/shift.
- **X-Out** can also be accessed from the **Menu Bar** of the **Log Viewer** (to be discussed later). When accessed from the **Log Viewer**, you can use it to view sales from any day. If you have multiple stations, you can also choose to view sales from any of the stations.
- **X-Out** is formatted to print on 2.5-inch or 3-inch wide receipt printer paper. This is useful if you don't have a dedicated printer for reports. You can still use a regular letter-size printer to print.

Z-Out provides all features of **X-Out** with the addition of a **Z-Out** button. This button inserts a **Z-Out** checkpoint to separate the shifts. For example, when the first operator is ready to leave, he can use **Z-Out** to print a report of his own shift, and then presses the **Z-Out** button to conclude the shift. When the next operator logs in later, she won't be able to view the sales from the first (or any other) operator. His/her sales figures in the **Z-Out** report will start with zeros.

14.3 Operator Log

Every day a new Operator Log is created automatically. The date and time it is created are stamped as the first line in the log. This log records each operator's username, login time and logout time. It also records each and every transaction (amount, time and operator's name...) and certain events such as voiding items, opening cash drawer without sale, and turning on lights using special light switches.

If you only want to view today's log, you can use several features from the program's **Menu Bar** under the **Report** menu title. If you need to access older logs, you can use the **Report by Calendar** feature (also under the **Report** menu title). Either way, once you invoke a particular log or report viewer, you can always switch to any other year, month or day from within. For example, In **Operator Log Viewer**, You can change the year/month/date by using its drop-down selectors or by clicking on the "day of week" field (the small box that displays Sun, Mom, Tue…) to bring up a calendar-style date selector.

You can search the log by the words you entered. The **Log Viewer** is part of this program, but it acts like a separate program. It has its own icon shown on Windows Taskbar. From the **Log Viewer**, you can set up fonts, print the entire or potion of the log, or copy and paste its content to another program.

If you have configured the program (from within **Master Password Setup**) to encrypt the logs, the background of the text becomes yellow and the green bar becomes an orange one. Regardless of the log's encryption status, you can encrypt or decrypt a log at any time by using the **Security** feature under the **Log Viewer**'s menu bar. This security feature is, however, only available to the **Master Users**. The **Log Viewer** can automatically tell whether or not a log is encrypted and display it accordingly on screen. The main reason for encryption is to prevent others from opening and altering a log from the Windows environment.

Instead of encrypting the logs, this program provided other ways to prevent others from accessing data from the Windows environment. Please refer to the **Advanced Security** features described in the **Setups** section of this document.

Although the Operator Log displays a complete running history of the entire day's activities, it does not provide total sales figures and is not very helpful in separating sales made by individual operators. For such, you will have to use the **Summary** features (available under the **Log Viewer**'s menu bar). These **Summary** features are described in the following sub-sections. If the **Summary** features are still not enough for your reporting needs, you can find more under the **Special Reports** feature discussed in a later sub-section.

From the **Log Viewer**'s menu bar, click on **Summary** and you can select one of the **Summary** features.

14.3.1 Itemized Sales Summary

One very useful function is the **Itemized Sales Summary** feature (under the **Summary** menu title). It shows you the sales dollar amount and quantity for each and every item from the **Shop Sale** and **Deli/Bar Sale** windows for any given day.

If you want to view or print the **Itemized Sales Summary** for the entire week or month or for a range of days, use the **Export Itemized Sales Summary** feature instead. The **Export Itemized Sales Summary** feature can also export data to a file in comma-delimited format that can be readily opened by a spreadsheet program. It can also create itemized summary for each and every operator.

14.3.2 Comprehensive Sales Summary

The **Comprehensive Sales Summary** feature (also under the **Summary** menu title) gives you an organized sales report (in both dollar amounts and quantities) for any given day. The totals from various sources, such as Shop, Deli, Service/Pool, Credit, Discount, Tip and Tax, are reported here.

If you want to view or print the **Comprehensive Sales Summary** for the entire week or month or for a range of days, use the **Export Comprehensive Sales Summary** feature instead.

You can also choose certain categories and items that you are most interested in to show up in this **Comprehensive Sales Summary**. To do this, use the **Define Categories and Codes** function under the **Summary** menu title to select the categories and item codes. You can define up to 10 sets of categories (each set can have up to 7 categories) and up to 10 sets of item codes (each set can have up to 7 codes). You can choose which set to display from the **Define Categories and Codes** window. You can also switch to any set from within the **Comprehensive Sales Summary** window.

Use **Export Comprehensive Sales Summary** if you want to view or print the entire 10 category sets (70 categories in all) and the entire 10 code sets (70 codes in all) at once.

The categories or item codes you define must be among those entered in the **Shop Sale** and **Deli/Bar Sale** windows. Both categories and codes are case-sensitive. For **Rental** items (via the **Rental** button in **Table Timer**), the default codes are "Rent 1", "Rent 2"... "Rent90". Note that there is a space between "Rent" and the number if the number is less than 10.

To get a report of the time-based service charges earned by tables, you can enter TBL1, TBL2, … as the **Item Codes** in the **Define Categories and Codes** window. The **Comprehensive Sales Summary** will then show you the daily totals of the time-based service charges from these tables. This can be handy if you want to compare the popularity of different tables or table types.

To get a report for the time-based service charges paid by members, you can enter member categories (from the Category column of the **Customer/Member List**) as the **Categories** in the **Define Categories and Codes** window. The **Comprehensive Sales Summary** will then show you the daily totals of the time-based service charges from these member categories. If you add a player without using **Customer/Member List**, the default category name will be "PLAYER". The default category name can be changed in the **Member Discount/Surcharge Setup** window

14.3.3 Operator Transaction Summary

Another useful report is **Operator Transaction Summary** (also accessed from the **Summary** menu title of **Log Viewer**'s menu bar). It summarizes all transactions for the current day and reports cash, credit and check transactions handled by each and every shift of operator. This can be used to count cash and settle credit card sale for that day at the end of the day.

If you want to view or print the **Operator Transaction Summary** for the entire week or month or for a range of days, use the **Export Operator Transaction Summary** feature instead. The **Export Operator Transaction Summary** feature can also export each and every transaction.

14.3.4 Operator Performance Summary

The **Operator Performance Summary** feature summarizes all transactions for today and reports departmental earnings (time-based service, Shop, Deli, … etc.) handled by each and every operator. This feature can be used to view each operator's performances in different departments so far today.

If you want to view or print the **Operator Performance Summary** for the entire week or month or for a range of days, use the **Export Operator Performance Summary** feature instead.

14.3.5 Server Performance Summary

The **Server Performance Summary** feature summarizes all transactions for the current day and reports earning handled by each and every server (wait staff member). This feature can be used to view each server's performances so far today.

You can set up "servers" the same way you set up "operators" by using the **Operator Password Setup**. The program does not distinguish servers from operators and the roles of server and operator can be interchangeable. Whenever an employee is ordering items for customers, he/she becomes a server. Whenever an employee is finalizing a sale, he/she becomes an operator.

Note that the "servers" (wait staff members) get their credits right after the customers "order" items (i.e., when items are sent to **Table Timer** or **SuperTab**). On the other hand, as reported in the aforementioned **Operator Performance Summary**, the "operators" get their credits after the customers "pay" for the purchases (i.e., when sale is finalized by using **Register**). For example, if a waitress orders a $5.00 sandwich by using the program, the $5.00 will be added right away to the **Server Performance Summary** under the waitress's name. Later, when the customer pays $5.00 for the sandwich, the $5.00 will be added to the **Operator Performance Summary** under the operator's name. For the same customer, the server and the operator may or may not be the same employee.

If you have the Network Edition, you can handle the "Ordering" operations and "Paying/Finalizing" operations by using two different stations to improve efficiency. For example, the "Server Station" can be placed near the dinning area for the wait staff members to order items for customers. The "Operator Station" can be placed near the store entrance for the operators to finalize sales.

Other reports related to wait staff members' performances are available in Special Reports (to be discussed later).

14.3.6 Employee Time Clock Summary

Any employee (not just the ones who operate this program) can use the **Employee Clocks In/Out** features from the program's **Menu Bar (**under the **Extra** menu title) to record the work hours.

If an employee is not assigned as an operator or server, but still needs to report the work hours, you can use **Operator Password Setup** to set his/her operator type to "Time Clock Only". This employee then won't be able to login as an operator to operate the program, but can still use the **Employee Clocks In/Out** features.

The **Employee Time Clock Summary** report is a running history of such "Clocks In" and "Clocks Out" activities.

If you want to view or print the **Employee Time Clock Summary** for the entire week or month or for a range of days, use the **Export Employee Time Clock Summary** feature instead. The **Export Employee Time Clock Summary** feature is also useful if you need to transfer the work hour data to a spreadsheet program for further calculations such as wages.

14.3.7 Total Worksheet

The **Total Worksheet** feature allows you to calculate the total sales (in both dollar amounts and quantities) of selected categories and items.

14.4 Receipt Log

This log displays a running history of all receipts. All sold items and services (table time) are listed with descriptions. The summary reports available from within **Operator Log** are also available here.

An **Export Receipts** feature is available here under the **Log** menu title of the **Menu Bar**. You can use it to export receipts to accounting software such as QuickBooks. The exported data can also be copied to spreadsheet software such as Excel. You may need to edit the exported data before they can be successfully imported into your accounting program. Therefore certain knowledge of the data format may be required.

14.5 Playing Log

This log is available only if you have the **Table Timer** feature. It records detailed service/playing history (start, add/remove player, rate change, transfer, pause, stop... etc). This log, written in comma-delimited format, can be easily imported into other programs such as Microsoft Excel.

If you have the **Table Timer** feature, an operator can also access this log from the **Table Layout** window. If a customer has questions about the charges after the receipt is printed, the operator can open this log to see how the service fee (table time charge) was calculated.

14.6 History Report

The **History Viewer** gives you a graphical representation of your **Service/Pool**, **Shop** and **Deli/Bar** sales (in either dollar amounts or quantities). It scans your receipt logs, gathers the data and displays the results graphically.

By default, this report displays results in monthly-daily view (that is, daily result for each and every day of the entire month). You can use the **Range** menu title from the **Menu Bar** to switch from monthly-daily view to daily-hourly view (hourly result for each and every hour of the entire day).

The **Multiple Days** feature (also under the **Range** menu title) allows you to create a sales report or chart that combines data from a period of days you specified. You can elect to skip certain days of the week. For example, before you schedule your employees to handle the coming busy Wednesday, you can create a Wednesday-only report that shows you the hourly earnings from multiple Wednesdays of the last few weeks and then use it to determine the hours that require more employees.

The **Print Graphic** feature allows you to print the chart with a printer. You can also copy the graphic data to paste to another program or export the data as a comma-delimited text file that can be easily imported into a spreadsheet program such as Microsoft Excel.

Under the **Type** menu title of the **Menu Bar**, you can choose whether to display sales in dollar amounts or in quantities. Under the **Style** menu title, you can change the style of the graphics (e.g., 2D or 3D, Line or Bar chart).

For extra information such as transaction amounts, added charges, credits/discounts, taxes and tips, you can use the **Show Data in Numbers** feature from the **Menu Bar** under the **Data** menu title.

14.7 Comparison Report

The **Comparison Viewer** is similar to the **History Viewer** except that it allows you choose the categories or items to display.

For example, your local law may require you to report the sales of tobacco and liquor separately. If you have defined a tobacco "category" for all tobacco products, the combined tobacco sales will show up on the chart and on the **Show Data in Numbers** window.

In addition to "category" comparison, you can also do "item" comparison. For example, you can use this feature to compare the popularities of different burgers.

To choose the categories and items to show up in this **Comparison Report**, use the **Define Categories and Codes** function from the **Data** menu title of the **Menu Bar**. You can define up to 10 sets of categories (each set can have up to 7 categories) and up to 10 sets of item codes (each set can have up to 7 codes). You can choose which set to display from the **Define Categories and Codes** window. You can also switch to any other set by using the **Menu Bar** of the **Comparison Viewer** window.

The categories or item codes you define must be among those entered in the **Shop Sale** and **Deli/Bar Sale** windows. Both categories and codes are case-sensitive. For **Rental** items (via the **Rental** button in **Table Timer**), the default codes are "Rent 1", "Rent 2"... "Rent90". Note that there is a space between "Rent" and the number if the number is less than 10.

To get a report of the time-based service charges earned by tables, you can enter TBL1, TBL2, … as the **Item Codes** in the **Define Categories and Codes** window. The **Comparison Report** will then show you the earnings of the time-based service charges from these tables. This can be handy if you want to compare the popularity of different tables or table types.

To get a report for the time-based service charges paid by members, you can enter member categories (from the Category column of the **Customer/Member List**) as the **Categories** in the **Define Categories and Codes** window. The **Comparison Report** will then show you the earnings of the time-based service charges from these member categories. If you add a player without using **Customer/Member List**, the default category name will be "PLAYER". The default category name can be changed in the **Member Discount/Surcharge Setup** window.

By default, this report displays results in monthly-daily view (that is, daily result for each and every day of the entire month). Use **Range** from the **Menu Bar** if you want to switch from monthly-daily view to daily-hourly view (hourly result for each and every hour of the entire day).

14.8 Table Usage

The **Table Usage** feature (under **Report** menu title of the program's **Menu Bar**) allows you to calculate the usage hours of any table. It's available only if you have the **Table Timer** feature. You can view the hours by month or by year. This feature is useful if your equipments require maintenances after certain hours of usages.

14.9 Special Reports

The **Special Reports** window can be accessed from the program's **Menu Bar** under the **Report** menu title. After you open the **Special Reports** window, you can select one of the 20+ special reports to display by using the drop-down selection menu near the upper left corner.

Special reports have more shift-based querying features than the summary reports mentioned earlier. For most of the special reports, you can customize the scope of the report or the time range of a shift in the following ways:

- You can limit the scope of the report to one or several operators (via a drop-down menu).
- You can limit the scope of the report to a period of time during the day (via a drop-down menu).
- You can limit the scope of the report to a particular station (via the **Options** button; for Network Edition only).
- You can change the scope of the report to any particular date (via the **D** button).
- You can limit the scope of the report to certain payment types (via the **P** button).

To print the special report currently shown on screen, left click on the **Print** button. If you need to print several special reports at once, you can right click on the **Print** button to access the **Batch Printing** feature. The program will remember the reports selected for batch printing so next time all needed reports for the day/shift can be generated quickly.

Each of the special reports will be explained in the rest of this section.

14.9.1 Daily Sales Summary

This report shows the total amounts of sales, refunds, coupons, adjustments, payouts, tips and taxes arranged by payment types. Refund, coupon, adjustment and payout items are created in **Register List** by using the corresponding buttons in **Register** window.

14.9.2 Daily Shift Balance

This report is most useful if you need to reconcile the quantities of consumed items after each shift. For each item, the consumed quantity is shown, followed by paid quantity and open table/tab quantity. In most cases, the consumed quantity should equal the sum of paid quantity and open table/tab quantity. The open table/tab quantity data are available only if you have the optional **SuperTab** and/or **Table Timer** features.

14.9.3 Daily Paid Items

This report shows the total sales amounts arranged by items and categories. These are items that have been sent to and finalized in the **Register** window.

14.9.4 Daily Divisions

This report shows the total sales amounts arranged by items and divisions.

14.9.5 Daily Consumed Items

This report shows the total amounts of consumed items arranged by items and categories. The difference between this report and the **Daily Paid Items Report** is that the **Daily Paid Items Report** displays only paid items (already paid by customers), whereas the **Daily Consumed Items Report** includes both paid items and open table/tab items (not yet paid by customers).

14.9.6 Daily Consumed Ingredients

This report shows the total amounts of consumed ingredients arranged by items and categories. An "Ingredient" is a cross-linked item of another item. Please refer to the discussion of **CrossLink** features in the **Item List** and **Inventory Control** sections for details.

14.9.7 Daily Timer Report

This report shows the total amounts of paid time-based services arranged by table numbers. The free hours redeemed by the customers are also shown.

14.9.8 Daily Free Hour Report

This report shows the number of free hours redeemed by each member.

14.9.9 Daily Coupon/Adjustment/Payout

This report lists all coupon, adjustment, payout, charge, credit and discount amounts from the uses of corresponding buttons in **Register**.

14.9.10 Detail Coupon/Adjustment/Payout

Same as Daily Coupon/Adjustment/Payout report, but certain details are added.

14.9.11 Open Table/Tab Items

This report shows the total amounts of open table/tab items (items not yet paid by customers) arranged by items and categories.

14.9.12 Tab List

This is a list of all on-going Tabs in **SuperTab** with name, code, price and tax shown for each item. The time at which the item was ordered and the name of the operator who sent the item to **SuperTab** are also shown.

14.9.13 No Sale Report

This report shows time and operator name for each no-sale drawer-opening activity (via the use of the Open Drawer function key or function button).

14.9.14 Voiding Activities

This report shows operator name, time, item name, item price and quantity for each voiding activity.

14.9.15 Tip Summary Report

To calculate the total tip amounts based on operator logins, use the drop-down selector at the top to choose the operator. To calculate the total tip amounts based on the operators' entries in **Register**'s **Tip** window, use the drop-down selector to choose "Entire Day" first. The report will then display multiple total tip amounts.

14.9.16 Referral Report

The **Referral** report displays the referral activities that were recorded via the use of the **R** button in the **Member Management** window.

14.9.17 Purchase Records

Information of items purchased from vendors.

14.9.18 Inventory Detail Summary

This report calculates the current inventory based on opening stock and quantities of consumed and purchased items. It also allows you to view past inventory history. Please refer to **Inventory**

Control section for more details.

14.9.19 Inventory Summary

Same as the Inventory Detail Summary report except that individual items are not shown.

14.9.20 Customer List

You can use this feature to design and print a customized customer list. The alignment tabs near the top of this window can be used to adjust the field widths.

This report can be useful in determining the best target customers when you have a promotion program. For example, you can press the **Options** button to select only customers whose birthdays are near. You can also target only one particular gender and/or category of members (e.g., senior, student…). The "Member Last Presence" option can be used to exclude those who haven't come in for a long time.

In the **Options** window, you can press the **More Options** button to select the member data fields to be included. The **Export** button allows you to export the selected fields to a spreadsheet or e-mail program. Exporting to an e-mail program can be useful if you decide to deliver the promotion materials to your customers by e-mails.

14.9.21 Customer Labels

This feature has similar member filtering options as in the aforementioned **Customer List** feature. This one is, however, more suitable if you decide to deliver the promotion materials to your customers by mail.

14.9.22 Birthday Report

This report displays a list of customers who have the same birth month. Member IDs, names, birthdays and the dates of their last visits are shown.

14.9.23 Barcode Labels

This feature allows you to create and print your own barcode labels on 7x2 label sheets. Press the **Edit** button to enter barcodes. This barcode type used here is "Code 39".

14.9.24 Custom Reports 1 to 6

These are customizable sales reports. Press the **C** button for customization options. The "Profit%" option displays the percentage of each item's profit out of profit from all items. It can be used to find out what items are most popular and profitable.

14.10 Email Reporting

The program can email you automatically, at pre-set times of your choices, the status of your business.

Select **Email Reporting Setup** from the **Menu Bar** of the program (under the **Setup** menu title) to set up.

Note that certain network and emailing components must exist on your system for this feature to work, so only certain versions of operation systems and configurations are compatible.

15. Departmental Management

Many business owners and managers prefer to have separated sales reports for their service sales (table time), shop sales and deli/bar sales. Having separated bookkeeping can be helpful if later the data are to be used for calculating sales taxes, evaluating employee performances or making business decisions.

Several reports mentioned in the **Reports** section (such as the **Comprehensive Sales Summary** and **Show Data in Numbers** windows) already present to you the sales/transactions from six sources: Service/Pool (Time-based), Shop (Retails), Deli (Restaurant, Bar), Charge, Credit and Discount. This section shows you additional techniques that can give you more control over departmental sales and transaction reporting.

