



INNOVATING POINT of
SERVICE SOLUTIONS

Sapphire Management Manual

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I. OVERVIEW

Congratulations on purchasing the most innovative food service software available today! You will find *Sapphire* from Khamu Systems is efficient for all staff members, extremely user-friendly, and will increase productivity for all areas.

This manual will describe every feature of *Sapphire*, with step-by-step instructions for each function, along with tutorials. Navigating through *Sapphire* is extremely self-explanatory as it is developed for use through a Web browser, which most people are already familiar with, or can learn quickly. *Sapphire* has been developed with ease-of-use as a primary goal, and most functions are straight-forward and easy to understand.

HOW TO USE THIS MANUAL

This manual is broken into sections. While it will be helpful for all users to know how the system works, this manual is geared towards three different groups of users.

Managers will want to start with the **Basic Concepts** to get an overall understanding of how Sapphire works. The **Management Functions** section will explain to the manager how to use the reports and how to manage the system.

There is a separate **Server Guide** which discusses how to use Sapphire to enter and manage orders, as well as the different areas of the system that servers will use.

The **Configuration System** should be understood by the person setting up Sapphire for the operational environment. Once set up, Sapphire rarely needs to be re-configured, unless minor changes are needed.

CONVENTIONS USED

Buttons are shown as a **Button**. When using the system this would be a clickable button if it is enabled.

Security privileges or rights are shown in *italics*.

Notes and examples are shown in a box for easy identification when browsing through the manual.

Different areas or screens in Sapphire are shown as bolded, such as **Sapphire Management Central**.

Reports and Management functions are shown in bolded italics, such as ***Day-End Close***.

II. BASIC CONCEPTS

TERMINOLOGY

Various terms are used in this manual and those terms are explained here.

Device means the handheld, wireless device that the server uses as a portable Point Of Sale (POS) interface. This interface has been removed in Sapphire 6.0 as those devices are obsolete.

Terminal means the Point Of Sale computer screen or any screen used for the management of Sapphire.

Fulfillment area means the kitchen or concession area that is used to fulfill an order or any items on the order. There may be a fulfillment terminal and/or a fulfillment printer in use in the fulfillment area.

Runner means any employee who delivers food from the fulfillment area to the customer.

Server means any employee designated as one who takes orders from customers and manages those orders.

Spectra means the restaurant version of Sapphire.

Stadia means the stadium version of Sapphire. Many functions are the same for the restaurant version or the stadium version, but differences exist. The differences will be described where they exist.

SAPPHIRE RELEASE VERSIONING

Sapphire uses version numbers in an X.Y.Z.Fixes format. The X.Y is the version number for a major release (e.g. 5.1). The Z number is a revision or update to a version. It might be accumulated fixes or minor additional functionality. The Fixes number is the number of a fix file release that is specific a given X.Y.Z release.

SAPPHIRE LAYOUT

Sapphire is set up to be used in several different ways by different users. The front page is the initial screen seen when starting Sapphire, and where shared POS terminals should return to, for security reasons. There are buttons used to select a fulfillment terminal view or a seating terminal view. The final section of Sapphire is the Management System where managers can set up menus, manage orders, generate reports, etc.

THE FRONT PAGE

The front page is the primary screen that displays information to the viewer, based on configuration items. The active employee count (employees clocked in) is shown, and any active employees with *Server* rights are shown as buttons by default (Sapphire can be configured to use a keypad sign-in). The server can click on their button to enter their personal order entry area. The TimeClock functionality is used by using the **Clock In** or **Clock Out** buttons. An employee can go on break by using the **Break Start** button and break time is accrued until the **Break Stop** button is used to stop the break. Any clocked-in employee can go to the **Checkout** section to view wage history, declare tips, or to do end-of-shift activities. A configurable message can be displayed to users as a communication mechanism. Fulfillment, delivery, or the seating terminals can be entered via the **Terminal Sign-in** button, and the management functions can be accessed by clicking on the **Manage**

System button. A company picture or image can be configured to be displayed on the front page.

Clicking on **Manage System** will launch a new window for management access. A user cannot access the management system from multiple computers or multiple windows at the same time. Also, leave the original window on the “Manage System Launcher” page so cookie values that are used by the management system are not accidentally cleared out.

While Training Mode must be enabled via the management system, an individual terminal can enter training mode by clicking on the **Enter Training Mode** button. Likewise, pre-paid accounts must be enabled, but once there are active accounts, account balances can be easily viewed through the **PrePaid Acct Balances** button.

