



Edgeserv - User Manual

Support Information

(845) 418-4432 ext #2

Call or Text

Table of Contents

iPad Settings.....	4
Sections.....	6
Transactions & Tips.....	6
Reports.....	7
Gift Card and Coupons.....	7
Time Clock.....	8
Edit Hours.....	8
Cash Drawer.....	9
Open Drawer.....	9
Close Drawer.....	9
Menu Editor.....	10
Guest Editor.....	10
Quantity Control.....	11
Paid In and Out.....	11
Reprint Docs.....	12
Manager Card.....	12
Taking and Order.....	12
Menu Section.....	13
Check Section.....	14
Item Actions.....	15
Payment Option on Order Screen.....	16
Payment Screen.....	17
Credit Card Terminals.....	18
Accept Credit Card Payment.....	18
Troubleshooting Credit Card Readers.....	18
Splitting a Check.....	19
How to Use Delivery.....	20
Set Your Delivery Zones.....	21
Taking a delivery order.....	21
Gift Cards.....	22
Create Gift Card Item.....	22
Load Gift Card.....	22
Check Balance.....	22
Pay with Gift Card.....	23
Partial Payments.....	23
Tipping.....	23

System Crash.....	24
Verify Basic System Function.....	24

iPad Settings

URL: Enter the IP address of the local Server with the Port
Format: 192.168.2.201:8080

Animation Enabled: This enabled the animation for opening and closing various windows in the app.

HTTPS Connection: Turn this on if you are using the VPN address of the server. Depending upon local network, you may not be able to use the VPN for a server when you are on the LOCAL network. Turn this off when setting up a machine and you must use the local IP address.

Credit Card Reader: Select the type of card reader that this terminal will be using. You can select Multiple you are using both a PAX reader and Bluetooth reader on the machine.

Default Receipt Printer: Enter the ID of the receipt printer you would like to pair this terminal with. If you do not enter anything it will default to ID 1.

Default Menu ID: Enter the ID number of the Menu you would like to have the terminal default to when the user logs in. This ID can be easily found by clicking the Menu in the back office and looking at the ID# in the address bar.

Select Receipt Printer Before Print: Toggling this on will require the server to select the receipt printer each time they need to print. This is only advised for mobile terminals.

Print Check When Paying: This will print a copy of the check automatically when you navigate to the payment screen.

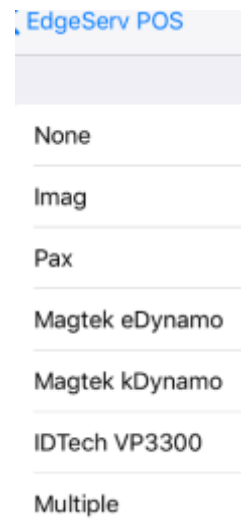
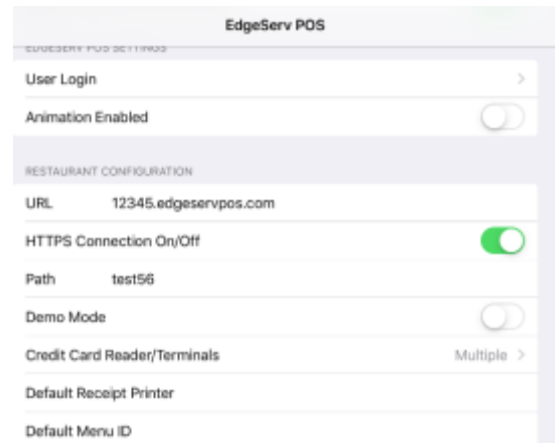
Alternate Screen View: This will toggle a new layout for the view menu. Toggle On to show all of the individual menu items groups together on the first page, or Off to only show the categories requiring a server to dial down to the individual menu items.

To-Go-Prefix on all items: This will add the To-Go description to every item to denote that all orders taken from this terminal will be considered a To-Go order.

Training Mode: Toggle the training company on and off, and enter the path for the training company. Please refer to the Document on setting up a training database.

Show Fingertip: This will show where your fingers tap on the screen. This is primarily meant for remote training or to day play on a TV for group training.

Search Panel for Optional Mods: When this is on the menu will automatically open the search keyboard when you open up a modifier group marked as NOT always active.



Search Interface for Item Selection: This option will enable the search panel to open on the menu so you can search items. This is meant for terminals that will be using a barcode scanner.

Enable Fast Screen Ordering: This will turn on the separate menu for the Fast-Ordering Screen. Please see documentation on menu programming for more on the fast screen.

Enable Breadcrumb: This shows the layers of subfolders used to navigate to a menu item.

Touch ID for Login: Enable the function of using the iPad fingerprint scanner. **Note:** the iPad fingerprint scanner can only store 5 unique fingerprints.

Optional Modifier Pre-Selector Change

Back to default: After selecting a modifier in a group marked as NOT always active this will keep the screen near your previous selection, not using this will send the modifier selection back to the top of the list.

Start Order with Here/Togo: The order will ask if the order is for here or to-go at the beginning of each order.

Navigate back to the menu after item selection: This will determine if, after ordering an item, whether the system navigates back to the highest level of the Menu, or back to the category you just ordered from.

Barcode Reader Support: If you wish to use standard barcode reader for text entry.

Order Screen Grouping Similar Items: Items that have been ordered that are the same will group together with a number preceding them instead of each item having a separate line entry.

Call ID Listen to Incoming Calls: If you have called connected to network the system will listen to the information from the caller id and display the details in the guest ordering screen. Please refer to the delivery documentation for more details.

Auto Logout Timer Suspended: This will disable to the timer auto-logout function if an order is currently open on the terminal.

Price Embedded Barcode Settings: Please refer to the Barcode Documentation for more details.

Customer Checkout: This will enable the Customer checkout screen option on sections that you enable it for.

Enable Pre-Authorization: Enable the Pre-Authorization functionality for this terminal. (ADDITIONAL BOH SETTINGS REQUIRED)

Enable Item Multiplier Bar: This will always keep a bar on the screen to multiply the number of items ordered.

Barcode Reading in Background: This will continue to always read the barcode scanner, otherwise you must be on the item searching panel to scan a barcode.

Overriding Rules when Ordering Tax Inc Items: Enabling these functions will override the tax inclusive options determined for the section.

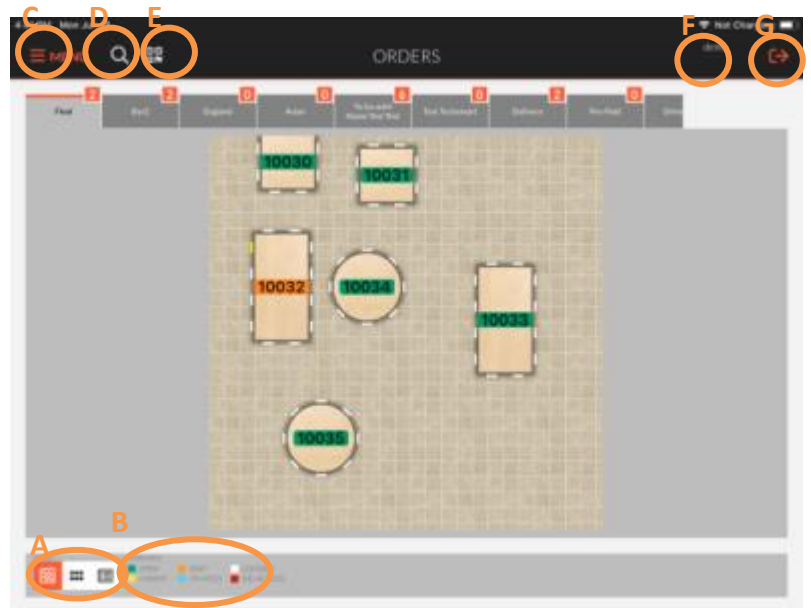
Always Jump to Last Item on Order Screen: The ordered item screen will always scroll down as you order items.