In this program, any product (service or item) sold can be identified by three properties: **Department**, **Category** and **Code**. If you check the sales receipts it generates, you can see that each item contains these three data (in addition to price and product name). For example, when you send a 7-Up soft drink to the **Register**, the **Department** is "DELI", the **Category** is probably "POP" and the **Code** is probably "7UP". The **Category** and **Code** data are from the corresponding columns in the **Shop** or **Deli/Bar Sale** window and were created by you. This program, however, automatically assigns the **Department** name ("DELI" in this example) for you.

What if you don't want a particular item in the **Deli/Bar Sale** window to be included in the "DELI" department? For example, you probably prefer certain service sales (such as administrative fees, practice passes, service and table time discounts, coupons, private parties and memberships fees) to be listed under the "POOL" department instead of the "DELI" department. To make this possible in this program, you need to enter the term "POOL" onto the **Department** field of this item in the **Deli/Bar Sale** window. The following is a list of valid **Department** names:

POOL
SHOP
DELI
CHRG
CRDT
DISC

For example, the first one assigns department name "POOL" to the item. Once a department name is changed, the sales for this item will be reported differently. For example, the sales for an item with the department name "POOL" will be reported under the "**Pool"** column in the **Comprehensive Sales Summary**, even when in reality this item was created in **Shop Sale** or the **Deli/Bar Sale** window.

Another way to sell a product/service or to give a credit/refund/discount under a specific department name is to use the **Add Charges**, **Credit** and **Discount** buttons in the **Register** window. For example, if you want to refund a beer that "tasted funny" to satisfy a customer, you can use the **Credit** button. Then select the "DELI" department and this refund will deduct the sales amount reported under the **Deli** column in the **Comprehensive Sales Summary**.

The following is a summary of the department names used in this program and how the department names are assigned:

POOL: Time-based service charges created in **Table Timer**.
Items from **Shop Sale** or **Deli/Bar Sale** window with department name "POOL".
Rental items added to **Table Timer** by using the **Rental** button.
Items assigned "POOL" when using the **Charge/Credit/Discount** buttons in **Register**.

SHOP: Items from **Shop Sale** window with no department name.
Items from **Shop Sale** or **Deli/Bar Sale** window with department name "SHOP".
Items assigned "SHOP" when using the **Charge/Credit/Discount** buttons in **Register**.

DELI: Items from **Deli/Bar Sale** window with no department name.
Items from **Shop Sale** or **Deli/Bar Sale** window with department name "DELI".
Items assigned "DELI" when using the **Charge/Credit/Discount** buttons in **Register**.

CHRG: Items from **Shop Sale** or **Deli/Bar Sale** window with department name "CHRG".
Items assigned "CHRG" when using the **Charge/Credit/Discount** buttons in **Register**.

CRDT: Items from **Shop Sale** or **Deli/Bar Sale** window with department name "CRDT".
Items assigned "CRDT" when using the **Charge/Credit/Discount** buttons in **Register**.

DISC: Items from **Shop Sale** or **Deli/Bar Sale** window with department name "DISC".
Items assigned "DISC" when using the **Charge/Credit/Discount** buttons in **Register**.

In addition to these six major **Departments**, there are two supporting **Departments**: Tax and Tip. These two cannot be used in the "Department" field of the **Shop Sale** or **Deli/Bar Sale** window, however.

Such separations by departments make reports more readable. The program, however, does not allow you to create additional departments. If you need to further divide your products into more groups (e.g., for reporting, tax or accounting purposes), you can use the "Division" and "Category" fields mentioned in the **Item List** section of this document.

16. Inventory Control

For a business that sells goods, knowing the quantities of goods in store is as important as controlling expenses. Some may see counting store items as an inevitable chore. Other does it regularly in order to minimize lost (due to, for example, stale items). Every store handles inventory differently. For businesses that have limited varieties of products to sell, it may not be a major concern. On the other hand, for stores with items that have slow turn-around rates, knowing the status of the items can be crucial when it comes to making right re-stocking and marketing decisions.

The main purposes of Inventory Control are to:

1. Know the current quantities and values.
2. Check if the items have been consumed in expected quantities.
3. Know when stocks of items are running low.
4. Help make business and management decisions.

The following will explain how this program calculates the inventory and how you can read and use the results.

16.1 Inventory

You may have noticed that there is a "Stock" column in the **Item List** (within the **Shop Sale** or **Deli/Bar Sale** window) and may have been using the values in this stock column to check against your physical inventory. The values in this stock column are being updated in real time by this program. For each item, a single stock value is kept and constantly updated by transactions such as selling, purchasing, voiding and refunding. This value can also change if a user who has access privilege modifies it directly under Modify Mode in **Shop Sale** or **Deli/Bar Sale** window.

The values in this stock column are referred to as "Inventory" in this program. Ideally, we want to make this "Computer Inventory" (a virtual one maintained by the software on the computer) identical to the real "Physical Inventory" so we can rely on the information reported by the software to make decisions and the software can use the data to inform the operator when the stock for any particular item is running low.

Keeping "Computer Inventory" identical to "Physical Inventory" all the time may not be possible, though. For example, you may have broken or stale products that were discarded without any stock adjustment on the software side. Sometimes you give customers freebies and refills without going through the software. Therefore, on a regular basis, you will need to make adjustments so the stocks values in this program reflect the physical ones again.

Although you can make such stock adjustments directly in the **Shop Sale** and **Deli/Bar Sale** windows (via, for example, the Modify Mode), a better way will be explained in later sub-sections.

16.2 Inventory Checkpoints

This program has an "Inventory Checkpoint" feature designed to make inventory control flexible. An inventory "checkpoint" is a previously saved inventory snapshot. Information saved in a checkpoint includes, for each and every item, the opening stock, consumed and supplied quantities, adjustment, the closing stock, and your own remark at the time when this snapshot was taken.

Anytime you do a physical inventory count (even on only a subset of your products), it is recommended that you update the values and save it as a new checkpoint. You can, at a later time, open and review this checkpoint or use it as a basis for further inventory checking purposes. For example, if you have a checkpoint saved last week, you can compare it with the current inventory or use it as the opening stock of the day when calculating the current inventory.

Details for creating and editing a checkpoint will be provided later.

16.3 Inventory Reports

The "Stock" column in the **Shop Sale** or **Deli/Bar Sale** window can provide a quick view of your items' current inventory levels. It does not, however, show you how these stock values were calculated.

For that, you will have to use the **Report** feature and select **Special Reports**. From the upper left corner of the **Special Reports** window, you can then choose **Inventory Detail Summary**. For each item (your product), this **Inventory Detail Summary** report gives you the figures of the opening stock, consumed quantity, supplied quantity and the closing stock.

For each item, the "consumed quantity" includes quantity of sold items and quantity of open table/tab items. It also takes into account the voided items and refunds. The "supplied quantity" is the added quantity received via this program's **Receiving** feature (as explained the **Receiving** section of this document).

The **Inventory Detail Summary** report is similar to a monthly bank statement. In a bank statement, you have an opening balance (opening stock) based on last month's balance (previous checkpoint). You also see series of withdraws (consumed quantity) and deposits (supplied quantity). Based on these, the closing balance (closing stock) is constructed and can be used as next month's opening balance if needed.

Depending on whether a previous checkpoint is available, there are two methods the **Inventory Detail Summary** report can use to display opening and closing stocks:

<u>Non-Checkpoint Method</u>

If you have never created a checkpoint before, this method is used by default. When this method is used in the **Inventory Detail Summary** report, a description near the upper right hand corner indicates that no checkpoint is being used. If this method is not used, you can switch to this method by pressing the **View CP** button and then press the [**Use No Checkpoint**] button.

When Non-Checkpoint Method is used, the current stock values in the "Stock" columns of the **Shop Sale** and **Deli/Bar Sale** windows are used as the closing stocks in the **Inventory Detail Summary** report. Then the opening stocks are calculated retrospectively based on the quantities consumed and supplied today.

Obviously, for any item, if its current stock value in the "Stock" column is not correct, neither its opening stock nor the closing stock will be correct. Therefore this method is not recommended unless you don't have a previously saved checkpoint to start with.

<u>Checkpoint Method</u>

If you know a previously saved checkpoint contains accurate stock values of one particular day, you can use it as a basis to calculate today's stock values.

You can select this method by pressing the **View CP** button, choose a previously saved checkpoint from the list and then press the **Load Checkpoint** button. A description near the upper right hand corner displays the date and time of the checkpoint being used.

If you are not sure whether a checkpoint is the right one to use, you can press the **View CP** button and then press the **View Checkpoint** button to review its values first.

The program uses the Checkpoint Method automatically if a recently saved checkpoint is available. The most recent checkpoint will be loaded. Any checkpoint older than 30 days cannot be used and is deleted automatically.

For each item, when Checkpoint Method is used, the closing stock of the selected checkpoint is used as the opening stock in today's **Inventory Detail Summary** report. Then the closing stock (the current stock) is calculated based on the quantities consumed and supplied since the date of the selected checkpoint.

16.4 Editing and Saving Checkpoints

This sub-section explains how you can create, edit and save a checkpoint that can be used for the purposes described earlier.

If **Inventory Detail Summary** is not already opened, select the **Reports** feature from the program main window and choose **Special Reports**. From the upper left corner of **Special Reports**, choose **Inventory Detail Summary**. As mentioned earlier, the numbers presented in this reports will not be accurate unless it has an accurate opening stock based on an accurate checkpoint or based on accurate values from the Stock" columns of the **Shop Sale** and **Deli/Bar Sale** windows.

If you don't have a good checkpoint saved previously to start with, our recommendation is not to worry about the opening stock in the **Inventory Detail Summary** report for now. Our goal at this point is to make certain stock adjustments (to be explained soon) and, based on such adjustments, to make the closing stock the same or as close to the physical stock as possible.

First press the **Save CP** button. An **Inventory Checkpoint** window will be shown. You can sort this list in different orders by clicking on the title caption of any column. In this window, the "C.Stock" column is the closing stock values copied from the **Inventory Detail Summary** window. To its right, you have two editable columns: the "Modify" column and the "M.Stock" (Modified Stock) column.

If you find any stock value incorrect after performing a physical count, now it's the chance to correct it. You can make stock adjustments by directly placing a new value on either the "Modify" or the "M.Stock" field. The "Remark" and checkbox fields are also editable which allow you to enter your own notes such as whether physical count has been performed or the reason for discrepancy.

If you have lots of items and don't have time to perform all physical counts, you may choose to correct only certain items or certain categories at a time. Once you are satisfied with the new modified inventory, you can press the **Save Checkpoint** button to save it as a new checkpoint. Once saved, the **Inventory Checkpoint** window is automatically closed and the **Inventory Detail Summary** report now displays the corrected stock values.

You may choose to perform additional physical counts later. When you do, this same method can be repeated to create another checkpoint with more up-to-date information.

16.5 Updating Inventory

After a checkpoint is saved, the program will ask if you want to use the corrected stock values in the **Inventory Checkpoint** window to update the values in the Stock" columns of the **Shop Sale** and **Deli/Bar Sale** windows. This "Checkpoint-to-Inventory" update is recommended unless you are still working on more physical counts to achieve a more accurate checkpoint.

If you choose not to do the "Checkpoint-to-Inventory" update, you can do it later by pressing the **Save CP** button and then the [**Checkpoint to Inventory**] button.

16.6 Tracking Consumed Ingredients

As mentioned earlier, your inventory is affected by transactions such as selling, purchasing, voiding, and refunding items. There is one more type of action that can change the inventory: The use of CrossLink Items as ingredients and raw materials, as explained in the **Linking Items** section.

In Special Reports (see the **Reports** section), you can use the **Daily Shift Balance** report and **Daily Consumed Ingredients** report to track the daily usages of ingredient items. For the current inventory of the ingredient items, please refer to earlier discussions about Inventory Reports.

16.7 Direct Inventory Modifications

Via the **More** button within the **Shop Sale** or **Deli/Bar Sale** window, you will find several functions to modify the inventory (the values in the 'Stock" column) directly.

A useful one is the **Batch Modify** feature. If you have to modify or adjust multiple stock values in a regular basis, you can create a **Batch Process** to update them in a just few clicks.

However, the program does not record such direct modifications into its logs. Therefore, they are not recommended as a way to update inventory when you receive incoming items from vendors.

The **Receiving** feature (see the **Receiving** section) is the recommended method to receive incoming items from vendors.

17. Supporting Features

This section describes several features that have not been explained in previous sections.

17.1 Alarm and Memo

You can access the **Alarm/Memo Setup** feature from the program's **Menu Bar** under the **Extra** menu title. There are 50 alarm slots available. Each of them can be designated as a **One-time Alarm** or an **Everyday Alarm**.

To add an alarm message, first select an **Alarm Slot** from the upper left list, adjust the time on the **Alarm Time** section, check the **Everyday** checkbox if it's an **Everyday Alarm**, and press the **Set** button. If you need to change the time, readjust the time and press the **Reset** button. Once these are done, a message box will appear for you to enter the messages.

There are two ways to delete an alarm message. The first way is to completely delete it by pressing the **Purge** button. The second way is to uncheck the checkbox on the left hand side of an alarm slot without deleting its message.

Alarm can be useful as a way to inform the operator about the upcoming events. For example, if your flat rate time ends at a certain time everyday, you can use an **Everyday Alarm** to remind the operator so he/she can pause or inform the flat rate players.

When an alarm goes off, the **Alarm/Memo** window automatically shows up with flashing color, speaker beeps and the pre-set message. You can either close the **Alarm/Memo** window or leave it opened after viewing the message. However, unless you press the **Disable** button, the alarm will keep coming back even if you close it.

If you need to open the **Alarm/Memo** window when it's not shown, there are two ways to access it. The first way is to open it by using **Show Alarm/Memo** from the program's **Menu Bar** under the **Extra** menu title. The second way is to click on the red box that appears on **Status Bar** when any alarm goes off.

The **Alarm/Memo** window is also used by the program to display the **Customer Reminder** messages added by using **Table Timer**'s **Remind** button.

17.2 Employee Time Clock

Any employee (not just the operators and servers who operate this program) can use the **Employee Clocks In/Out** features from the program's **Menu Bar (**under the **Extra** menu title) to record the work hours.

In addition to clocking in and out, an employee can also press the **View** button to view or print a day/week/month summary of his/her clock in and out history

If an employee is not assigned as an operator or server, but still needs to report the work hours, you can use **Operator Password Setup** to set his/her operator type to "Time Clock Only". This employee then won't be able to login as an operator to operate the program, but can still use the **Employee Clocks In/Out** features.

Although **Operator Login** and **Employee Clock In** are two independent functions, the program will automatically bring up the **Employee Clock In** window right after each operator's first Login of the day. This is to ensure that operators don't forget to Clock In. You can disable this by un-checking the

"Remind Employee Clocks In" checkbox in **Master Password Setup**.

The report for **Employee Time Clock** is available from the **Menu Bar** of the **Operator Log** (part of **Reports**). Please refer to the **Reports** section for details.

17.3 Legal Ages

This feature displays two messages related to alcohol and tobacco purchases. If a customer's birthday is on or before the shown date, he or she can purchase the product legally.

17.4 External Programs

This feature allows you to access other programs. If you have a couple of programs that you use frequently, this feature may be more convenient than accessing them from Windows.

17.5 Database Maintenance

This feature has two maintenance functions to be applied to databases used by this program. If you ever encounter error when you open **Shop Sale**, **Deli/Bar Sale**, **Member List** or **Waiting List** window, try the **Repair** function first. The other function, **Compact**, can improve database performance and is recommended if the **Register** seems slower than before.

17.6 Lock Program

An operator can temporarily hide this program by selecting the **Lock Program** feature from the program's **Menu Bar** (under the **Extra** menu title). This feature blocks any access to the program by others (such as customers) if the operator has to be away from the computer. To unlock the program, enter the current operator's username, password or the combination of these two. You can also use a master user's username to unlock.

You can also quit the program to block access, but the **Lock Program** feature is faster than quitting and restarting program.

17.7 On-Screen Keypad

An on-screen keypad can be invoked from many windows within the program for text/number entries. It is especially useful if you are using a touch-screen monitor.

In this program, there is no separate button to bring up this on-screen keypad. Instead, you can click on (or touch) the text description near the entry field to access it. For example, in **Table Timer**, you can click on the "To add a customer" description to access the keypad and use it to enter customer's name.

In the on-screen keypad window, you can press the **Style** button to choose one of several keyboard layout options.

17.8 Function Keys

If you like to customize the keyboard function keys (F1 to F12, excluding F10), select **Function Key Panel** from the program's **Menu Bar** (under the **FKey** menu title) and click on the **Setup** button. You can then make a frequently used feature accessible by one of the keyboard function keys.

You can also leave the **Function Key Panel** on screen and use mouse to access these assigned features. The **Function Key Panel** is resizable and the large buttons can be used easily with a touch-screen monitor.

Some users like to use keyboard whenever possible. If you use a function key to bring up a window, you can use the **Tab**, **Esc**, **Space**, **Enter**, **Arrow**, and **Page Up/Down** keys to navigate the window.

18. More Information

Please send e-mail to support@timemagic.com if you have questions. To order **Pool House Manager** by credit card or PayPal, please visit our website.

The prices for **Pool House Manager (PHM)** are listed as follows:

	PHM Lite	**PHM Pro**	**PHM Lite + Add-in**	**PHM Pro + Add-in**
Single Station	$399	$599	$599	$899
2-Station Network	NA	$899	NA	$1399
3-Station Network	NA	$1099	NA	$1699

- All packages include **Table Timer** and **Member List** features.
- **PHM Lite** can handle up to 12 tables.
- **PHM Pro** can handle up to 99 tables. Please contact us if you have more than 99 tables.
- **PHM Lite + Add-in** includes **PHM Lite** plus the **TouchPad**, **SuperTab** and **Dynamic Pricing** add-in features.
- **PHM Pro + Add-in** includes **PHM Pro** plus the **TouchPad**, **SuperTab** and **Dynamic Pricing** add-in features.
- **SalesMonitor** feature can be added to any package for $100.
- If you need more than 3 stations, please contact us for pricing.

These prices may change without notice. Please visit our web site (www.TimeMagic.com or www.PoolHouseManager.com) for up-to-date prices.

19. Version History

PHM 2.0 introduces many features. Some of them are listed as follows:

1. The **PHM Pro Network Package** features networking capabilities. You can use **PHM** from multiple PCs to access the same **Timer/Shop/Deli/Member/Waiting/Log**... data.
2. Database engine for **Shop/Deli/Member** data for better speed and larger data size.
3. Five selections of table shapes (so 8' pool, 9' pool, dinning ... tables can be easily identified).
4. New **Find Player** feature.
5. Barcode scanner and card reader supports.
6. Send member to **Waiting List**.
7. Member picture and membership expiration date check.
8. The **Shop, Deli** and **Member Windows** are now resizable.
9. Shopping **Basket** to eases shop/food/drink ordering.
10. Cancel **Shop/Deli** items from **Timer/Register/Basket**.
11. Function keys for certain windows.
12. Improved **Table Status Window**.

PHM 2.4 introduces more features. Some of them are listed as follows:

1. Customizable function keys to access frequently used features. These can also cut-down or eliminate mouse usage for those who are used to DOS programs.
2. Large **Function Key Panel**. Great for touch-screen monitor.
3. Hide/Disable Windows 95/98 to block access to other programs and sensitive data.
4. Reminder for each customer to remind him/her that a pre-set playing time is up.
5. Scale icons (from 20% to 500%) inside the **Table Layout Window**.
6. Larger **Quick Table** icons on the **Timer Window**.
7. Adding members directly from the **Timer Window**.
8. Changing customer names.
9. Up to 100 member types.
10. The escape key (**Esc**) to close windows.
11. New **Shop Sale Express** and **Deli/Bar Sale Express** for faster Point of Sale.

PHM 2.5 introduces two new features:

1. For the **Comprehensive Sales Summary**, you can now define up to 10 sets of categories and item codes. Each set has up to 7 categories (or item code). You can choose any set on the fly and the results will be shown on the **Comprehensive Sales Summary** right away. Use **Export Comprehensive Sales Summary** if you want to view the entire 10 category sets (70 categories in all) and the entire 10 code sets (70 codes in all) at once.
2. For the **Comparison Viewer**, you can now define up to 10 sets of categories and item codes. Each set has up to 7 categories (or item code). You can choose any set on the fly and the results will be

shown on the **Comparison Viewer** right away.