Send Remote Assist

Click on **Send Remote Assist** to make your system known to the www.khamu.com web site by manually registering its location on the Internet in the Khamu customer database. This feature only works if you have Internet access and have a remote assistance account enabled. It is useful for both Khamu support personnel to aid in problem solving, as well as remote access of your system. Linux-based Sapphire systems will be set up to automatically send the remote assist communication. Contact a Khamu representative for more information on Remote Assistance.

MAGNETIC STRIPE CARDS

Sapphire can be configured to allow a magnetic stripe card be used by servers to access the system. Go to the Employee module and set up a magnetic stripe card. Then from the front page if the card is swiped for the server their orders page will be shown.

THE TERMINALS

There are several different types of terminals. Terminals entered by clicking on the **Terminal Sign-in** button. Any terminal that has been set up will be displayed as a button and when clicked, that terminal is entered.

A **fulfillment** terminal will start displaying open orders that need to be fulfilled. They are displayed in the sequence tickets are entered. A **Print** button is available to print the order without clearing it. The **Clear** button will print and clear the order.

A **seating** terminal is available by clicking on the **Seating** button. This terminal will show which tables are available (in green) and which have an open order (in red) or need to be cleared (a button). A table needing to be cleared is one where the order has been closed, but the table is not yet available for another customer. Tables with open orders will show the time that table has been busy and which server is serving that table. Numbers are used to match multiple orders to their respective server. The seating terminal is intended for restaurant-style seating, but can be used in the Stadia version.

A **delivery** terminal is available (if configured) for entering and tracking delivery orders but is accessible through any server’s Orders page. More information is available in the Delivery Terminal section.

Note: The fulfillment, seating, and delivery terminals will refresh themselves after a configurable period. If the user desires, the screen can be refreshed manually by clicking on the **Refresh** button.

If configured (see section on Setup Terminals & Printers) a Cash Service terminal is available. This terminal is reached through the server's Orders page after the server has signed in to Sapphire. See the separate Sapphire Cash Service terminal documentation for information on using the terminal.

DISCOUNTS AND SPECIALS

Specials are essentially automatic discounts. Discounts and specials are shown separate from sales. This way the total sales can be tracked separately from discounts and specials.

Note: Specials are not allowed on To Go orders unless configured.

SURCHARGES

With Sapphire, surcharges can be set up to track activities that involve money but are not desired to be reflected in total sales. Examples would include room charges, aprons, etc. The ability to add surcharges increases accountability for cash management.

TIME CLOCK

Sapphire can be used as a TimeClock mechanism for employees. The employee simply clicks on the Clock In button. A required password is configurable, as is any adjustment to bring the time to a consistent interval (for example, adjust to the next 15 minute interval). To clock out, simply click on the Clock Out button. A server with open orders cannot clock out – either transfer the orders to another active server or close them. The Admin password can be used to override the employee's password in case the employee forgot to clock out (or, a manager can change the employee's password and use the new password to clock out, and then the employee can change their password later).

To fix any TimeClock entries, a user with *Payroll* rights can edit the times – this is discussed under the Employee Hours report.

Note: Only existing TimeClock entries can be edited. If a time period is completely missing, the employee can clock in and clock out again, and then that time period can be edited into correctness.

When clocking out, a mini-timeclock report is presented to the user. It can be printed out on a receipt printer if desired.

SECURITY

There are two types of security in Sapphire. There are "rights" or privilege levels that can be set up for each employee, if desired. Certain management functions are only available to employees with certain rights. Additionally, a special right of *Server* is used to signify which employees are servers and can be listed on the front page.

The other type of security is password-level security. Each employee can have their own PIN (personal identification number). The PIN can be of any length and use any keyboard character except the single quote. However, servers may want to only use numbers for their password as a keypad is set up for PIN entry and on devices it is easier to use the keypad.

A manager PIN can override a server PIN for any clocking in or out or taking breaks.

Managers will need to set up a password in order to get into the management side of Sapphire. This password must be at least eight (8) characters long and at least one of those characters will need to be a number. The password must be changed every 90 days and the same password cannot be used for the last four passwords.

ORDER LOCKS

Sapphire can be configured to set a lock when a server is adding menu items. This is to prevent another user at a different terminal from also adding items and then placing the items prior to the first server being ready. More information is under POS Module, Manage Locks.

THE CLOSE PROCESS

There are two close processes available. The first, a Mid-Day close is optional. The second, the Day-End close, is required.

