MicroSale
Simple, Complete Point of Sale System

Menu Programming *Version 8*

3rd Edition
Revised 2013
KIS Software, Inc.

Table of Contents

Understanding the concepts of Menu Programming is one of the most important parts of selling the software. Most questions, concerns and issues come from the lack of understanding the menu programming process.

Helpful Tips:

- 9 categories fit on the main page
- 45 buttons per category screen (will go to a second page AFTER 45 buttons are on the first page)
- Subcategories help organize menu items (ex: Beverages can be broken down into Beer, Wine, and Liquor)
- The **goal is to minimize the number of touches** to complete an order, not to eliminate buttons
- Keep colors bold and easy to read
- The **department and category functions should be set up first**; everything else can be built in any order
- Do not use the same name for Menu Items, Categories, Sub-Categories and Departments. The names WILL overwrite.

Regarding Databases:

- MicroSale is driven from SQL and Microsoft Access. If the menu you are starting has liquor, it is suggested to start off with a "liquor" based menu; you can find this on the FTP site. This is a great shortcut to starting your menu, as liquor can go into great detail.
- To start off with a new menu, go to your Local Disk C:, Program Files, MicroSale, Blank Databases. ONLY copy in the CR Menu and Menu Mods.
- Please be aware that if the CR Menu and Menu Mods are overwritten, they cannot be restored. It is important to save the CR Menu and Menu Mods in more than one location when working between menus or on a demo unit.

Menu Programming Steps:

There are only 5 main steps to menu programming; planning the organization, building departments, building categories, creating menu items and modifiers.
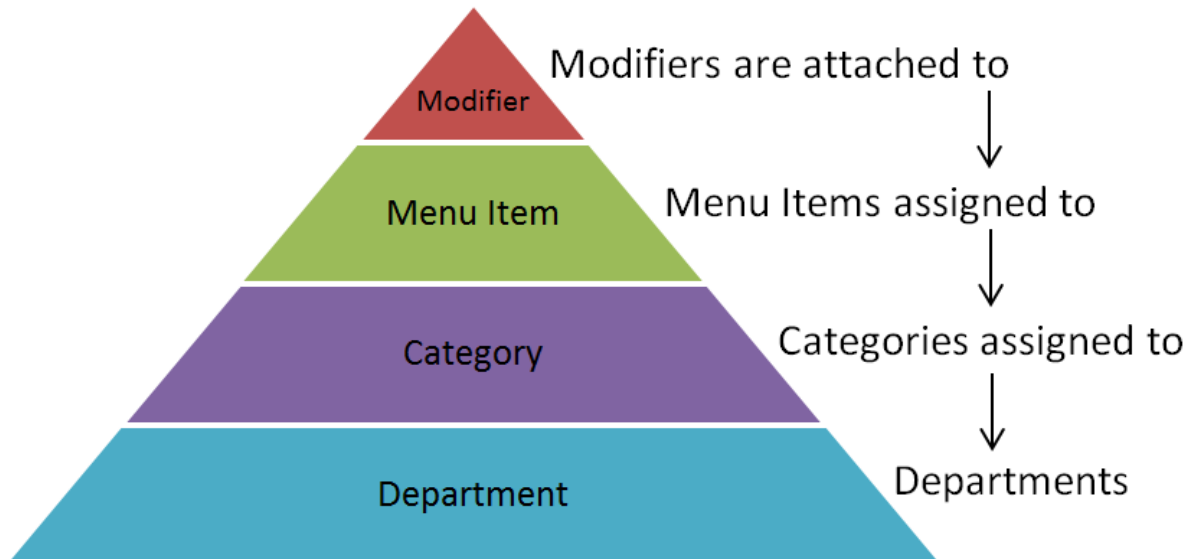
Step 1: PLAN! PLAN! PLAN!

The organization of your menu directly correlates to reporting. Disorganized menu programming=disorganized and confusing reports

---
! TIP
Use a "Menu Discovery" Questionnaire for your customers to find out how they would like the menu organized

---

Hierarchy of Menu

Modifiers are attached to
↓
Menu Items assigned to
↓
Categories assigned to
↓
Departments

Modifier
Menu Item
Category
Department

Step 2: Build a Solid Base

Departments are essentially your "main" categories. Departments are primarily used for report grouping.
Typically a restaurant's departments are Food, Beer, Wine, Liquor
Or Food and Beverage for quick service establishments.

Master Departments can group departments into a bigger sort. Such as Beer, Wine and Liquor may go to a Master Department of Alcohol.
(Master Departments are typically not needed)

Step 3: Build Organized Categories to Group *Menu Items*

A category's main purpose is to group menu items for single layer reports such as the Product Mix and to group menu items for the button layout.

Typically categories for restaurants are Beverages, Appetizers, Entrees, Desserts, etc.

Subcategories may be used to break down a category further; a restaurant could have 100 dinner entrees, you may want to break it down into "Seafood Dinner", "Chicken Dinner", etc.

Subcategories group like items; prevents servers/cashiers from paging down through multiple screens to find an item.

DO NOT: Make a "Main" Category and put all menu items in Subcategories on the "Main" screen. THIS WILL CREATE CONFUSING REPORTS, MAKES THE ORDER SCREEN DIFFICULT TO NAVIGATE, AND MAKES IT HARD TO USE FEATURES SUCH AS 'MANDATORY DRINKS'.

Step 4: Create your Menu Items

Menu items define your sales. Menu items allow you to see which items are selling and which are not. It is important to create "easy" menu items in order for cashiers, servers, and bartenders to ring in the items quickly.

The **Menu Items and Pricing Screen** is the single most important screen when programming. Think of it as the Linking or Relationship Area. The ONLY thing you will *create* here is menu items and pricing. All other components are to tell the menu item what to do, where to print, what time the item shifts to happy hour, etc. (All of that is created elsewhere).

! TIP
Menu Items must be put on buttons in order to ring them in. (in Button Layout)

Step 5: Create Modifiers

Modifiers are groups of items used to extend, alter, or further define menu items. Modifier Functions further define modifiers, allowing them to take on a new role or function that is different than the norm.

Modifiers are created in the Menu Modifiers area and then linked to a menu item in Menu Items and Pricing.

Shortcuts and Filters

Shortcut Keys

Control S (Ctrl S)

With the curser in the Menu Item Name field, you can press CNTRL S. This will save the menu item and blank out the Name Field to create additional menu items while keeping all other links on the screen.
This is extremely useful for similar menu items, such as Draft Beer; keeps the links in place to change the menu item name.

Insert

On the Modifiers Screen, press INSERT on the keyboard to move the modifier name into the modifier list area.

Filtering Items

Filtering by Category

In Menu Items and Pricing, you can easily filter previously saved menu items.
1. Press the drop down first and select the department or category that you need to filter.
2. EX: "Appetizers". Then press "Category/Sub Cat."
3. Press the drop down next to Menu Item name to only view the menu items saved in that category.
4. Unfilter by clicking "Show All Items"

Loading Functions

Load Functions will create ALL functions into your menu.
To only select a few to create into the menu, press the drop down and find **Functions** first.
Then click **Department**.
Press the drop down next to menu item name and create a selected few functions to go on buttons.

Quick Reference
Adding a Menu Item

1. Log in with your manager number.
2. Go to Menu Maintenance
3. Go to Menu Items and Pricing
4. Type in a new menu item (make sure that no other menu items in your system have this same name, or it WILL overwrite)
5. Skip the first two lines unless you would like a button alias or PLU number
6. Press the drop down and choose the category that the new menu item needs to be assigned to
7. Press the drop down and choose the department that the category needs to be assigned to
8. Type in a Regular Price
9. By default, if the menu item does not have special taxes, happy hours, specials, or modifiers, all other settings in the screen will be correct and will not need to be altered.
10. On the right, check ENABLE REMOTE PRINTING. (if you want this item to print),
11. Press the drop down next to the first printing field, and choose a predetermined printer such as "Bar" or "Kitchen".
12. **PRESS SAVE.**
13. Put the menu item on a button so that it can be viewed on the order screen. You can stay on this screen and go to "Button Layout".
14. Find the category in the gray or blue buttons on the left. (click it)
15. Find your menu item in the teal box. (click it)
16. Left click the gray button on the bottom labeled "unassigned".
17. Right click and drag the button to the screen. To find out about how to make the button look similar to the rest, go to the chapter Tips and Tricks and find button layout.

In order for items to exist in the database, they must belong to a department. Departments are groups used to classify menu items.

Usually, restaurants have two major departments: Food and Liquor. However, Food, Beverage, Beer, Wine, and Liquor, are all commonly used as well. Departments can be thought of as a large category. Departments are crucial for reporting, as it allows management to quickly run reports at the end of the day to see sales for items in specific groups.

Creating Departments

1. Go to the Manager's Menu, Menu Maintenance, Department Menu
2. Type in your departments:
>   Food, Beverage, Beer, Wine, Liquor, Retail, Etc.
>   Or chose simple departments: Food (for food and nonalcoholic beverages) and Alcohol.

*Master Department is only used if you want to categorize departments a step farther. For example Beer and Wine Departments will go in a Master Department of Alcohol.

The **Select Remote Printer** For Misc, allows a Misc Sale to go to a predetermined printer. (Misc is a button on the order screen, it makes you choose a department before typing in a price). For example, a "St. Patty's Day Shirt" could be in the Department of Retail. The Remote Printer for this will print to the Office Printer.

The **Department ID** is typically left blank, as it is only used in specific above store interfaces. A Department ID is similar to a "PLU Number". The text description is linked to a number for the accounting purposes.

The **Timed Event** area in the Department screen is also typically left blank. MicroSale gives you the ability to add Timed Events to many different aspects of the menu. An attached Timed Event would be linked to the entire department such as "Food" or "Beer", if you wanted to make "Beer" only available specific times, or wanted to make everything in the department, for example, a dollar off.

Categories

Categories combine similar menu items into like groups for reporting, group pricing, server contests and forecasting specific sales.
Examples of categories are Sandwiches, Sides, Appetizers, Desserts, and Drinks.

1. Type a name in the white field under Category List
2. Press Enter (on the keyboard) or "Add New"
3. The name will appear in the white box below
4. Click the name text and click a button (in the middle)

Optional Category Configurations

1. The **Category Priority** list is optional. This determines the order the menu items on the customer's receipt by category. By default, the priority sort level will be in the order of the buttons. To change the sort level but keep the button names in the same order, left click the text (in the white box framed in purple) and move the text in a field that does not have text, allowing you to move around text in white areas.

The Category Priority will group menu items on the virtual check/receipt accordingly, such as all beverages will go to the top and Children's items or sides will go to the bottom

2. To change the order on the Priority list touch the category name under Category Priority on the left side of the screen. The Category name will disappear. Then touch or click the mouse on the new placement desired. By default, the priority is the order of the button placement.

3. The **Disable Modifiers** button is terminal specific. This is designed for Bartenders so they do not have to go through modifiers to complete an order. By default all categories are set to No. If you want **to disable the Modifiers**, it is a two-step process. Click the No and it will become Yes. Next, go to Register Setup, Register Options by Terminal and in the blue Modifiers area check the Disable Modifier By Category. Touch Save.

4. The **Tip Exempt** button allows the Category Sales to be exempt from Tip Dollars. This would show up on Server reports as a tip exempt category. By default, all Categories are set to No. For example, a Catering Category may be exempt from tips.

5. The **Category Prompt** button is used to prompt a message every time that Category is selected. Type the message desired next to the Category. Remember to Save when done. Figure 1-3

Once finished, click **SAVE**. To make a specific category mandatory, such as beverages (as reminders for servers to ring in beverages before sending the food to the kitchen) touch the mandatory button in the teal box.

Click on the No to change it to Yes. If you touch the Yes, it will say COM, this means that a combination of categories will count as a

required beverage. For example, you can use COM for beverage,

beer, wine, liquor. When done, click SAVE.

Mandatory Category Screen

6. If an age restriction for drinks is needed, click the Category or Sub- Category, then right click the mouse. The screen to the right will appear, showing *Enter Age*. On the number pad, enter the age *21* (most likely), and

touch *Done*. The next screen will ask, "*Force Birth date to Ring Item*?

If *yes*, the following screen will appear, and *Age Verification 21 Mandatory* will be printed in the box. Touch *Save*.

Sub Categories

1. Menu Maintenance→Managers Menu→Sub Category
The Sub Categories are categories within the "main" Categories.

For example, in the **Beverage** Category, you could have a subcategory of **Beer**

**! Important: *Categories, subcategories and menu items should all have unique names.
Creating identical names for a category and a sub category or a menu item will cause confusion.
There may be times that you need to make the names very similar. In that case, change something simple about the names.***

2. To add a timed event to a subcategory, touch the drop-down to the right of the *Timed Event* box, and scroll through the list to select the correct Timed Event.