Search Panel for Optional Modifiers	<input type="checkbox"/>
Search Interface for Item Selection	<input type="checkbox"/>
Enable Fast Screen for Ordering	<input checked="" type="checkbox"/>
Enable Breadcrumb on Menuitem Selector Screen	<input type="checkbox"/>
TouchID for Login and Approval	<input type="checkbox"/>
Optional Modifier Pre-Selector Change Back to Default	<input type="checkbox"/>
Start Order with for Here/To Go question	<input type="checkbox"/>
Navigate Back to Menu After Item Selection	<input type="checkbox"/>
Barcode Reader Support	<input type="checkbox"/>
Order Screen Grouping Similar Items	<input type="checkbox"/>
CallerID Listen to Incoming Calls	<input type="checkbox"/>

Sections

Shows you all of the sections you have set up in the back office.

- A. Change the view
- B. Status Key of Tables
- C. Menu for all additional functions
- D. Search for open orders by Price, Check ID, or Table Number
- E. Scan QR Code on a check to jump straight to that order
- F. User currently logged in
- G. Log out user (this does not Clock you out)



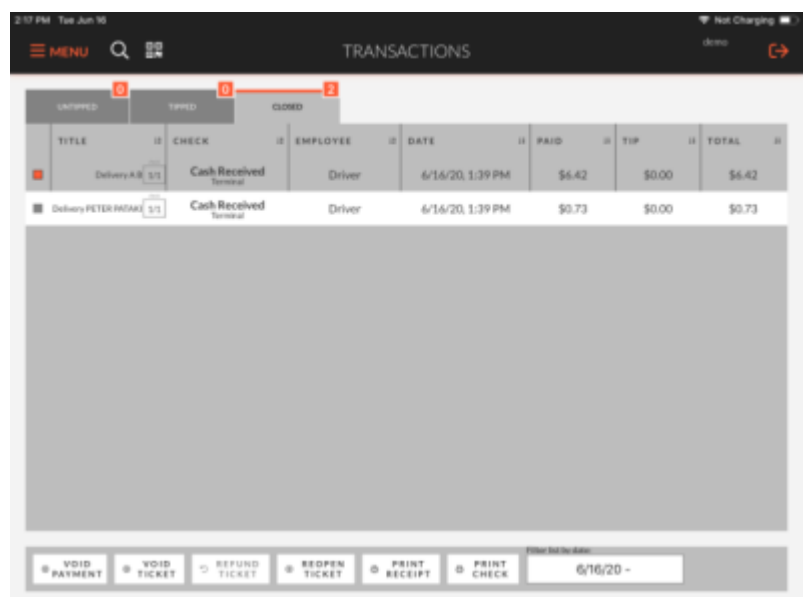
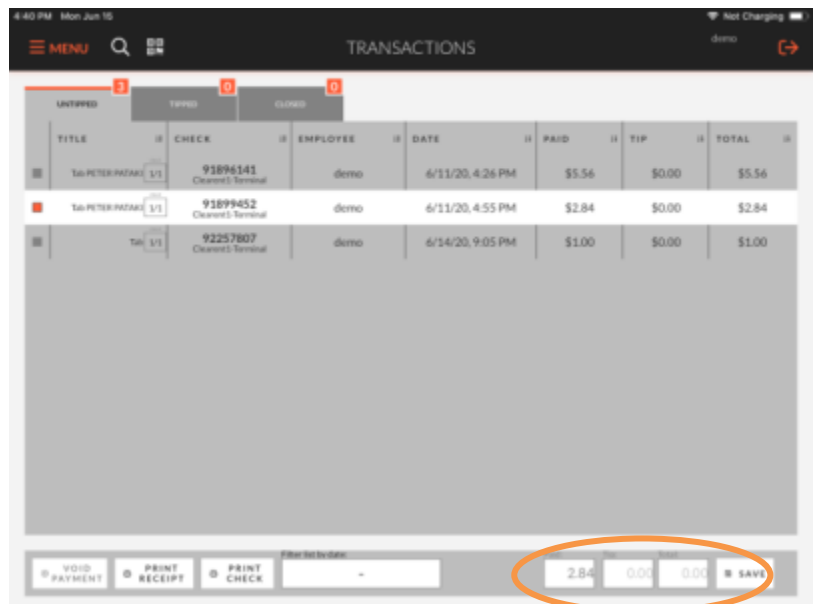
Transactions & Tips

See ALL closed transactions, and apply tips to credit cards. Sorted by Untipped and Tipped. The Closed tab will show cash transactions that have finished for that day.

Untipped: Tap any order to print a copy of the check or the receipt. You can add the tip in the bottom right and save. This will move it to the Tipped tab.

Tipped: Tap an order to adjust the tip before it goes to the batch.

Closed: Tap today's orders to void the Ticket or Payment. You can refund the Ticket from here after the batch. You can only reopen cash transaction on the same day and a credit card transaction will be here once batched the only thing you can do is reprint or refund



Reports

See all reports that are available from the Back Office, and see options for quick reports.

The top section will allow you to view any report. Tap the type of report you wish to review, and enter the search parameters for the report.

Along the bottom of the Reports page are all of the usual reports you would typically need to view through the day.

Daily Sales: Full sales report for the restaurant that day.

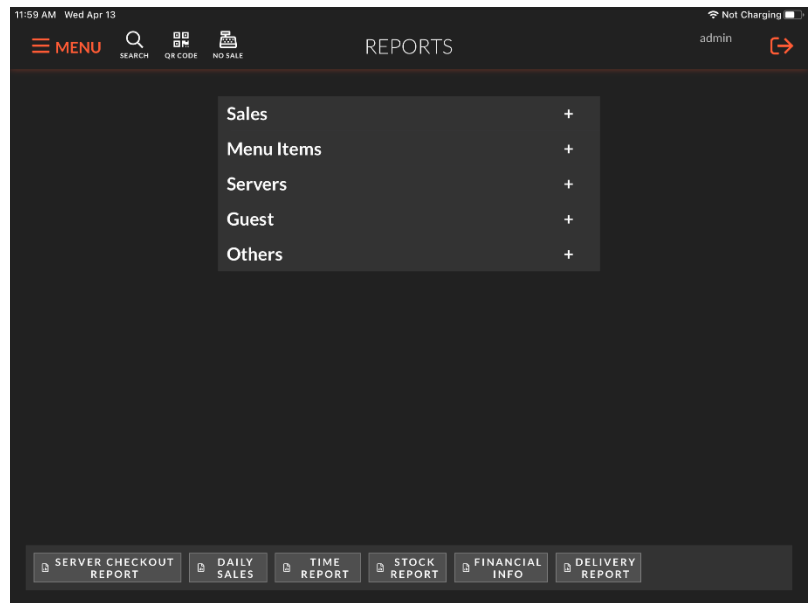
Server Checkout Report: Select a server and see their sales report for that shift.

Time Report: Show all people currently clocked in.

Stock Report: Shows the quantity of items that are set as limited.

Server Financial Report: Simple breakdown of each server, and the of sales they have made.

Delivery Report: Select a driver and see a detailed breakdown of all deliveries that have dispatched to them including time and sales.