PHM 2.6 introduces these new features:

1. Improved receipt printer supports. **PHM** can now print directly to COM (serial) or LPT (parallel) port even without a printer driver.
2. Improved cash drawer supports. In addition to the cash drawers connected to COM or LPT port, a cash drawer connected to the receipt printer (such as the Epson TM or Star SP receipt printers) can also be used.
3. Multiple tax rate support. You can define up to five different taxes, to be used by pool playing charges, shop items and deli/bar items. You can select a tax rate during item checkout, or you can assign one of the five taxes to any item and have it applied to the item automatically during item checkout.
4. Improved departmental sales control. Items from the **SHOP** or **DELI** department can now be marked as Pool Items or others and sold by any of the six departments (**POOL**, **SHOP**, **DELI**, **CHRG**, **CRDT** and **DISC**). From the **Register Window**, you can also add charge/credit/discount to any of the six departments.
5. Pool playing charge can now be rounded off to, rounded up to or rounded to nearest a base unit ranging from 0.05 to 1.00. If you collect tax for the pool playing charge, you can choose to have the rounding occur before or after tax is applied. Access this feature from the **Options** button in the **Timer Window**.
6. Improved **Register Window**. A large panel is added to more clearly display the total amount due. A line near the bottom is added to remind the operator about the last receipt. This line is also used to show the detail description of an item when you click on the item on the receipt list (Version 2.6.1).
7. You can now add guests from the **Member List** and **Waiting List**. A **Member Lookup** feature is also added to the **Waiting List**.
8. Row heights for most windows with data table can now be enlarged. This can make using touch screen monitor easier.
9. Member discount can now be enabled/disabled without having to re-enter the discount rates.

PHM 2.7 introduces these new features:

1. Customer/Member surcharge. Previous versions only allow discounts for members. This new version also allows surcharges.
2. Reporting hourly, daily and monthly pool table charges for each table. You can use TBLx (where x is the table number) as the **Item Code** for the **Comparison Report**. The **Comparison Report** will then show you the hourly, daily and monthly totals of pool charges for this particular table. This can be handy if you want to compare the popularity of different table types. Use **Range** from the menu bar if you want to switch from monthly-daily mode to daily-hourly mode
3. Reporting hourly, daily and monthly pool table charges for each member category. You can use a member category (from the third column of the **Customer/Member List**) as the **Category** for the **Comparison Report**. The **Comparison Report** will then show you the hourly, daily and monthly totals of pool charges for this particular member category. Use **Range** from the menu bar if you want to switch from monthly-daily mode to daily-hourly mode
4. The **History Report** and **Comparison Report** can now report hourly sales for each department and up to 70 selected categories and items. This is useful if you want to find out the peak time of your sales.
5. Member expiration warning can now be enabled or disabled (from the **More** button).
6. Payment and change are now printed to the receipts.

7. The access right to the **Sales Summary** and **Transaction Summary** can be enabled/disabled from the **Operator Password Setup**.
8. To login from the **Operator Login Window**, you can skip the **Username** field and enter the username and password together in the **Password** field. This allows a Fingerprint Recognition System, such as the one from www.digitalpersona.com, or a magnetic card reader to work with **PHM**.
9. Number of rental types is increased to 15. The accumulated rental time for a non-fix rate rental item can now be changed.
10. The default non-member category name (that is, the category name used when you add a player from the **Table Timer** without using the **Customer/Member List**) can now be changed in the **Member Discount/Surcharge Setup** window. The category name will be shown on the "detail description" portion of the receipt and can be used to customize your sales reports (via the **Define Categories and Codes** function).

PHM 2.8 has these new features:

1. Text and numerical keypads for on-screen data entry.
2. Backing up logs to a folder on any floppy disk, hard disk or Zip disk.
3. An operator without voiding right now needs supervisor's authorization password for voiding items.
4. New **TouchPad** Add-In (sold separately).
5. New **SuperTab** Add-In (sold separately).
6. Low stock notification.
7. You can now send items to a table without going to **Timer** to add a customer to that table first. A guest can be added directly from the **Send to Table** window.
8. Version 2.8.6 can output orders and messages to **SalesMonitor** (sold separately). **SalesMonitor** is a separate program that can be used by the manager or the chef to monitor and print the orders automatically from other network PCs.
9. Version 2.8.6 can repair corrupted database (under **Extra** menu title).
10. Version 2.8.6 can compact database to improve access speed (under **Extra** menu title).

PHM 2.9 has these new features:

1. New **Total Worksheet** report (under **Operator Log or Receipt Log**).
2. The **History Report**, **Comparison Report** and **Comprehensive Sales Summary** can now show the quantities of the sales in addition to the dollar amounts of the sales.
3. The **Member Picture** feature is now extended to include both picture and text files. This feature can also be accessed from the **Add Member** window by clicking on the icon in the lower left corner.
4. The **Item Picture** feature is now available for the **Shop Sale**, **Shop Sale Express**, **Deli/Bar Sale**, and **Deli/Bar Sale Express** windows. This feature can be accessed by clicking on the icon in the lower left corner.
5. Version 2.9.2 has a new **Itemized Sales Summary**.
6. Version 2.9.3 can automatically switch the printer for receipt and report printing if you have multiple printers.

PHM 3.0 has these new features:

1. Flat rate now can be either a fix charge or an hourly rate.

2. You can now pause/resume flat rate players.
3. The charge/rate of a flat rate player can be decided on the fly when a player checks in.
4. The charge/rate of a flat rate player can be changed manually at any time.
5. The **Layout Window** now has a status bar showing the numbers of regular rate players, flat rate players and guests, respectively.
6. To give a discount from **the Register Window**, click on an item on the list or the total price box and press the **Discount** button. The original price of the item (or total price) you selected will be automatically entered.

PHM 3.1 has these new features:

1. You can now have up to 20 sets of regular rate schedules. Any table can have its own schedule. You can also use different schedules for special occasions or holidays.
2. The allowed number of operators is now increased from 30 to 100.

PHM 3.2 has these new features:

1. Inventory control for items with recipes, items with multiple prices, combo packages or any item linked to or dependent on inventories of other items.
2. New **Cash Drawer Calculator** (under the **Extra** menu bar).
3. New **Employee Time Clock** (under the **Extra** menu bar). The report is under the **Summary** menu bar of the **Operator Log**.
4. Version 3.2.2 allows rental items to be automatically added to a customer when the customer is added to a table. You can specify the type of customer (regular, flat rate player or guest) to whom the rental items will be added to.
5. Version 3.2.2 allows you to set a "time limit" to any hourly rate rental item. This rental will stop accumulating charges after a pre-set time limit.
6. Version 3.2.4 adds active-row highlighting to some Windows such as **Shop Sale** and **Deli/Bar Sale Windows**.
7. In version 3.2.5, you can bypass the **Operator Login Window** when the program starts. You can choose whether to login automatically as the first master user or as the first operator. Use the **Password Setup** to specify your selection.
8. In version 3.2.5, you can choose to use a smaller version of **Tool Bar**. Use **Customize Tool Bar** from the **Window** menu bar to specify your selection.
9. Version 3.2.6 adds Tool Tips to **Tool Bar**.

PHM 3.3 has these new features:

1. Version 3.3.0 allows one new type of member category called **Star Member**. When you send a star member from the **Customer/Member List** to the **Table Timer Window** as a regular rate player, the original table rate schedule is replaced by a different rate schedule. This new rate schedule can be from any of the 20 pre-defined rate schedules. This feature allows more flexibility in applying member discounts. A star member can have up to 3 different discounts a day and all 7 days can be different.
2. A **Show Member Discount/Surcharge** feature is added to the menu bar under the **Customer** menu title. In previous versions, if an operator wants to find out what percentage discount a particular category of members can have, he/she has to use the **Member Discount/Surcharge Setup** feature under the **Setup** menu title. However, operators often do not have access rights to the setup features.

The **Show Member Discount/Surcharge** feature now allows the operator to see (but not edit) the discount information.

3. Version 3.3.0 allows tracking the total hours a member had played since he/she became a member. A new "Played" column is added to the **Customer/Member List**. The total hours shown in this column can be reset to zero by using the **More** button or by modifying the list directly.
4. A new "Birthday" column is added to the **Customer/Member List**.
5. When using the **Lock Program** function, you can now use current operator's username, password or the combination of these two to unlock. You can also use a master user's username to unlock.
6. When using the **Operator Login** function, you can now bypass the username and use only the password to login. In a multi-operator poolroom, this can speed up the login process. Use the **Password Setup** to specify this option.
7. A new function key (F12) is added to access the **Operator Login** function. In a multi-operator poolroom, this can speed up the login process for those who prefer using keyboard. You can change the default F12 key to a different key by using **Function Key Panel** under the **FKey** menu title.
8. You can reset the "Sold Quantities" in the **Shop Sale** and **Deli/Bar Sale Windows** one category at a time. Previous versions only allow resetting all categories at once.
9. Version 3.3.2 adds support for TW523 light controller support. A serial port interface connector must be used together with the TW523 unit. The speed of CM11A operation is also improved.
10. In version 3.3.2, the **Cash Drawer Calculator** function can now save the total to log and print a screen shot.
11. In version 3.3.3, the **Export Transaction Summary** function is improved to export weekly and monthly summaries and summaries of specified ranges.
12. In version 3.3.3, the **Export Itemized Sales Summary** function is improved to export weekly and monthly summaries and summaries of specified ranges.
13. In version 3.3.4, the **Export Itemized Sales Summary** function is improved to export itemized summary for each and every operator.
14. In version 3.3.4, the maximum number of **CrossLink Items** is increased from 20 to 50.
15. In version 3.3.4, you can re-print the last receipt from the **Option** button in **Register Window**. This is useful if the receipt was not printed correctly (e.g., due to paper jam).
16. A new level of security is added to version 3.3.4. Authorization Passwords cannot be used to login but can be handy in some situations.
17. In version 3.3.5, the Register total is automatically copied to Windows clipboard memory. This can be useful if you need to paste the amount to another program.
18. In version 3.3.7, the **Export Comprehensive Sales Summary** function is improved to export weekly and monthly summaries and summaries of specified ranges.

PHM 3.4 has these new features:

1. Version 3.4.0 is a maintenance release. No new feature is added.
2. New in Version 3.4.1: If you often use keyboard instead of mouse, the F1, F2 and F9 Function Key features are enhanced. Several new features, including pausing/resuming all players of the same table at once, are added to F9.
3. New in Version 3.4.1: You can now select whether the **OK** or **Receipt** button is pressed when you press the Enter key on the keyboard. Use the **Options** button in the **Register Window** to make the selection.
4. New in Version 3.4.1: Pausing and resuming players will now affect the table lights.
5. New in Version 3.4.2: You can send customers and their items from **Table Timer** to **SuperTab** by

clicking on the **Transfer Selected** button while holding down the **Control** key on the keyboard.

6. New in Version 3.4.3: The **Search** feature is no longer disabled when the **Shop Sale**, **Deli/Bar Sale** and **Customer/Member List Windows** are in "Modify" mode.
7. New in Version 3.4.3: In the **Shop Sale Window**, when you send items to the **Basket** while the **Shop Sale Window** is maximized, the **Shop Sale Window** will remain maximized. This new behavior also applies to the **Deli/Bar Sale Window**.
8. New in Version 3.4.3: You can change the sizes of the table icons in the **Table Timer Window**. Use the **Options** button to change icon sizes.

PHM 3.5 has these new features:

1. All windows (except **TouchPad** and **SuperTab**) in this new version can now be operated by using keyboard alone. You can use **Tab**, **Esc**, **Space**, **Enter**, **Arrow**, and **Page Up/Down** keys to navigate a window. For **Table Timer**, **Shop Sale Express** and **Deli/Bar Express Windows**, the **/**, *****, **-**, and **+** keys on the numerical keypad of your keyboard also give you quick access to certain functions. Click on the **H** (or **?**) button in these windows for details.
2. New in Version 3.5.0: In the **Table Layout Window**, you can select whether to use "Single Click" or "Double Click" to open a table. Set up this selection by using the **Options** button.
3. New in Version 3.5.0: About 40 features can be assigned to the F1-F9, F11 and F12 function keys. One of them is the **Show Function List** feature, which can be used to access most features in the program by typing in a number.
4. New in Version 3.5.1: If you choose "Single Click" by using the **Options** button in the **Table Layout Window**, then use single-left click to open **Table Timer** and use single-right click (or single-left click with the **Control** key pressed down) to show the table information on the bottom status bar.
5. New in Version 3.5.2: **Calculator** result is automatically copied to Windows clipboard memory. This can be useful if you need to paste the amount to another window or program.
6. New in Version 3.5.2: If "Minimum Minutes" is selected in **Rate Setup** and a player is transferred to another table with different rate, the program will use rates from both tables to calculate minimum rate.
7. New in Version 3.5.3: In **Table Layout Window**, you can use **Up/Down Arrow** keys and **Page Up/Down** keys to select a table. Then use **Tab** key to select a command button and use **Space** key to activate the command.
8. New in Version 3.5.4: If you purchased **TouchPad**, you can also use it for **Shop Sale** now.
9. New in Version 3.5.4: A new **Legal Age** feature under the **Extra** menu title. You can have a "Legal Age" reminder appear when you move you mouse over certain buttons on various sales windows.
10. New in Version 3.5.5: You can limit the access to playing logs by using authorization passwords.
11. New in Version 3.5.6: In the **Register** window, the **Cash/Credit/Check** selection can be disabled. This is useful if your poolroom accepts cash only. To disable it, press the **Options** button.
12. New in Version 3.5.7: To change customer's name on a tab under **SuperTab**, click on the **Void Selected** button while holding down the **Control** key on the keyboard.
13. New in Version 3.5.8: You can now use light controller connected to COM1 to COM8. The previous versions allow only COM1 to COM4.
14. New in Version 3.5.8: This version has a new **Operator Performance Summary** feature (accessed from **Operator Log**'s **Summary** menu title). It summarizes all transactions for today and reports departmental earnings (Pool, Shop, Deli, … etc.) handled by each and every operator. This feature can be used to view each operator's performances in different departments so far today. If you want to view or print the **Operator Performance Summary** for the entire week or month or a range of

days, use the **Export Operator Performance Summary** feature.

15. New in Version 3.5.8: The **Cash Drawer Calculator** can now report the cash/credit/check earnings and departmental earnings (Pool, Shop, Deli, … etc.) handled by the current operator. This can be used to check against the amounts inside the drawer. The current operator can also use it to view his/her performance so far. Note that only the earnings by the current operator are reported here. To view the earnings by other operators, you need to have the access right to open the **Report/Log Window**.
16. New in Version 3.5.8: You can now limit the amount of credit/discount your operator can give to a customer. To customize the limit, log in as a master user first, press the **Credit** or **Discount** button in the **Register Window**, and then press the **Options** button.
17. New in Version 3.5.9: When the operators work multiple shifts the same day, the **Operator Transaction Summary** and **Operator Performance Summary** can report the combined earning as well as the earning for each and every shift.
18. New in Version 3.5.9: If the current operator has worked multiple shifts today, the **Cash Drawer Calculator** can report the combined earning as well as the earning for each and every shift.
19. New in Version 3.5.9: When printing a receipt, the identical items will now be combined to reduce length of receipt.
20. New in Version 3.5.9: From the **Member Discount/Surcharge Setup**, you can choose whether the discount/surcharge will apply to the minimum charge provided in **Table Rate Setup**.

PHM 3.6 has these new features:

1. New in Version 3.6.0: An option is added to the **Cash Drawer Calculator** to change the details of information shown.
2. New in Version 3.6.0: The "Adding flat rate players" feature can be selectively disabled for any individual operator by using **Operator Password Setup**.
3. New in Version 3.6.1: The **Cash Drawer Calculator** feature is modified to separate total earnings from multiple terminals when the **Pro Network** version is used.
4. Version 3.6.2 is a maintenance release.
5. Version 3.6.3: Double-clicking on the background area of the program main window will bring up the **Table Layout Window**.
6. Version 3.6.4 is a maintenance release.
7. New in Version 3.6.5: On-screen Keypad is added to several windows, including the **Authorization Password** window.

PHM 4.0 has these new features:

1. New in Version 4.0.0 is the **Sub-Register** feature. The **Register** window now has five sub-registers. Each of the sub-registers can hold an individual receipt. You can click on the A, B, C, D and E tabs in the **Register** window to make “active” another or a free (empty) sub-register when the current one is awaiting customer’s payment. Customers and items sent to the **Register** window will then be placed in the active sub-register.
2. New in Version 4.0.0: When sending customers/items from **Table Timer** to **Register**, holding down the **Control** key on the keyboard allows you to choose any of the five sub-registers. It a sub-register is already in use by a customer, names and receipt number will be available here. This is useful if you are adding other customers/items to an existing receipt. You can also send several customers at once and have them placed in separate sub-registers (for multiple receipts). If you press the **Send Selected** or **Send All** button without holding down the **Control** key, customers/items are by default sent to the active sub-register.

3. New in Version 4.0.0: Names of customers are now shown in the upper left corner of a sub-register. If not all names are shown (due to space limitation), you can click on the name field to display more names. This is useful when you are working on several receipts at the same time and need to identify customers/receipts.
4. New in Version 4.0.0: After sending customers/items to **Register**, you can "undo" this action by clicking on the pink **U** button (near upper right corner of the **Timer** window). You must use the feature from the same table where the customers/items were sent. Multiple steps of undo are available as long as no new customer/item is added to or deleted from this table. You can no longer undo the customers/items once the sale is committed (by using the **OK** or **Receipt** button).
5. New in Version 4.0.0: If you purchased the **TouchPad/SuperTab** options, you can customize all category buttons and item buttons in the **TouchPad** window. In the category page, press the **Options** button and check the **Edit button graphics** checkbox. You can then right-click on a button to access the **Button Designer**. Color, alignment, font style and caption of a button can be edited. You can also add your own icon or picture to a button. Color and icons can make buttons easier to identify and can speed up the selling process.
6. New in Version 4.0.0: The **Report** feature is removed from under the **Extra** menu title and now has its own menu title on the menu bar.
7. New in Version 4.0.0: The **Table Usage** feature (under **Report** menu title on the menu bar) allows you to find out the usage hours of any table. You can view the hours by month or by year. The **Cloth Advisor** feature calculates for each table the usage hours between two set dates (date installed and date replaced). If date replaced is not provided, it will calculate the usage hours between date installed and now. It is useful if you are comparing different brands of table fabric.
8. New in Version 4.0.0: The **Recent Receipts** feature allows you to view and print any of the last 100 receipts without using to the password-protected **Receipt Log**. To access this feature, press the **Options** button in the **Register** window and press the **More** button.
9. New in Version 4.0.0: The **Log Viewer** (for **Operator**, **Receipt** and **Playing Logs**) now allows printing the selected (highlighted) portion of the log to either the report printer or receipt printer.
10. New in Version 4.0.0: When using the **Add Charges**, **Credit** and **Discount** features in the **Register** window, category and item codes are now available from the drop-down menus.
11. New in Version 4.0.0: If you purchased the **TouchPad/SuperTab** options, you can hide the main window of the program to create a **TouchPad/SuperTab**-only **Server Station**.
12. Version 4.0.1 is a maintenance release.
13. Version 4.0.2 is a maintenance release.

PHM 4.1 has these new features:

1. Canadian users can now set up multiple tax types (e.g., GST, PST, LST and HST) to appear on receipts. For example, You can use **Tax Script** to have the program automatically apply GST and PST on a particular item and have both GST and PST listed separately on receipts.
2. Canadian daily and monthly tax breakdown can be accessed from the **Show Data in Numbers** feature under **History Report**.
3. New in Version 4.1.1: If you have the **TouchPad** Add-In, you can use the new **Dynamic Pricing Schedule** feature to set up different prices at different days or time for Deli/Bar and Shop items.
4. Version 4.1.2 is a maintenance release.
5. New in Version 4.1.3: Pole displays using "Logic Controls Command Set" and "Logic Controls Pass-Thru Command Set" are supported.
6. Version 4.1.4 is a maintenance release.
7. New in Version 4.1.5: Cash change is displayed in large font after the **OK** or **Receipt** button in the

Register window is pressed.