3. Once you have completed a subcategory, touch the *Save* button.

! TIP: A subcategory is connected to a category; the subcategory will be a "nonassigned menu item" in the button layout of the main category. Put the subcategory on a button in that category and save.
Scroll down (in button layout) through the categories on the left and find your subcategory (subcategories are displayed in blue). At that point, you can add the menu items to buttons in the subcategory

---

Menu Items and Pricing Screen

Located in the Managers Menu, Menu Items and Pricing

The Menu Items and Pricing screen is where menu items are created. This screen is the most used screen for menu maintenance. It is where the created menu item is organized into a category, department, given a price, taxed, linked to a timed event, printer, modifiers and even specific functionality. Only menu items are created on the screen. Every component to the menu item is set up outside of this screen. Such as linking the item to a timed event is set up prior in the Timed Event section, and so forth.

The following documentation will describe the Menu Items and Pricing Screen in entirety and direct you on where to set up other components.

Quick Guide: Adding a Menu Item

1. Log in with your manager number.
2. Go to Menu Maintenance
3. Go to Menu Items and Pricing
4. Type in a new menu item (make sure that no other menu items in your system have this same name, or it WILL overwrite)
5. Skip the first two lines unless you would like a button alias or PLU number.*
6. Press the drop down and choose the category that the new menu item needs to be assigned to
7. Press the drop down and choose the department that the category needs to be assigned to
8. Type in a Regular Price
9. By default, if the menu item does not have special taxes, happy hours, specials, or modifiers, all other settings in the screen will be correct and will not need to be altered.
10. On the right, check ENABLE REMOTE PRINTING. (if you want this item to print),
11. Press the drop down next to the first printing field, and choose a predetermined printer such as "Bar" or "Kitchen".
12. PRESS SAVE.
> ⇒ *Saving Menu Items Tips & Tricks:*

For Menu Items that have the same modifiers, printer destination, etc, Press CONTROL S *on your keyboard. This will save your menu item settings while leaving the menu item name blank to add more items. Make sure that the curser is in the Menu Item Name Field.*
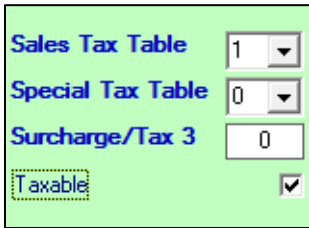

13. Put the menu item on a button so that it can be viewed on the order screen. You can stay on this screen and go to "Button Layout".
14. Find the category in the gray or blue buttons on the left. (click it)
15. Find your menu item in the teal box. (click it)
16. Left click the gray button on the bottom labeled "unassigned".
17. Right click and drag the button to the screen.

PLU Number* or Bar Code

PLU codes (or numbers) are used primarily in retail stores or restaurants, where they are keyed into a POS system by a cashier or customer at a self-check-out machine. PLUs can also be defined by the individual retailer, or location, and used in place of barcodes for a variety of reasons.

PLU Numbers must be entered systematically when using Online Ordering or RTI.
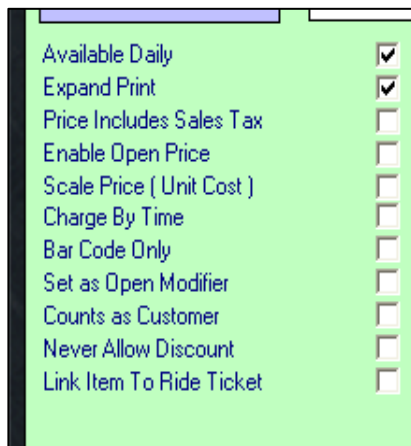
Tax

Recording proper taxation is one of the most powerful benefits in using a point of sale system. MicroSale allows up to 5 basic sales tax tables, 5 special taxes and also can have a "Tax 3". Please see Occupation Tax for further explanation of Tax 3.

1-5 references the tax tables previously set up in MicroSale. Please contact your MicroSale reseller to properly set up the tax tables. Improper tax set up can cause many problems later with your state laws.

By default, menu items reference Tax Table 1. This means that the menu item follows the tax percentage set up in the register options.

Tax Inclusive menu items must have the Taxable option checked.

Checkmark Options

Available Daily: This is for all menu items that are available every day, excluding Specials that are available only on certain days.

Expand Print: This is an option that will display larger print on the printed ticket. It is good for menu items that are printed on remote printers, for example large print on a dinner item would be easier for the cooks to read.

Price Includes Sales Tax: makes the menu item tax inclusive. Used primarily for bars to make drinks even amounts.

Enable Open Price: Prompts an open price, or number pad when the menu item is rang in for a manual price to be added

Scale Price (Unit Cost): This option allows the item to be used with a scale interface (Weightronics).

Remote Printing: This option enables the remote printer section of the screen. this is used only if you have remote printing in your setup, for example a printer in the kitchen on the cook's line.

Charge by Time: This option charges per minute from the time the check was opened.

Bar Code Only: This is checked mainly with retail items in use with a bar code scanner.

Set as Open Modifier: This allows a Modifier to be set as Open, and it can be attached to any menu item. It appears on a button just like a menu item.

Counts as Customer: Useful in quick service establishments or restaurants that do not use table covers. Usually beverages are used with the checkmark, as most people only order one drink per person but could order multiple sandwiches or menu items.

Never Allow Discount: menu items associated with this checkmark will never take a discount. Typically high food cost items will be exempted from all discounts. In some states, discounts on alcohol are prohibited.

Link Item to Ride Ticket: When using a ticket printer or a theme park or entertainment center, menu items pay prompt a ticket to print. Ex: "Child's Entry" menu item.

Minimum and Maximum Choices

Checking this choice means that a user must choose a certain amount of modifiers in the selection.
For example: An entrée comes with 2 sides. All sides are listed in one modifier called "Sides" min/max will *force* the user to choose 2 sides before exiting the screen.

Figure 3-16 Min/Max in Menu Items and Pricing

Matrix Stop At

This is typically only used for quick service on *Conversational Ordering.*

      Example: Combo Meal:
              Modifier #1: Sandwich Alterations
              Modifier #2: Sides
              Modifier #3: Drink

First Matrix stop '2'. This will bypass the first modifier on the *Matrix.* To access the Sandwich alterations, either press the first matrix box, or simply finish the order and press the menu item on the virtual check. This will automatically pop up the alterations modifier.

Miscellaneous Menu Item Options and Stipulations

Miscellaneous Options allow menu items to be further defined or to include stipulations.

Product Cost	0.00
Price Adj Go Order	0.00
Tare Weight	None
Age Requirement	None
Access Required	None
Days to Expiration	0
Priority Sort Level	0

Product Cost

In many reports, you may notice your cost is at "0.00" The Product Cost is where the cost may be entered. This allows the restaurant to quickly find costs, percentages and totals that may otherwise only be found in the Inventory Module or 3rd party Inventory software.

Ex: A Cheeseburger has a price of $8.00 and the Product Cost (bun, burger, cheese, fixings) is $3.00. Your profit no counting labor and variables is $5.00 reflected in reports.

Price Adj Go Order

To Go meals occasionally is a larger order or a larger drink and always includes disposable containers. To offset the cost of supplies, the POS offers a price adjust for To Go orders. If the restaurant does not change a price based on To Go's or Dine In's, leave this set at 0.00.

The Price Adj, is an "Adjustment", so only put in a price difference. For example if a 'Coke' is $2.00 for Dine in but $3.00 To Go, put in 1.00.

If the To Go's are sold at a lower price, adjust it with a negative, such as -1.00 if the soda is sold for one dollar less.

Tare Weight (Empty Container Weight)

What is a Tare Weight?

Tare weight is the weight of a container when it is empty. This weight is used in calculations of net weight for tasks which range from properly charging customers for consumer goods. To calculate the net weight of a load, the container is weighed to establish the tare weight, loaded and then weighed again for the gross weight; the tare is subtracted from the gross to find out how heavy the load is. This term can also be used in the culinary or food service industries, where it may refer to the weight of inedible parts of different foods.

Tare Weights are commonly used in yogurt establishments.

The Tare Weight containers will need to be set up before linking it to a menu item. The Tare Weight set up is located in the Menu Maintenance Menu under Tare Weight Set up.

Type the name of the container(s) that will be used for the scalable items and the weight of each container. This amount will be subtracted when figuring the weight of the item.

Age Requirement

The Age Requirement stipulation is not to be confused with the Age Verification (swiping a license to ensure a customer is old enough for the product. The Age Requirement is to allow the Server or Cashier to ring in the item. In some states, a cashier or server must be of a certain age to SELL the product to a customer. MicroSale gives you, the restaurant owner, reassurance that your restaurant is not inadvertently doing illegal and fineable activity.

The system "knows" how old the employee is by his or her log in number. The log in number is set in Employee Maintenance when employment is set. You must set the employees age in the Employee Maintenance to use the Age Requirement stipulation.

Access Required

The Access Required will only allow employees of a specific or higher access level to ring in the item. This could be used for menu items that need to take precautionary measures or for coupons that are programmed as menu items.

Days to Expiration

When set (numerically, such as 50), the menu item will count down days. Days are recognized through Windows' settings. When the menu item expires, it will not allow employees to ring up the item.

Priority Sort Level

Menu Items can be sorted generally by category. For example, all of the drinks could print on the top of the check and desserts can print at the bottom. However, if you need to further define how menu items appear in the kitchen/virtual check, you may set priority levels.

Priority Sort Levels must be set on ALL menu items if it is used for one. Otherwise, it will randomly group and will not know the order for the other priority levels.

Priority Levels descend as numbers ascend**.** It is easiest to prioritize by groups. For example, Drinks could be from 1-1000, giving an ample range to add more drink menu items as the menu grows. 1000=top of receipt. 5000=middle, 9000=bottom.

Create Ride Ticket

This option will link the menu item with a ticket for rides or admission. The ticket must be in a .BCA format

Ingredient List

This option is great for restaurants offering *Hibachi Style Cooking*. MicroSale will print the ingredients that are required to prepare each entrée. This ensures that the proper food is taken out to the Hibachi Grill to prepare at the table in front of the guests.

To set up the Ingredient Lists, go to *Managers Menu*, *Menu Maintenance*, *Menu Items and Pricing.* Select a menu item from the *Menu Item Name* field. Touch the *Ingredient List* button. Create ingredients in the *Create Ingredients* field. After all ingredients have been created, click on the blank fields in the *Menu Item Ingredient List* table and select them from the drop-down list. In the field next to each ingredient, enter the quantity of that ingredient. In the *Ingredient Printer* field select the printer that you would like the ingredient list to print to. When finished, touch the *Done* button.

To allow the ingredients to print at the printer you selected, the following steps must also be done: Go to *Managers Menu*, *Register Setup*, *Register Options By Terminal*. Touch *Printing/Cash Drawer* button at the bottom left of screen. On the *Receipt Printer Options* tab, put a check mark in the box beside *Print Ingredient List to Remote*. SAVE.

Nutritional Value

This option allows health-conscious restaurants, such as hospital cafeterias, to print the *Nutritional Values* in reference to the food that was ordered.

Note: You will not see the Nutritional Values on the screen when you ring up a sale. The information only prints on the bottom of the receipt.

To set up the Nutritional Values, go to Managers Menu, *Register setup*, *Misc. Setup- Terminal Groups, Etc.* Touch the *Nutritional Data* button. Select the menu item from the
Menu Items drop-down field. Enter nutritional information into the following fields:

a. Fat Grams
b. Carbs
c. Sodium
d. Calories
e. Protein

Touch the *Save* button when finished.

To turn on the nutritional value printing, go to *Register Setup*, *Register Options By Terminal*, *Printing/Cash Drawer* and put a check mark in the box labeled *Print Nutritional Values.*

Debit Card Set Up

"Debit Card Setup" is used with the Intercard or Sacoa Interface only.
This option is only used by **Entertainment Centers**.

Play Card Set Up

Name the menu item, for example, $20 Play Card, Select a Category, Dept. is *Debit Card*, and the price is $20.00. Touch the *Debit Card Setup*. For promotional value added to the card, you may give points, Bonus dollars, or Courtesy Group No. is no longer used.

Time Play Card Set Up

Name the menu item, for example, $20 Time Play, Select the Category, Dept. is *Time Play*, Touch the *Debit Card Setup*. Set the Duration in Minutes, Click the Start Time and the Hours and Minutes must be selected, then, select the Day of the week the card is active.