The Mid-Day close can be used to segment the day into two periods, making shift reconciliation easier. Simply choose any closed orders to put into the first period.

At the end of every business day, the Day-End Close process should be run to make sure all orders are closed and employees clocked out for the day. This is used to ensure reporting accuracy. The close process is described under the Day-End Close management system process.

THE “FISCAL” DAY

Sapphire has a configurable “Fiscal” day concept that is used to put orders in to the correct business day. This is not an issue for a business that opens and closes business all in the same calendar day, but is useful for businesses that might stay open after midnight. This day boundary is also used in creating order ids. The “Fiscal” day is discussed further under “Order Day Boundary” in the System Configuration section.

REPORTS

A variety of reports are available with Sapphire. The reports use a “Basic” and “Advanced” view for looking at data differently. The Basic view will only let the user select a calendar day, and uses the date component of the order id to obtain records.

Note: Some reports do not contain order information, so the calendar day is used in the Basic view. Timeclock reports will use the payroll time boundary.
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The Advanced view lets the user select either a time period or date range that crosses more than a single day, and is not limited to the day-end boundaries.

Note: 24-hour time is used for accuracy. A special time of 11:59 pm is available to get close to midnight. The alternative is to use 00:00 hours of the next day. **By default the order day boundary time will be chosen. Make sure the correct dates are selected in Advanced View.**

Use the Set Report Date Range feature on the management Main Menu to set a range that can be used by multiple reports. This will allow you to move in and out of various reports and not have to set a date or range multiple times.

TIME PERIODS

All reports have a consistent mechanism for selecting the time period the report is to cover. For most reports there is a “Basic View” where a single calendar date can be entered or selected by clicking on the calendar icon (📅). The date selected will define the data range for the report; if there is order information, and then the date portion of the order id is used to obtain the data. This helps view data based on the “fiscal” or order day. When the data does not contain order information, then the calendar day boundary is used. The **Get New Data** button needs to be clicked to re-generate the report with the new data.

There is also an “Advanced” view for selecting data. Here either a pre-defined time period (such as Month To Date) can be selected, or a specific date/time range can be entered or selected using the calendar icon. There is an “effective date” field that gives a reference to the pre-defined period (i.e. the “To Date” date).

The Advanced view uses 24-hour time to ensure consistency and accuracy. By default the time period will be based on the Order Day Boundary in order to match the Basic view.

Note: Take care when switching to Advanced View as the default end time (“data to”) will be the order day boundary for *tomorrow*. Older versions of Sapphire used midnight *today* as the upper boundary so be careful the upper boundary is what is expected.

Since Midnight is also the same as 12:00am the largest upper boundary is through 23:59 (11:59 pm) which should work for most cases. However, if there are sales or other activity (such as TimeClock clock-out times) that go past midnight, then a date/time value that correctly covers the desired time period should be used (such as 3am the next morning).

Example: If you want to check the 1st through the 15th, you would click the first calendar and choose the 1st. Then you would click on the second calendar and choose the 15th; then you would click **Refresh**. The numbers will then recalculate to include data from the 1st at 12am (00:00 hours) until the 15th at 11:59pm (23:59 hours). To be more accurate, you could select 12am (00:00 hours) on the 16th. Also, you must always **Refresh** after each chosen data range for the numbers to recalculate.

Note: When using the calendar icon to select a date/time, always select the time first as the selection of the date causes the pop-up calendar to go away and the selected date/time value to be entered in the text box.

SHIFTS VS AM/PM

Sapphire is configured by default to automatically create a new “shift” for a server who clocks out and back in again in the same day. The sales information is then shown in the Server Report, Server Deposit Report, and Cash Drawer Checkout by shift. The configuration can be changed to show that information based on the AM/PM separation that the Mid-Day Close process provides. This setting is in the Manage System / POS Module / Shifts.

Note: The AM/PM concept is an accounting-like feature where the sales information can be broken into two parts using the Mid-Day Close process. The Order Shifts concept is per-server and only servers who clock out and back in again will get a second shift (if configured appropriately). The two can be equivalent if during the Mid-Day Close the appropriate orders are picked to go into the AM sales to match the first shift.

PRINTING

If a report has a **Print It** button, it will attempt to print the viewed report on a configured report printer. This is assumed to be a printer similar to one used for printing fulfillment tickets or receipts. If the printer is wide enough, then the report will print.

Reports can also be displayed in a “printer friendly” manner where the report can be printed from the browser window. This style report may contain more information than the narrower report printer. Click the **Printer Friendly Report** button to see the printer friendly report.