Note – Cash Drawer Reports located under the Cash Drawer Tab

Gift Card and Coupons

In the list you will all gift cards that are still waiting to be activated. Gift cards can be set for activation at the time of sale, or in a separate process under this section.

To activate one of these gift cards, tap the Card Transaction you wish to activate, then select the method with which you wish to activate it.

Auto Generate: This will have the system automatically generate a random code, and print a paper slip, this code can be used as a gift card.

Card Swipe / Manual Entry: You can either manually enter in a unique identifier to apply the transaction amount toward. This can be a previous Auto Generated code, or possibly any 8-digit code from a previous system. You can also use the QR code scanning functionality to scan a QR code on a physical gift card to hand out to your customer. You can have gift cards created with random QR codes printed on them to use as gift cards. Tap info in the bottom left to then enter the code for scan the QR code of a card to check the balance of a card.

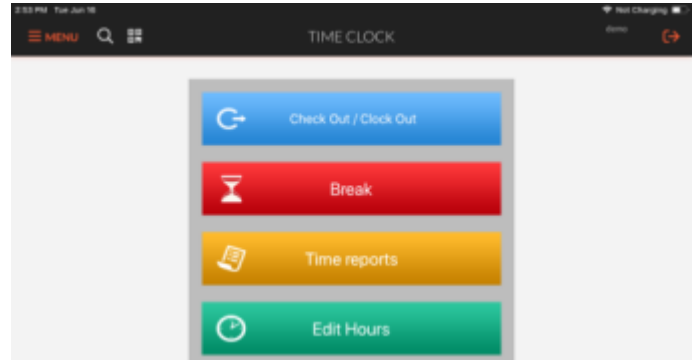
Create Coupon: You can search your database for existing customers from your delivery list and rewards program to issue a coupon for your customer or simple tap the button to create a coupon to bring a customer back.



Time Clock

Access the time clock functions.

Clock in OR Check Out / Clock Out: Tap this to clock in if you have not already done. Any non-manager will automatically be forced to clock in when they first sign in. After you are clocked in the buttons will be replaced with Check Out / Clock Out. You can tap this to do your end of day Check Out procedures, and the system will print a copy of your server report. You may then also choose to Clock Out or stay clocked in if you have additional job duties to perform. Forcing Clock Out at time of Check Out can be enabled in the Back Office.



Break: Tap to go on a break and clock out without ending your shift.

Time Reports: You can view your Time Report; a manager may view all employees Time Report. Access to this function can be disabled.

Edit Hours: Only a manager can view this. From here you may fix an incorrect clock in or out from an employee after they have finished the shift.

Edit Hours

Tap the Edit Hour Button

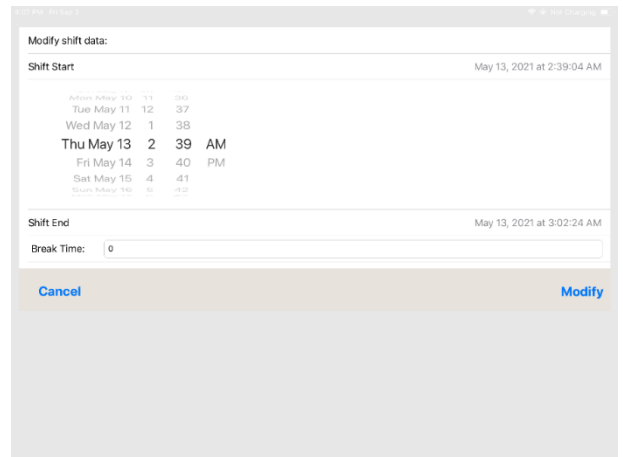
Tap the Date/Time

Scroll to enter beginning Time AND End Time

Tap the Time Punch you wish to edit

The starting or ending punch time to edit.

Tap MODIFY when done.

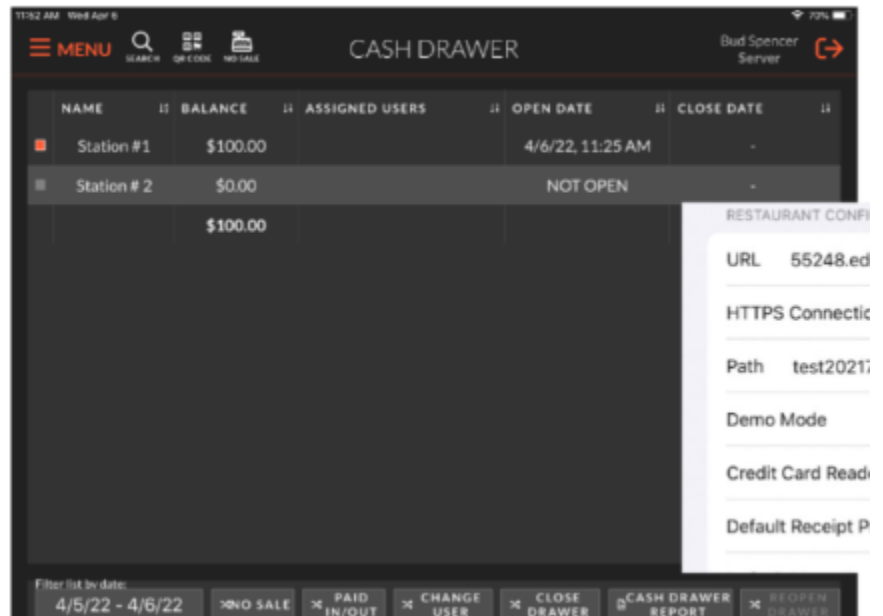


Cash Drawer

If you have enabled the cash drawer functionality for your restaurant and this user has permission to edit the drawer, they will see this option. From here you can see the balance of the draw, when it was opened, who closed it and if it was off. You may also open a new drawer and assign a user to that drawer.

Open Drawer

1. Select Menu
2. Select Cash Drawer
3. Select the cash drawer to open
4. Select Open Drawer at the bottom
5. Enter in starting amount



Close Drawer

1. Select Menu
2. Select Cash Drawer
3. Select the cash drawer to close
4. Select Close Drawer at the bottom
5. The cash drawer report will print and the drawer will open

Menu Editor

Edit the menu from the iPad

1. Select Menu, then select Menu Editor
2. Tap the item, cart, or category you would like to edit.
3. Tap the edit button in the bottom left corner to make an edit.
4. When the window pops up, make the changes you wish and tap save.

Note: All menu editing functions are available at this level of editing; some are only available from back office.



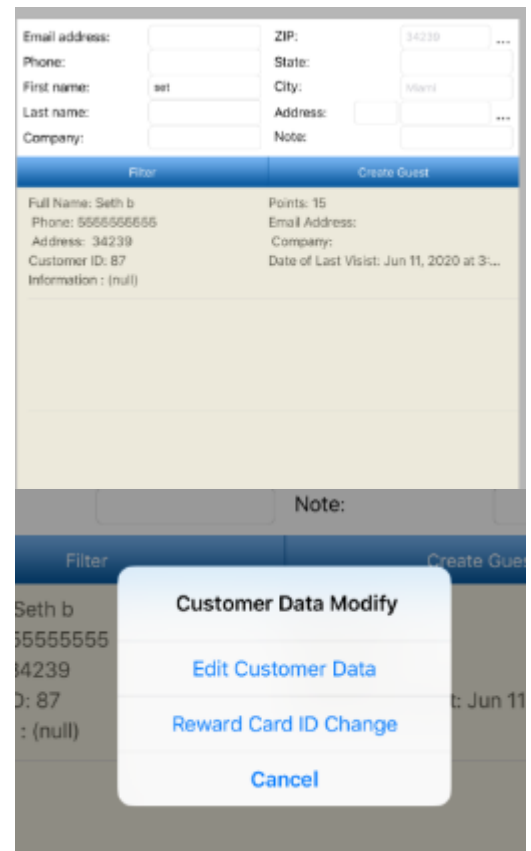
Guest Editor

View and edit your guest contact information.