Recipes / Procedures

This option allows a recipe or procedure for that menu item. For example, in a bar you may want to show the recipe for an unusual drink. At the order screen, touch the **Options** button. On the *Options Menu,* touch **Show Recipe** button, and then touch the item button. The recipe will appear for the server if it was programmed.

Also used for creating the Yes/No Menu Item Reference (see section below)

Yes or No Menu Item Reference (Using the Recipe/Procedure Button)

The feature allows the cashier to upsell a single item into a combo. When pressing the menu item, it will prompt a message asking if you would like to make the item into a combo. When pressing "yes", the menu item then references the combo version of the item.

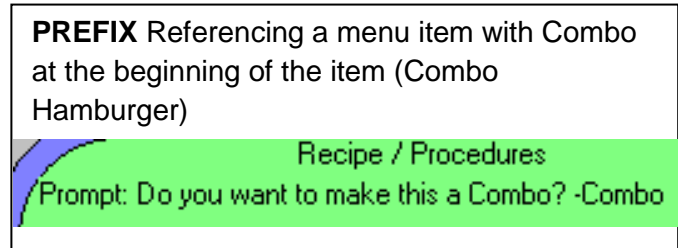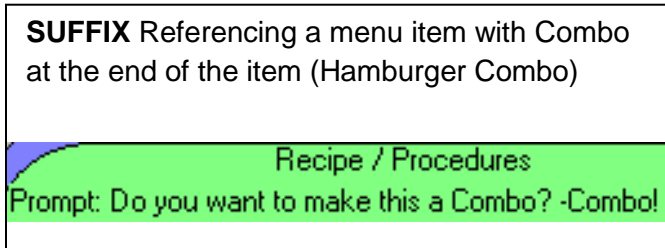| **Yes** will path you to the combo version of the menu item.	**No** will keep you on the original menu item chosen. (When choosing No, you will not see this prompt again when choosing this menu item for a second time). To disable this, create a .dat file; see last page

Set Up for the Yes or No Function:

1. Go to the Manager's Menu and then Menu Maintenance.
2. Go to Menu Items and Pricing; set up a menu item regularly.
3. Press the Recipe/Procedure button at the bottom of the screen.

4. Type in the word Prompt with a colon, followed by a yes or no type of question. After your question, put a dash and a reference word. MicroSale will automatically look for the reference word as a prefix. For MicroSale to look for that word as a suffix, put an exclamation point on the end.
5. Press Done.
6. Then Save the menu item.

Examples:

SUFFIX Referencing a menu item with Combo at the end of the item (Hamburger Combo)	**PREFIX** Referencing a menu item with Combo at the beginning of the item (Combo Hamburger)
Recipe / Procedures Prompt: Do you want to make this a Combo? -Combo!	Recipe / Procedures Prompt: Do you want to make this a Combo? -Combo

Note: The reference word can be anything as long as it matches to a menu item

7. Create a Combo menu item using identical spelling with the added word of Combo. Add in all necessary pricing, modifiers, etc.
8. Save your new combo menu item.
9. Put both menu items on to buttons

Data File Creation

By default, when the user touches "No", the prompt will not appear again in the current check. This is to prevent repetition. The Yes or No prompt is essentially to only remind a cashier that another version of the menu item is available. To make the menu item ALWAYS prompt the question regardless of touching no, create a data file in the MicroSale directory. Create a new text file and name it promptison.dat

---

Search By/ Labels

Selecting the *Search By* button on the *Menu Items and Pricing* Screen allows three different methods to search for items in your database. If you have many items that you scan, the most helpful method would be to *Search by bar code*. Often it is not obvious what name or descriptor was given to the items with UPC #'s. You can also search by *Menu Item Name* or *Alternate Print Product Code*.
This feature allows you to *create label files* for your items, and *print Bar Code labels*.

Parent Item

The Parent Item option connects previously made menu items together. The 'child' item is dependent on the parent item. This means, when the child item is connected to a parent, it will not be able to be rang in until the parent item is rang in (and sent to the kitchen) first.
The Parent Item feature will be useful in many situations. This was primarily designed for 'All You Can Eat' scenarios; the All You Can Eat (with a price) must be rang in first before you can ring in a 'Refill'.
Set up:
1. Press the Parent Item Button.
2. Select the Parent Item (must be made as a menu item first)
3. Select the Child Item (must be mad as a menu item first)
4. Save.

Number Available

In Menu Items and Pricing you'll see a field called "Number Available" underneath Regular Price. If the default of 9999 is left as is, the feature is not active. This was intended to be used as a count-down for Daily Specials or Lobster.

Go to Menu Items and Pricing and select the "Daily Special" item(s). Then enter the total number of Specials available at the start of day or meal period in the Number Available field. The count reduces as each Special is rung up. This prevents the Servers from ringing up an item that is no longer available.

When the count becomes low, it shows "Low Stock Warning" along with the quantity left in stock on the chalkboard of the ID Screen. The menu item button will display the quantity still available on the order screen, unless there is a logo image on the button which hides the count. If Servers try to ring up an item that has already counted down to zero, a message appears "Menu Item is out of stock. Item has been 86".

Product Inventory

Go to *Menu Items and Pricing*. Underneath "Number Available" is the field called "*Product Inventory*". This was added on version 8 to help restaurants keep track of such things as bottled beer. You cannot use this option for any item that has price shift levels, such as Sml, Med and Lrg. It is not intended for true inventory tracking. Restaurants wanting to track inventory should purchase our optional module, RPM (Restaurant Profit Maximizer).

Many locations find *Product Inventory* helpful for a few items they want to watch. For example, they can enter the "Product Inventory" for each bottled beer available at the start of the day. The "Menu Inventory" report automatically prints on the Daily Close if a product inventory amount was entered for any item. To manually execute this report, go to *Managers Menu*, *Reports Menu*, *Menu Reports*, *Daily Menu Inventory*.

On the Menu Inventory report, the "Amount On Hand" represents the "Product Inventory/Beginning Count" minus the quantity sold that day. If you did a physical count of how many are left at the end of the day, it should match the "Amount On Hand".

Message Item

1. Type the name of your item in the "Menu Item Name" field. Example: "Message"
2. Next, in the "Category/Sub Cat," click the drop-down arrow to select a category
3. In the "Department" field, select the department called "Remote Message".
4. Touch the "Save" button when finished.
5. Assign the menu item to a button in "Menu Item Button Layout".

Items Sold by Time

1. Create a menu item (with the appropriate category and department)
2. In the "Regular Price" field enter the price of the item for 1 minute. Example: Pool table rentals might be $7.00 per hour. **7.00/60= $.12** per minute.
3. Place a check mark in the box "Charge by Time".
4. Touch the "Save" button when finished.

Gift Cards

1. Type the name of your item in the "Menu Item Name" field. Example: "Gift Card"
2. Next, in the "Category/Sub Cat," click the drop-down arrow to select the category
that you would like your menu item to be located in.
3. In the "Department" field, select one of the following departments:
a. Gift Certificate- MicroSale's built in Gift Card/House Accounts.
b. Account Payment- MicroSale's built in Gift Card/House Accounts.
c. Mercury Gift- Mercury Payment System's integrated Gift Cards.
d. Gift Epay New Issue- Datacap Systems integrated Gift Cards.
e. Gift Epay Reload- Datacap Systems integrated Gift Cards
4. Take the checkmark out of the box labeled "Taxable".
5. Place a checkmark in the box labeled "Enable Open Price".
6. Touch the "Save" button when finished.
7. Assign the menu item to a button in "Menu Item Button Layout".
** Be sure to put a checkmark in the box "Enable Gift Cards Local" in the *Special Options* section of *Register Options*.

Paid Out Item (can be used for lottery redemption, etc.)

1. Type the name of your item in the "Menu Item Name" field. Example: "Message"
2. Next, in the "Category/Sub Cat," click the drop-down arrow to select the appropriate category.
3. In the "Department" field, select the department called "Paid Outs".
4. Put a check mark in the box "Enable Open Priced Item".
5. Touch the "Save" button when finished.
6. Assign the menu item to a button in "Menu Item Button Layout".

Modifiers

Modifiers are groups of items used to extend, alter, or further define menu items. Modifier Functions further define modifiers, allowing them to take on a new role or function that is different than the norm.

Creating a Simple Modifier

1. Type in a "good description" of your modifier so that you can easily find it later
Please note that the three fields under the Modifier title MAY stay blank when creating a simple modifier group.
2. Type in the Modifier Name; if there is an upcharge for this item, type in the price on the right.
Press SET COLOR to change the color of the modifier buttons. Next to the Name, you can add a Modifier upcharge Price.
3. Press the green arrow, Add Modifier to List, or press INSERT on your keyboard.

Understanding the Checked Options on the Modifier Screen

Enable Matrix: Check this for menu items that will require multiple modifiers. This will have to be turned on for the FIRST modifier choice. To the right shows what the Matrix looks like. In this case, you would have to check Enable Matrix on the first modifier of SPL Flavors 4. (see picture above)
This option allows the user to go out of sequence in the modifier choices.

Mandatory Selection: This option means that you must choose a modifier before pressing DONE. (a mandatory selection turns the background dark red on the order screen)

Select until Done: This will keep the modifier screen open, allowing the users to choose as many modifiers as he or she would like until hitting DONE.

1.16

Order as Programmed: Despite how the order is rang in, the order will input as it is programmed on this screen.

Expand Print on Check: all of the modifiers chosen will show on the receipt.

Print in Color: Modifiers will print in Red to kitchen when enabled

Disable Price Roll Up: Price Roll up means that the upcharge modifiers will 'roll up into the menu item's price

Set as Count Down: function for wings or items with a high quantity choice allowing you to choose your own increments. (See Countdowns further in document)

Changing Functionality of Modifiers

Modifiers are groups of items used to extend, alter, or further define menu items. Modifier Functions further define modifiers, allowing them to take on a new role or function that is different than the norm.

Uses for the Function/Department Name

Append

Modifiers in this selection will go to the bottom of the modifier list on a menu item. This works for optional modifiers and *open modifiers*.

Prefix and Suffix

Modifiers in this selection will go to the right or left of the menu item and not underneath as a typical modifier. If there is an attached price, it will add it to the main item. The Prefix and Suffix functions recreate the menu item, so this will be reflected in reports.
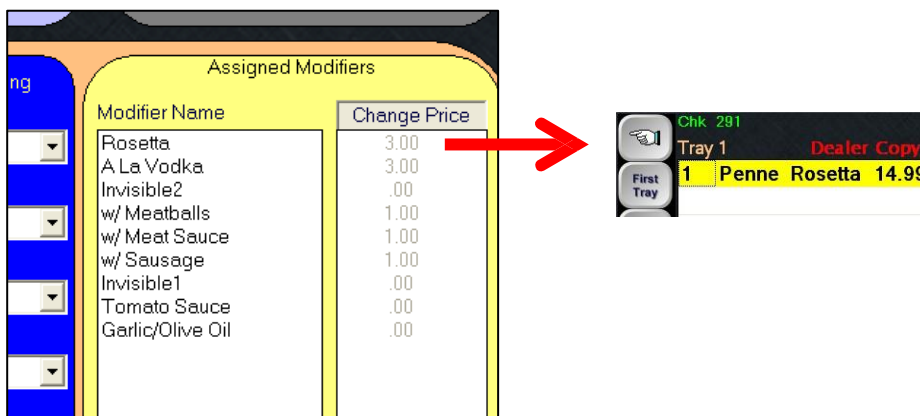
Preselect Modifiers

Preselect modifiers are useful in combo meals and any other menu item that is ordered with a certain size 80% of the time. This function will automatically insert a "SM, MED, or LG" along with the appropriate price when choosing a drink, attaching an auto side to the menu item.