Subsets of reports can also be printed by simply copying (Ctrl-C) and pasting (Ctrl-V) into your favorite editor. Report data can be transferred to a spreadsheet application in this manner, as well.

NAVIGATION

On all the management screens, there is one or more of these buttons:

Back: This will return you to the previous data screen. It might be the same as the Home button in some cases.

Home: This will always return you to the Sapphire Management Central screen.

Refresh: This will re-display the current data screen you are on, showing any updates that may have occurred.

DELETING INFORMATION

Due to the importance of retaining historical data so reports make sense, some data or values are never deleted. Instead, Sapphire uses a concept of hiding “Deleted” records and displaying “Active” records. An example would be if a menu item is used for a while and then discontinued. If the menu item was physically deleted from the database, then historical reports over the time period in which the item was in use would contain bad information.

Note: It is highly recommended to never change the meaningful information on a menu category or item once orders have been placed using that category or item. Instead, create a new category or item and mark the old one as deleted. For example, don't change the menu item from "Mike's Lemonade" to "Tomato Juice" when you discontinue selling lemonade and start selling tomato juice, otherwise historical sales of lemonade could show up in reports of tomato juice sales.

Some areas are not affected by the deleting of information and therefore a physical delete is used. Information that is physically deleted cannot be retrieved, and will need to be re-entered.

MODIFIERS AND TRIMMINGS

Sapphire has the concept of Modifiers and Trimmings that are closely related. Modifiers are used to provide instructions and modifications to menu items. Trimmings also modify menu items, but are for building customizations with menu items. Examples of a Modifier would be cooking temperatures for meat (e.g. Rare, Medium Well) or a salad or soup included with a menu item. Examples of Trimmings would be toppings on a pizza or "building" a sandwich by selecting meats, cheeses, condiments, etc. Trimmings have "custom actions" that can be used, such as "Add", "No", "Extra", etc. Sometimes trimmings are referred to as custom items.

Modifiers can have prices associated with them. These are called "Priced Modifiers" and will show up on the order ticket. The price can be set when the modifier is defined.

A modifier can be defined to have a "second-level" modifier where additional information can be included about a modifier. A second-level modifier cannot have a price or be a prepared item that goes to a different printer – the information is only used with the original modifier. An example of a second-level modifier could be a salad dressing choice for a salad modifier to a menu item.

CUSTOM PRICING

Sapphire has the ability to handle custom pricing at the time the menu item is ordered.

When setting up a menu item enter a negative price (e.g. -1.00) in the price field. This is a signal to the POS system to ask for the price at the time the price category for the menu item is selected. You may want to set up a special price category just for custom prices as an aid to clarity for servers using the POS menus.

INVENTORY MANAGEMENT

Sapphire has a robust food inventory management system that uses a "perpetual" inventory concept and ingredient lists to relate inventory items to menu items. It is discussed further in the Inventory Management section. The Retail Module also uses a perpetual inventory concept but is much simpler with each retail item assumed to be an "each," single ingredient list item. The retail inventory is managed through the Retail Module.

Note: Inventory is depleted when the ticket is closed.

ORDER/ITEM HOLDS

If desired, an order or item(s) on an order can be marked as “Held” to show up at a later time at any fulfillment terminal(s). The Confirm feature must be enabled (see section on *System Configuration*). When the order confirmation screen is shown the server can choose to give a predefined hold time to any order item(s) or click on the **Order Hold** button to hold the whole order. When the hold is released it will look as if the order/item was just entered by the server. Tickets cannot be closed when a hold exists. If there is more than one item held at a time all the items print at the same time. If there is more than one order hold on a ticket all the order items are printed at the same time (the time the first hold is released).

DECLARED TIPS

Any employee can be flagged as needed to declare tips prior to clocking out. This is done in the Employee Info screen and checking the “Tips” checkbox. Any employee can declare tips; only employees with the “Tips” checkbox checked are *required* to declare tips. Tips are declared by entering the “Checkout” section and submitting a declared tip value. A suggested tip value is displayed, based on the sum of the credit card tips (if using the Sapphire integrated credit card support), the Tips payment method, and a calculated amount of sales (for orders not having information in the other two categories). The calculation will rely on a configuration entry that gives the suggested tip percentage. It is assumed that the total tips received are being declared (including credit card tips).