8. New in Version 4.1.6: Some “common payment” buttons ($5, $10...) are added to the Numerical Keypad window (you can access Numerical Keypad by touching or clicking the word "Payment" on the left of the payment entry field).

9. New in Version 4.1.6: You can supply a command data to be executed automatically when receipt printing is finished. For example, this command data can be used to cut the receipt paper. Press the **M** button in the **Receipt Printer Setup** window to provide this command data. Please refer to your receipt printer manual for available commands and data types.

PHM 4.2 has these new features:

1. New in Version 4.2.0: A numerical keypad is added to the **Send To Table** feature (from **Shop Sale**, **Deli/Bar Sale** and **Customer/Member List Windows**). This can be convenient when used with a touch screen monitor.

2. New in Version 4.2.0: A numerical keypad is added to the **Transfer Table** feature.

3. New in Version 4.2.0: Page Up and Page Down buttons are added to the **Send To Tab** feature (from **TouchPad**). This can be convenient when used with a touch screen monitor.

4. New in Version 4.2.0: Timestamps are added to the **Deli** and **Shop** items in **SuperTab**. Hover the mouse pointer over an item (but don't click), wait about 5 seconds and timestamp and other information will come up. This can be convenient if you want to know how long the customers have been in.

5. New in Version 4.2.1: A new **Export Employee Time Clock Summary** function is added to export daily, weekly and monthly timecard summaries. You can also export summaries from specified day ranges.

6. New in Version 4.2.1: When sending items to **Register** (from **Deli/Bar Sale**, **Shop Sale**, **Deli/Bar Express**, **Shop Express**, **Basket**, **TouchPad** and **SuperTab**), holding down the **Control** key on the keyboard allows you to choose any of the five sub-registers. It a sub-register is already in use by a customer, names and receipt number will be available here. This is useful if you are adding other items to an existing receipt. Without holding down the **Control** key, items are by default sent to the active sub-register. This feature was previously only available from **Table Timer**.

7. New in Version 4.2.1: The **Played** field in **Customer/Member List** window now includes both the total hours and the most recent day this customer played.

8. New in Version 4.2.2: You can now have up to 90 different rental items from **Table Timer**’s **Rental** button.

9. New in Version 4.2.2: You can disable **TouchPad** and **SuperTab**’s “Confirm Send to Register” message from **TouchPad**’s **Options** button.

10. New in Version 4.2.2: In **Deli/Bar Sale** and **Shop Sale** windows, if an item code begins or ends with a “-” sign and the price is left empty, you create an un-priced discount item. When you sell this item, a window will appear for you to enter the discount price. You then enter the price without the need to enter the “-” sign.

11. New in Version 4.2.3: **SalesMonitor** can now monitor items sent directly to **Register**. **SalesMonitor** is a separate program that can be used by the manager or the chef to monitor and print the orders automatically from other network PCs.

12. New in Version 4.2.3: An **External Programs** feature (under **Extra** menu bar title) is added to allow accessing programs you frequently use from within **PHM**.

13. New in Version 4.2.3: Negative stocks are now allowed in Deli/Bar and Shop items. A warning will be displayed when you try to sell an item whose stock quantity is zero, negative or a number you specified.

14. New in Version 4.2.3: The **To Table**, **To Register** and **To Tab** buttons in **TouchPad** and **SuperTab** can now be selectively disabled (from **TouchPad**'s **Options** button).
15. New in Version 4.2.3: The **Add Charges**, **Void**, **Credit**, **Discount** and **Tip** buttons in **Register** can now be selectively disabled (from **Register**'s **Options** button).
16. New in Version 4.2.3: **SuperTab** can now be disabled if not used (from **TouchPad**'s **Options** button).
17. New in Version 4.2.3: From **Operator Password Setup**, you can set the operator type to "Time Clock Only". This employee then won't be able to login as an operator to operate the program, but can still use the **Time Clock** feature.
18. New in Version 4.2.4: More options for **Register** are added (via **Register**'s **Options** button).
19. Version 4.2.5 is a maintenance release.
20. Version 4.2.6 is a maintenance release.
21. Version 4.2.7 is a maintenance release.
22. New in Version 4.2.8: Fonts are made more readable in several areas including **Timer**, **Register** and **Detail Charges**.
23. New in Version 4.2.8: Light controlling is made more reliable in multi-controller settings.
24. New in Version 4.2.9: When sending items from **TouchPad** to **Timer** or **SuperTab**, you can choose to print an item list.
25. New in Version 4.2.9: A compatibility option is added for using cash drawers and pole displays under Windows 2000 and Windows XP.

PHM 4.3 has these new features:

1. Printer and cash drawer supports are enhanced.
2. New in Version 4.3.0: You can disable selected categories and items in **TouchPad** (via **the Edit Button Graphics** feature activated by using the **Options** button). This is useful if, for example, you don't want the waiters to be able to access the beverage selling features.
3. New in Version 4.3.0: Right-clicking on the **Regular Rate**, **Flat Rate** and **Guest** buttons on **Table Timer** gives you another way to check in multiple customers. You can also use Left-Click with the **Control** key held down for the same effect.
4. New in Version 4.3.0: The **Add Customer** window now features quick buttons for adding one to eight customers.
5. New in Version 4.3.0: The master users can now disable/enable the **Performance/Shift Information** in Cash Drawer Calculator.
6. New in Version 4.3.0: In the **Table Timer** window, you can now use the **Paid-By** button to transfer the items to another customer at a different table. Previously, this is possible only for a customer at the same table.
7. New in Version 4.3.0: In the **Table Timer** window, double-clicking on an item or pressing the **Detail** button now shows you the total quantities of this item purchased by this customer and by this table. This is useful if the customer asks about the quantities of certain items they have purchased.
8. New in Version 4.3.0: In the **Register** window, pressing the **Options** button and then the **More** button will bring you a different view of the "Current Receipt". The receipt combines the items of the same kinds. This is useful if the customer asks about the quantities of certain items they have purchased.
9. Version 4.3.1 is a maintenance release.
10. Version 4.3.2 is a maintenance release.

11. Version 4.3.3 is a maintenance release.
12. New in Version 4.3.4: You can disable either **Shop Sale** or **Deli/Bar Sale** in **TouchPad** (via the **Options** button)
13. Version 4.3.5 is a maintenance release.
14. New in Version 4.3.6: Several printing features are improved.

PHM 4.4 has these new features:

1. New in Version 4.4.0: **Comprehensive Sales Summary** now allows you to include or exclude pool charges.
2. New in Version 4.4.0: If you have the Network Edition, **Comprehensive Sales Summary** can now display the earning from all stations or any selected station.
3. New in Version 4.4.0: From **Register** window's **Credit** feature, a new feature to credit all shop and deli/bar items is added. Press the **Options** button (in the **Credit** window) to enable this feature.
4. New in Version 4.4.1: Features to delete certain files are added to **Backup Setup**.
5. New in Version 4.4.1: New printing options are added to improve printer compatibility.
6. New in Version 4.4.1: Operator's names are added to the **Deli** and **Shop** items in **SuperTab**. Hover the mouse pointer over an item (but don't click), wait about 5 seconds and name and other information will come up. This can be convenient if you want to know who sent the items to the customer.
7. Version 4.4.2 is a maintenance release.
8. Version 4.4.3 is a maintenance release.
9. Version 4.4.4 is a maintenance release.
10. Version 4.4.5 improves some messages and colors.
11. Version 4.4.6 is a maintenance release.
12. New in Version 4.4.7: Voiding items from **Table Time**, **Register** or **SuperTab** will leave records in Operator Log.
13. New in Version 4.4.7: Via the **Options** button in **Table Timer**, you can customize the behaviors of the 8-ball and clock icons. For example, "Toggle Special Add/Send Functions" can be useful if you use touch-screen monitor or don't use keyboard.
14. Version 4.4.8 is a maintenance release.

PHM 4.5 has these new features:

1. New in Version 4.5.0: You can selectively hide the **Mbr**, **Regular**, **Flat** and/or **Guest** buttons for each individual table. This can be useful if you have different types of tables. For example, a dinning table needs only the **Guest** button so it's a good idea to hide buttons for other customer types to reduce user mistakes. In **Table Timer**, press the **Options** button to do this.
2. New in Version 4.5.0: A new printout receipt format is added. The **Department** and **Code** fields are replaced by the item's full name. Use **Receipt Printer Setup** to select this option.
3. Version 4.5.0 improves some messages and colors.
4. Version 4.5.1 is a maintenance release.
5. Version 4.5.2 is a maintenance release.
6. New in Version 4.5.3: A new printout receipt format is added. Some old formats are renamed.
7. New in Version 4.5.3: In **Shop Sale** and **Deli/Bar Sale Windows**, if you don't need to track stocks

of certain items, enter “OK” in the **Stock** field and the program will never bother you with low stock warnings.

8. New in Version 4.5.3: Some windows (**Log**, **History**, etc.) are enlarged to fit the entire screen.
9. New in Version 4.5.3: The **Member Discount/Surcharge Window** has a new **Note** field.
10. New in Version 4.5.3: The **Search** feature in **Customer/Member List Windows** is improved. The program starts searching the **ID** and **Name** fields while you are still typing. You can also click on the **Search** button to search other fields.
11. New in Version 4.5.4: Cash drawer operation is improved for compatibility.
12. New in Version 4.5.5: In **Network Setup Window**, the computer’s network name is shown.
13. New in Version 4.5.6: Number of members is show in the **Customer/Member List Window**.
14. New in Version 4.5.6: **TouchPad** has a new “Standby Mode” option. When it is enabled, **TouchPad** will enter “Standby Mode” whenever the operator sends items to **Table Timer** or **SuperTab**. When the program is in use by multiple operators simultaneously, this feature ensures that the next operator won’t forget to enter his/her own username. To enable “Standby Mode” option, press the **Options** button in the **TouchPad Window**.
15. New in Version 4.5.7: A **Delete Operator** button is added to **Operator Password Setup**.
16. Version 4.5.8 is a maintenance release.

PHM 4.6 has these new features:

1. New in Version 4.6.0: Marked-down tables are now hidden in **Table Layout Window**.
2. New in Version 4.6.0: Marked-down tables are now hidden in **Table Timer Window**.
3. New in Version 4.6.0: The function key to manually open cash drawer (F4) can be customized to require password.
4. New in Version 4.6.0: You can send one customer from **Table Timer** to **SuperTab** by Right-Clicking or Ctrl-Clicking on the **Transfer Selected** button. You can also send all customers of a table from **Table Timer** to **SuperTab** by Right-Clicking or Ctrl-Clicking on the **Transfer All** button.
5. New in Version 4.6.1: Some buttons are enlarged.
6. New in Version 4.6.1: A blue dot appears on the selected table in **Table Timer**.
7. New in Version 4.6.2: Colors of some buttons are changed.
8. New in Version 4.6.3: In network version of **PHM**, the **Table Layout Window** and the table icons in **Table Timer Window** are updated more often.
9. New in Version 4.6.4: A new option to operate Pole Display through a printer driver.
10. New in Version 4.6.4: More COM port selections (COM1 to 9) for Pole Display and Cash Drawer.
11. New in Version 4.6.4: Extra information in **Table Timer**’s **Detail** window.
12. New in Version 4.6.4: Previously selected tables will be automatically selected again when sending item to table from **Deli/Bar Sale** and **Shop Sale** windows.
13. New in Version 4.6.5: More printer options are added.
14. New in Version 4.6.6: **Recent Receipt** window now includes more information.
15. New in Version 4.6.6: New credit card software integration option with tip editing capability.
16. Version 4.6.7 is a maintenance release.
17. New in Version 4.6.8: Debit card processing feature is added.
18. New in Version 4.6.9: Additional options are added for rounding up/down receipt total to 0.05.

PHM 4.7 has these new features:

1. New in Version 4.7.0: The style of **History** and **Comparison** reports now reflects the beginning and end of day defined in **Miscellaneously Setup**.
2. New in Version 4.7.0: The user can select an optional discount percentage when sending an open-price item to Register or Table. An open-price item is an item with blank price field.
3. Version 4.7.1 is a maintenance release.

PHM 5.0 has these new features:

1. New in Version 5.0.0: New options to display item code/name (instead of department/code) or just name in **Register**. Press the **Options** button in **Register** to change display type.
2. New in Version 5.0.0: If you have the optional **TouchPad** feature, in both category and item pages, you can customize the sizes and positions of buttons. To do this, press the **Options** button and enable **Edit Mode** first. Then press the "**?**" button for instructions. Once in **Edit Mode**, you can resize any button or drag any button to a new position. You can also make a button invisible (to disable selling that item without needing to delete its record).
3. New in Version 5.0.0: If you have **Network Edition** with **TouchPad**, you can copy customized buttons (graphics, sizes and positions…) from **Network Host** to **Network Terminal**. To do this, press the **Options** button and then press the "**Copy button graphics, sizes and positions from Host computer**" button. This option is only available from a **Network Terminal.**
4. New in Version 5.0.0: **Network Edition** now includes **Automatic Fail-Safe Backup** feature. Once **Automatic Fail-Safe Backup** is enabled, critical files and logs can be maintained on two or more computers. In the event that the **Network Host** fails, a **Network Terminal** can be re-configured to become the new **Network Host** in a few clicks. All settings, open table/tab info and logs will be in place automatically and the business can continue without being interrupted. To enable **Automatic Fail-Safe Backup**, select **Setup** from menu bar and then select **Backup Setup**. This option is only available from a **Network Terminal**.
5. New in Version 5.0.0: In previous versions of **TouchPad**, if the list on the right hand side already contains items, the next item sent to the list will be placed at the bottom of the list. In this new version, you can insert items to any position on the list. This way the add-on ingredients (such as onion, ketchup...) can be placed right below the main item (such as a burger). If later this info is read by kitchen (via printout, **SuperTab** or **SalesMonitor**), it will be easier to tell what items the add-on ingredients are adding to. To do this, select an item on the list, the next item added to the list will be put right below the selected item. To make add-on ingredients even more readable, you can use names such as "--- Onion". The extra "---" can make such items distinguishable among main items on **SuperTab** or **SalesMonitor** window for the kitchen.
6. New in Version 5.0.0: If you don't want the add-on ingredients (such as onion, ketchup...) to appear on receipts, you can use M@ as the first two letters of the code (M@ plus anything). Such items won't appear in **Register** or receipts, but will still show up in **Table Timer**, **SuperTab** and **SalesMonitor**.
7. New in Version 5.0.0: A **Copy Rates** button is added to **Advanced Rate Setup** window.
8. New in Version 5.0.0: When customers are sent to **Register** and a table becomes free, **Waiting List** will automatically come up.
9. New in Version 5.0.0: In **Table Timer**, table icons with paused players are now shown in a different color.
10. New in Version 5.0.0: The last column of **Operator Password Setup** has more selections. You can now assign "**Light Switch Only**" operators who have the access to **Light Switch** but cannot access other features. This is useful for persons in charge of cleaning tables.

11. New in Version 5.0.0: New **Operator Login Time Verification** feature. This feature can be used to restrict individual operator's login to certain time frames. To enable this feature, select **Setup** from menu bar and then select **Advanced Security Setup**. Instruction is available in program. If you have the **Network Edition**, different stations can have different settings.
12. New in Version 5.0.0: New options to display an **Operator Reminder** when a pre-set maximum pool charge is reached. Press the **Remind** button in **Table Timer** to do this. You can also elect to have the program automatically "**Pause All Players**" of that table (and turn its lights off) when the pre-set pool charge or pre-set time is reached.
13. New in Version 5.0.0: In **Table Timer**'s **Reminder** feature, a **Register Message** can be set up to remind the operator to return a player's deposit or ID at checkout time.
14. New in Version 5.0.0: New options to "**Pause all player and turn off all table lights**" at pre-set close time. This can be useful if your local regulation doesn't permit business to stay open after a certain hour. This can be set up from **Advanced Security Setup**. For example, if the time is set to 02:30, then at 2:30 AM, the program will pause all players from table 1 to the last table. Lights will be turned off one by one as a result. Program has to be running for this to work. If program is not running, but is started within 10 minutes of the pre-set time (i.e., before 2:40 AM), it will still work. After players are paused, you can still resume them and the program will not re-pause them (unless you quit and restart the program within 10 minutes of the pre-set time).
15. New in Version 5.0.0: In **Table Timer**, you can change the action of the **Pause** button to "**Always Pause the entire table**". To enable this, use the **Options** button in **Table Timer** and then enable **Always Pause the entire table**. Once this is enabled, pausing one player will cause all players at the same table to be paused and the table lights to be turned off.
16. New in Version 5.0.0: Visual feedback of added items is displayed on the title bar of **TouchPad**. This can be helpful for the operator to make sure the correct numbers of items are added to the list.
17. New in Version 5.0.0: Any **Deli** and **Shop** Item in **Table Timer** or **SuperTab** now includes extra information such as time when item was added, tracking number, name of the operator who added the item and station (in **Network Edition**) that added the item. To view this information **in Table Timer**, double-click on that item in **Timer**'s List. To view it in **SuperTab**, hover the mouse pointer over that item (but don't click), wait about 5 seconds and the information will come up. This information can be useful when you have to correct mistakes after discovering that wrong items have been sent to wrong table or tab. After the items are paid for, same information will be recorded in **Receipt Log**. If you have the optional **SalesMonitor** program, this information is also available in it.
18. New in Version 5.0.0: A new option to disable multiple sub-registers. To do this, press **Register**'s **Options** button.
19. New in Version 5.0.0: If you have the **Network Edition**, all stations can share the same light controller attached to one of the stations. This feature is useful if some stations at certain area of the building cannot provide clear and strong light control signals due to interference. Use **Light Control Setup** to select this option.
20. New in Version 5.0.0: **Table Status** window now shows the open-table pool charge for each table. You can access **Table Status** window by pressing the little green icon on bottom status bar.
21. New in Version 5.0.0: In **SuperTab**, you can bring items back from **Register** if those items are still in **Register**. Select the Tab that the items were originally in, press the **Special** button and then press the **Undo Sent** button.
22. New in Version 5.0.0: In **SuperTab**, you can select some or all items in a Tab and then transfer them to another Tab or send them to **Register**. Press the **Special** button to access this feature.
23. New in Version 5.0.0: In **SuperTab**, you can change name of a Tab. Press the **Special** button to access this feature.
24. New in Version 5.0.0: New **Inventory Restocking** features. If you have regular incoming shipments, you can create a **Batch Process** to update stocks of multiple items in a few clicks. To do

this, select **Extra** from menu bar and then select **Inventory Restocking**.

25. New in Version 5.0.0: In **Table Timer**'s **Detail Window**, you can select some or all items for one customer and transfer them to another customer/table or send them to **Register**. In **Table Timer**, press the **Detail** button and then use the **Send Selected** or **Paid By** button.
26. Version 5.0.1 is a maintenance release.
27. New in Version 5.0.2: A Touch-Screen Friendly option is added to the **Register**. Various buttons in **Register** can have larger sizes. To enable this, press the **Options** button in **Register**.
28. New in Version 5.0.2: A **Show Basket** feature is added to the program **Menu Bar** (under **Sale**).
29. New in Version 5.0.2: A **Register Options** feature is added to the program **Menu Bar** (under **Setup**). You can access the same feature by pressing the **Options** button in **Register**.