EX: Choose a Sandwich→ Choose a Drink→ Auto Insert Side
        Sandwich →SM Coke→ SM Fries
        Click the SM Coke/ SM Fries to change out the size
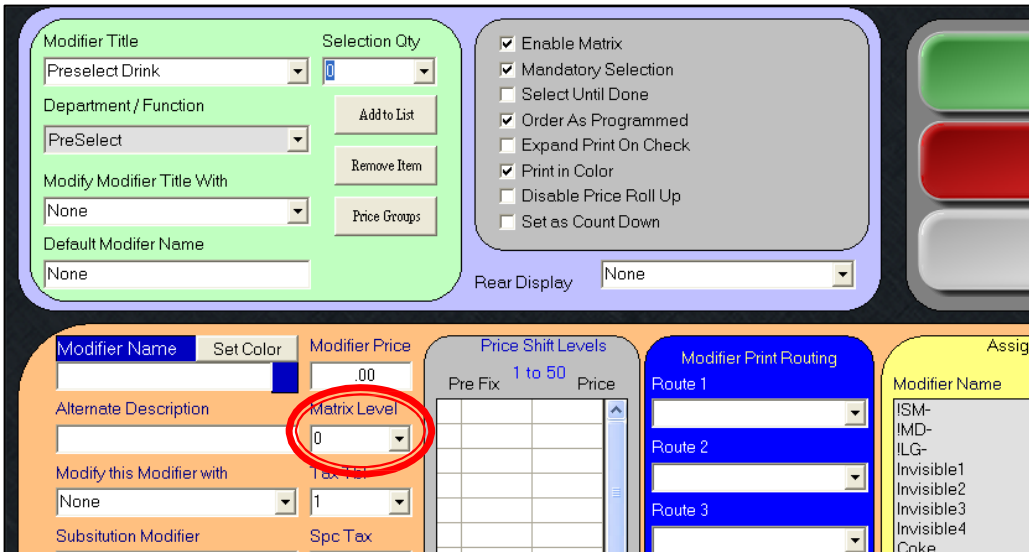
Creating Preselect Modifiers

Preselects are cued by the default blue color
If you change the color of the modifier button, it will strip off the predetermined prefix. *–to get back to the default blue, press the Modifier Name text (highlighted in blue to the left of Set Color.*

Preselect Drink

1. Make a Modifier Title
2. Select PreSelect under Department/Function
3. Under Modifier Name input the following. (Whichever Prefix is first will be the "PreSelected Choice"
   !SM-   (Matrix Level 1)
   !MD-   (Matrix Level 2)
   !LG-   (Matrix Level 3)

*The Exclamation Mark (!) enables the word to become a Prefix. The dash (-) enables the prefix to become recalled after order entry.
*The Matrix Level (circled) will affect the Price Shift Levels for the drinks and sides.
DO NOT PUT IN A PRICE FOR THE SM, MD, LG*

4. Type in your Modifier Names (Example for Drinks)
      Type in Coke

5. Now, put in the prices

In the first blank box, referring to the Matrix Level 1, assigned to the prefix "SM", type in 0 if there is not an additional charge for a SM Coke.
The .25 represents a .25 upcharge for a MD
And .50 upcharge for LG

(you may leave all other areas blank)

1.20
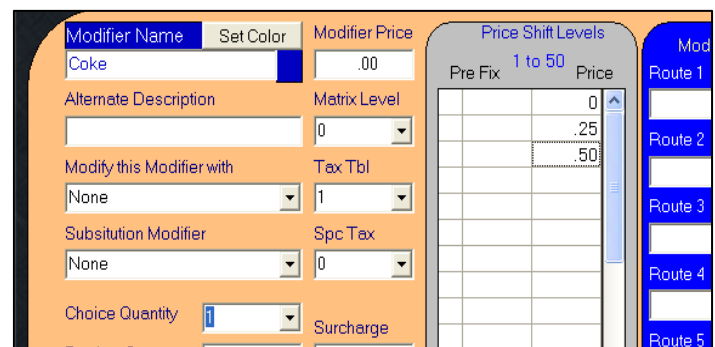
6. Press the green arrow to add the modifier to the list. (do not use the insert key on your keyboard, as the price levels will not carry over)

Preselect Side

Follow the previous steps to create a preselect drink. However, in the Default Modifier Name, type in the side that "usually" comes with this item.

YOU MUST HAVE A DEFAULT MODIFIER WHEN USING PRESELECTS, IF YOU DO NOT WANT A MODIFIER TO DRAG IN, SWITCH TO PREFIX MODIFIER
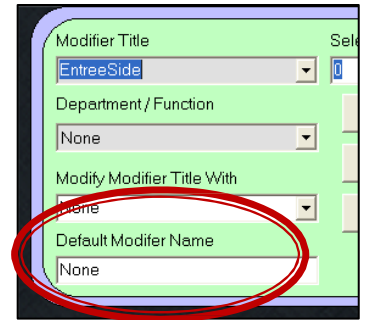
Example: Fries. Make sure that Fries is typed in identically to the Fries in the modifier list.

Preselects are cued by the default blue color
If you change the color of the modifier button, it will strip off the predetermined prefix.

(WHY?) This allows you to have all of your drinks on one screen. On drinks such as Milk, Juice, Bottled Water, you would not want it to pull in a preselected size.

You will not need to put in prices next to the Price Shift Levels, since this beverage is only offered in one size.

Prefix Modifier (function name: Prefix Modifier)

Prefix Modifiers are cued by the default blue color
If you change the color of the modifier button, it will strip off the predetermined prefix.

(WHY?) This allows you to have all of your drinks on one screen. On drinks such as Milk, Juice, Bottled Water, you would not want it to pull in a size.

Prefix modifiers are similar to "PreSelect Modifiers" however; PreSelect Modifiers pull in the default modifier on the following screen. Prefix Modifiers allow you to go from one screen to the next without pulling in a default modifier.

1. Type in the Modifier Title
2. Select Prefix Modifier in the Department/Function List
3. Type in your Modifier Names (Example for Drinks)
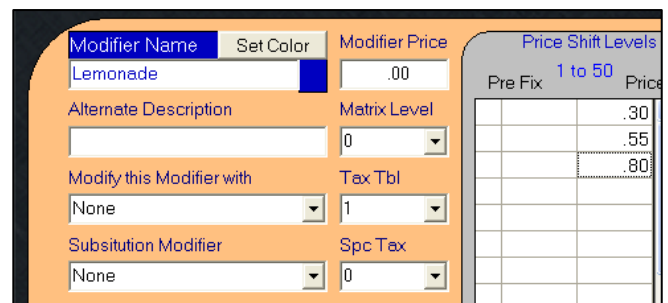   Type in Lemonade
4. Put in the "Price Shift Levels"
In the first blank box, this is for the Matrix Level 1, which is assigned to the prefix "SM", type in .30 if there is an additional charge for this beverage
The .55 represents a .55 upcharge for a MD
And .80 upcharge for LG
(you may leave all other areas blank)
3. Now press the green arrow, Add Modifier to List

1.21

Requiring a Shift (a Department/Function does not have to be set)
"Requiring a Shift vs. Prefix Modifier… what's the difference?"

A Prefix Modifier automatically inserts the prefix shift on top of the list if another prefix shift is not chosen. Shift Required will not assume that the first prefix shift needs to be chosen and will flag the user to pick a shift before touching a modifier. Unlike the Prefix Modifier, the default blue color is not involved in the set up. You can choose any modifier color. **The function is cued by a negative one (-1) matrix level.**

1. Creating Prefix Shifts:

Under Modifier Name input the following.
!VAL-　　(Matrix Level 1)
!SM-　　(Matrix Level 2)
!MD-　　(Matrix Level 3)

*The Exclamation Mark (!) enables the word to become a Prefix. The dash (-) enables the prefix to become recalled after order entry.
DO NOT PUT IN A PRICE FOR THE !Value-, !SM-, !MD-, !LG-

Prefix Shifts set to Matrix Levels. (Value=1, Sm=2, etc)

Regular modifiers that do NOT need a prefix shift (since the side is only offered in one size. **::Matrix Level set to 0 by default::**

Matrix Level set to -1 for modifiers that MUST have a prefix shift.

Price Levels for the Prefix Shifts (1=Value, 2=Sm, etc)

1.22

Required

"Required vs. Mandatory… what's the difference?"

A mandatory checkbox will force the user to touch a modifier before exiting the modifier screen, when the modifier screen is exited (quit) without choosing a modifier, the menu item will not go onto the virtual check. The Required function enables the user to continue ringing in multiple items without interrupting the customer. Before the user tenders the order, it will remind them that you are missing criteria that is *required* before you may cash it out.
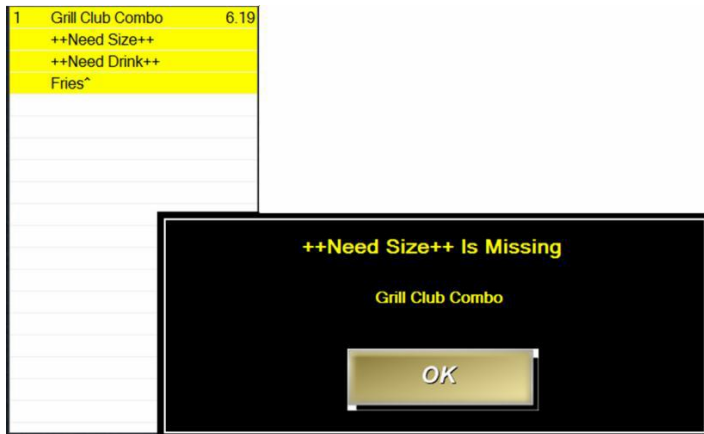
QUICK SERVICE ONLY; USING THE SKIP BUTTON.

Required Set Up

1. Go to the modifier set up screen, type in your modifier title and choose Required for the Department/Function.
2. You MUST have a Default Modifier Name. Such as Make a Selection, Choose a Drink, etc.

Since the Default Modifier Name is not a choice in the modifier list such as Coke, Diet Coke, Sprite, etc., MicroSale will know that a choice was not actually picked. (refers to the above picture after touching tender). When you press OK, it will link you back to the modifier screen that needs a selection.

Check Mandatory so that MicroSale knows that one of the choices must be selected before tendering

Stack

This function allows two prefixes to go on the same line. For example, you can choose Wings, XC and XWET, (XC and XWET set as prefixes). This will allow all 3 words to be on the same line on the virtual check and printed receipt.

1. Pick a modifier Title
2. Choose Stack in the Department Function
3. Add in the prefixes
4. Add in the modifier choices

Click Price

Selection quantity is helpful to Chicken Restaurants that may offer a "2 Pc Meal" which comes with 1 breast and 1 wing for a specific price. This allows the customer to select 2 different pieces and be up-charged appropriately. In our example, the Chicken category will have 3 buttons named "*2-Piece White Meat*", "*3-Piece Dark Meat*" and "*8-Piece Bucket*". The following is how to set this up.

"2-Piece White Meat Example"

Go to *Managers Menu*, *Menu Maintenance*, *Menu Items and Pricing*. The item name is "*2-Piece White Meat*" which is linked to the "Chicken" category and "Food" department. We entered the Regular Price as $3.99 and made the item taxable. Put a checkmark on Available Daily, Expand Print, Modifiers Required, Enable Min/Max Choices and Enable Remote Printing. Select the appropriate remote printer where this item should print. Touch *Save*. Touch *Review Modifiers* button, and create the Modifier Title named "2 Pc White". Department/ Function must be set as "Click Price". The Selection Quantity is "0". Put a checkmark on Enable Matrix, Select Until Done, Expand Print On Check and Print in Color. Do not check Order As
Programmed or Set as Count Down.

The first Modifier Name is "Breast" with the Modifier Price as .00. There should be a "1" in both the Tax Tbl field, and the Choice Quantity field. Since the "2 Pc White" comes with 1 Breast and 1 Wing, you want it to charge an extra dollar if the customer requests 2 Breasts. In this case, the Price Shift Levels should be set as follows: The 1st field is 0.00, the 2nd field is 1.00 and all other fields are 0.00. Touch *Add Modifier To List* and touch *Save*.

The second Modifier Name is "Wing" with the Modifier Price as .00. There should be a "1" in both the Tax Tbl field, and the Choice Quantity field. There is no extra charge if the customer requests 2 Wings, so the Price Shift Levels should all be set to 0.00. Touch *Add Modifier To List* and touch *Save*.
Go to *Menu Items and Pricing* and select "2-Piece White Meat" item. On Modifier #1 select "2 Pc White" Modifier Title. On Min/Max enter 2/2, and touch *Save*. It is likely that you would select "Sides" as the Modifier Title on Modifier #2 with Min/Max set as 0/2, however it is not needed to make selection quantity work.

Select 1/2

MicroSale recently enhanced its Pizza functionality involving halves and quarters.

PROS:

- The ½ function will not appear on every menu item modifier as it has in earlier versions, it will only appear on modifiers where the option is set (helps eliminate confusion and errors)**Version 8.0.1833 or later**
- Eliminates one extra touch

Set Up for Select ½

1. Go to Menu Maintenance and then Menu Modifiers
2. Find the modifier list that should include the half functionality
3. Under the Department/Function, select "Select 1/2" if you will be using a customized percentage for the toppings. Select ½, enables you to put in any percentage in Register Options. You may also choose "Select ½ 100%", "Select ½ 50%, or "Select ½ 75%", which will take that percentage of the topping price when using the halves.