RECEIPT LOGOS

Certain receipt printers can be configured to print a logo on the receipt prior to the receipt information. Since each printer manufacturer has a different utility or process to load the receipt logo on the printer, please contact Khamu Solutions for instructions on loading the logo. The better printing logos will be wider and without too many colors as only black is used by the printer.

INTUIT QUICKBOOKS SUPPORT

Sapphire can now export data for use in QuickBooks®.

Timeclock data can be exported if the QuickBooks company number is known. Note that this is not payroll data but just timeclock data (hours worked). To allow export of timeclock data see the Employee Module Setup page to configure and use the Advanced Payroll Report to gather the data to export. The exported works with QuickBooks Pro 2006 and may work with other versions. Contact Khamu Support for more information on configuring this feature.

The G/L Report can also export sales data for import into QuickBooks. See the section on the G/L Report for more information.

MULTIPLE TILLS

Sapphire can support up to two cash drawers per receipt printer. A special cable is needed between the printer and the cables normally connecting the printer to the cash drawer. In the *Setup Printers And Terminals* section specify the number of tills to be “2”.

If the Cash Drawer Ownership feature is used the first person signing onto a terminal that has a till, and can own a till will be asked which, if any, cash drawer they would like to own.

DAILY LOG

A daily log can be used to record short notes about any given day. The log is accessed through the *Daily Sales* report (in the POS Module). The information is just recorded in raw format and can be read back at any time.

SAPPHIRE TERMINAL ASSIGNMENT

Terminals can be assigned when they are first used by Sapphire. You will need a manager name and password to “authenticate” a new terminal. If you are setting up a new terminal (as opposed to using an existing definition) you can enter the terminal’s name, information about any attached printers, cash drawers, or pole displays. You can also identify the characteristics of the terminal, such as if it is a cash service or bar terminal, the number of tills, and a default fulfillment terminal.

If the terminal’s IP address changes Sapphire will automatically update the settings for the terminal and any attached printers. If the terminal is using printers that are not attached to itself it is important that the printers are associated with a static IP address (either an Ethernet printer or attached to a terminal with a static IP address).

See the section on **Setup Terminals And Printers** for more information on Sapphire terminals and printers.

III. MANAGEMENT FUNCTIONS

The management functions are separated into different modules. Some modules will have a Reports and System Management section. Reports allow the manager to obtain information from the Sapphire system. System Management is used for setting up the Sapphire system as well as other operational actions such as managing orders. It is assumed for most of the management functions that a workstation with a keyboard is used.

The **POS module** is the area where the POS system is set up and managed. The menu and ordering related management is here.

Go to the **Employee module** for employee-related management.

The **Customer module** is used to manage customer information from the Delivery, Pre-paid, Customer Charge Accounts, and Loyalty Card areas.

The **Credit Card module** is used to set up and manage credit card processing.

The **Setup module** is where various configuration activities are performed.

Inventory management is all handled in its own module. Is just food-related inventory. The “On Hand Specials” are handled in the POS Module and will disable a menu item if the quantity on-hand reaches zero.

The **Event Planning module** (not implemented yet) is used to create distinct events to account for activities related to that event.

Management functions can be accessed from the front page by clicking [Manage System](#). After you enter your password, you will be in **Sapphire Management Central** where you can choose which module to enter. The ability to perform functions is dependant on your security privilege level.

FIRST TIME SETUP

When setting up Sapphire for the first time, the ***Edit Categories (Price and Menu)*** and ***Set up Printers and Terminals*** should be completed before Edit Menu.

MID-DAY CLOSE

The ***Mid-Day Close*** is an optional step that can be run at any time before the Day-End Close. Any orders that are closed will be displayed and the user can select the orders to put into the “AM” period. Any orders not chosen for the “AM” period will be moved to the “PM” period when the Day-End Close process is run. The Mid-Day Close will help separate shifts so per-shift reconciliation is easier to perform. The orders moved into the “AM” period will show up under a “Closed AM” heading in various reports.

If any orders are accidentally moved into the “AM” period, they can be re-opened and closed through the ***Manage Orders*** process, discussed below. This can only be done prior to the Day-End Close being run.

Employees can remain clocked in and orders can be processed while the Mid-Day Close is being performed.

DAY-END CLOSE

Day-End Close needs to be run at the end of each day, after all employees have clocked out and orders are closed. This is a data integrity feature to help make sure information is correct at the end of each day, credit cards are processed, etc. The process will check what tickets are still open and if any servers are clocked in (non-servers, such as dishwashers may still be clocked in). If there are, those issues need to be resolved before the close process can complete.