Finding a Guest: You can enter in basic customer information like their first name or phone number and tap filter to quickly find a guest you are looking for.

Edit a Guest: Press and hold on a guest entry to see the Customer Data Modify options. You can edit their contact information, or change their reward card if you are using the rewards program. Just scan the new card on the new screen.

Create a Guest: If you want to register a new guest for the reward program, or to create a mailing list for promotional purpose. Type your guest information in the various fields and tap Create Guest.



Quantity Control

You can quickly limit the available quantity of items on your menu.

When you open the Quantity Control screen you will see a list of all your individual menu items.

Tap the toggle to the right (green) to set this item as limited. Then enter in the desired quantity that will be available.

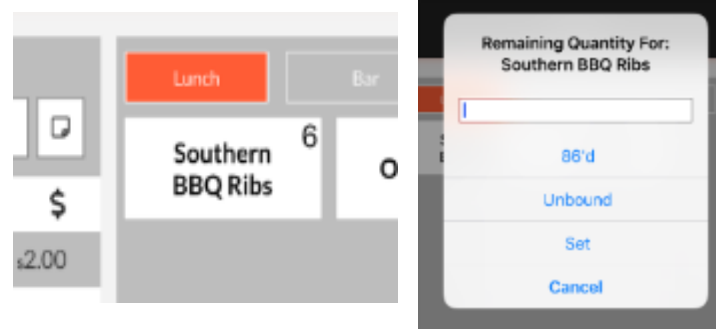
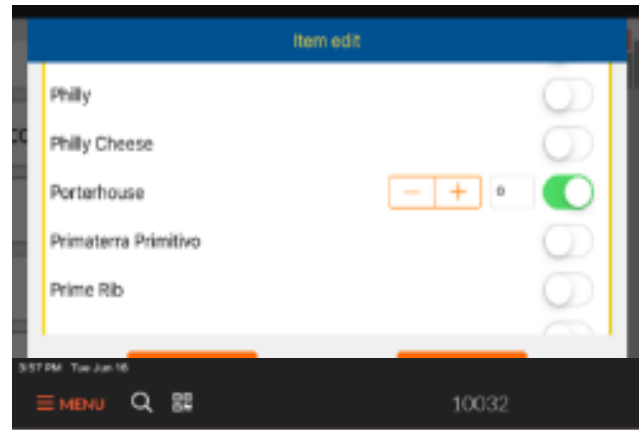
You may also set the Remaining Quantity directly from the ordering screen by Pressing and Holding on a menu item for 3 seconds. Then tap Set Remaining Quantity

Enter the remaining quantity and tap set.

86'd: To say the item is not available anymore.

Unbound: To remove any quantity control from the item.

After setting the quantity of an item you will have a number appear on the menu item representing the quantity that is still available.



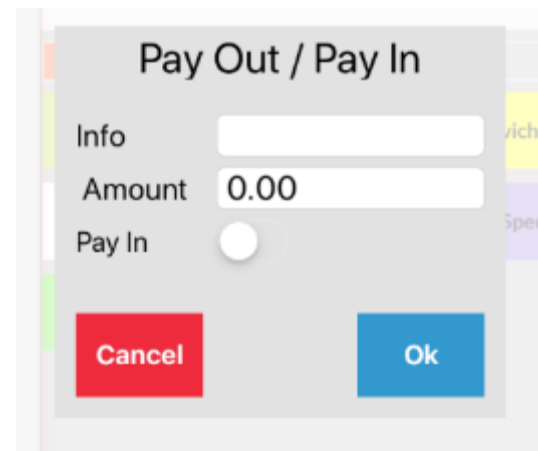
Paid In and Out

Edit the balance of the cash drawer for the restaurant to track additional transaction in and out of the drawer.

Example: If you need to add more change to the draw you would pay in.

Example: If you need to pay product vendor cash from drawer you pay out.

All of these transactions will show with a note on the House Report.



Reprint Docs

See all recently printed documents from the system.

Tap any document to view. While viewing you can print to the default printer or select another. You may also search for a document from a time other than today. Document records will go up to six months into the past.

Filter by Server: Select which servers' documents you would like search for.

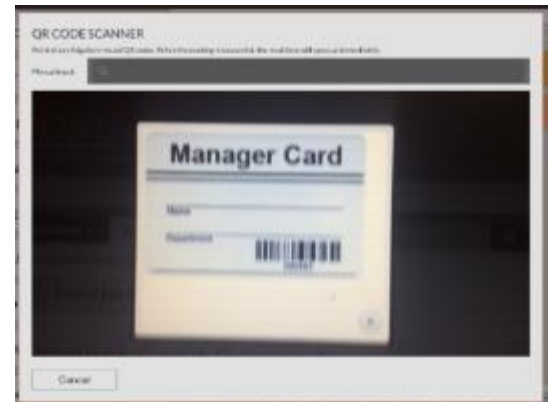
Filter by Table Number: Narrow your search down to a specific table number



Cancel	Printed documents	Filter
Check	2022-06-16/08 (Table 108/23)	Jun 16, 2022 at 2:48:00 PM
	demo	Counter
		(unknown)
		(unknown)
Discount	(unknown)	Jun 16, 2022 at 3:45:18 PM
	(unknown)	Counter
	(unknown)	(unknown)
Check	2022-06-16/19 (Delivery # 0)	Jun 16, 2022 at 1:30:41 PM
	demo	Counter
		(unknown)
Check	2022-06-16/08 (Table 8/19)	Jun 16, 2022 at 1:04:21 PM
	demo	Counter
		(unknown)
Check		Jun 16, 2022 at 1:34:21 PM

Manager Card

If you are a manager, tap this to scan a new card for you to use as a manager. Just hold the card up to the camera to scan. You can use a manager card to scan instead of typing your code in when a server needs approval. If you are NOT a manager you can still use this to scan a new employee card. Any barcode or QR code will work for this.



Taking and Order

Tap the Section you want to place an order in. Sections are for different dining rooms, and different order venues like To-Go orders, Bar Tabs, and Delivery. Each tab can be set up to reflect the needed function for each ordering method.

Table Dining

Tap a section for a dining room. You will see the table layout.

COLOR CODE

Green: The table is open you have permission to place an order on here.

Yellow: This table is in use, has an item on the order, but there are items that have not been sent to the kitchen.

Orange: There is an active order on this table, and all items have been sent to the kitchen.

Blue: There is an active order on this table, and there are items ON HOLD waiting to be sent to the kitchen.

White: The table is locked while another user is logged in and editing an order on that table.

Red: You do not have permission to access this table. Either because you do not have permission to access this Section, or another user has an order on it, and you do not have the ability to edit their order.