PHM 5.1 has these new features:

1. New in Version 5.1.0: The **Find Customer** feature now includes active tabs from **SuperTab**. For each tab, both operator and customer names are listed. To access the **Find Customer** feature from **TouchPad** or **SuperTab**, press the F11 key on the keyboard.
2. New in Version 5.1.0: Items voided in the **Register** window no longer show up on printed receipts. The records saved in Receipt Logs still keep the info of voided items, however.
3. New in Version 5.1.0: Fonts in titles of tabs in **SuperTab** are made larger and easier to read.
4. Version 5.1.1 is a maintenance release.
5. New in Version 5.1.2: You can create a Register Message for all customers. This message will be displayed every time one or more customers are sent to **Register** from **Table Timer**. To create a message for one particular customer, use the **Remind** button in **Table Timer** instead.
6. Version 5.1.3 is a maintenance release.
7. New in Version 5.1.4: Debit card processing feature is improved.
8. New in Version 5.1.4: Change amount has different color in **Register** window.
9. New in Version 5.1.5: New option to open the drawer with or without password. Use the F4 key under master login to configure this.
10. New in Version 5.1.5: New option for voiding items with or without password in **SuperTab**. Use the **Options** button in **TouchPad** to configure this.
11. Version 5.1.6 is a maintenance release.
12. Version 5.1.7 is a maintenance release.

PHM 5.2 has these new features:

1. New in Version 5.2.0: Table Timer can now print a preview check/receipt of the current charges, including table fee and item purchases. Right-click (or Left-click with keyboard's Control key held down) on one of the two "Send...To Register" buttons to access this feature. This is useful if the customer wants to know the current charges but is not ready to check out.
2. New in Version 5.2.0: Light Control Setup has a new option that allows user-supplied codes to be used to turn on/off lights. This can be useful if your light control hardware has programmable settings.
3. Version 5.2.1 is a maintenance release.
4. New in Version 5.2.2: Some password screens are now compatible with the fingerprint reader from Microsoft.

5. New in Version 5.2.3: Data access speed over the network is improved for the Network Edition.
6. New in Version 5.2.3: Credit card receipts now include cardholder's names.
7. Version 5.2.4 is a maintenance release.
8. New in Version 5.2.5: In **Register**, a new **Split** feature can be used when two customers are paying for the same receipt or when a customer is paying with multiple types of payments (e.g., cash + credit). Press the **Options** button to access this feature.
9. New in Version 5.2.6: Several improvements on integrated credit card features.
10. Version 5.2.7 is a maintenance release.
11. New in Version 5.2.8: Extra information in **Recent Receipt** window and receipt printout for integrated credit card features.
12. Version 5.2.9 is a maintenance release.

PHM 5.3 has these new features:

1. New in Version 5.3.0: **Register** speed is improved when large numbers of items are sent to it.
2. New in Version 5.3.0: Improved **Timer** operations when hard disk or network becomes busy.
3. New in Version 5.3.0: Improved backup features. If you use the fail-safe backup feature, both Host and Terminal need to be configured to turn on this feature.
4. New in Version 5.3.0: In **Waiting List** window, user can choose whether the **Waiting List** will come up automatically when a table becomes free.
5. New in Version 5.3.0: Tip Confirmation will be shown when the user enters a tip but then presses the **Cancel** button.
6. New in Version 5.3.0: Number of Tabs shown in the **Send to SuperTab** window can be configured. Log in as a master user and press the **M** button in the upper right corner of the **Send to SuperTab** window to do this.
7. New in Version 5.3.0: Color changes in the **Send to SuperTab** window.
8. New in Version 5.3.0: A new **Debit Cash Back** button is added if you have the Integrated Credit/Debit Card Processing feature. In the processing window, press the **Options** button and then the **Debit Cash Back Setup** button for more options.
9. New in Version 5.3.0: In the Integrated Credit/Debit Card Processing window, clicking on the text description on the left side of an entry box will bring up an on-screen keypad. This is useful if you use a touch screen monitor.
10. New in Version 5.3.0: In the Integrated Credit/Debit Card Processing window, you can choose to print a receipt when a pre-authorized transaction is forced. Press the **Options** button to do this.
11. New in Version 5.3.0: In the Integrated Credit/Debit Card Processing window, you can choose to have the **Approval** window closed automatically. Press the **Options** button to do this.
12. New in Version 5.3.0: For Integrated Credit/Debit Card Processing, on-screen messages are added to remind the operator when there are pre-authorized transactions waiting to be forced. When force transactions are needed, the **More** button in **Register** begins to flash. The bottom status bar of the main program also begins to flash. The operator needs to press the **More** button and open the **Recent Receipts** window to force the pre-authorized transactions the same day as soon as possible. If a pre-authorized transaction expires and cannot be forced, the operator can press the small red **C** button in the **Recent Receipts** window to delete it.
13. New in Version 5.3.1: If you have the Integrated Credit/Debit Card Processing feature, the positions of some buttons in **Register** window are adjusted.
14. Version 5.3.2 is a maintenance release.

15. New in Version 5.3.3: Only master users are allowed to delete expired pre-authorized transactions.
16. New in Version 5.3.3: User is informed when two networked stations both select and attempt to add items to the same empty Tab.
17. Version 5.3.4 is a maintenance release.
18. New in Version 5.3.5: In the Integrated Credit/Debit Card Processing window, you can choose to disable the debit card feature. Press the **Options** button to do this.
19. New in Version 5.3.5: For pre-authorized transactions in Integrated Credit/Debit Card Processing, a confirmation message is shown if the same card has been used for the same amount.
20. New in Version 5.3.5: **Debit Cash Back Limit** can be set if you have the Integrated Credit/Debit Card Processing feature. In the processing window, press the **Options** button and then the **Debit Cash Back Setup** button to do this.
21. Version 5.3.6 is a maintenance release.
22. Version 5.3.7 is a maintenance release.
23. Version 5.3.8 is a maintenance release.

PHM 5.4 has these new features:

1. New in Version 5.4.0: Two-line support is added for certain pole displays. Use **Pole Display Setup** to configure this. When two-line mode is enabled, one line is used to display name and price of the last rung-in item. The other is used to display total amount.
2. New in Version 5.4.0: After finalizing a sale, pole display will show payment change.
3. New in Version 5.4.0: When Two-line mode is enabled, pole display will show item's name and price when user selects an item in **Register**.
4. New in Version 5.4.0: You can decide how long the result remains displayed on pole display after the transaction.
5. New in Version 5.4.0: When an item is sent to **Basket**, pole display will show item's name and price. Use **Pole Display Setup** to enable this.
6. New in Version 5.4.0: When an item is sent to **TouchPad** list, pole display will show item's name and price. Use **Pole Display Setup** to enable this.
7. New in Version 5.4.0: By default, Lights of a table are turned off when all players at that table are paused. You can change it to keep table lights on when players are paused. To do this, log in as a master user and press the **Options** button in **Table Timer**.
8. New in Version 5.4.0: If you have the Integrated Credit/Debit Card Processing feature, you can access the new **Credit/Debit Card Processing Summary** from the menu bar of **Operator** or **Receipt Log**.
9. New in Version 5.4.0: In **Log Viewer**, you can click on the "day of week" field to bring up a calendar style day selector.
10. Version 5.4.1 is a maintenance release.
11. New in Version 5.4.2: In **Table Timer's Check Preview** feature, the printed preview check now has a line to indicate that it's not an actual receipt.
12. New in Version 5.4.3: In the Integrated Credit/Debit Card Processing window, you can choose to use a card reader that reads only Track 2. Press the **Options** button to do this.
13. New in Version 5.4.3: You can decide whether the cash drawer is opened after or before the receipt is printed. Use the **Cash Drawer Setup** to select this option.
14. Version 5.4.4 is a maintenance release.

15. New in Version 5.4.5: Password verification can be added to the **Transfer** feature in **SuperTab**. To enable this, log in as a master user and press the **Options** button in **TouchPad**.
16. New in Version 5.4.6: In **Cash Drawer Calculator**, you can use keyboard's Enter and Up/Down Arrow keys to navigate the entry fields.
17. Version 5.4.7 is a maintenance release.
18. New in Version 5.4.8: Right-clicking on the **Basket** button in **Shop Sale** or **Deli/Bar Sale** window will bring up the **Basket** window. You can also use Left-Click with the **Control** key held down for the same effect.
19. New in Version 5.4.8: When **Table Timer** is enlarged via the **Options** button, certain buttons in it are also made larger.
20. New in Version 5.4.8: Buttons in **Waiting List** are made larger.
21. New in Version 5.4.8: Voiding actions from **Basket** and **TouchPad** are now recorded in **Operator Log**.
22. New in Version 5.4.8: All voiding actions (from **Register**, **Timer**, **Basket**, **SuperTab** and **TouchPad**) will be recorded with more information in **Operator Log** now.

PHM 5.5 has these new features:

1. New in Version 5.5.0: The **Options** buttons in **Table Layout**, **Table Timer**, **Register** and **TouchPad** can be disabled now. From **Operator Password Setup**, press the **More** button to do this.
2. New in Version 5.5.0: When the customer is a member, the **Details** window (via the **Details** button in **Table Timer**) displays mender ID and category on the right hand side of the window (previously only on title bar).
3. New in Version 5.5.0: If you enable the "Enter Standby Mode…" option (via **Options** button in **TouchPad**), the program will automatically switch back to **TouchPad** after the next operator logs in.
4. New in Version 5.5.1: If you have the **Network Edition**, a "Browse and select folder" button is added to the **Network Setup** window.
5. New in Version 5.5.1: If you have the **Network Edition**, editing in **Deli/Bar Sale**, **Shop Sale** and **Customer/Member List Windows** is now allowed when the user logs in as a master user.
6. New in Version 5.5.2: You can now adjust left margin of receipt printout from **Receipt Printer Setup**. This setting doesn't affect left margins for headers and footers (You can add space characters in header/footer settings for the same effect).
7. New in Version 5.5.2: In **Edit CrossLink** window, a **Get** button is provided to obtain Codes from a list.
8. New in Version 5.5.2: In Report's **Define Categories and Codes** window, buttons are provided to obtain Categories and Codes from a list.
9. New in Version 5.5.2: In **Inventory Restocking** window, a **Get** button is provided to obtain Codes from a list.
10. New in Version 5.5.3: Several font and interface adjustments.
11. New in Version 5.5.4: In **Table Timer**, a new option is added to bring up the keypad (for easier touch screen name entry) automatically if the user doesn't enter the customer's name in the name field. . From **Table Timer**, press the **Options** button and check the "Bring up Keypad…" option to enable this.
12. New in Version 5.5.4: A button is added to '**Send To Tab**" window for easier touch screen name entry.

13. Version 5.5.5 is a maintenance release.
14. New in Version 5.5.6: All voiding actions (from **Register**, **Timer**, **Basket**, **SuperTab** and **TouchPad**) will be recorded with more information in **Operator Log**.
15. New in Version 5.5.6: Support for another type of light controller, the CM17A FireCracker model, is added.
16. New in Version 5.5.6: When the customer's name is edited in the name field of **SuperTab**'s Special Function window, the **Change Name** button doesn't need to be pressed. The name will be automatically changed when the Special Function window is closed.
17. New in Version 5.5.7: Color and font changes in various places.
18. New in Version 5.5.8: **Calculator** is now larger and easier to use with a touch screen monitor.
19. New in Version 5.5.8: A **Register** button is added to **Calculator**. It can be used to send the displayed or calculated value to the payment field in **Register** window.
20. New in Version 5.5.9: Changing tax in Tax Selector can be disabled in **TouchPad**. Press the **Options** button to in **TouchPad** to do this. This is useful if you don't want the user to accidentally change the tax rate. For more options about tax rate, please read the info about Tax Script in this manual.

PHM 5.6 has these new features:

1. New in Version 5.6.0: Color and font changes in various places.
2. New in Version 5.6.1: A new **Wait List** button is available in the **Send to SuperTab** window when you send items to an empty tab in **SuperTab**. This allows you to move a customer's name from the waiting list to a new tab.
3. New in Version 5.6.1: The **M** button in the **Send to SuperTab** window is no longer visible unless you log in as a master user.
4. New in Version 5.6.2: A new option is added in **Light Switches** feature to disable individual table selection.
5. New in Version 5.6.2: A new printing option for receipt itemization is added if you have the Integrated Credit/Debit Card Processing feature. In the processing window, press the **Options** button to set up this.
6. Version 5.6.3 is a maintenance release.
7. New in Version 5.6.4: **Cash Drawer Calculator** can also be accessed as **Shift Summary** from the **Menu Bar** under **Report**.
8. Version 5.6.5 is a maintenance release.
9. New in Version 5.6.6: **Find Customer** feature is enhanced.
10. New in Version 5.6.6: If you have the Integrated Credit/Debit Card Processing feature, you can access the new **Export Credit/Debit Card Processing Summary** from the menu bar of **Operator** or **Receipt Log**. This feature can combine multiple days of credit card sales records into one report.
11. Version 5.6.7 is a maintenance release.

PHM 6.0 has these new features:

1. New in Version 6.0.0: New "Image" option for **Table Layout** window. With it, you can use your own pictures and photos to represent tables. Your package may have included some sample pictures. If not, you can contact us to obtain them. To use this option, press the **Image** button in **Table Layout Setup**.

2. New in Version 6.0.0: A new "Resizable" style of the **Table Timer** is added. This style is more flexible if you use a touch-screen monitor and need to customize the **Table Timer** to make buttons larger.
3. New in Version 6.0.0: The graphics of the small status icons displayed in **Table Layout** window are improved.
4. New in Version 6.0.0: New **Icon Sets** feature can be used to customize the **Tool Bar**. This feature requires external icon data files placed in the "Themes" folder located in the same place where this program is installed. If you don't see the options of **Icon Sets** under the **Window** menu title of the program's **Menu Bar**, you can contact us to obtain the icon data files.
5. New in Version 6.0.0: The buttons on **Tool Bar** can be set to "Flat" style in additional to the original "Button" style.
6. New in Version 6.0.0: The Pro version and the Network version can now handle up to 99 tables. Please contact us if you have more than 99 tables.
7. New in Version 6.0.0: On-screen keypad for text entry now has more layout styles, such as QWERTY and All-Caps.
8. New in Version 6.0.0: For each item in **Item List** (**Shop Sale** or **Deli/Bar Sale** window), you can bring up an **Item Details** window by pressing the icon in the lower left corner.
9. New in Version 6.0.0: Each item in **Item List** has a new Item Type data field. It is used to set up special items such as coupons and alias items.
10. New in Version 6.0.0: Each item in **Item List** has a new Tax data field. You can use it to customize individual item's tax rate. The old Tax Script method can still be used.
11. New in Version 6.0.0: Each item in **Item List** has a new Low Stock Notification data field. You can use it to setup a Low Stock Notification (LSN) number so the program can give you a warning when the current stock is less than this number. The old LSN Script method can still be used.
12. New in Version 6.0.0: A new Function data field is added in **Item List**. This is used to save information for special items.
13. New in Version 6.0.0: Each item in **Item List** has a new Department data field. You can use it to customize individual item's department setting. The old Department Script method can still be used.
14. New in Version 6.0.0: Product photo can be displayed in the **Item Details** window.
15. New in Version 6.0.0: A new **Receiving** feature is added to receive items purchased from the vendors. The inventory is updated automatically when this feature is used. The **Receiving** feature can be accessed from the **Menu Bar** under **Sale**.
16. New in Version 6.0.0: You can use the new **Receiving** feature to handle recurring shipments.
17. New in Version 6.0.0: Each item in **Item List** has the new Cost and Markup data fields. The **Receiving** feature uses these two data fields to calculate prices of items purchased from vendors.
18. New in Version 6.0.0: A new Note data field is added in **Item List**. This Note entry can be used in the new **Receiving** feature as one of the sorting/search criteria.
19. New in Version 6.0.0: A **Vendor List** is added. This feature can be accessed from the **Menu Bar** under **Sale**, or from within the **Receiving** window.
20. New in Version 6.0.0: A **Purchase Order** feature is added as part of the **Receiving** feature.
21. New in Version 6.0.0: A **Purchase Log** feature is added to display records of items purchased from vendors. This feature can be accessed from the **Menu Bar** under **Report**.
22. New in Version 6.0.0: You can create "Smart Coupon" items in **Item List**. Such items will show up in the **Coupon** list and in several special reports. Types of Smart Coupons include table/service time with pre-set maximum free minutes, table/service time with a pre-set maximum dollar amount, and item purchase with a pre-set percentage discount.
23. New in Version 6.0.0: You can create "Adjustment" items in **Item List**. Such items will show up in

the **Adjustment** window and in several special reports.

24. New in Version 6.0.0: You can create “Payout” items in **Item List**. Such items will show up in the **Payout** window and in several special reports.
25. New in Version 6.0.0: You can create “Alias” items in **Item List**. Using alias allows the same product to show up in two or more places. For example, if a particular drink is popular, you can create an alias for this drink and have it appear in the “Popular” page within the **TouchPad** window for quicker sell. Another use of alias is to sell a product that has multiple revisions with different barcodes.
26. New in Version 6.0.0: You can create “Prepaid” items in **Item List**. Selling such items to a member will add certain credits to the member’s record. Such credits can then be redeemed in the future.
27. New in Version 6.0.0: You can create “Modifier” items in **Item List**. If you don’t want an add-on ingredient (such as onion or ketchup) to appear on receipts, you can designate it as a modifier item. Such items won’t appear in **Register** or receipts, but will still show up in **Table Timer**, **SuperTab** and **SalesMonitor**.
28. New in Version 6.0.0: You can create “Information” items in **Item List**. Information items will appear in both **Register** and receipt, but will not have a price field. This is useful if you want to add extra information or messages to the receipt.
29. New in Version 6.0.0: In the **Dynamic Pricing Schedule** window, new “Group Pricing” and “Extra Member/Item Verifications” settings are added. By using combinations of these new settings with the “Time-Dependent Pricing” settings, you can create promotional programs such as “Happy Hours”, “Buy-2-Get-1-Free” and “Member Coupons” which can be helpful for your business to become more competitive.
30. New in Version 6.0.0: New settings in the **Dynamic Pricing Schedule** allow you to create items that are discounted only when they are purchased by certain customers or purchased together with certain items.
31. New in Version 6.0.0: New settings in the **Dynamic Pricing Schedule** allow you to create coupons that are redeemable only when they are redeemed by certain customers or purchased together with certain items.
32. New in Version 6.0.0: New type of “CrossLink” item is added to allow more options in creating combo items. Please search the team “Combo” in program documentation for more information.
33. New in Version 6.0.0: In **Register** window, a new **Coupon** button (**C** button) is added to access the items configured as “Coupon” items.
34. New in Version 6.0.0: In **Register** window, a new **Adjustment/Payout** button (**A** button) is added to access the items configured as “Adjustment” items and “Adjustment” items.
35. New in Version 6.0.0: In **Register** window, a new **Payout** button (**R** button) is added to do refunds. The **Refund** feature is used when the sale had been finalized (that is, a receipt has been created and given). If the sale has not been finalized and the item is still in **Register List**, you can use the **Void** button instead.
36. New in Version 6.0.0: In **Register** window, a new **More** button is added to access additional features such as “Print Recent Receipts”, “Print Last Receipt” and “Split Receipt”.
37. New in Version 6.0.0: VAT and other tax options are added, If your local regulations require you to combine each individual item’s tax with its price (e.g., VAT), you can use the **More** button for extra configurations. The word “Tax” shown on receipts can be changed to something else, such as “VAT”.
38. New in Version 6.0.0: The new **Extended Payment Types** feature can be used if the three basic payment types (**Cash**, **Credit** and **Check**) are not enough for you. You can configure up to 30 payment methods. To do this, select **Extended Payment Types** from the **Menu Bar** under **Setup**. This feature can also be used for tracking wasted or destroyed products, as well as the For-Store-Use items.