Note: The **Day-End Close** can be set up to run automatically. If no issues are encountered then the close will complete. If there are issues then the close will not complete and a user will need to address the issues and then run the close manually.

If there are open orders, they can be closed by the employee or anyone with the *SuperServer* privilege level (see the section on Employee Rights and Privileges). The manager can clock out employees if the employee's password or admin password is known. Alternatively, the manager can change the employee's password and use the new password to clock them out.

When the day-end close process runs successfully a message is displayed stating that success.

If **Day-End Close** is not run at the end of the day, a message will show up on the front page stating that the day-end close process needs to run. The manager can then run the process, and the prior-day orders are processed first. The manager may want to verify employee hours for the prior day as it may be unknown when an employee actually clocked out. A warning will be displayed for any employee that is currently clocked in with more than eight (8) hours currently accrued in the work period, in case the warning may be for an employee who forgot to clock out.

If processing the prior day-end close, the manager can return to the management central screen before processing the current day close. At that point the message will disappear from the front pay, and the normal message, if any, is displayed.

POS MODULE

MANAGERIAL REPORTS

DAILY SALES

Daily Sales displays a calendar for the current month. For each day the total orders are presented in the day of the month. On the right side of the screen a more detailed look at that day is presented, as well as some short-cut buttons that will call up a specific report to show even more detail. Clicking on the dollar total for any day will cause that day's detail to be shown on the right side of the screen.

The current monthly total is shown in the lower right-hand corner of the calendar. That total only includes days of the current month. Along the right-hand column the weekly total is shown. That weekly total includes all days in the preceding week, even if a day lands in a different month. Along the bottom row is the total for that day of the week. Again, that day of the week total will include totals for days that are from different months. Finally, the daily average for the month is shown. It is simply the current month total divided by the number of days in the month.

Note: The totals shown on this report are for closed sales. Any open sales will not be reflected until the order is closed.

Check the “after discounting” checkbox to show the effect of discounting on the report.

Daily log entries are shown via this calendar. If the “Log” link is red then no entry has been made. If the link is green then there is an entry. Click on the link to enter, read, or change the log entry.

Click on the **Done** button to get back to the main management screen. Click on the navigation buttons to move to different months.

Click on the **View Log Entries For Month** button to see the daily log entries for that month.

SALES BY SERVER

Sales by Server will give the open and closed total for all servers that have data for the selected time period. These numbers are broken down by categories for **Dine In**, **To Go**, and **Delivery** (if the delivery module is enabled). Further categories showing the **Subtotal**, **Total**, and **Taxes** are displayed, as well as **Discounts**, **Specials** and **Surcharges**. Additionally, for each server, the **Open**, **Closed**, **Closed AM**, **Closed PM**, and **Cancelled** totals are shown if there are any amounts in the row. Finally the subtotal (sum of the above rows) is shown for each server. When a server is finished for the day, there should be nothing in the **Open** categories. The “Totals” section has the totals of each server's data, and the “Net Sales” has the total open and closed amounts.

The Subtotal for each server will be shown with a percentage of the total sales for all servers.

SALES BY CATEGORY

Sales by Category will give you sales numbers for each category of items sold. For the given data range, all sales of any category are shown. To get more detail, click on the **Item Details** button. In this detailed view, the data can be re-sorted by which ever category the user desires. From the detailed view, click on the **Orders** button to see which orders contained that particular item and price category.

Example: If you wanted to see how many hotdogs were sold for the entire month of June, you would select **Advanced View** and then use the calendar icons to choose June 1st and then June 30th, select **Refresh**, and it will recalculate. Then select the **Item Details** button for the food category and find the entry for hotdogs.

Note: No tax treatment is given to these numbers, so if taxes are included in menu items, then they are also included in this report. The opposite holds true where taxes are added in after the total.

SALES BY FULFILLMENT AREA

Sales by Fulfillment Area will give you sales numbers for each fulfillment area or terminal. For the given data range, all sales of any category are shown. To get more detail, click on the **Item Details** button to see the actual items sold at that terminal. In the detailed view, the data can be re-sorted by which ever category the user desires.

Note: This report may display a warning, *** Cancelled orders exist in this report ***. This is only a warning to let the user know that during the specified time period there were cancelled orders. The totals in this report only use normally closed orders and do not include cancelled orders. To see the cancelled items, please reference the **Cancelled Orders** report.