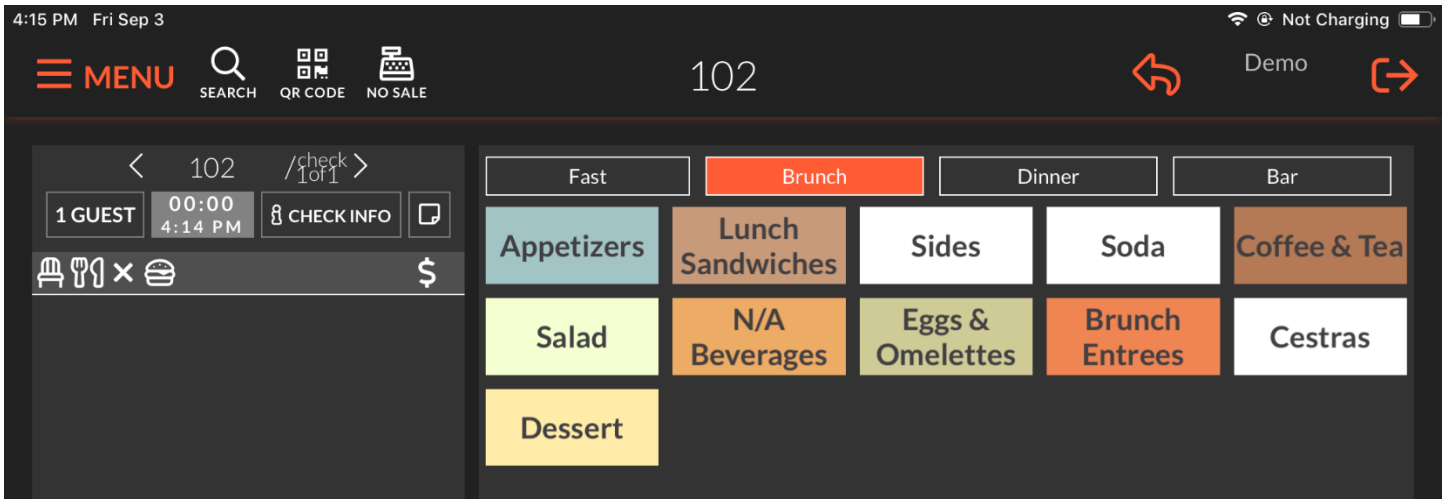


Tables and Chairs: Around each table are white dashes. These correspond to the number of chairs that are set as available on that table. If you see a dash that is yellow, that represents how many seat positions are being tracked.

1. Tap a table to begin taking an order.
2. The right section is the ordering screen for available menu items.
3. The left section is for all ordered items.
4. The bottom is for additional functions.

Menu Section

Along the top you will see the Carts you currently have active in your menu. Carts organize your menu by grouping logical items together that would normally appear on your menu. Example: Breakfast, Lunch, Dinner, and Bar.



When you select a cart, the second row below that will show the categories of Menu Items that are available in that MENU.

In this example to the right, you see there are Lunch, Bar, and Breakfast carts, the Lunch MENU is selected currently, and below that you can see Beverages, Sandwiches, and Sides are possible categories.

When a MENU is selected you will see all menu items in the entire MENU below. All categories will be merged onto one screen.

If you select an individual Category the visible items will narrow down to just the items in that category. So, if you select the Sides category this is what you see. → Menu items that show with a “*,” “represents that it is a Sub-Category, and that there will be more items in it once you tap it.



Menu Items that show with a “/” through the icon denote that this item is a combo item, and that the next level of options that appear will be part of a combo.



Check Section

This section shows all the information regarding the check and what has been ordered. The top here shows what Table the order has been opened up on. You can see how many checks are on this order, and which check you are currently editing, and the arrows to the left and right allow you to cycle between the additional checks.

Next you will see the number of guests recorded for this order. You can tap this to enter the number of guests, or set the system to always ask for the guest count in this section. You will also see the time the order was placed, and how long the order has been open. Here you can see the order was opened at 9:10PM and has just been opened.

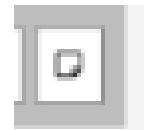


Further down is the Check Info. If you tap this you will see additional information about the order at the bottom of this section.

See CHECK DETAILS →

CHECK DETAILS	
Subtotal	\$15.00
Sales Tax	\$1.05
Check Total	\$16.05
Non Cash Fee	\$0.52
ADJ Total	\$16.57

The paper icon can be tapped to create a note for the order for the kitchen staff. There are several default notes, and more can be added in the back office under System > Terminal Settings > View > Pre-Set Kitchen Notes. Additional ones may be added with a comma and a space.



Note For: Order

Do not make See server Urgent Have ready at

CANCEL OK

Note: Notes do not print on the receipt.

The next line below will show details about the items ordered.

Chair Icon: The seating position around the table.

Fork Icon: Shows the course line of the item ordered.

X Icon: Shows how many of that item was ordered.

Burger Icon: The name and modifiers of the item.

\$ Icon: The price of the item and the price of the modifiers added.

1	1	1x Coke		\$0.00
2	1	1x Bottle Water		\$0.00
1	2	1x Caesar Salad		\$12.00
		Five Grain		\$1.50
		Dress On Side		\$0.00
2	2	1x Grilled Chicken Sandw...		\$12.00
		Sour Dough		\$0.00
		American		\$0.50
		Fries		\$0.00

Item Actions

Once you tap a menu item, an additional section of options will appear to the right.

To Go: This will set the selected item or items as to go. This will put a “TO-GO” in front of the menu item so the kitchen staff knows to package it.

Repeat: This will reorder the item exactly as it was ordered with all modifiers and notes.

Split: This will split the individual item; this does not split the check. A box will appear asking how many ways you would like to split the item. Example: Four customers want to split a \$40 bottle of wine evenly. Tap split, then enter 4 and tap OK. The system will split the bottle into 4 evenly priced items (4 items at \$10 each), and this will allow you to then assign those to each of their checks.

Undo Discount: If a Discount had been applied to an item, you can undo that discount.

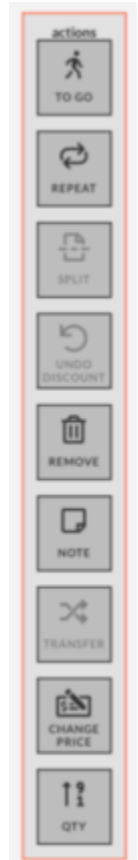
Remove: If the item has not been sent to the kitchen yet, you may remove the item from the order. If the order has already been sent to the kitchen this button will be replaced with a VOID option for void the item.

Note: This will add a note to individual item for the kitchen staff, notes do not print on the receipt.

Transfer: After an item has been sent to the kitchen you can choose to transfer this item to another order.

Change Price: Tap this to change the price of the ordered item manually. This will not change the price for future orders, only this selection.

QTY: Before sending the order to the kitchen you may tap this to change the quantity to order of the selected item.



Payment Option on Order Screen

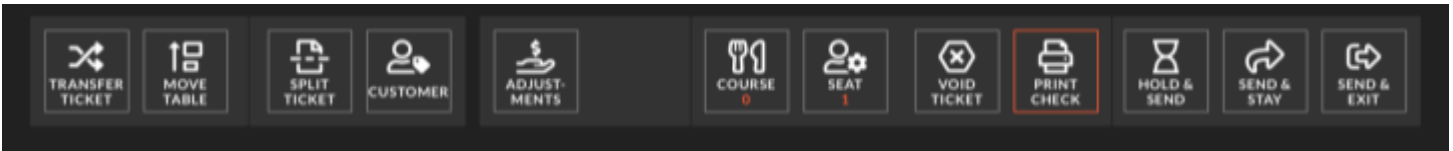
Quick Cash: Will immediately close the open check to cash. Any leftover change is implied to be the Server's tip.

Quick Card: This will prompt for a credit card payment for the full amount of the check.

Pay: This will show the current balance owed on the order, and tapping it will take you to the payment screen.



BOTTOM OPTIONS



Transfer Ticket: This will open a screen to transfer the currently selected ticket to another currently logged in server. This is used primarily for when a server needs to leave and wants to transfer an order to another server so they can clock out.