4. Save the modifier

When using "Select ½" you may set your own percentage in Register Options (General Tab)

1. Go to Register Options. Put the number of the percentage in the purple area. (Under the General Tab)

2. In the same area, check the options "Enable ¼". (Please check with the customer to ensure that they use the ¼ function, if it is not allowed, do not check it. Enable ½ has been deleted in the options list since that is now driven by modifier.

Operations

1. Go to the order screen and select the relevant pizza
2. In addition to the modifier created for the pizza, you will see the new design for halves and quarters. (below)
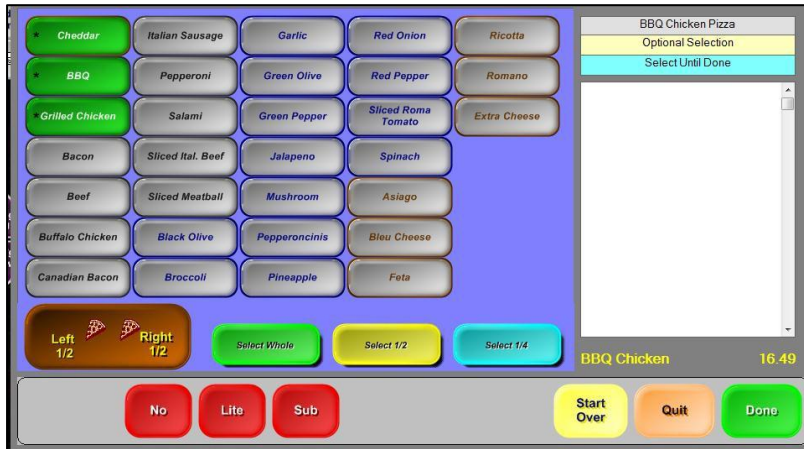
3. *(EX) No BBQ on one half of the pizza, Add Mushrooms to the other half, and Add Feta to the Whole.*
   a. Touch Left ½ then BBQ
   b. Touch Right ½ then Mushrooms.
   c. Touch "Select Whole" then Feta.
      **The Select Whole, Select ½ and Select ¼ are toggles to change the functionality

Upick-

Upick- is a function that has been created for scenarios where you may have a certain number of modifiers (or toppings) for free and after the maximum amount has been chosen, the modifiers need to start charging a price. Since you may choose any number as your maximum, the option is not 'hard coded in the software'. You will need to create the function with the number of maximum free choices.

Set Up for Upick-

1. Go to Menu Maintenance, and Departments (where regular departments are programmed)
2. Create a department called Upick- plus the number of maximum free choices.

3. Go to the modifier set up and choose the department Upick-3 as your "department/function"

1.26

The number typed in the department is the trigger, it will know that you can only get up to that specific quantity at no charge

4. Create your modifier list.

The Price Shift MUST be used in order for the Upick- to work as designed. To differentiate the 'freebees' versus chargeable items, it will use a prefix with the new price. For example; the user touches, Cheese 0.00, Cheese 0.00, Cheese 0.00, c- Cheese .50.

The prefix makes it able to separate the free items and the chargeable when editing the modifiers on the virtual check. The prefix may be anything; c- is only an example. You must put a dash at the end of the prefix in order for it to be recalled.

Exempting Premium Modifiers from the Freebee List

Much like preselects, sometimes items need to be exempted from a size or quantity selection. Any modifier that has a Modifier Price will be exempted from the freebee selection. Example: Lettuce, Tomato, Onion, can count as the 3 free. However, chicken at $2.99 will never be a part of that list. When the user rings in chicken, it will still allow you to ring in three additional items for free.

Modifying Modifiers and Substitution Modifiers

This function 'modifies the modifier'. The most common use for this feature is for Side Salads. The Side Salad is in the Sides choice, so you can choose fries, chips or a side salad. Once you choose one side, the screen goes away. With this feature, a side salad will prompt a list of salad dressings (QTY: 1).

> *To stay on the current screen, to select until done, set the QTY to 0.*

Substitution Modifiers

This function is to substitute out a modifier to better regulate substitutions for cashiers or servers. With the regular No, Sub, Extra Prefixes, anything can get subbed out with the price stripped off the item. With this function, you can program it to only sub out equivalent items. Such as, pressing NO Bacon will prompt SUB Turkey, SUB Ham, etc.
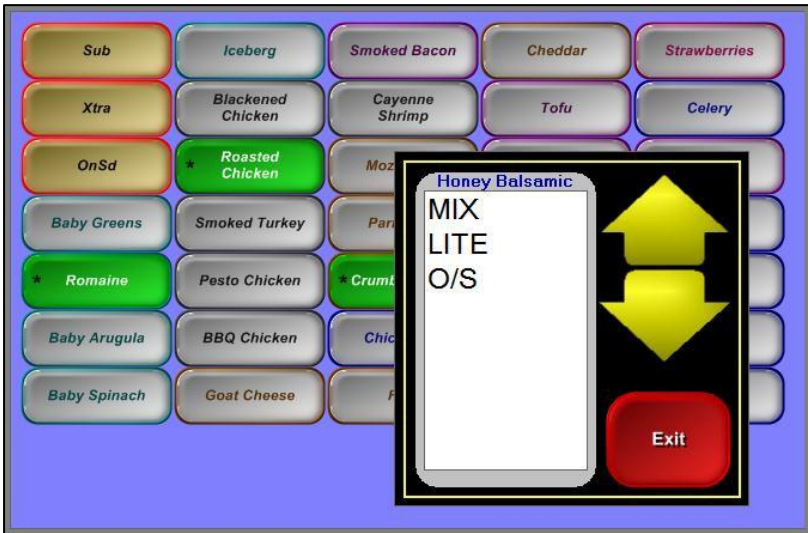
Included Modifiers "Green Buttons"

On the Modifier screen, the under modifier name, there is a check option for making the item an included modifier.

Warning: The "Green Button" screen is a single layer modifier group. Meaning, you cannot 'modify the modifier' or use substitution modifiers. Checking only ONE modifier in the list turns on the functionality for the whole modifier list.

Modifying Modifiers Using the "Green Buttons"

You CANNOT link off to a "modifying modifier". The purpose of the Green Buttons is to create a quick and visual way to add, delete, and sub out items and show items that come with the menu item by default.

You can however, use the **Modify this Modifier With** to create a **Pop Up Prefix**. A Pop Up Prefix is programmed using the same set up as "Modifying a Modifier". Instead of linking off the item to another modifier list, it will prompt a prefix choice. You could use this for wings, salad dressings, or anything that could use further modifications for the Green Button modifiers. The prefix list is created from a regular modifier list.

Ingredients

Used with the green buttons, the Ingredients Function will auto insert modifiers included on the virtual check/printer. You must have "Items Included With" to use this function correctly. The function was added to remind kitchen staff ingredients of menu items.
In order for the ingredients to auto insert, the modifier list must pop up automatically. It cannot be a checked modifier (optional modifier).

Assign Alternate Remote

By default, modifiers print to the same remote printer as the menu item to which they are attached. However, it is possible to send a modifier to a different printer or to not print the modifier at all. A list of all system printers will be displayed in the pull-down box including "None" and "Pass". *None* is the default setting that will cause the modifier to follow the menu item. *Pass* will cause the modifier to not print at all, and any other selection will cause the modifier to go the alternate printer. When Alternate Remote is set, it will redirect the entire menu item to the route by the modifier chosen.
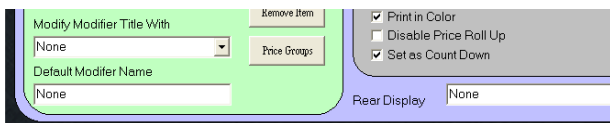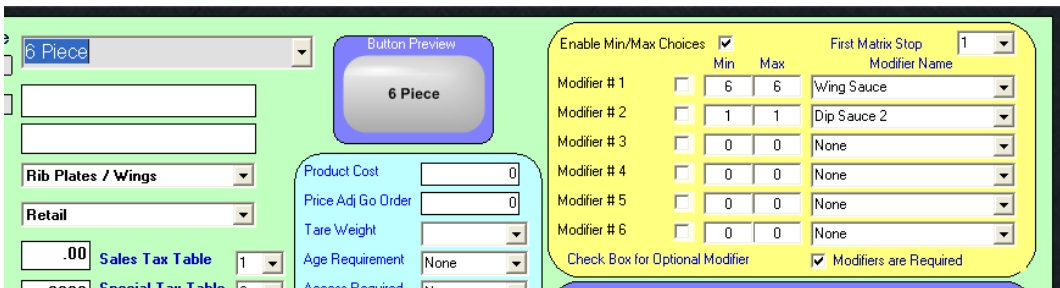

1.28
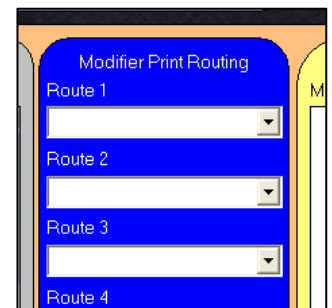
Modifier Countdowns
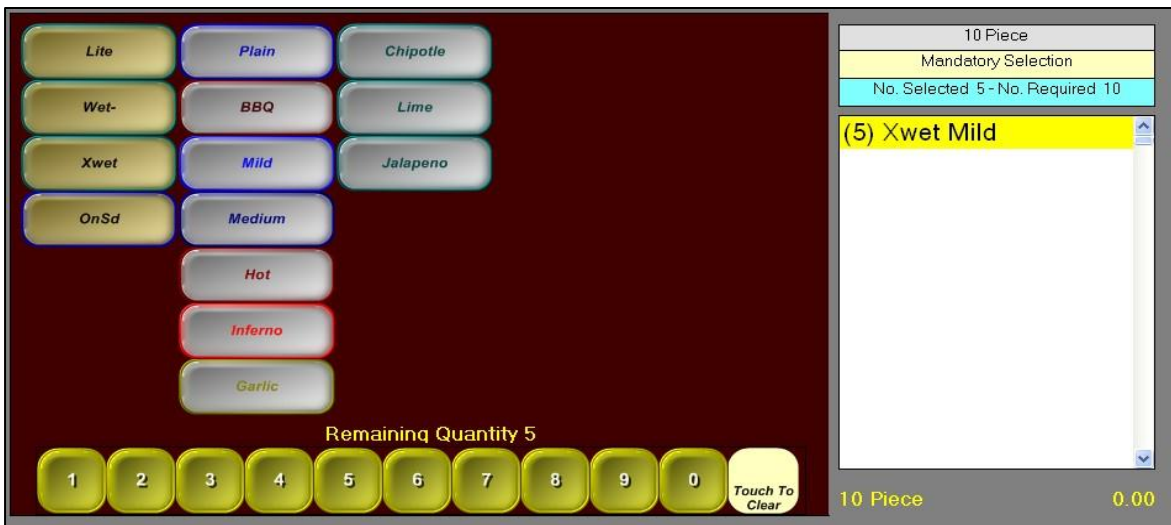
Final Result

Setting up Count Downs

1. Start in the Modifier Screen. After you choose your modifiers, check the Set As Count Down box. (this is a checkbox. The Department/Function may be set to none)

2. Go to the Menu Items and Pricing Screen.

3. Enable Min/Max Choices, (by Checking)

For the Modifier #1, Wing Sauce selection, choose the amount of Wings (or bagels, whatever item is used for the Countdown). Choose the min and max as the same. The user must choose the total quantity.
Since the Min/Max is turned on, the other modifiers MUST be chosen with a min/max as well. If you get one sauce, choose 1 for both. If the option would otherwise be set to "Select Until Done" set the Min and Max to 0 to disable the min/max with that modifier choice.

$ Shift and % Shift

The $ Shift and % Shift functions were designed for donation type giveaways. It will shift a dollar amount or percentage from the menu item into the modifier so that at the end of the day, you will see the proper amount of money for each type of donation.

Ex: A Cheeseburger is sold for $5.00. When touching the "Children's Hospital" modifier for $1.00 (as shown above), the Cheeseburger will drop to $4.00 and put the $1.00 in the "Children's Hospital" area.

Change Item

By default, when a modifier is recalled (pressed on the virtual check) it is replaced with whatever modifier you choose when the list prompts. However, if a prefix is in front of the item it gets replaced by the new modifier as well. **Change Item will keep the prefix and only change out the modifier behind it.**

Ex:

1	Slice Cheese	2.25
	No-Onion	

→

1	Slice Cheese	2.25
	No-Tomato	

Multiply Prefix

Multiply Prefix will put the modifier name in front of the menu item and multiply the menu items price by the number in the modifier name's price. The price field takes on the functionality of a multiplier instead of a price.