SALES BY MODIFIER REPORT

Sales By Modifier Report will let you see what modifiers were chosen with menu items. This might be helpful in menu planning or knowing what to stock in the kitchen. The menu categories with menu items that have modifiers are shown for the given time period. If there are no menu items with modifiers sold in the time period, the menu category will not be shown. Clicking on the menu category **Detail** button will show the menu items with modifier choices in that category that were sold in the given time period.

Note: Only menu items that have modifier choices are shown in this report. However, if a menu item was selected with no modifiers chosen, it is still shown.

CANCELLED ORDERS

Cancelled Orders will report on the orders and/or items in orders that have been cancelled. There are several ways an order can be cancelled. Any order that is merged into another order will be given a cancelled status. Also, if an order is started and never placed (i.e. the menu page times out and returns to the front page before the **Place** button is clicked) it will receive a cancelled status. These orders have a reference field of "Incomplete" and are only shown if the *Show zero dollar orders* is set to *Yes*. Finally, through the **Manage Orders** function, orders

can explicitly be cancelled (this method will capture a cancel reason, which is displayed in the **Reference** column).

DISCOUNT REPORT

Discount Report shows information about any discounts given in the time period of the report. For each discount the report prints a line showing the order number, server, the time the order was opened, an optional description (reference), and the total order discount. Grouped under that line is some detail information that shows if the discount was on an individual item or the total order, and the discount rate, as well as the discounted amount. If it is on an individual item, that item is shown. Finally, for each discount, the total effective discount is shown, which is the amount discounted, divided by the total order (pre-discount) amount.

The **Applied By** column will show who applied the discount.

The report can be filtered by the reason for the discount and/or the server who owned the order.

PROMOS REPORT

Promos Report shows information about any promotions applied in the time period of the report. The report can be filtered to show certain promotions or promotions given by a certain server.

SPECIALS REPORT

Specials Report shows information about any specials given in the time period of the report. For each special the report prints a line showing the order number, type of special, the item the special was for, and the value of the special.

SURCHARGE REPORT

Surcharge Report shows information about any surcharges given in the time period of the report. For each surcharge a line is printed with the order id, server name, time, reason, and the amount of the surcharge.

TABLE TURN TIME

Table Turn Time will show how long it took between the time a ticket was opened and closed. It will show an average for the servers with orders in the given time period, or you can click on the server's information for more detail.

Note: This information is dependant on the servers closing the tickets in an accurate manner. If the ticket is re-opened for any reason (e.g. correcting a mistake) the information may not be accurate.

NO SALE REPORT

No Sale Report will show when the cash drawer was opened. This includes printer test commands, during the close of an order, etc. Since it is possible that a manager used "Super Server" rights to open the drawer, the **Super Server** column will show who, if any, opened the drawer that way. The **Type** column shows the different types of opens.

GUEST COUNT REPORT

Guest Count Report will show the Per Person Average of sales. This will only be valid if the *Count Guests* feature is enabled and it is only as accurate as the data is entered. If a count needs to be “fixed” check the “Show Detail” checkbox and then click on the **Fix** button for the appropriate entry. The report can also be filtered for only Dine-In tickets.

HOURLY SALES REPORT

Hourly Sales Report will display the sales data broken into time periods throughout the day. The user can select the length of each period and whether or not to show periods with \$0.00 in sales. The intent of the report is to show activity so the manager can have the information to aid in determining correct staffing. Subtotals for each fulfillment terminal are shown to get a better idea where the activity is occurring.

Note: This report uses the time the order was opened.

Note: The **Order day boundary** configuration value is used to pick a starting time to display orders.

PIZZA SALES

Pizza Sales will show specific sales information for menu items set up in the pizza module (see *Define Pizzas*). Sales information will also be shown in other reports but this report will show just the pizza sales data as it relates to other pizza. Clicking on the **View Modifier Report** button will show the counts of various choices of crust, sauce, cheese, and toppings were chosen, by the sizes available.

SALES BY TYPE

Sales By Type will show sales information based on the type of ticket (e.g. dine-in, to go, delivery, pick-up).

AGE CHECK REPORT

Age Check Report will show age check information for any tickets that have been age-checked.

ACCOUNTING REPORTS

SERVER REPORT

Server Report is an informational report that displays data directly related to the server's activity. If configured to show order shifts, the data will show either the latest shift or let the server choose which shift. Otherwise, the data is grouped by the different close groups – Closed-AM, Closed-PM, and closed orders that have not been put into an AM or PM group.

There are several areas of information shown:

Server Deposit – This shows the totals of any payment methods and the net cash based on the “cash” payment method minus any “change” or “tips” payment methods. Any credit card tips processed through Sapphire will also be subtracted. Paid In/Out totals are shown as well.