39. New in Version 6.0.0: Via the **More** button in **Shop Sale** or **Deli/Bar Sale** window, you can use the **Batch Modify** feature to modify inventory. This method can be used if you decide not to use the more comprehensive **Receiving** feature.
40. New in Version 6.0.0: More features can be assigned to function keys. To customize function keys, use the **Function Key Panel** feature available from the program's **Menu Bar** under the **FKey** menu title.
41. New in Version 6.0.0: An **Integrated Security** feature is added to allow the program to operate under Restricted Windows Account. To configure it, use the **Advanced Security Setup** feature.
42. New in Version 6.0.0: If you have several operators (e.g., cashiers) using the same station at the same time and you want this program to record **Register** transactions handled by each individual operator, you can enable the **Auto-Stand By** option in **Master Password Setup**. When this option is enabled, the program enters "Standby Mode" automatically after each **Register** transaction. This way, the next operator won't forget to login with his/her own password.
43. New in Version 6.0.0: A "Touch screen friendly" option is available from within **Master Password Setup**. When this option enabled, several styles of login window with different on-screen keypad layout will be available.
44. New in Version 6.0.0: **Multiple Cash Drawer** support is added. You can connect up to five cash drawers to your computer. The **Multi-drawer Operator Assignment** button in **Cash Drawer Setup** allows you to assign drawers to certain operators at different time during the week.
45. New in Version 6.0.0: If the computer is accidentally turned off while the operator is preparing a receipt in **Register**, the program will recover the receipt when it's restarted.
46. New in Version 6.0.0: If the computer is accidentally turned off while the operator is preparing items in the **Basket** window, the program will recover the items when it's restarted.
47. New in Version 6.0.0: If the computer is accidentally turned off while the operator is preparing items in the **TouchPad** window, the program will recover the items when it's restarted.
48. New in Version 6.0.0: In **SuperTab**, you can find the name of the wait staff member (or operator) who first created the tab. To do that, press the **Special** button. This information can be useful in avoiding confusion when you have multiple wait staff members handling multiple tabs at the same time.
49. New in Version 6.0.0: A new "Memo" field is added to each tab in **SuperTab**. To access it, press the **Special** button.
50. New in Version 6.0.0: The **Select Tab** window is improved to include extra information. This reduces the risk of choosing a wrong tab.
51. New in Version 6.0.0: In **SuperTab**, you can "Link" a tab to a customer at a Table in **Table Timer**. This link serves as a reminder so later operator won't forget to send charges from both places to **Register**. To create such a link, press the **To Table** button.
52. New in Version 6.0.0: A **Find** button is added in **SuperTab**,
53. New in Version 6.0.0: In **TouchPad**, background of a **Category Menu** or an **Item Page** can now be customized.
54. New in Version 6.0.0: In **TouchPad**, buttons for switching categories (the lower portion) can now be customized. The background surrounding these buttons can also be customized.
55. New in Version 6.0.0: When customizing buttons in **TouchPad**, you can use the "Button Position and Size" options to align buttons.
56. New in Version 6.0.0: A **Quantity Modifier** feature is added in **TouchPad**. In **TouchPad**, first send the item to the list (or highlight it if it's already there), press "Q" or "-" key on keyboard to invoke the Quantity Modifier, and then use mouse or keyboard arrow keys to change quantity.
57. New in Version 6.0.0: **TouchPad** and **SuperTab** now have the same function keys as those available under the main program window.

58. New in Version 6.0.0: The **Check Preview** feature in **SuperTab** is enhanced to reflect discounts from special coupon items and for items with group pricing rules.
59. New in Version 6.0.0: In **SuperTab**, the buttons near the bottom are used to switch to other pages. Each of these buttons will now display a red dot if the associate tab is not empty.
60. New in Version 6.0.0: In the **Member Discount/Surcharge Setup** window, a new option is added to let the program automatically change the member category when a member reaches certain age. For example, if your senior members enjoy lower rate than regular members, you can configure the program to change any regular member to a senior member when the member becomes 55.
61. New in Version 6.0.0: For each member in **Customer/Member List** window, you can bring up a **Member Management** window by pressing the icon in the lower left corner. Instead of entering data directly in the spreadsheet-like **Customer/Member List**, you can now use the **Member Management** window to create and edit member data.
62. New in Version 6.0.0: A new "Member Free Hour Earning Program" feature is added. This feature can be enabled from the **Options** button in the **Member Management** window. If this feature is enabled, the program will automatically give the members free redeemable **Table Timer** service/playing hours based on the service/playing time they already purchased.
63. New in Version 6.0.0: A new "Member Prepaid Program" feature is added. The Member Prepaid Program allows you to accept and record payments from your customers before the services are rendered or before the items are purchased. For example, a customer can spend $100 now to buy a prepaid item. This prepaid item is not a tangible product but it gives this customer $120 worth of credit for future services (table time) and/or future purchases.
64. New in Version 6.0.0: From within the **Member Management** window, you can give member free hour by using the **Referring New Member** button (**R** button).
65. New in Version 6.0.0: From within the **Member Management** window, you can enter notes by using the **Note** button (**N** button).
66. New in Version 6.0.0: Member photo can be displayed in the **Member Management** window.
67. New in Version 6.0.0: New promotion-related member data fields, such as Prepaid Hours, Earned Hours and Purchase History, are added in **Customer/Member List**.
68. New in Version 6.0.0: Customer/Member name is separated into two fields: First Name and Last Name.
69. New in Version 6.0.0: New address-related member data fields, such as Apartment, City, State and Zip Code, are added in **Customer/Member List**.
70. New in Version 6.0.0: Gender information is added in **Customer/Member List**. This can be use for marketing purposes.
71. New in Version 6.0.0: E-mail address field is added in **Customer/Member List**. This can be use for marketing purposes.
72. New in Version 6.0.0: Additional data fields, such as Company, Company Phone, Fax and Serial Number, are added in **Customer/Member List**.
73. New in Version 6.0.0: For each member in **Customer/Member List** window, you can enter an optional memo (to the Memo field). When this memo is provided, the program will display it as a reminder when the operator tries to send this member to a table.
74. New in Version 6.0.0: Members can be sent to **Register** to create member tags. When member tags appear in **Register**, they can affect discount rates of certain items according to the rules you set. To create member tags, you can use the new **Register** button in **Customer/Member List** window.
75. New in Version 6.0.0: Members can be sent to tabs in **SuperTab**. Later when the tab is sent to **Register**, such member information will become member tags and will be used by the program to determine discount rates of certain items according to the rules you set.
76. New in Version 6.0.0: To send members to **Table Timer**, **SuperTab**, **Register** or **Waiting List**,

you can use the **Customer/Member List Express** feature available from the program's **Menu Bar** under the **Customer** menu title.

77. New in Version 6.0.0: Within the **Customer/Member List Express** window, you can press the picture button (near the lower left corner) to bring up the **Member Management** window.
78. New in Version 6.0.0: From the **Shift Summary** window or **Cash Drawer Calculator** window, you can send the counted amount to the payment field in **Register** window by clicking on the picture button near the lower left corner.
79. New in Version 6.0.0: New **X-Out** and **Z-Out** reports are added. These reports offer printouts similar to those from the reporting functions of certain traditional non-computer-based cash register machines.
80. New in Version 6.0.0: The new **Special Reports** feature can be accessed from the program's **Menu Bar** under the **Report** menu title. After you open the **Special Reports** window, you can select one of the 20+ special reports to display by using the drop-down selection menu near the upper left corner. Special reports have more shift-based querying features than the summary reports. For most of the special reports, you can customize the scope of the report or the time range of a shift. The hardcopy printouts from special reports use that same formats as shown on screen.
81. New in Version 6.0.0: **Daily Sales Summary** is added as part of **Special Reports**. This report shows the total amounts of sales, refunds, coupons, adjustments, payouts and taxes arranged by payment types.
82. New in Version 6.0.0: **Daily Shift Balance** report is added as part of **Special Reports**. This report is most useful if you need to reconcile the quantities of consumed items after each shift. For each item, the consumed quantity is shown, followed by paid quantity and open table/tab quantity.
83. New in Version 6.0.0: **Daily Paid Items** report is added as part of **Special Reports**. This report shows the total sales amounts arranged by items and categories. These are items that have been sent to and finalized in the **Register** window.
84. New in Version 6.0.0: **Daily Divisions** report is added as part of **Special Reports**. This report shows the total sales amounts arranged by items and divisions.
85. New in Version 6.0.0: **Daily Consumed Items** report is added as part of **Special Reports**. This report shows the total amounts of consumed items arranged by items and categories. The difference between this report and the **Daily Paid Items Report** is that the **Daily Paid Items Report** displays only paid items (already paid by customers), whereas the **Daily Consumed Items Report** includes both paid items and open table/tab items (not yet paid by customers).
86. New in Version 6.0.0: **Daily Consumed Ingredients** report is added as part of **Special Reports**. This report shows the total amounts of consumed ingredients arranged by items and categories. An "Ingredient" is a cross-linked item of another item.
87. New in Version 6.0.0: **Daily Timer** report is added as part of **Special Reports**. This report shows the total amounts of paid time-based services (table charges) arranged by table numbers. The free hours redeemed by the customers are also shown.
88. New in Version 6.0.0: **Daily Free Hour** report is added as part of **Special Reports**. This report shows the number of free hours redeemed by each member.
89. New in Version 6.0.0: **Daily Coupon/Adjustment/Payout** report is added as part of **Special Reports**. This report lists all coupon, adjustment, payout, charge, credit and discount amounts from the uses of corresponding buttons in **Register**.
90. New in Version 6.0.0: **Open Table/Tab Items** report is added as part of **Special Reports**. This report shows the total amounts of open table/tab items (items not yet paid by customers) arranged by items and categories.
91. New in Version 6.0.0: **Tab List** is added as part of **Special Reports**. This is a list of all on-going Tabs in **SuperTab** with name, code, price and tax shown for each item. The time at which the item was ordered and the name of the operator who sent the item to **SuperTab** are also shown.

92. New in Version 6.0.0: **No Sale** report is added as part of **Special Reports**. This report shows time and operator name for each no-sale drawer-opening activity (via the use of the Open Drawer function key or function button).

93. New in Version 6.0.0: **Voiding Activities** report is added as part of **Special Reports**. This report shows operator name, time, item name, item price and quantity for each voiding activity.

94. New in Version 6.0.0: **Purchase Records** is added as part of **Special Reports**. This report shows information of items purchased from vendors.

95. New in Version 6.0.0: **Inventory Detail Summary** is added as part of **Special Reports**. This report calculates the current inventory based on opening stock and quantities of consumed and purchased items. It also allows you to view past inventory history.

96. New in Version 6.0.0: **Inventory Summary** is added as part of **Special Reports**. Same as the Inventory Detail Summary report except that individual items are not shown.

97. New in Version 6.0.0: **Customer List** is added as part of **Special Reports**. You can use this feature to design and print a customized customer list. This report can be useful in determining the best target customers when you have a promotion program. For example, you can press the **Options** button to select only customers whose birthdays are near. You can also target only one particular gender and/or category of members (e.g., senior, student…). The "Member Last Presence" option can be used to exclude those who haven't come in for a long time.

98. New in Version 6.0.0: By using the **Options** button in **Customer List** under **Special Reports**, you can export selected member data to a spreadsheet or e-mail program. Exporting to an e-mail program can be useful if you decide to deliver the promotion materials to your customers by e-mails.

99. New in Version 6.0.0: **Customer Labels** feature is added as part of **Special Reports**. This feature has similar member filtering options as in the **Customer List** feature. It is, however, more suitable if you decide to deliver the promotion materials to your customers by mail.

100. New in Version 6.0.0: **Birthday** report is added as part of **Special Reports**. This report displays a list of customers who have the same birth month. Member IDs, names, birthdays and the dates of their last visits are shown. Such information can be used for marketing purposes.

101. New in Version 6.0.0: **Barcode Labels** feature is added as part of **Special Reports**. This feature allows you to create and print your own barcode labels on 7x2 label sheets. Press the **Edit** button to enter barcodes. This barcode type used is "Code 39".

102. New in Version 6.0.0: **Custom Reports 1 to 6** are added as part of **Special Reports**. These are customizable sales reports. Press the **C** button for customization options. The "Profit%" option displays the percentage of each item's profit out of profit from all items. It can be used to find out what items are most popular and profitable.

103. New in Version 6.0.0: A **Batch Print** feature is added to allow printing of multiple reports without the need to select each individually. This feature can be accessed from the program main window's **Menu Bar** under **Report**.

104. New in Version 6.0.0: A new "Inventory Checkpoint" feature is added to make inventory control flexible.

105. New in Version 6.0.0: More **Flat Rate** options are added. In **Simple Rate Setup** or **Advanced Rate Setup** window, first press the **Flat Rate Setup** button. You can then press the **Edit Flat Rate List** button to configure up to 10 different rates.

106. New in Version 6.0.0: If you have the Network Edition, **Table Timer** can be configured to close itself automatically after a pre-set period of idle time. This allows other network stations to access the same table.

107. New in Version 6.0.1: New options to automatically round up the decimal portion of the Retail Price to the closest nickel, dime, quarter or dollar, after calculating Retail Price based on Cost and Markup.

108. Version 6.0.2 is a maintenance release.

109. Version 6.0.3 is a maintenance release.

110. New in Version 6.0.4: If you have the Integrated Credit/Debit Card Processing feature, you can choose to allow or disallow multiple pre-authorized transactions by the same credit card within 24 hours when the amounts are the same. In the processing window, press the **Options** button to customize this.

111. New in Version 6.0.5: You can choose not to print the table time charge when its amount is zero. This is useful if you don't need to charge time-dependent services on some tables but still want to track their usages. Use **Receipt Printer Setup** to customize this.

112. New in Version 6.0.5: When adding a row to a dynamic pricing scheduling rule, holding down the keyboard's Option button while pressing the **Add Row** button allows you to insert a row above the selected row.

PHM 6.1 has these new features:

1. New in Version 6.1.0: In **Log Viewer**, a new **Export Receipts** feature is added to the **Menu Bar** under the **Log** menu title. You can use it to export sales receipts to QuickBooks, an accounting program. The exported data, when opened by a text editor such as Notepad, can also be copied to a spreadsheet program such as Excel.
2. New in Version 6.1.0: In **Receiving**, a new **Export Lists** feature is added to the **Menu Bar** under the **List** menu title. You can use it to export receiving, draft, and fulfilled lists to QuickBooks. The exported data, when opened by a text editor such as Notepad, can also be copied to a spreadsheet program such as Excel. When exported to QuickBooks, data are converted to bills, which can be used to print checks.
3. New in Version 6.1.0: If you have the Integrated Credit/Debit Card Processing feature, you can use the new **PLPA** (Preliminary Pre-Authorization) feature to pre-authorize a credit card sale while the customer's items are still in **SuperTab** or **Table Timer**. In **SuperTab**, select a tab first and then press the **CC Pre-Auth** button to start a PLPA transaction. In **Table Timer**, you can configure a picture button (via the **Options** button) for such transactions. In both, you can use the "A" key on keyboard for such transactions. When the items are eventually sent to the **Register** window, the program will bring up the corresponding pre-authorized transaction for the operator to finalize.
4. New in Version 6.1.0: The **Change** feature (accessed via the **Change** button) in **Table Timer** can now be used to change non-member guests to member guests, change member guests to non-member guests, and change member guests to different members. Member types associated with guests affect certain discounts (as mentioned in the **Extra Member/Item Verifications** section).
5. New in Version 6.1.0: Certain buttons in the **Select Tab** window can now be disabled. In the **Select Tab** window, press the **M** button to customize options.
6. New in Version 6.1.0: In **Shop Sale** and **Deli/Bar Sale** windows, items can now be sorted in numerical order (instead of alphabetical order) by item code. This is useful if your codes are mostly numbers. In **Shop Sale** or **Deli/Bar Sale** window, press the **More** button to customize options.
7. New in Version 6.1.0: In **Customer/Member List**, members can now be sorted in numerical order (instead of alphabetical order) by id. This is useful if your member id entries are mostly numbers. In **Customer/Member List**, press the **More** button to customize options.
8. New in Version 6.1.0: Items in **Coupon** window and in **Adjustment & Payout** window can now be sorted in alphabetical order by code, name, category or amount. To change the sorting order, press the title caption of the corresponding column.
9. New in Version 6.1.0: When the cash drawer is opened via the function key or function button without a sale, a "No Sale" message will be sent to the **SalesMonitor** program.
10. New in Version 6.1.1: If you have the Integrated Credit/Debit Card Processing feature, you can choose to enable or disable the **PLPA** (Preliminary Pre-Authorization) feature. In the processing window, press the **Options** button to customize this.

11. New in Version 6.1.1: From the **Check Preview** feature (available in **Table Timer** and **SuperTab**), you can choose to print a tip line along with the items and total amount. This can be used as a way for your customer to tell you the tip amount before he/she receives the credit card receipt.
12. New in Version 6.1.2: In **Tax Rate Setup**, you can select certain items to use VAT Mode. This is useful if you advertise some of your items at prices that include taxes. When an item is included in the VAT list, the per-item amount (with tax included) will not be affected by the purchase quantity.
13. New in Version 6.1.3: To use the Refund feature, the operator now needs to have the access right. This access right is given in **Operator Password Setup** under the same one for the Void feature.
14. Version 6.1.4 is a maintenance release.
15. New in Version 6.1.5: Program no longer brings up the **Redeem Credits** window when the customer is buying “Prepaid” credits.
16. New in Version 6.1.5: In **Member Management** window, you can press the **Options** button to adjust size of the member photo.
17. New in Version 6.1.6: When the program is restarted, a new **PhotoX** folder will be created within the **PHM** folder. If you have the Network Edition, it is recommended that the member photos be placed in Host’s **PhotoX** folder. After you place the photos in Host’s **PhotoX** folder, use the **Photo** button (available in Modify Mode in **Member Management** window) to assign these photos to corresponding members. If your network is slow, you may place duplicated copies of member photos in each Terminal’s local **PhotoX** folder to reduce network traffic. A Terminal of the Network Edition will first search its local **PhotoX** folder for a member’s photo file. If it can’t be found there, it will then search the Host’s **PhotoX** folder for it.
18. New in Version 6.1.6: When redeeming “Prepaid” credits, the **Redeem Credits** window now allows the user to choose department.
19. New in Version 6.1.7: More options are available when you create “Smart Coupons” to give percentage discounts.
20. New in Version 6.1.8: **Customer Label** (part of **Special Report** feature) now displays and prints labels in alphabetical order by name.
21. New in Version 6.1.8: When **Special Report** is started, you can choose to display the current shift or to display the entire day. In **Special Report** window, press the **Options** button to customize this.

PHM 6.2 has these new features:

1. New in Version 6.2.0: In **Member Management** window, you can use the new **Capture** button (under Modify Mode) to create a member photo by using an attached camera or web cam.
2. New in Version 6.2.0: In **History Report** and **Comparison Report**, you can access a new **Multiple Days** feature from the report’s **Menu Bar** under the **Range** menu title. It allows you to create a sales report or chart that combines data from a period of days you specified. You can also elect to skip certain days of the week. For example, before you schedule your employees to handle the coming busy Wednesday, you can create a Wednesday-only report that shows you the hourly earnings from multiple Wednesdays of the last few weeks and then use it to determine the hours that require more employees.
3. New in Version 6.2.0: In certain area of Canada, PST can be waived if the purchase is less than a certain amount. The program can handle this automatically. In **Tax Rate Setup** window, press the **Tax in Canada** button to customize this.
4. New in Version 6.2.1: **Daily Sales Summary** (part of **Special Report**) now includes table time charges.
5. New in Version 6.2.1: **Custom Reports** (part of **Special Report**) now include table time charges. Table time charges are displayed under category PLAYER (non-member players) and PLAY-M (member players).