Ex: a Vodka Double is 2 times the price of a regular vodka shot. The Modifier Name would be written as Double or DBL with a 2 inserted in the price field. Vodka $5.00 | Double Vodka $10.00

Multiply Prefix may also be used as a percentage.

Ex: a guest orders a Margarita with double tequila. The restaurant owner does not want to double the price of the margarita, but a percentage to make up the difference for the tequila. This will allow you to reuse the same modifier for all drinks, raising the price 20%, 30%, etc.

25% can be represented as a decimal: .25. 100% can also be represented as a decimal: 1.00. Adding 1.00 to .25 represents 125% which is a 25% increase from the original 100%.

%25 Price Increase: $5(1.25)=$6.25

Difference in 25%: $5(.25)=$1.25

Modifier Names with Functionality

MicroSale has certain words that flag functionality such as Half, With, Blank, Keyboard, Invisible, and exclamation points.

Keyboard

While you can add requests with the Attach Request function button, you can add a Keyboard button to the modifier screen. Type in **Keyboard** (with a capital K).

Need to upcharge?

Type in **Keyboard$** to prompt a keyboard and a price keypad behind it.

Half

*** This function is only enabled with Countdowns ***

In the modifier set up screen, simply type in **Half** (This is simply the word, it is not a prefix) as a modifier (in modifier name)
Must be at least on Version 8.944
The Half will be 'smart' and put in the quantity for half. Ex: Pressing Half Honey BBQ, will show (5) Honey BBQ

With

This function can only be used when selecting more than one quantity. For example, a taco restaurant has a menu item of one taco. The user pressed the quantity "2", the With Key will show up in the modifier allowing you to select different modifications for both tacos.
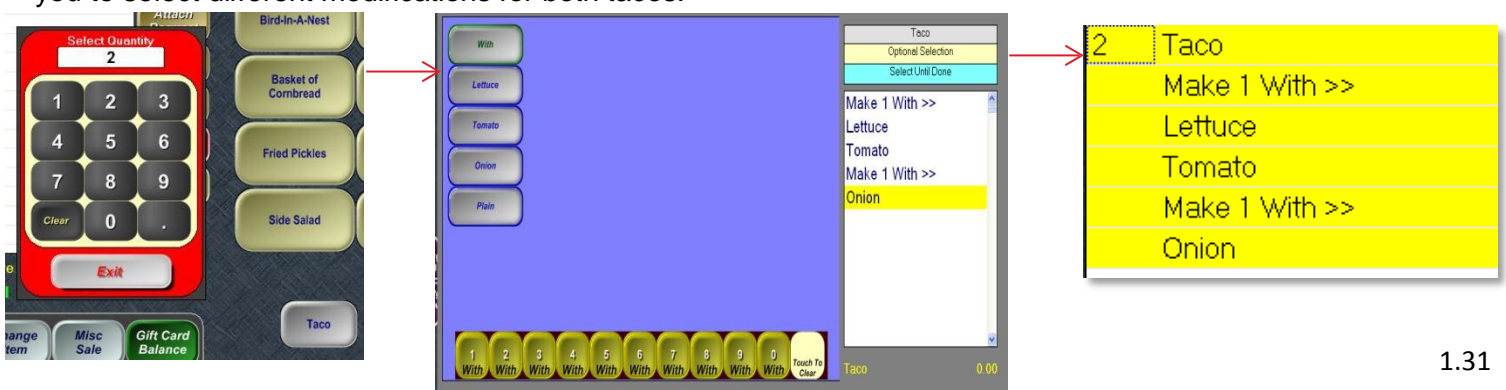
Set up (for the With)

In the modifier screen, type in the word With. (Capital W, this is just the word, not a prefix). This word will only show up on the modifier screen if the Quantity bar is selected with a quantity greater than 1. Make sure that the Order as Programmed flag is NOT checked. When ordering, press the With button first to enable the quantity bar at the bottom of the modifier screen.

Invisible

Invisible buttons are used as spacers for modifiers. By typing in *Invisible,* a space will be added. If you are using more than one Invisible button, be sure to add numbers to the end. Ex- Invisible 1, Invisible 2….3, etc.
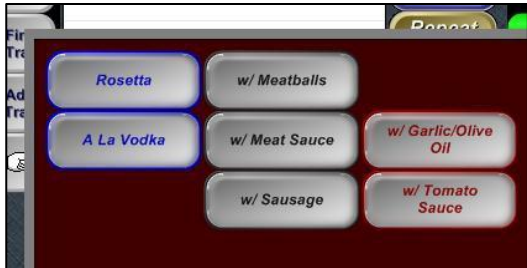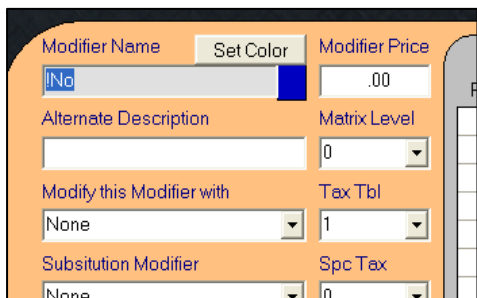

Exclamation Points
!No-, !Add-, !Sub-, !Extra-

On the modifier screen, you can add buttons for prefixed named. Type in **!** followed by your prefix. The Exclamation point allows MicroSale to create the Prefix Button.
A prefix button can have up to 4 characters. (The button will turn Gold)

The !Sub- and !No- buttons will strip off the Modifier Price.

| To be able to recall this modifier on the virtual check, add a DASH on the end of the name, |
| For example !No- or !OnSd- |

Prefixes with Specific Pricing (!Xtra-)

(Example: Extra Lettuce is .25 cents but Extra Bacon is $1.00)

1. Create your prefix. Remember, a prefix will only show four characters.
!Xtra- **Set the Matrix Level to 1.** (Do not put in a price for the Xtra)

2. Insert the prefix into your modifier list.

3. Type in the modifier name. The below example, extra lettuce will cost an additional .25 cents. *Notice* that the matrix level is set to 0. This shows that lettuce regularly will not cost anything. When first pressing the prefix of "Xtra" the lettuce will then reference the .25 in the Price Level of 1.

For further clarification, the modifier price to the right of the modifier name is a level of 0. The Shift levels in the gray then start at 1.

4. For additional items, such as "Bacon" that is not included such as lettuce in step 3, you can type in a price for the modifier, such as .50 cents. This will allow the user ringing in the item press Bacon and adds the .50 cents. However, if the customer wanted to add bacon plus add additional bacon, the below screen shot would then allow the user to press "Xtra- Bacon" for $1.00.

Attaching Modifiers to Menu Items

After the modifier has been created, it will need to be attached to the menu item.
Go to the Managers Menu, Menu Items and Pricing (yellow box to the right)

1. Create the menu item or find the item in the drop down list.
2. Check "Modifiers are Required"
3. Scroll through to find the modifier title previously created. (see page one of documentation)
4. Choose all of the modifiers that need to be associated with the menu item

> Checked modifiers mean that the user will have to highlight the menu item and press *Modify Item* on the order screen. Unchecked modifiers will prompt automatically when the menu item is rang in.

Minimum and Maximum Choices

Checking this choice means that a user must choose a certain amount of modifiers in the selection.
For example: An entrée comes with 2 sides. All sides are listed in one modifier called "Sides" min/max will *force* the user to choose 2 sides before exiting the screen.

Matrix Stop At

This is typically only used for quick service on *Conversational Ordering.*

Example: Combo Meal:
Modifier #1: Sandwich Alterations
Modifier #2: Sides
Modifier #3: Drink

First Matrix stop '2'. This will bypass the first modifier on the *Matrix.* To access the Sandwich alterations, either press the first matrix box, or simply finish the order and press the menu item on the virtual check. This will automatically pop up the alterations modifier.

Modifiers as Order Screen Buttons (not attached to a specific menu item)

Assigning a single modifier name to the order screen as a button
For creating a single modifier that may attach to any menu item

Ex: Whipped Cream. This will be a button on the order screen with all of the other menu items. The Whipped Cream button on the order screen will attach to a highlighted menu item as a modifier.

1. Type in the name of the modifier and the appropriate price if necessary
2. Find the word 'Modifier' as the department/function
3. Turn on the remote printing and set it to the appropriate printer

Assigning a modifier title (modifier group) to the order screen as a button
For creating a 'generic' modifier list that may attach to any menu item

1. Type in the name that you would like to show on the button (this will be a "bridge", it will not be shown on the virtual check/receipt)
2. Link it to the appropriate category and department, (Instead of MODIFIER, this will be as FOOD/BEVERAGE../Etc).
3. Find and check Open Modifier (checkboxes listed on the menu items and pricing screen) and link this with the modifier list that it needs to prompt

Shift Levels with Price Level Modifiers

For menu items that offer different prices. (Ex)Pizza

In order to program the Orange Box in Menu Items and Pricing you must first go to Menu Maintenance, Shift Levels.

Programming the Shift Levels

The Key Name/Description can be the same, depending on what you would like it to say for your servers versus the check.

The **Key Name** will be on the Check and what gets sent to the kitchen/bar.
The **Key Description** is for the user's description of what is on the button.

Make sure that you assign the shift pricing to the correct category.
In this example Price Level 1 is a SL (Slice of Pizza). The Levels determine the order of the buttons.

Once you are finished, press SAVE and EXIT.

Programming Menu Item with the Shifts

1. Go to Menu Items and Pricing

2. Type in the menu item regularly, but do NOT put in a price for the menu item. (otherwise, the regular price will be your base price for the shift levels)

3. Check Forces Item to Shift Price

4. Press the drop down for each of your price levels; you should see one option for each level.

If you do not see descriptions in the drop down, press SAVE and go back to the item. MicroSale needs to know the category in order for it to register the price levels.

5. Put in the appropriate price for each

6. Next to Mod Price, put in the appropriate level that the shift needs to reference

Prefix Name			Shift Pricing				
			Event Name	Price	Modifier		Mod Price
SL ▼	Price Level 1	3.19	▼	0.00	▼	1 ▼	
12 in ▼	Price Level 2	16.49	▼	0.00	▼	2 ▼	
16 in ▼	Price Level 3	21.99	▼	0.00	▼	3 ▼	
18 in ▼	Price Level 4	24.99	▼	0.00	▼	4 ▼	
▼	Price Level 5	0.00	▼	0.00	▼	0 ▼	
Shift Price Only		✓	Forces Item to shift prices	Follow main items with call the modifier listed for the main menu ite the prefix of the shift			

The 1-4 Mod Price references the linked modifier of "Included-Veggie". (Included-Veggie was created earlier, please reference Modifier Set Up for Price Levels below)

Modifier Set Up for Price Levels

Go to Menu Maintenance, then Menu Modifiers.

1. Create your modifier regularly. (you will not need to choose any special options in the set up)

2. When you are ready to type in your modifier name, such as "Pineapple", leave the regular modifier price 0.00.

3. Keep in mind the sizes of your pizza (levels 1-4). You will see in the gray box "Price Shift Levels 1-50". The first line is "1", second line is "2", etc. **Type in your prices that correlate to the pizza size.**

4. Press Add Modifier to List

5. Repeat the process until your list is complete.

6. Press SAVE and EXIT.

Modifier Title
Included-Veggie

Selection Qty
0

Department / Function
None

Add to List

Remove Item

Modify Modifier Title With
None

Price Groups

Default Modifer Name
None

- ☑ Enable Matrix
- ☐ Mandatory Selection
- ☑ Select Until Done
- ☑ Order As Programmed
- ☑ Expand Print On Check
- ☑ Print in Color
- ☐ Disable Price Roll Up
- ☐ Set as Count Down

Rear Display   None

Save

Clear

Exit

Modifier Name   Set Color
Pineapple

Modifier Price
.00

Alternate Description

Matrix Level
0

Modify this Modifier with
None

Tax Tbl
1

Subsitution Modifier
None

Spc Tax
0

Choice Quantity
1

Surcharge
.00

Product Cost
0

PLU

☐ **Included In Menu Item**   **Show**

Clear Item

Shift Key

Shift Exempt

Price Shift Levels
1 to 50

Pre Fix	Price
	.39
	.69
	.89
	1.15

Build Liquor PLU's

Modifier Print Routing

Route 1

Route 2

Route 3

Route 4

Route 5

Route 6
None

Add Modifier To List

Assigned Modifiers

Modifier Name	Change Price
Black Olives	.00
Broccoli	.00
Mozzarella Chs	.00
Mushrooms	.00
Red Onion	.00
Red Peppers	.00
Tomatoes	.00
Bacon	.00
Beef	.00
Buffalo Chicken	.00
Canadian Bacon	.00
Grilled Chicken	.00
Italian Sausage	.00
Pepperoni	.00
Salami	.00
Sliced Ital. Beef	.00
Sliced Meatball	.00
Garlic	.00

Move Up In List

Move Down In List

Remove from list

1.38

Button Layout

- Menu Items can only be rang in if they are placed on buttons
- Menu items before placed on buttons will be shown in the teal, unassigned area
- Up to 45 buttons can fit on a screen. If you exceed that number, you can hit the down arrow for a new screen.