Move Table: Move this order to another table, or move a current Tab or ToGo order to a Table.

Split Ticket: Opens the Split Order Screen, select a number to split the ticket.

Customer: Opens the Guest Editor screen to find or create a new guest. This is used to attach a guest to the order so that they may earn rewards points.

Adjustments: Refer to Adjustments Section

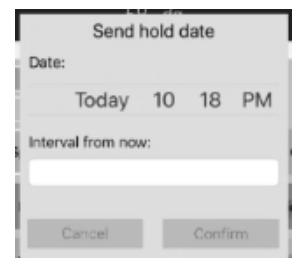
Course: Tap to automatically increase the Course line of the next ordered item. Press and Hold to open a dialog screen to select which course you would like to order under. Note: You may also set menu items to automatically default to a particular course line in the menu editor if you always use course lines in your restaurant.

Seat: Select the seat position you would like to order for. Press and Hold the Seat button to open a dialog for which seat you would like to order for.

No Sale: Will open the cash drawer. Note: Must have Cash Tender enabled for user.

Print Check: This will print a copy of the current check. **Warning:** If the order had not yet been sent to the kitchen this will send all items to the kitchen.

Hold and Send: A dialog will appear asking which items you would like to send the kitchen immediately, tap to select the items you wish to send now, tap SEND when you are done selecting those. The next screen will ask you when you would like to send the rest of the items. You may use the date function to select a particular date and time you would like to have the items sent to the kitchen, or use the "Interval from now" to simply enter a number of minutes you would like the system to wait before sending.



Send and Stay: Send the order to the kitchen, but stay on this ticket. This is useful for sending the order part way through if you have a large group.

Send and Exit: This sends the order to kitchen, and exits ordering screen.

NOTE: Do not use the COURSING/FIRE options together with HOLD and SEND options.

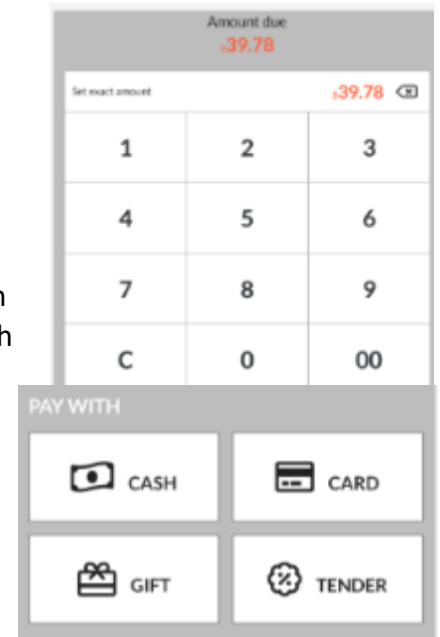
Payment Screen

When you tap the PAY button it will take you to the payment screen. At the top you will see the current amount due on this ticket.

Set Exact Amount: The system will default the full amount of the ticket, but if the customer wishes to split payments in any way you may erase this and use the number pad to enter in a new amount. The amount typed here is the amount that will be paid when you select a payment method.

Split Check Evenly: If the customer is not splitting the check by items, they can choose to split the check evenly by the price. Tap the number of ways you wish to split the check. You can tap the 1/n option to enter any value for numbers greater than 3.

Quick Cash Payment: If the customer is paying with large bills tap the amount that was given. This amount will adjust based upon the amount of the order. This will close the order to cash for that amount, and display the change due.



Pay With

Select the type of payment you would you like pay with in the “Set Exact Amount” section above.

Tap **Cash** for a Cash sale, **Gift** to pay with a Gift Card, and **Card** for a Credit card. A terminal can be paired to always use one credit card reader, or a dialog will appear asking which credit card reader you would like to use.

TENDER: Will open up additional payment options added to the back office under Financial > External Payment Options.



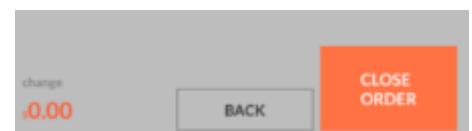
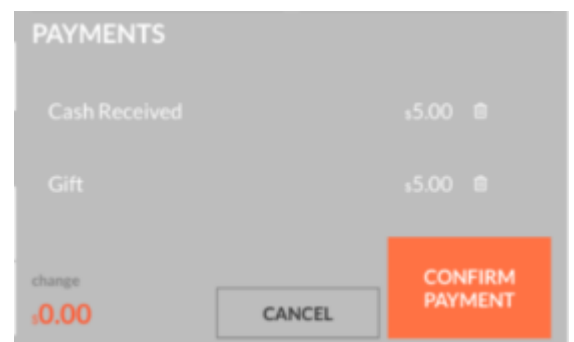
PAYMENTS

Here you can see all currently applied payments to an order. You will see all Tenders for Cash, Credit, and even Discounts. You may tap the Trash Can icon to delete any payment made except for Credit Card sales. You must go to the Transactions & Tips MENU option to void credit sales.

If change is due, you will see that in the bottom left, you may also have a Change Due window pop up for the server to seen under System > Terminal Settings in the Back Office.

If you see an “!” next to a payment you must tap CONFIRM PAYMENT to confirm the application of that payment.

Within the Sections settings you may have an order stay open after it has been fully paid. This is useful for Order Types such as Delivery or Catering. In this case, after paying in full, the Confirm Payment button will change in to a Close Order button to finally close the order.



Credit Card Terminals

To accept credit cards using EMV Chip or Tap to Pay, you must have an external credit card reader. This will resemble one of these three (3) devices:

Pax A35



Pax A77



Pax Aries 8



Accept Credit Card Payment

1. Navigate to the Payment screen and select Card
 - a. In the back office a credit card reader is assigned to each iPad, it will then send the transaction to the reader's IP address
2. The reader will then light up and request you to insert a card or tap to pay
 - a. You may use any tap to pay card with the wave symbol
 - b. You may also accept Apply Pay by tapping the phone or watch
3. The unit will beep when the transaction has completed
4. A receipt will print with the authorization and signature line on the iPad's receipt printer

Troubleshooting Credit Card Readers

If you have issues connecting to a credit card reader follow the steps below to reconnect:

1. Reboot the credit card reader by unplugging the power cord, waiting 5 seconds, then re-applying power
2. Wait for the reader to boot up, it will display its IP address for 5 seconds at the top once fully booted
 - a. Document the IP Address to help tech support
3. Select the TSYS Transit App and wait for the app to boot up, you will see a Blue TSYS logo on the screen
4. Attempt the transaction again, if the connection still fails proceed below
5. Open the back office, Settings > Card Reader Editor and verify the IP address of the device
6. Open the back office, Settings > Terminal Editor and verify the iPad has the correct terminal selected
7. If the reader still will not connect, contact support for further instructions

Splitting a Check

To split an order, tap the Split Ticket button on the bottom left of the Ordering Screen.