6. New in Version 6.2.1: **Custom Reports** (part of **Special Report**) now include rental charges. Rental charges are displayed under category RENTAL.
7. New in Version 6.2.2: You can now exclude flat rate table time from the "Member Free Hour Earning" Program. In **Member Management** window, press the **Options** button to customize this.
8. New in Version 6.2.2: When you use the **Adjustment** or **Payout** feature, you can now choose the department name (e.g., DELI or SHOP) for your adjustment or payout amount.
9. New in Version 6.2.2: Under **Tax Rate Setup**, you can now choose the tax type for table time charges. For example, in Canada, you can use Type G (for GST) instead of the default Type T.
10. New in Version 6.2.2: The **Discount** feature (**DISC** button) in **Register** now includes a **Calculate** button. When you are preparing a receipt and need to apply a discount to certain items within that receipt, you can use this feature to select the desired items and it will calculate the total amount for you. For example, your **Register** may include multiple juice items along with multiple liquor items. If you want to apply discount to the juice items but not the liquor items, you can press the **Calculate** button and then the JUICE category button to calculate the combined amount of all juice items.
11. New in Version 6.2.2: The **Message to SalesMonitor** feature is improved. In addition to entering the message with keyboard, you can use an on-screen keypad or the keyword buttons. You can prepare up to 100 sets of keywords. Each set can have up to 30 keywords. When this feature is used together with the **Message Item** and **CrossLink** features, it can be an efficient way to send a message such as "Chicago Rare, Extra Cheese, Pickles Outside, No Mustard" to the kitchen.
12. New in Version 6.2.2: In **Shop Sale** or **Deli/Bar Sale** window, you can designate an item as **Message Item**. When a message item is being sent to a table or tab or to **Register**, the program will ask the user to enter a message to **SalesMonitor**. The kitchen or bar that is using the **SalesMonitor** program will receive this message in a few seconds.
13. New in Version 6.2.2: In **TouchPad**, you can send a message item to the shopping list. Once it's in the shopping list, you can still change the message by highlighting it and pressing the "Q" or "-" key on the keyboard.
14. New in Version 6.2.2: The **CrossLink** feature is improved. In addition to using it to track consumed ingredients and to create combo items, you can now use it to create "Pending" links to other items such as add-ons, sides, modifiers and message items. When such a main item is being sent to **Register**, the program will automatically prompt the questions for the operator to choose the linked ones. For example, when a pizza is being sent to **Register**, the program will automatically ask one or several questions to help the user decide what toppings to add, what sides and drink to include, and what extra information/modifiers/messages to send to the kitchen. You can also set quantity limits on individual items and on items within groups. Please read the **Linking Items** section of the user's manual for details.
15. New in Version 6.2.2: In the **CrossLink** window, a **Copy Links** button is added. You can use it to copy links from another item. This is useful if you have several items that have the same or similar CrossLink programming.
16. New in Version 6.2.2: The **Recent Receipt** feature now displays a **Re-Tender** button when you select a previously finalized receipt. You can use it to correct balances when a transaction was finalized by wrong payment type.
17. New in Version 6.2.2: **Daily Sales Summary** (part of **Special Report**) now includes tips.
18. New in Version 6.2.2: When the cash drawer is opened via the function key or function button without a sale, a "No Sale" message will be sent to the **SalesMonitor** program. An option is now added to disable this message-sending feature. To access this option, log in as a master user and press the cash drawer function key.
19. New in Version 6.2.3: If the Integrated Credit/Debit Card Processing feature is available, any operator can delete pre-auth transactions that are older than 24 hours. A master user, however, can delete any pre-auth transaction any time. To delete a pre-auth transaction, use the red **C** button from within the **Recent Receipt** window.

20. New in Version 6.2.3: If the Integrated Credit/Debit Card Processing feature is available, any operator can delete any **PLPA** record from within the **Recent Receipt** window by using the red **C** button. Sometimes **PLPA** records need to be deleted due to customers' requests to combine purchases or to use different payment types.
21. New in Version 6.2.3: If the Integrated Credit/Debit Card Processing feature is available, you can delete a **PLPA** tag in the **Register** window by using the **Void** button. This is useful if multiple **PLPA** tags appear in the **Register** window and you want to make sure the correct one will be used to finalize the credit card transaction. If none is deleted, the user will still have a chance to select the correct one later. Having multiple **PLPA** tags in **Register** window is not common but may happen due to customers' requests to combine purchases.
22. New in Version 6.2.3: If the Integrated Credit/Debit Card Processing feature is available, the operator can delete a **PLPA** record by selecting the corresponding customer (in **Table Timer**) or tab (in **SuperTab**) and pressing the "A" key. When a **PLPA** record is deleted, it is also removed from the **Recent Receipt** window. Sometimes **PLPA** records need to be deleted due to customers' requests to combine purchases or to use different payment types.
23. New in Version 6.2.3: If the Integrated Credit/Debit Card Processing feature is available, the caption bar of the activity list in **Table Timer** changes its color when the table has a **PLPA** transaction.
24. New in Version 6.2.4: If the Integrated Credit/Debit Card Processing feature is available, the **More** button in **Register** begins to flash when you have any un-finalized pre-auth transaction (not PLPA transaction). The program can monitor one or several stations (depending on your settings in the **Recent Receipt** window) and remind the operator when force transactions are needed to finalize credit card transactions.
25. New in Version 6.2.4: If you have the Network Edition, you can combine any Terminal's recent receipt records with the Host's recent receipt records. Once combined, from either the Host or any Terminal station, you will be able to view recent receipts created by all stations or any selected station. If the Integrated Credit/Debit Card Processing feature is available, you will also be able to process credit card force transactions from any station. To combine recent receipts, log in as a master user and press the **Options** button in the **Recent Receipt** window. Via the **Options** button, you can also choose whether to show certain types of receipts such as pre-auth and **PLPA** transactions created by other stations.
26. New in Version 6.2.4: If the Integrated Credit/Debit Card Processing feature is available, you can use the new "PA-Only" feature in the **Recent Receipt** window to limit the contents displayed to only pre-auth and **PLPA** transactions. This makes it easier when you are doing certain maintenance works such as forcing and voiding transactions.
27. New in Version 6.2.4: the **Recent Receipt** window now displays total number of recent receipts.
28. New in Version 6.2.4: If the Integrated Credit/Debit Card Processing feature is available, the program will automatically transfer the **PLPA** record when you transfer the purchases from **Table Timer** to **SuperTab** or from **SuperTab** to **Table Timer**.
29. New in Version 6.2.5: If you use the **Register Message** feature, the **Register** total amount is updated when the message comes up.
30. New in Version 6.2.6: When using the data exporting feature in **Comparison Report** window, different file names will be used to save different sets of categories and codes.
31. New in Version 6.2.6: When transferring a customer from a table to an empty tab, the name of the customer will be used by default as the name of the tab.
32. New in Version 6.2.6: If the Integrated Credit/Debit Card Processing feature is available, you can attach an optional memo to each pre-auth or **PLPA** transaction. For example, you can enter a description of the customer (cardholder) as the memo and use it later to reduce the risk of finalizing a wrong one. In the processing window, press the **Options** button to enable this memo feature.
33. New in Version 6.2.7: Support for CM15A (ActiveHome Pro) light controller is added.
34. New in Version 6.2.8: Performance is improved when exporting data of multiple days.

35. New in Version 6.2.9: An option is added to allow you to designate members as "Generic" members. Generic members, such as "Senior Members" and "VIPs", can be used to represent groups of members. In the **Member Management** window, press the **Options** button to change this setting.
36. New in Version 6.2.9: If a member is already playing, you can choose whether or not to allow this same member to be sent to a table again. In the **Member Management** window, press the **Options** button to change this setting. This setting, however, has no effect on "Generic" members. A generic member can always be sent to tables multiple times.
37. New in Version 6.2.9: You can decide whether the time a player just played should be included in calculating the free redeemable hours right away or till next visit. In the **Member Management** window, press the **Options** button to change this setting.

PHM 6.3 has these new features:

1. New in Version 6.3.0: For Network Edition, performance is improved when multiple stations are selling items at the same time.
2. New in Version 6.3.0: The "Use user-supplied codes" option in **Light and Power Control Setup** now accepts special characters, such as <ctrl-a> and <ctrl-t>. You can also use any ASCII characters. For example, <a120> is for the ASCII character with decimal value 120.
3. New in Version 6.3.0: The Batch File option in **Cash Drawer Setup** now accepts file located in a folder with long path name.
4. New in Version 6.3.0: In **Special Reports**, the time-range selectors (Before… After… From…To) are improved. The time after midnight is now considered the later part (instead of the beginning part) of the day when these time-range selectors are used.
5. New in Version 6.3.1: If you have the Network Edition, switching tables is now faster.
6. New in Version 6.3.1: when a table is selected in **Table Timer**, the same table in **Table Layout** window is highlighted.
7. Version 6.3.2 is a maintenance release.
8. New in Version 6.3.3: Supports for various regional date and time formats are added.
9. New in Version 6.3.4: If the "Code, Name and Price" option is selected in **Receipt Printer Setup**, printed receipts for tabs (from **SuperTab**) will include customer's name.
10. New in Version 6.3.4: Several buttons in the **Detail** window (via the **Detail** button) are now larger and easier to use if you have a touch screen monitor. The list of purchased items in the **Detail** window is also larger.
11. New in Version 6.3.4: In **Table Timer**, after you close the **Detail** window, the same customer you selected in the **Detail** window will be automatically highlighted in **Table Timer**. This is convenient if you need to send the same customer to **Register**.
12. New in Version 6.3.4: If you already select a customer in **Table Timer**, the same customer will be automatically highlighted when you send items to the same table.
13. New in Version 6.3.4: If you use the "Member Free Hour Earning" feature, Weighted Credit Hours can now be based on the actual played hours not divided by the number of players.
14. New in Version 6.3.4: The **Coupon**, **Adjustment** and **Refund** buttons in the **Register** window can now be disabled. In the **Register** window, press the **Options** button to change the settings.
15. New in Version 6.3.4: A new Type5 coupon is added for table/service time with pre-set hourly discount amount.
16. New in Version 6.3.5: If the Integrated Credit/Debit Card Processing feature is available, the program can pause printing between multiple copies of receipts. This is useful if your printer doesn't have auto-cut feature and you need to rip off the receipt manually. In the processing window, press the **Options** button to enable this feature.

17. Version 6.3.6 is a maintenance release.
18. Version 6.3.7 is a maintenance release.
19. New in Version 6.3.8: After the user decides to redeem a member's prepaid or earned credit (amount or free hours), he/she can still cancel the redeeming by voiding it from the **Register**.
20. New in Version 6.3.9: Buttons in the **Send to Table** window are larger now.

PHM 6.4 has these new features:

1. New in Version 6.4.0: When adding "Extra Verifications" in **Dynamic Pricing Schedule** window, you can now select item codes and member IDs from lists. Press the button next to the entry field to bring up the list.
2. New in Version 6.4.0: The maximum number of **CrossLink Items** is increased to 100.
3. New in Version 6.4.0: The **Auto-Stand By** option now allows different settings for different stations. You can access **Auto-Stand By** option from **Master Password Setup**.
4. New in Version 6.4.0: The "Use your own program or batch file" option in **Cash Drawer Setup** now has options to set up the program to automatically press a particular button in the drawer-opening program. In the **Cash Drawer Setup** window, press the **More** button to change the settings.
5. New in Version 6.4.1: The category names of the message items are now sent to **SalesMonitor** along with the messages. This allows you to configure the **SalesMonitor** program to display only selected categories of messages. This feature works with **SalesMonitor** Version 1.9.3 or newer.
6. New in Version 6.4.2: In the **Dynamic Pricing Schedule** window, you can use the **Copy Schedule** button to copy schedules from another item. This is useful if you have several items that have the same or similar schedules.
7. New in Version 6.4.3: After exporting certain data, a button will allow you to open the folder that has the exported data.
8. Version 6.4.4 is a maintenance release.
9. Version 6.4.5 is a maintenance release.
10. New in Version 6.4.6: You can now limit the number of tabs allowed to use in **SuperTab**. In the **TouchPad** window, press the **Options** button to change the settings.
11. Version 6.4.7 is a maintenance release.
12. New in Version 6.4.8: In **Log Viewer**, the **Export Receipts** feature has several new setting options.
13. New in Version 6.4.9: Additional redeeming option is added to the **Redeem** window of the "Member Free Hour Earning" Program.
14. New in Version 6.4.9: **Waiting List** now allows more characters in the name field.
15. New in Version 6.4.9: **Waiting List** now automatically refreshes (synchronizes) data if you have multiple stations. This automatic refresh is disabled if you enable the "Modify" mode.

PHM 6.5 has these new features:

1. New in Version 6.5.0: The buttons in the **Add Tip** window are now easier to use if you have a touch screen monitor.
2. New in Version 6.5.0: You can use a magnetic or barcode reader for login and password entries. This works even when you card's magnetic stripe or barcode has data that exceed the length limit.
3. New in Version 6.5.0: The **Export Comprehensive Sales Summary** feature now exports taxes from difference sources. If the "Canadian Tax" option is activated, then GST, PST, LST, HST and Other

taxes are reported. If the “Canadian Tax” option is not activated, then Cash Tax, Credit Tax and Check Tax are reported.

4. New in Version 6.5.0: In **Recent Receipt** window, the drop-down selector for viewed stations can be disabled. Press the **Options** button to change this setting.
5. New in Version 6.5.0: If you have the Integrated Credit/Debit Card Processing feature, the **Credit/Debit Card Processing Summary** now displays number of transactions.
6. New in Version 6.5.0: If you have the Integrated Credit/Debit Card Processing feature, the **Credit Card Transaction Lookup** window now displays number of transactions.
7. New in Version 6.5.1: When you have open price/name/code/category item, the program will bring up a window for you to complete the price/name/code/category information. This window in now larger and more touch-screen friendly.
8. New in Version 6.5.1: When you are converting a player to a generic member, you now have the option to use the original name instead of the generic name.
9. New in Version 6.5.1: If a tip amount is already entered and the user decides to change the tip amount, the previously entered tip amount will be displayed in the **Add Tip** window.
10. New in Version 6.5.1: The **Find Customer** window is improved to include more information.
11. New in Version 6.5.1: A long message sent to **SalesMonitor** can be formatted to be more readable. To do this, select **Message to SalesMonitor** from the **Menu Bar** of the program (under the **Extra** menu title) and press the **Setup** button.
12. New in Version 6.5.2: A **Name** button is added to the **Find Customer** window. This can be used to bring up the on-screen keypad for name entry.
13. Version 6.5.3 is a maintenance release.
14. Version 6.5.4 is a maintenance release.
15. New in Version 6.5.5: If you use a magnetic or barcode reader for login and password entries, you can limit the number of characters read in by the reader. Use **Master Password Setup** to configure this.
16. New in Version 6.5.5: In **TouchPad**, you can double-click on the item on the shopping list or left-click on the **Void** button to access the Quantity Modifier.
17. New in Version 6.5.6: If the Integrated Credit/Debit Card Processing feature is available, credit/prepaid card Partial Approval is supported.
18. New in Version 6.5.6: A "Close after Apply" option is added to he **Credit**, **Discount** and **Charge** features in the **Register** window. When this option is enabled, the windows automatically closes itself after the user presses the **Apply** button.
19. New in Version 6.5.6: You can create a Register Message for all **SuperTab** customers. This message will be displayed every time items are sent to **Register** from **SuperTab**. To set up the message, log in as a master user and press the **Options** button in **TouchPad**.
20. New in Version 6.5.6: A “Touch screen friendly” option is available from within **Advanced Security Setup**. When this option enabled, several styles of login window with different on-screen keypad layout will be available.
21. New in Version 6.5.7: If the Integrated Credit/Debit Card Processing feature is available, **Check Preview** for **PLPA** now prints credit card receipt.
22. New in Version 6.5.7: If the Integrated Credit/Debit Card Processing feature is available, you can enable a “Quick Force” option for faster Force operation. From **Credit Card Processing** window, press the **Options** button to enable the “Quick Force” option.
23. New in Version 6.5.7: If the Integrated Credit/Debit Card Processing feature is available, the “Auto-closing Approval window” option can now be set to shorter time.

PHM 7.0 has these new features:

1. New in Version 7.0.0: **Operation Style** feature. An operation style is a preprogrammed arrangement of several features. Such an arrangement presents to the users the frequently-used features in more accessible ways. Several operation styles are available: Classic Style, Register-First Style, TouchPad-First Style, Table Timer-First Style and Seat Editor-First Style. Depending on how you operate your business, one of the operation styles may work better for you. If you have the multiple station network edition of this software, you can choose to use the same or a different operation styles at each station. For example, if you want a particular station to focus more on the restaurant-side of your business, you may want to use the TouchPad-First Style. This way, every time after an operator logs in, the **TouchPad** window is automatically brought to the front. To select an operation style, use the **Operation Style Setup** feature from the program's **Menu Bar** under the **Setup** menu title. You can further customize the arrangement of features by repositioning and resizing their windows, depending on your preferences and the monitor screen size. For example, if you have a wide-screen monitor and elect to use the Register-First Style, a recommended customization would be to let the **Register** window occupy the right half or the screen. The program's **Main** window, the **Table Timer** window, and the **TouchPad** window can be overlapped and share the left side of the screen. You can then use the buttons near the upper-right corner of the **Register** window to control the view of the left side. You can find screenshots of such arrangement at http://www.timemagic.com/phm/style.htm
2. New in Version 7.0.0: When a non-classic **Operation Style** is chosen, you can enable an option to have the program automatically enter "Standby Mode" after a period of time without activity. This is useful if you want to make sure the employees log in with their own passwords.
3. New in Version 7.0.0: When a non-classic **Operation Style** is chosen, a larger **Resizable-Style Register** window will appear in place of the original compact-style **Register** window. This new **Register** can be resized to full screen or preferred size and still provide good button sizes, even if you are using a small monitor. This can be useful if you are using a touch-screen Windows Tablet with small screen size.
4. New in Version 7.0.0: When a non-classic **Operation Style** is chosen, a larger **Resizable-Style Table Timer** window will appear in place of the original **Table Timer** window. This new **Table Timer** can be resized to full screen or preferred size and still provide good button sizes, even if you are using a small monitor. This can be useful if you are using a touch-screen Windows Tablet with small screen size.
5. New in Version 7.0.0: The **Resizable-Style Register** window supports barcode reading as an additional way to sell items. This **Register** has a **Ready/Once/Manual** button. The operator can toggle the **Ready/Once/Manual** modes by clicking on this button or by pressing the ***** key on the numerical keypad of the keyboard. If the operator wants to operate with a barcode scanner in continuous mode, he/she can use the **Ready** mode. To sell an item, scan the barcode on the item. If the barcode is found among these that had been set up, the corresponding item will be added automatically to the **Register List**. If the barcode is not found, a message will be displayed below the **Register List**. When using this continuous **Ready** mode, there is no need to go back to mouse or keyboard between items. The **Once** and **Manual** modes are used when the operator has to enter barcodes manually by using the numerical keypad of the keyboard. This is useful if the item doesn't have barcode printed on it. When **Register** is set to the **Once** mode, it will automatically switches itself back to the **Ready** mode after the operator manually enters the barcode (on the numerical keypad), followed by the Enter key. If the operator has to sell multiple barcode-less products by using keyboard, he/she can use the **Manual** mode instead. In **Manual** mode, the program doesn't switch itself back to the **Ready** mode so there is no need to keep pressing the ***** key to start manual entry for each item.
6. New in Version 7.0.0: The **Resizable-Style Register** features two "Quantity" buttons. The upper one displays the quantity of the highlighted item already in the **Register** window. The other one displays the quantity of the all items already in the **Register** window. The upper button can be used to duplicate the highlighted item.

7. New in Version 7.0.0: The **Resizable-Style Register** hosts all FKey buttons. To customize these buttons, use the **Function Key Panel** feature from the **Menu Bar** of the program (under the **FKey** menu title) and press the **Setup** button.

8. New in Version 7.0.0: **Multi-View Check and Seat Editing** feature, also called **Seat Editor**. This feature is an extension of the **Table Timer** feature. Time-based service charges (e.g., playing time) are also displayed. However, it's main focus is on ordered items such as foods and drinks. **Seat Editor** makes it easy for operators to manage items ordered by multiple customers of the same table. Each customer (player or guest) is viewed as a "Seat" of the table. Often at the time the items are ordered, the operator doesn't know whether these items will eventually be paid for by a single customer or by multiple customers. With this feature, the operator can initially send all items to Seat 1 (or any seat), and later use it again to quickly separate the checks if needed. This is especially useful when your restaurant becomes busy. To move items to a different seat, select the items first and then press the **Move** button of the destination seat. In addition to moving items, the operator can also "red-tag" a seat to designate that it will later be paid for by another seat. To "red-tag" a seat, press the Number Box near the upper-left corner of a seat. If you are using the larger **Resizable-Style Table Timer** window, you can press the **Edit Check** button to access this **Multi-View Check and Seat Editing** window. You can also access it via the **Edit Check** button in the **Detail Charge** window (accessed by double-clicking on a customer in **Table Timer**), or via the **Edit Check** button in the **Multi-View Check Preview** window.