! TIP   Drag one button to the top left of the grid. And use the "Snap to Bottom" or "Snap to Right" to align and organize others based on that button.
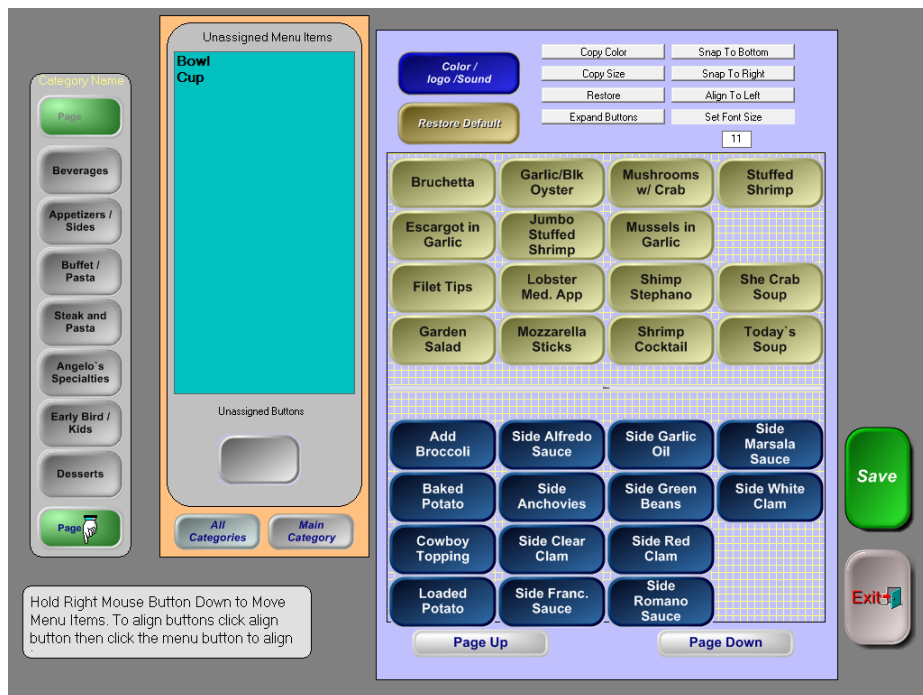
Creating a Button:

1. Click the category that you need to access
2. Left click the menu item name (text in the teal box)
3. Left click the gray button under the teal box (text will then appear on the button)
4. Right click and hold as you drag the button to the grid
    TIP: *Start in the top left area: this allows you to "snap the buttons" to the right and bottom to quickly organize buttons*
5. Save the screen before exiting or toggling to another category. *Going to a new category or exiting will cause you to lose your current changes*

Understanding the Button Layout Screen

All Categories and Main Category (located under the unassigned button area)

The **All Categories** button will populate all menu items saved in your menu. *This allows you to put menu items in multiple places. For example, you may want drink choices on every page.*
Main Category will only show the menu items in the specific category again (if you hit the All Categories by accident or would like to get back to the default list)

Command Functions
*Be sure to turn off the command when it is no longer needed (by clicking the command function)

Color / Logo / Sound: Allows you to customize the button color and/or text color, add a bitmap, or add a sound.
If a bitmap/logo is not stored in the database, you may create your own (must be saved with a prefix of M- and must be saved as a .bmp file) Or you may contact your dealer to create the buttons for you

Restore Default: Populates default buttons on the order screen (default size/gray color)

Copy Color: Allows you to copy colors from one button to another. Click copy color and then click on the colored button that you would like copied. After the color is copied, click one or all buttons to transfer the color.

Copy Size: Allows you to copy a button's size to other buttons. Click copy size and then click the button with the desired size that you would like copied. After the button is copied, click one or all buttons to transfer the size.

Restore: Allows you to restore the button back to the default size. (Restore default puts ALL buttons back to the default size/ **Restore** only affects selected buttons)

Expand Buttons: Allows you to increase or decrease the size of a button. Click Expand Buttons and then right click and drag the selected button to change size. *Hint: Use Expand Buttons First and then Copy the Size.*

Snap to Bottom: Allows buttons to properly align and say organized. Click Snap to Bottom and then click the button that you would like other buttons to "snap" to. Like many other command functions, the first button clicked is always your anchor (or example button). *Hint: Start with your buttons on the top left (left to right; creating an "axis" or starting point for other buttons to follow)*

Snap to Right: Allows buttons to properly align and say organized. Click Snap to Right and then click the button that you would like other buttons to "snap" to. Like many other command functions, the first button clicked is always your anchor (or example button). *Hint: Start with your buttons on the top left (left to right; creating an "axis" or starting point for other buttons to follow)*

Align to Left: Aligns buttons in a column. Click Align to Left and then click the button that you would like other

buttons to align to underneath.

Set Font Size: Allows you to increase or decrease the text on a button. Click set font size (or the font size number) and input the desired size. After the size is inputted, click one or all buttons to match. ***Hint:** Set Font Size helps better fit text on the button to prevent "text wrapping"*

Separating Buttons on the Order Screen / Button Layout

You may create nonfunctional buttons to help organize the order screen.

Create a menu item named Blank.
The word Blank will disappear in the button, as the text changes to the same color you pick for the button color. To make it even more unnoticeable, make the font size 5 or less.

You are able to reuse the Blank buttons (also regular menu items) on all screens by pressing All Categories on the button layout page. However, if you would like more than one blank on a page, number the blanks like the Invisible buttons. Example: Blank 1, Blank 2…. Etc. *If you would like to add words or pictures to this "Blank Button", you can put in a button alias name or you can go to the button layout and put a bitmap on the button.*

Timed Events

A Timed Event is a period of time that enables a menu item to become available (to be rang in) or a period of time where a menu item has a different price.

The Timed Event section is to only set the criteria for the event, the pricing will be attached to the menu item (in Menu Items and Pricing)

1. Managers Menu→Menu Maintenance→ Timed Events
Timed Events are used for Happy Hours, Holiday Specials, Lunch, etc.

2. Type in the Event Name, Start Time and End Time. The Price Reduction is used for regular menu items offered at a uniform discounted price.

3. Check the correct days for the event. Dates Valid usually is not necessary, unless you are offering a Holiday Special, Football game special, etc.

4. After saving your Timed Event, go to Menu Items and Pricing.

5. In the gray box called Timed Events, click the correct drop down Timed Event Name (such as Lunch) then put the price of the menu item. During the time period (of the Timed Event) the regular menu item price will be overwritten to the price in the gray area.

In the below example, the event is NOT valid every day, so available daily is unchecked. If a user tries to ring the menu item, it will say "Menu Item not Available at this Time".

Keyboard Functions

"Odd" requests are common in a restaurant environment. It is important to make customizable options available for your staff. MicroSale has the ability to set up multiple ways to type in your own requests.

Adding a Keyboard in Attach Request

The Attach Request function offers an array of preprogrammed requests plus a Keyboard button.
To add more preprogrammed requests or add in the Keyboard, if not present, follow these steps:

1. Go to:Manager Menu→Register Set up→Tenders, Paid Outs, Customer Requests (middle button)→ Customer Request
2. Press the drop down to see your preprogrammed requests.
NOTE: THE ORDER OF ENTRY IS THE ORDER IT WILL DISPLAY IN THE BUTTON LIST
3. Press the gray button under Up Charge to add in the Keyboard Option. Remember to Save, then Exit.
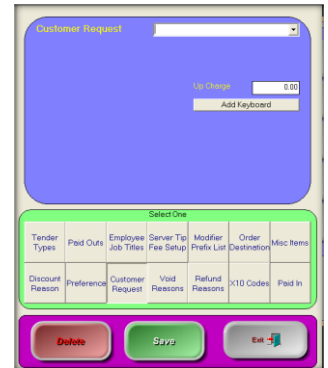
Adding a Keyboard in a Modifier List

While you can add requests with the Attach Request function button, you can add a Keyboard button to the modifier screen. By typing in Keyboard (with a capital K), you can easily type in odd requests. The message then goes in the appropriate place that can be easily read by the cooks.

Need to upcharge?

Type in Keyboard$ to pull up a keyboard and a price keypad behind it.
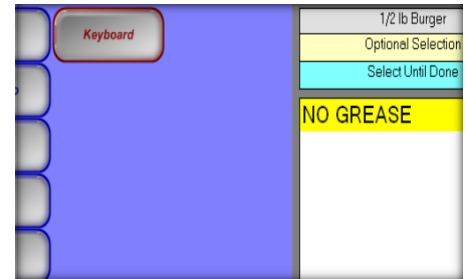
Adding a Keyboard to the Order Screen

You can create a keyboard on the order screen as a shortcut. The keyboard button will attach the customization to the menu item you highlight on the virtual check.
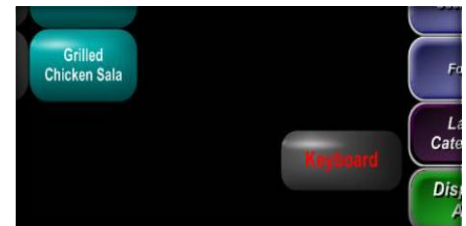
Adding a Keyboard to the Order Screen with Prompt for a Price

This will work similar to MISC item, however now you will not have to choose a department. You will create a menu item with any name and check open price. (Figure A)
A generic name will make it easy for the user to find and understand. After you create the item and save it, go to Register Options. Find the screen for Menu/Credit Card and check the option for Use Keyboard with Open Price (Figure B)
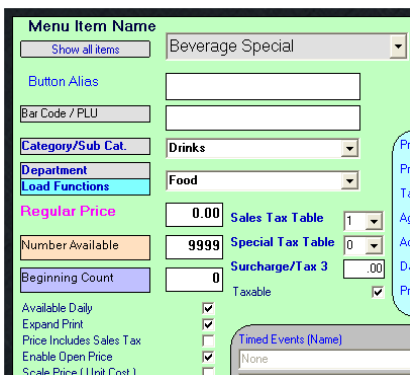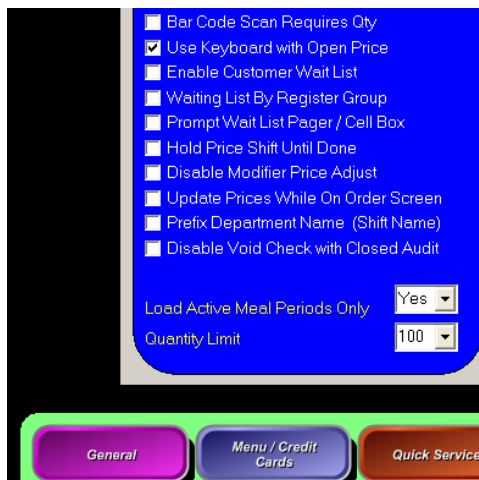
Figure A

Figure B

2.2

Shift Pricing (Shift Levels)

Shift Levels are useful for menu items that offer multiple sizes such as draft beer (12oz, 16oz, Pitcher) or pizza (Small, Medium, Large).

A Shift Level must first be created in order to assign shift pricing. A shift level is the "size" and a shift price is the price attached to the level *(or size).*

1. Go to the Manager's Menu, Menu Maintenance and click Shift Levels. (screen shot below)

2. Type in a Key Name. (The Key Name will the abbreviated size that will go in front of the menu item) Such as "SM" Pizza.
3. Type in a Key Description. (The Key Description will be displayed on the button in the POS for your staff to see only: 12oz Key Name and "Mug" for Key Description)
4. Press the drop down next to Category Assigned and choose the desired category. (A Shift Level is assigned by Category in order to add the levels to buttons on the order screen).
5. Press the drop down and put in the appropriate price level. (1 is the smallest size available, 5 is the largest. If you only have three sizes use levels 1-3)
6. The PLU Transformer Code can be level at 0. (This is used for above store interfaces that use PLU numbers)
7. Touch Save
8. Repeat steps 2-7 for all remaining levels

After your Shift Levels are programmed, you will need to assign the level to a menu item with a price. The reason that this is in two parts is so that you can use the same levels with different prices (a domestic draft may be less expensive than an import draft)

1. When on your menu item, go to the bottom of the screen in Shift Pricing. Press the down arrow to find your shift names. Put in the Price.
2. If the cashier/server must choose a size, check the option for "Forces Item to Shift Prices"
3. Save and Exit.