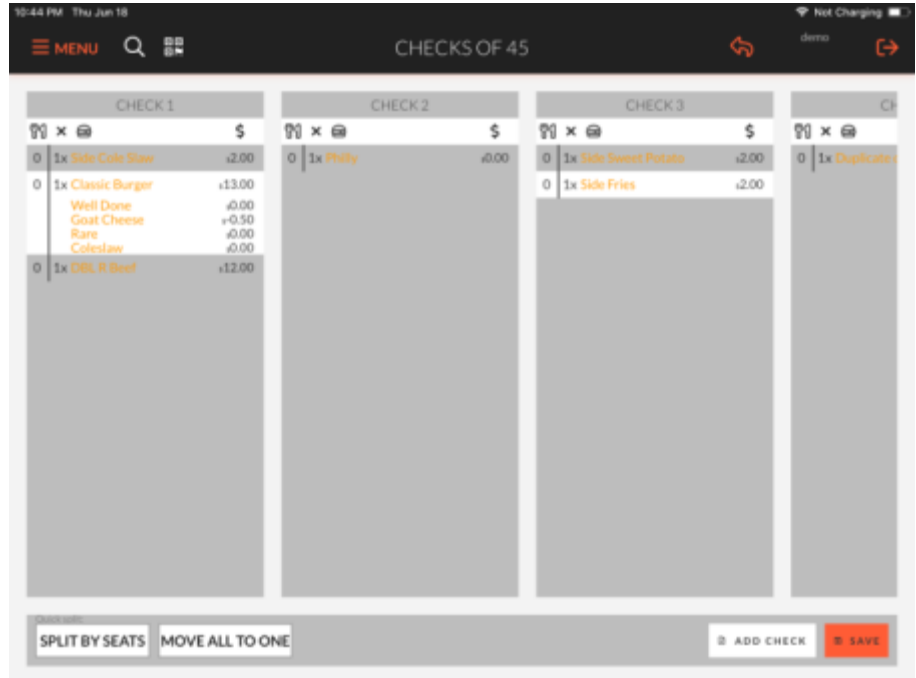
SPLIT BY SEATS: If you have the order separated by Seat Positions already you may tap this to automatically have every Seat become its own Checks.



MOVE ALL TO ONE: If you have split checks and would like to undo the split checks tap this to move all items back to check one.

ADD CHECK: You will see 3 checks at first, if you want 4 or more checks tap this to add as many checks as you need. Tap drag across the screen to scroll through the different checks.

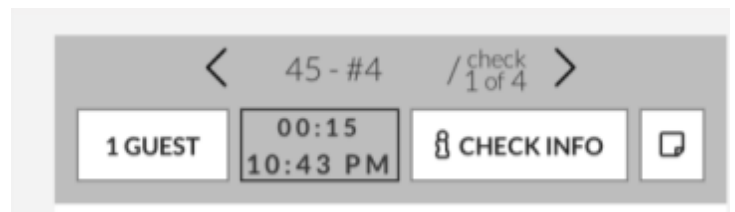
Moving Items between Checks by tapping any menu item. You will need to tap the first line of a menu item, not the modifiers. Then select the check you would like to move it onto. Tap save in the bottom right of the screen to save your changes.



Ordering on separate checks

Tap the arrows in the top left corner of the ordering screen to move between the separate checks.

Example: Here you can see we are on "Check 1 of 4"



How to Use Delivery

To enable Delivery options you must verify the settings listed below within the back office.

Under System > General Settings

Allow Delivery Orders (this will turn on the delivery functions for the iPad)

Delivery Service Charge Paid to Restaurant (the service charge you would like to use for delivery orders)

Under System > Terminal Settings

Close Paid Delivery Order at Closeout when On the Road (if the order is paid it will clear from the delivery screen at the end of drivers shift if the order is On the Road)

Close Paid Delivery Order at Closeout when Dispatched (if the order is paid, it will clear from the delivery screen at the end of the drivers shift when the order is dispatched to a driver)

Enable Quick to Go - Delivery Option (allows you to access the delivery screen directly from the Quick to go screen)

Display Warning if Zip Code is Not in Delivery Zone (only address with proper zip codes)

Under System > Subsystem

Default Delivery City (Set your default City)

Default Delivery State (Set your default State)

Default Delivery Zip Code (Set your default Zip Code)

Under Staff > User Roles

You will need to add these functions for your servers!

Access/Open Delivery Screen (can view the delivery screen)

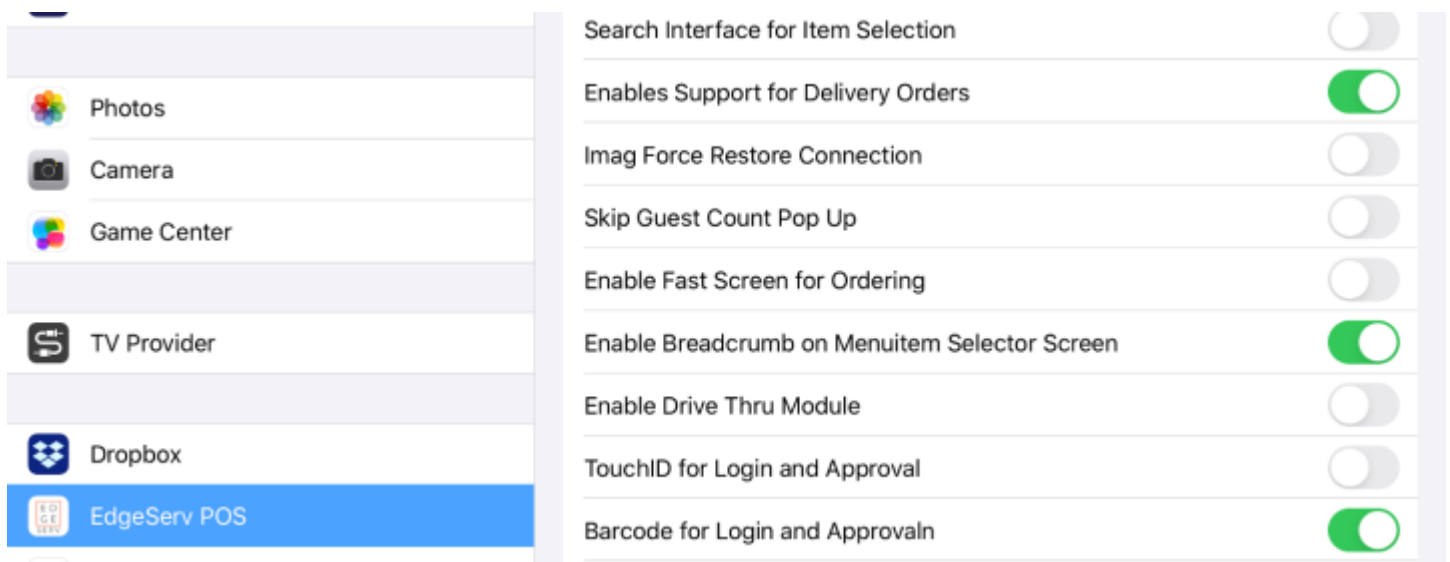
Access Delivery Fee (can change the delivery fee)

Delivery Driver Function (IMPORTANT! This permission MUST be assigned to a role, and then Driver must have that role)

Dispatch Order to Another Driver (can dispatch orders, this important for your servers to have)

On the iPad > Go the iPad Settings (Gear Icon) > Edgeserv POS Settings

Enables support for Delivery Orders (this will allow that iPad to access the Delivery screen)



Set Your Delivery Zones

In the back office under Establishment > Delivery Zones You can assign zones by Zip Codes, set a price for delivery to that zone, and the name of the zone.

Note: The “Edit on Map” function is currently only available for Online Ordering, not Delivery or Ordering.co integration

Commands	Id	Name	Price Of Delivery	Average Delivery Time Est. (Min)	Zip Codes	
✓ ✗	1	33916	\$2.00	30	33916	Edit On Map
✓ ✗	10	33901	\$2.00	30	33901	Edit On Map

Taking a delivery order

On the iPad, along the bottom you will see a Truck icon for the delivery screen, tap that.