9. New in Version 7.0.0: **Multi-View Check Preview** feature. the operator can use this feature to print/close any single seat, any selected seats, or all seats of a table. If you are using the larger **Resizable-Style Table Timer** window, you can press the **Close Check** button to access this **Multi-View Check Preview** window. You can also access it via the **Close Check** button in the **Detail Charge** window (accessed by double-clicking on a customer in **Table Timer**), or via the **Close Check** button in the **Multi-View Check and Seat Editing** window.

10. New in Version 7.0.0: The **Packages** feature comes with the optional **TouchPad** feature. For related information, please read the discussions about **TouchPad**, **CrossLink**, and **Group Questions**. This feature improves the **Group Questions** feature by adding the ability to edit item selections, even after they have been sent to the shopping list on the right hand side of the **TouchPad** window. For example, after answering the four group questions of choosing Toppings, Drinks, Sides and Extra Messages, if the customer changes his/her mind (about toppings, for example), the operator can click on any item of the package (in the shopping list of the **TouchPad** window) and press the **Edit Selected** button to go back to the corresponding group question to modify items within the package. The **Remove** button can be used to remove the entire package. The **New** button can be used to quickly add another of the same (or similar) package. The **Packages** feature also makes the item selections more readable in the shopping list of the **TouchPad** window. To set up a package, you still need to configure your item groups with Pending Links and Group IDs in the **CrossLink** window. After that, simply enable the "As a Package in TouchPad" option.

11. New in Version 7.0.0: If you have the optional **SalesMonitor** program, The **Packages** feature will make the printout and screen output of **SalesMonitor** program more readable.

12. New in Version 7.0.0: **Conditional Group Questions** feature. This is a function added to the **CrossLink** feature. When selling a combo or package that allows the customers to choose from groups of modifiers, add-ons, sides and message items, the operator often wants to skip irrelevant group questions. For example, you may have a first group question that allows the operator to choose between Baked Potato and French Fries. You may then have a second group question that allows the operator to choose between sour cream and cheese that are intended only for Baked Potato. In such a case, you can preprogram it so that if the operator does not choose the Baked Potato in the first question, the second group question wouldn't come up at all. To set up such **Conditional Group Questions**, press the **Groups** button in the **CrossLink** window to access the **Group Settings** window. Each row/group in this **Group Settings** window has a "Require" field. This "Require" field allows you to supply a conditional code for the corresponding group. If this field is left empty, the corresponding group question will always be invoked. If this field is supplied with an Item Code, the corresponding group question will be invoked only when the said item was chosen from any of the earlier group questions. Note that the first group question is always invoked

regardless of the entry in its “Require” field.

13. New in Version 7.0.0: In the **CrossLink** window, you can use the new **Move Up** and **Move Down** buttons to change the order of items.
14. New in Version 7.0.0: **Email Reporting** feature. The program can email you automatically, at pre-set times of your choices, the status of your business. Select **Email Reporting Setup** from the **Menu Bar** of the program (under the **Setup** menu title) to set up. Note that certain network and emailing components must exist on your system for this feature to work, so only certain versions of operation systems and configurations are compatible.
15. New in Version 7.0.0: The **Phone Notification** feature allows the operator to call a customer in the **Waiting List**. In **Member Management** window, press **Options**, then press the **More** button to add pre-defined cell info (e.g., cell phone suppliers). In the **Waiting List** window, press **Options** to activate the “Enable Phone Notification” option. Your system must be equipped with a modem for the phone line connection.
16. New in Version 7.0.0: The **Spot** feature allows you to add additional icons (or pictures) to the **Layout** window. A “Spot” is similar to a table, except that it cannot be used to hold customers. “Spots” can be useful when you are selling certain items by sending them directly to the **Register** window (that is, without going to **Table Timer** or **SuperTab** first). When such items are finalized in the **Register** window, the program will display the **Layout** window for the operator to choose a spot. If you have the optional **SalesMonitor** program, this information is then displayed on **SalesMonitor** screen or printed by **SalesMonitor**. The kitchen can then use this spot information to decide where the items should be delivered. Therefore, spots can be viewed as Delivery Points or customers’ Waiting Areas. To create Spots, Select **Table Layout Setup** from the **Menu Bar** of the program (under the **Setup** menu title), and use the **Spot** button. You also have to tell the program what types of items are to trigger the **Layout** window for the spot selection. To do so, select **Register Options** from the **Menu Bar** of the program (under the **Setup** menu title), and press the **Delivery Point** button.
17. New in Version 7.0.0: If the **Table Charge Notice** feature is enabled, a notice will be displayed when the service time charge of a table reaches a pre-set amount (or a multiple of it). To set up, select **Extra** from the **Menu Bar** and then select **Show Alarm/Memo**. Select the **Notice** tab and press the **Setup** button. Enable the **Table Charge Notice** feature and provide an amount.
18. New in Version 7.0.0: In the **Detail Charges** window (accessed by double-clicking on a customer in **Table Timer**), the operator can click on an item in the purchased item list (while holding down the control key) to view more information about that item.
19. New in Version 7.0.0: A new **Tip Summary Report** is added to the **Special Report** feature. To access it, open the **Report** window and press the **Special Reports** button. Then use the drop-down selector near the upper-left corner to select the **Tip Summary Report**. To calculate the total tip amounts based on operator logins, use the drop-down selector at the top to choose the operator. To calculate the total tip amounts based on the operators’ entries in **Register**’s **Tip** window, use the drop-down selector to choose “Entire Day” first. The report will then display multiple total tip amounts.
20. New in Version 7.0.0: A new **Referral Report** is added to the **Special Report** feature. The **Referral** report displays the referral activities that were recorded via the use of the **R** button in the **Member Management** window.
21. New in Version 7.0.0: A new **Detail Coupon/Adjustment/Payout Report** is added to the **Special Report** feature.
22. New in Version 7.0.0: With the new **Pause Time Limit** feature, you can limit how long the time-based service (playing time) can be paused. To set the limit, select **Table Timer Options** from the **Menu Bar** of the program (under the **Table** menu title) and press the **Pause-Resume Options** button.
23. New in Version 7.0.0: The **Gift Card** feature allows you to create “Gift Card Items” that can be purchased and later redeemed by your customers. In **Item Details** window, you can create a “Gift

Card Item" by using "Gift Card" as the "Item Type" property. To sell or redeem a gift card, use the **Gift Card** or **GC** button in the **Register** window.

24. New in Version 7.0.0: In **Item Details** window, you can create a "Tip Item" by using "Tip" as the "Item Type" property and using 0.00 as the price. Then press the **Tip** button to set the tip percentage. When this tip item is sent to the **Register** window, the tip amount of the receipt will be changed to the specified percentage of the total DELI purchase amount.
25. New in Version 7.0.0: New Type 6 coupon type. A Type 6 coupon is not a coupon redeemable within the program. Instead, it is a printed coupon (or ticket) to be used later or elsewhere. In **Item Details** window, you can create a "Coupon Item" by using "Coupon" as the "Item Type" property. Use the **Coupon** button to assign coupon type.
26. New in Version 7.0.0: You can configure the program to open a different cash drawer (or not to open any cash drawer) when "Credit is selected as the payment type. To set up such, press the **More Options** button in the **Cash Drawer Setup** window.
27. New in Version 7.0.0: In **Table Rate Setup** window, you can press the **M** button to set up additional rules. The rules you enter allow you to use different Minimum Charges and Minimum Minutes during different time of the week. If the start time of a table's service time matches one of these rules, the Minimum Charge/Minutes provided in that rule will be used. Otherwise, the Minimum Charge/Minutes provided in the **Simple Rate Setup** or **Advanced Rate Setup** window will be used.
28. New in Version 7.0.0: In **Employee Time Clock** window, an employee can press the **View** button to view or print a day/week/month summary of his/her clock in and out history.
29. New in Version 7.0.0: In **TouchPad**, the width and font size of the shopping list can be customized. To do such, log in as a master user, press the **Options** button in **TouchPad** and use the **List Size** selection.
30. New in Version 7.0.0: In **TouchPad**, the **To Table** button now displays a tag that shows the current active table number. The operator can click on this tag to access that table.
31. New in Version 7.0.0: A **Layout** button is added to the **Table Transfer** and **Send To Table** windows. The operator can use this **Layout** button to bring up the **Table Layout** window and use it to select a table.
32. New in Version 7.0.0: A **Find** button is added to the **Send To Table** window. When sending items to a customer of a table, the operator can use this **Find** button to help find a customer.
33. New in Version 7.0.0: A **Find** button is added to the **Send To Tab** window. When sending items to a tab, the operator can use this **Find** button to help find a tab.
34. New in Version 7.0.0: When sending additional items to a customer of a table, the **Send To Table** window now displays items that were obtained by this same customer from previous orders/rounds. This is useful as the operator can use such information to help find the correct customer more quickly.
35. New in Version 7.0.0: More format choices for operators' names printed on receipts. Instead of printing full name, you can choose first name only, or a combination of first or last name and initial.
36. New in Version 7.0.0: The **Quantity-Dependent** feature improves certain existing **CrossLink** features. Please read related information in the **CrossLink** section of the manual for details.
37. New in Version 7.0.0: For controlling lights, certain Insteon models are now supported. Insteon devices are often more reliable than X10 devices.
38. New in Version 7.0.1: In **Register** window, after pressing the **Adjustment/Payout** button (**A** button), pressing the text description near the top will bring up the on-screen numerical keypad.
39. New in Version 7.0.2: In **Register** window, the **Adjustment and Payout** feature can be customized to disable certain options. In **Adjustment and Payout** window, press the Options button to customize.
40. New in Version 7.0.2: Although **Operator Login** and **Employee Clock In** are two independent

functions, the program will automatically bring up the **Employee Clock In** window right after each operator's first Login of the day. This is to ensure that operators don't forget to Clock In. You can disable this by un-checking the "Remind Employee Clocks In" checkbox in **Master Password Setup**.

PHM 7.1 has these new features:

1. New in Version 7.1.0: When you use the **Remind** feature in **Table Timer** to create a reminder, the program will remember your choices of certain settings, and use them as the default settings for the next reminder.
2. New in Version 7.1.0: More port numbers are allowed for certain light controller models.
3. New in Version 7.1.1: More port numbers are allowed for dial-up modem.
4. New in Version 7.1.1: More port numbers are allowed for certain cash drawer and pole display types.
5. Version 7.1.2 is a maintenance release.
6. Version 7.1.3 is a maintenance release.
7. Version 7.1.4 is a maintenance release.
8. New in Version 7.1.5: Improvements in several reports that display consumption of ingredients.
9. New in Version 7.1.6: A new "Wait Time" option is available. This is useful if you have the **Network Edition**, and your network connection drops periodically. On a Terminal, go to **Advanced Security Setup** and change "Wait Time" to a longer time. A longer wait time can reduce user interactions by letting the program verify the existence of the host before displaying error messages.
10. New in Version 7.1.6: In **TouchPad**, a new "Constant Connection" option is available. If your station is a tablet or is using wireless network, disabling Constant Connection (by clearing the checkbox) may result in better performance. To change this setting, log in as a master user and press the **Options** button in **TouchPad**.
11. New in Version 7.1.6: In **TouchPad**, the width and font size of the shopping list have more selections now. A larger size can be easier to use if your station is a tablet or has small screen. To change this setting, log in as a master user, press the **Options** button in **TouchPad** and use the **List Size** selection.
12. New in Version 7.1.6: In **TouchPad**, you can hide buttons that have zero stock. To change this setting, log in as a master user and press the **Options** button in **TouchPad**.
13. Version 7.1.7 is a maintenance release.
14. New in Version 7.1.8: In **SuperTab**, several buttons are enlarged if the monitor has enough resolution.
15. New in Version 7.1.9: **X-Out** and **Z-Out** reports now display sales amounts of categories.

PHM 7.2 has these new features:

1. New in Version 7.2.0: A new **Category-Division Summary** section to the **Export Itemized Sales Summary** report. This is useful if you want to combine sales of multiple categories into one division.
2. New in Version 7.2.1: Button customization in **TouchPad** is improved.
3. Version 7.2.2 is a maintenance release.
4. Version 7.2.3 is a maintenance release.

PHM 7.3 has these new features:

1. New in Version 7.3.0: If the Integrated Credit/Debit Card Processing feature is available, EMV is supported.
2. New in Version 7.3.0: If you use the **Change** function in **Table Timer** on a customer with **PLPA** (Part of Integrated Credit/Debit Card Processing), the program will transfer the **PLPA** info to the converted customer.
3. New in Version 7.3.1: If you have the Integrated Credit/Debit Card Processing feature, **Tip** button can be disabled.
4. Version 7.3.2 is a maintenance release.
5. Version 7.3.3 is a maintenance release.
6. Version 7.3.4 is a maintenance release.
7. Version 7.3.5 is a maintenance release.
8. New in Version 7.3.6: Printing performance under Windows 10 is improved.
9. New in Version 7.3.7: If you use **PLPA** (Part of Integrated Credit/Debit Card Processing) under classic style of **Table Timer**, a blue dot will be displayed to indicate **PLPA**.
10. New in Version 7.3.7: In **Table Layout Setup** window, if any of the tables or spots is outside of the window's viewable area, you can press the **Align** button to bring it in. This is useful if you switch to a small monitor and want to rearrange the table and spot positions.

PHM 7.4 has these new features:

1. New in Version 7.4.0: If you have **SalesMonitor** program, you can configure **TouchPad** to automatically send customer's name (along with items) to **SalesMonitor** when you send items from **TouchPad** to table/tab. Customer's name is the one that is already available in table/tab, or the one you enter on the fly. To configure this, log in as a **Master User**, open **TouchPad**, press the **Options** button, and enable the "Send customer name to SalesMonitor" option.
2. New in Version 7.4.1: New options are added in **X-Out** report to customize the information shown. In **X-Out** report, press the **Options** button to customize.
3. Version 7.4.2 is a maintenance release.
4. Version 7.4.3 is a maintenance release.
5. Version 7.4.4 is a maintenance release.
6. Version 7.4.5 is a maintenance release.
7. Version 7.4.6 is a maintenance release.
8. Version 7.4.7 is a maintenance release.
9. Version 7.4.8 is a maintenance release.

PHM 7.5 has these new features:

1. New in Version 7.5.0: In **Table Timer**, a new option is added to automatically bring up the keypad with mandatory customer name entry (if it's not already entered). To enable this, from the **Menu Bar** under **Table**, choose **Table Timer Options** and choose "Bring up Keypad – Must enter name" option.
2. New in Version 7.5.0: When you send items to **SuperTab**, a new option is available to automatically bring up the keypad with mandatory customer name entry (if it's not already entered). To enable this, first log in as a **Master User**, then from **TouchPad**, add an item to the list, press the **To Tab**

button, press the **M** button and choose "Bring up Keypad – Must enter name" option.

3. Version 7.5.1 is a maintenance release.
4. Version 7.5.2 is a maintenance release.
5. Version 7.5.3 is a maintenance release.
6. Version 7.5.4 is a maintenance release.
7. New in Version 7.5.5: You can password-protect the access to Tab-to-Tab transfer and/or Tab-to-Table transfer. To change this setting, log in as a master user and press the **Options** button in **TouchPad**.
8. New in Version 7.5.5: Various activities will be recorded in Operator Log. These include adding a player or guest, transferring between table and table, transferring between table and tab, transferring between tab and tab, and using the **Paid by** feature in **Table Timer**.
9. New in Version 7.5.5: When you add a player in **Table Timer**, the program can automatically print a slip that shows start time, player's name and table number. You can give this slip to the player as a reminder. To enable this feature, select **Table Timer Options** from the **Menu Bar** of the program (under the **Table** menu title) and check the Print Slip option.
10. Version 7.5.6 is a maintenance release.
11. New in Version 7.5.7: A "Must use unique customer name" feature is added. When enabled, the program will not allow the user to enter a new customer name if this name is already in use. To enable this feature, choose **Table Timer Options** from the **Menu Bar** under **Table**.
11. New in Version 7.5.8: Several Integrated Credit/Debit Card Processing features are improved.
12. Version 7.5.9 is a maintenance release.

PHM 7.6 has these new features:

1. New in Version 7.6.0: In the new **Dynamic Pricing Schedule** window, you can use the new **Move Up** and **Move Down** buttons to change the order (priorities) of rules.
2. Version 7.6.1 is a maintenance release.
3. New in Version 7.6.2: If the **Remind Employee Clocks In** option is enabled **in Master Password Setup**, a duplicated clock-in will not be allowed.
4. Version 7.6.3 is a maintenance release.
5. Version 7.6.4 is a maintenance release.
6. New in Version 7.6.5: In the Integrated Credit/Debit Card Processing window, you can choose to have the **Process** button pressed automatically. Press the **Options** button to configure this. This setting only affects Non-Master Users.
7. New in Version 7.6.6: **Register** will show a message to remind operator if there exist additional sub-register receipts to finalize.
8. New in Version 7.6.7: When the program is in **Stand By** state waiting for operator to log in, any operator can access the **Clock In/Out** feature without actually logging in. Function keys (**FKey** feature) for **Clock In/Out** will need to be configured for this work.
9. Version 7.6.8 is a maintenance release.
10. Version 7.6.9 is a maintenance release.

PHM 7.7 has these new features:

1. New in Version 7.7.0: In **TouchPad,** when number of categories exceeds 96, extra button(s) are

displayed to make navigation easier.

2. Version 7.7.1 is a maintenance release.
3. New in Version 7.7.2: **X-Out** and **Z-Out Reports** can be configured to have restricted access. To change settings, log in as a master user and press the **Options** button in **X-Out Reports** window.
4. New in Version 7.7.2: In **TouchPad,** when number of items in a category exceeds 48, a button is displayed for quick access to more items.
5. New in Version 7.7.3: **X-Out** feature is improved. In addition to using **Z-Out** checkpoints to separate shifts, you can now also use operator logins to separate shifts. This makes it possible to create reports similar to some from **Special Reports**. **X-Out** is a good choice if you prefer to print with a receipt printer.
6. New in Version 7.7.4: In **Employee Time Clock Summary**, a **Manual Add** button is added. The manager can use this to manually add clock-in and cloak-out records when employees forgot to clock in/out.
7. New in Version 7.7.4: The **X-Out** and **Z-Out** features now allow you to select one individual operator for the report. You can also select all operators.
8. New in Version 7.7.4: If you have the **Network Edition**, the **X-Out** and **Z-Out** features now allow you to select a single station for the report. You can also select all stations.
9. Version 7.7.5 is a maintenance release.
10. New in Version 7.7.6: If none of the tables are configured to allow Guests (non-players), certain Guest-related features will be disabled throughout the program.
11. New in Version 7.7.6: Serial port ranges are increased.
12. New in Version 7.7.7: An option is added to print a gift card balance slip after the customer redeems or adds fund.
13. New in Version 7.7.7: When the program enters standby mode, the payment and change amounts of the most recent receipt will be displayed in **Login** window.
14. Version 7.7.8 is a maintenance release.
15. New in Version 7.7.9: Some export features add options to customize location of exported file.

PHM 7.8 has these new features:

1. New in Version 7.8.0: The **Discount** feature in **Register** will remember the discount percentage you used and use it as default percentage the next time.
2. New in Version 7.8.0: The **Discount** feature in **Register** now permits negative discount percentage. Negative discount is treated as **Charge**. Press the **Options** button to enable this. Negative discount can be used if you want to add a percentage surcharge to credit card purchase.
3. New in Version 7.8.0: The **Discount** feature in **Register** can be set to have different default values as the amount to be discounted. Press the **Calculate** button to enable this.