Side Notes:

The **Event Name** may stay blank unless it needs to be attached to a Timed Event. Put the corresponding price in to the right of the Event Name.

The **Modifier** may stay blank unless that specific size has its own modifier. If all sizes use the same modifier, you can insert the modifier in the regular area.

      EX: You may use the **Modifier** for a "Pitcher" to connect it to a modifier for a Number of Mugs.

Mod Price is discussed in Chapter One under "Modifiers" in the "Modifier Price Level" section. *(Click Link to Reference)*

PLU may stay blank unless you are using specific above store reporting.

The Shift Levels can be used in two ways. You may put the Level on a button (you will find the level in the button layout to place on the screen) or you may touch the menu item first, which will prompt you to choose a size level for the item.

Shift Combo

What is a Shift Combo?

A Shift Combo is a way to create a menu item into a combo meal after it is on the virtual check, when a customer changes their mind or does not say they want a combo before starting to order.
The cashier can touch the word "combo", "meal", or whatever word is chosen, and then touch the menu item on the check. It will then pull in the correct modifiers attached to the combo version of the meal.

Steps to Create:

Part 1

1. Go to Shift Levels in Menu Maintenance
2. Create a Shift Level, with the Key Name of "Combo", "Meal" or any other word desired.
        Make sure you put an exclamation point at the end, such as Combo!
3. Type in a Key Description (this word will be displayed on the button in the order screen)
4. Put in the appropriate category
5. The Shift Level may be 1 (one).
6. Save and Exit.

Part 2

1. Go to Menu Items and Pricing
2. Create your Menu Item Name
        Example: Baconzilla
5. Put in the price for the sandwich
6. (do not force items to shift)- find your combo shift and put in the appropriate price. The Combo Shift will reference the Menu Item of Baconzilla Combo.
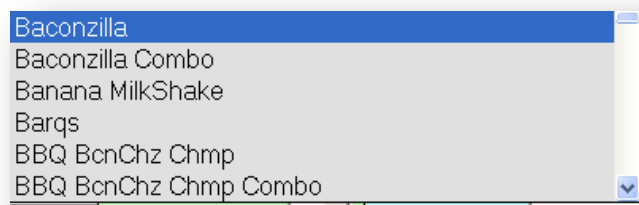
Menu Items of Singles and Combos with Identical Spelling

You must have another menu item name called Baconzilla Combo in order for this to link properly. Spelling MATTERS.

7. Make a Baconzilla Combo and put in the appropriate price and modifiers. (this is where you will build the combo)
HINT Put in the sandwich modifier first (like no tomato, etc) then put in the drink and the side. Put the first Matrix Stop at 2. This will bypass the first modifier for speed.

8. Put the combo Shift function on a button.

Two operational options for the function: Touch Combo then the Baconzilla to create the combo or ring in the Baconzilla, highlight then menu item, and then touch Combo

1. Go to Register Set up, Printers / Device Set up

2. In the teal box, type in the description name of a printer. In this example, the Bar printer is assigned to the printer NE05 which is a receipt printer. The failed printer means that if the printer fails to print, the menu item will reroute to the other printer.
3. Click SAVE.

Tax Rates

1. Stay in Register Set up and go to Sales Tax Menu
In the tax rate set up, you can have up to 5 levels of sales tax. In the purple box, you can have a n additional 5 for liquor or special tax tables.

2. Remember to SAVE.

Tare Weights

1. Tare Weight is set up when using the electronic scale. Touch the Tare Weight Setup button on the Menu Maintenance screen.

2. Type the name of the container(s) that will be used for the scalable items and the weight of each container. This amount will be subtracted when figuring the weight of the item.

Menu Related Register Options

(below: General Register Options)

Register Options will have to be set up at each terminal. You can update all registers from the General screen using the bottom right drop down box that says "Terminals"

Red Prefix Buttons

You may use prefixes as modifiers as earlier discussed, or you may turn on the Register Option for 'generic' prefixes. (Reference Below)

A total of three prefix buttons can appear on the modifier screen. These can be anything that you choose. Certain words will flag specific functionality. **No and Sub** will drop the price of the modifier if one is attached. **Prefix** will prompt a "prefix" box as shown above. Xtra (shortened to four characters) can, if chosen, shift the modifier to another price. For example, Xtra Chicken could charge $3.00 while Xtra Onion could charge .25 cents.

Set Up for "Special" Prefix Buttons:

1. **No and Sub** will work automatically. (no special programming needed)
2. Create a separate "list for the **Prefix** button. Register Set Up→Register Options→Customer Requests→Modifier Prefix List
3. **Xtra** (to shift to a price level) Type in a 1-4 character word such as EXTR, XTRA, etc and put a dash followed by the price level it needs to reference. For example, XTRA-1 will shift to price level one, XTRA-2 will shift to price level 2. The price level is created *BY MODIFIER*, so each price will be modifier specific.
   the dash and number will be masked. You will not see it on the order screen.

Modifiers		
*will turn off Modifier Prefix		
1 st Mod Prefix	No	
2 nd Mod Prefix	Prefix	
3 rd Mod Prefix	Xtr-1	
Price Reduction for 1/2 %	50	

☐ Disable Modifier By Category

☐ Enable 1/4 on Modifiers
☐ Matrix- Hold Screen For Review
☐ Matrix- Stop For Manditory Only
☐ Matrix- Allow Finish Any Time
☐ Enable Modifier Qty
☐ Enable Count Down Pricing
☐ Disable Count Down Edits

Tenders, Paid Outs, Customer Requests

Register Set up→ Tenders, Paid-outs, Customer Requests

Attach Request on Order Screen

Press Customer Request. Here you can add predetermined requests or press ADD KEYBOARD to enable the user to type in their own request. The order you type in the items is the order it will show up on screen. (With each request, you can also choose an upcharge price)

Modifier Prefix List

Add a separate "Prefix list" for modifier screens. For example, type in wet, xwet, xcrispy, xxcrispy, etc. To enable this, go to register set up→register options→general→under modifier prefix, type in Prefix in one of the fields.

Modifier Prefix List

WET
DRY
XTR
LITE
WELL
PAR
NO PAR
PLN

Exit

3.3

(Under the General Tab)

Disable Modifier by Category

This function allows certain modifier titles to be disabled from use in a specified category. The option is register specific and would need to be set on each register that you would like the modifiers to be disabled on. Example: a restaurant has server stations as well as bar stations. The server station will need to select mixers and other drink modifiers for alcohol so that the bartenders know what to make, however, the bartenders do not need to select modifiers for bar items.

Enable ¼ on Modifiers

When the option is checked, it will turn on the ¼ option as well as the ½ by modifier (Select ½ Modifier Function). The option will ONLY appear when the Select Half Modifier Function is turned on. (Please reference Modifier Functions for more information)

Matrix- Hold Screen for Review

The option holds the modifier screen open until the "Finished" button is touched. When checked, it will automatically check "Allow Finish Any Time"

Matrix-Stop for Mandatory Only

The option will bypass all optional modifiers in the Matrix (group of modifiers linked to an item) and only stop for mandatory modifier groups.

Enable Modifier Qty

This option allows the quantity to be carried over to the modifiers when the "Quantity" button is used with the associated menu item. Example: Press Quantity of 5→Cheeseburger→(choose a cheese) (5) American Cheese
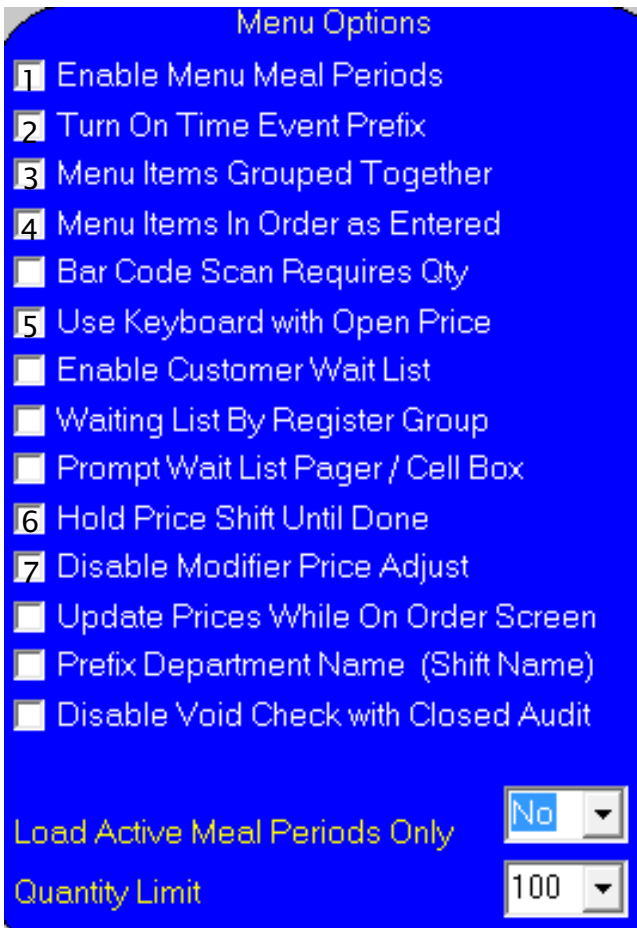
Enable Countdown Pricing

By default, if a modifier adds a price to a menu item that is using countdown then the modifier price will be added once. If this option is checked then the modifier price will be added to the item multiplied by the countdown number.

Disable Countdown Edits

By default, you may go back and change the modifier associated with a countdown. This option will not allow the user to edit anything in the modifiers for items that is using the countdown function. It will make you delete and rering the item if a mistake is made or the customer changed his/her mind. Example for default (not checked): 10 Wings→(5)Mild, (5) Hot. You may change the Mild to Honey BBQ, which maintaining the same quantity in front. Example for checked option: 10 Wings→(5)Mild, (5) Hot. It will only highlight the line item and not do anything. It will not allow any type of edit.

(under the Menu/CC Tab: Only items pertaining to menu programming are numbered)

Menu Options

1 Enable Menu Meal Periods
2 Turn On Time Event Prefix
3 Menu Items Grouped Together
4 Menu Items In Order as Entered
☐ Bar Code Scan Requires Qty
5 Use Keyboard with Open Price
☐ Enable Customer Wait List
☐ Waiting List By Register Group
☐ Prompt Wait List Pager / Cell Box
6 Hold Price Shift Until Done
7 Disable Modifier Price Adjust
☐ Update Prices While On Order Screen
☐ Prefix Department Name (Shift Name)
☐ Disable Void Check with Closed Audit

Load Active Meal Periods Only   No ▾

Quantity Limit   100 ▾

1. Enable Menu Meal Periods

This option when checked will link menu categories to timed events so that only the desired categories are displayed at the different times of day. This may work in conjunction with Load Active Meal Periods Only

2. Turn On Time Event Prefix

When the option is enabled, the timed event name becomes the prefix for the name of the menu item associated with a timed event. By default, the price will automatically shift during the correct time interval without a name change. The option checked will display the timed event name in front of the item shifting a price, such as HH Friday-Bud Light Draft.

3. Menu Items Grouped Together

The option is used with "menu items in order as entered" and puts the items together by category before they are put into the order as they were entered. For example, If you enter in a Coke, sandwich, Diet Coke, dessert, it will rearrange it on the virtual check/receipt to show Coke, Diet Coke, sandwich, dessert.

4. Menu Items in Order as Entered

This option will cause all items on a check to print in the order that they were entered by the user. Normally menu items print on remote checks and customer receipts in the order of the Category Priority list (see Menu Maintenance). The primary application for this option is in full service restaurants that have multiple courses; allowing the server to enter the items in the order the items are to be prepared.

5. Use Keyboard with Open Price

The option will work similar to MISC item, however it will not force not force you to choose a department. You will create a menu item with any name and check open price. When the option is checked, it will overwrite the menu item name with whatever name is typed in using the keyboard.

6. Hold Price Shift Until Done

When the option is enabled, the selected shift level will remain in effect until either the "done", "tender", or same shift key is touched.

7. Disable Modifier Price Adjust

The option will disable price levels when using Timed Events.

Load Active Meal Periods Only

By default, the option will be set to **No**. When the option is set to No and the "Enable Meal Periods" is set, categories that are not connected with a meal period will still show on the order screen; such as a drinks category that should be available at all times.

Yes, will only show categories assigned to that specific meal period. For example; it would only show "Breakfast" during the hours for that meal period.

Quantity Limit

The option affects the Quantity button on the order screen. It will block the quantity amount that is over the number typed in the box. In this case, you may not press Quantity 101→Bud Light. (to ring in over 100 of the item at one time.