Take Delivery – To start a delivery

Dispatch – After a delivery order has been taken, you must dispatch the order to one of your currently clocked in Drivers.

Take Delivery

Find an existing user by typing the first part of a name or number, and hitting FILTER. This will search your previous orders for names and address. If you find the one you are looking for just tap their name to start the delivery order.

If you do not find their name, just enter in their name, address, phone, and any other information you have. Then tap <CREATE GUEST>

After selecting your customer, simply take the order as usual. You may either send to the kitchen or pay, but the order will stay open in the DISPATCH window waiting to be dispatched to a driver.

Dispatching an Order

Go to the DISPATCH screen.

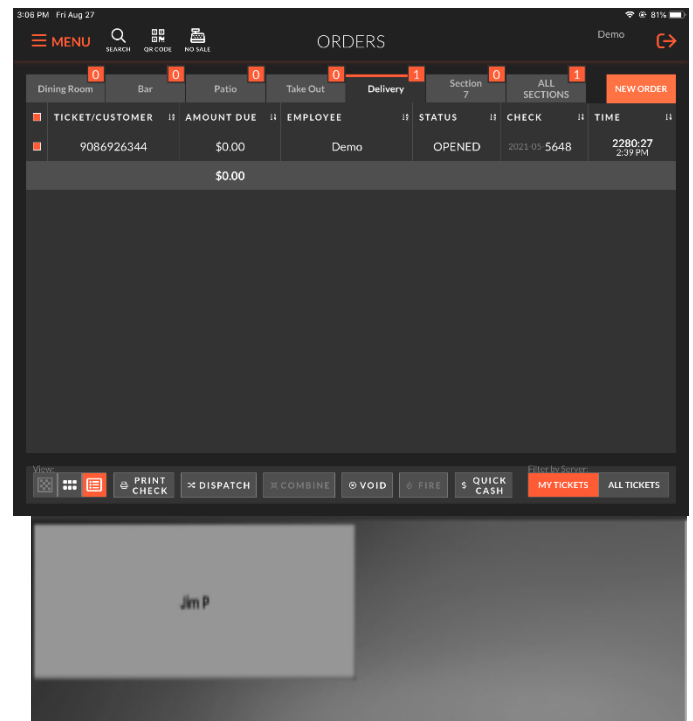
Tap the Order you want to Dispatch to a Driver

Open Order – You can re-open the order to edit it

Edit Customer Data – You can fix the customers information

Single Dispatch – Send the order to a Driver

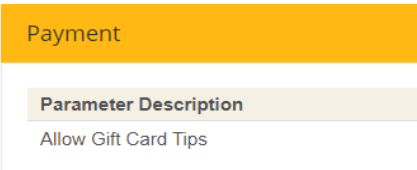
You will see a list of clocked in drivers, tap the driver you want to send it to.



Gift Cards

If you would like the system to prompt for TIP ON GIFT CARD you must change the following back office settings:

- System -> Terminal Settings -> Payment
- Allow Gift Card Tips = flag on ->Workflow
- Gift Card Type Question After Swipe (*semi-integrated for Valuetec*)



Create Gift Card Item

- Create Category named Gift Card
 - Be sure to select Gift Card option
- Create Gift Card MENU ITEM Button
 - Category should be Gift Card
 - Revenue Group should be Gift Card
 - Custom Price
- Create item call Gift Tip
 - Custom Price
 - Category should be Gift Card



Load Gift Card

1. Click on Gift Card Item
2. Enter Price for Gift Card and click OK
3. Tender Check

Popup will appear “Do you want to Active Gift Card Now?”
If you click Yes swipe card on Pax terminal
swipe card to add amount to card



Check Balance

Click Menu -> Gift Cards & Coupons -> Click Info then
swipe card on PAX Terminal. It will display Gift Card
balance.



Pay with Gift Card



Hit Pay -> Choose Gift Tender...Popup appears Would you like to Add Tip to Gift Card?

FOR VALUETEC GIFT CARDS

If you choose NO you will be prompted to swipe card on Pax Terminal. If you choose Yes, another popup will appear to add tip, you only have to add tip you don't have to add total. NOTE: when adding tip total amount will be added together for authorization. Also, with partial payments it will authorize the tip first. Next you will be prompted to swipe card on PAX Terminal.

Partial Payments

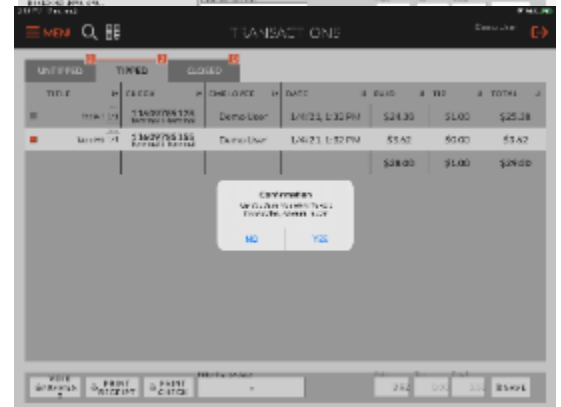
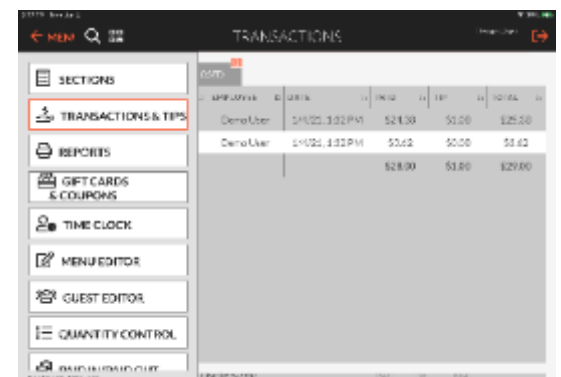
If gift card does not have the full amount of balance of the check a partial payment will happen. On the screen and a hit will print showing amount paid and amount remaining. The check will still need another form of payment. NOTE: Tip will be authorized first for partial payments. If the gift card balances less than the tip amount it will automatically void the transaction and user has to pay the whole amount in a different way or try without tip.

Tiping

When server is presented with Gift Card they can ask if the customer knows if they would like to add a tip to Gift Card. If Customer says yes, they can add a tip when they run the transaction. If they customer changes their mind and wants to leave a tip after 1st transaction is run a separate transaction is needed. Ring up \$.01 Gift tip item created during setup and put tip in when running second transaction.

Voiding Transaction

1. To void a Gift Card Transaction, click Transactions & Tips. Navigate to Tipped Tab
2. Select Transaction and click Void Payment button below.
3. Confirm Void



System Crash

In the event that your system crashes, you must contact support immediately so we can help get you back online as fast as possible. Contact support at (845) 418-4432 ext 2, or you may also text this number as well.

Verify Basic System Function

1. Locate the POS Server (Intel NUC box) and verify that it has a blue light on the front, and that all cables are plugged into it.
 - a. Only reboot this if instructed to by Drive support staff.
2. Locate the POS Router (Ubiquiti Edgemax Router) and verify that it has several green lights on the front, and that all cables are plugged into it.
 - a. ETH0 is the internet (WAN) port and must be plugged into your modem or upstream router.
3. Check your internet modem and verify that the US/DS light is solid, and that the link light is solid as well.
 - a. You may need to contact them to verify that there are no area wide outages.
4. Verify that all iPad's are powered up, and that the Edgeserv app is running. If they are, restart all apps.
 - a. Verify that all iPad's are on the POS wifi, they cannot be connected to any other wifi networks
5. Verify users can login to Edgeserv app with valid pin.