Sales by ticket – This shows the sales under each order, including the customer’s seat location and time the ticket was open. The total and average sales are shown. It could be useful for reconciling the server’s “bank”, or for determining if the server’s average sales are increasing.

Sales by category – This shows, for the server, the breakdown in sales by category. It could be useful for “contests” (e.g. increase merchandise sales in a month) or other activities where category sales are desired.

G/L Report – This shows the G/L Report only for sales attributed to the server. It uses the same settings the “regular” G/L Report uses.

Gift Card Activity – If gift cards enabled, any gift card activity is shown.

Prepaid Activity – If prepaid cards enabled, any prepaid card activity is shown.

Customer Charge Activity – If customer charge accounts enabled, any activity is shown.

Discounts Given – This breaks out, by ticket, any discounts given in the report’s time period.

Promos Applied – Any promos on a ticket are shown.

Surcharges – Any surcharges on a ticket are shown.

Paid In/Out – If there are any paid in/out records this table will show them.

Order payment methods – All payment methods are shown first listed by ticket, and then grouped into totals for each method. This can help the server reconcile against individual orders as well as credit card reports and cash till amounts.

Credit card transactions – This is a listing of all the credit card transactions for the orders in the report’s time period.

Sales and tip-out amounts – This shows closed sales and uses the information entered in the tip-out table (see section on Edit Tip-out Rates for more information) to display the amount the server needs to tip out to certain co-workers. Note that open sales are blindly picked up, so if viewing on a different day, some open sales may be shown. This report is really intended to be for the end of a shift for a server.

Work periods – This shows the hours worked for the server as an aid in helping make sure the TimeClock has recorded their work time correctly. If the server is currently working, the time shows unadjusted data.

The server report can be accessed three different ways. A server can access the report and see just their data by going to the Open Orders screen and clicking the **Manage** button and then the **Server Report** button, or by entering the Checkout screen and clicking the **Server Report** button.

Note: A server can only look at their own server report for the current day. Once the Server Report has been printed or Cash/Bank Checkout has been recorded the server cannot sign into the POS terminal again until after a clock-out occurs.

A manager can look at the server report for any server for any day by going through the Management Central reports. The manager can also configure **Server Report** to only display and print the sections of the report that are important to management. To view the data for a server, select the server from the list and click the **Refresh** button.

PAYMENT METHODS

Payment Methods shows information in two groups – the closed sales by category, broken into the Closed, Closed-AM, and Closed-PM groups, and the combined payment methods

captured at the time the order was closed. The two sides should reconcile with each other. A third group of information is a repeat of the summary **Server Deposit Report** information (see the Server Deposit Report if more information is needed). This total should also match the other two totals, but the payment information will show the total credit card receipts and net out any cash payments with tip on cashless payment.

If more drill-down information is needed, the user can reference the **Server Report** or **Sales By Server**, or **Sales By Category** report for the time period in question.

Note: priced modifiers are shown grouped by the modifier category. This is because modifiers may be used for menu items in different menu categories so they cannot be related directly to menu categories.

SERVER DEPOSITS

Server Deposits Report will show the total amount of any credit card receipts, checks, and any other payment methods. It will also net out the cash owed by the server by taking the total cash (based on payment methods) and subtracting off any “change” or “tips” payment methods. Any credit card tips processed through Sapphire are also subtracted. Any paid in or out activity is shown in separate columns. The totals for each server as well as the totals for all servers are shown. Check the “Show zero-dollar entries” checkbox to see deposits that have zero dollars.

BASIC ACCOUNTING REPORT

Basic Accounting Report will let you map menu categories to a “rolled-up” category. This “rolled-up” category can be an accounting package G/L account number, or just a consolidation of menu categories (for example, all the food categories can roll up to a “Food” category by typing the name “Food” into each food category mapping). You can choose to have item discounting be included with the item’s menu category or be totaled separately, and whether to show the payment method summary and/or Sapphire credit card summary. Once the mapping and configurations has been set and saved with the **Update** button, click on **Go To Report** to view the actual report.

For QuickBooks support simply put a sales category name into the *QuickBooks Acct Name* entry. That will cause a button to appear on the Basic Accounting Report page. Clicking on this button will create an IIF file that can be downloaded and imported into QuickBooks. See the documentation in QuickBooks on how to import IIF files.

NOTE: Due to the nature of importing IIF files into QuickBooks it is possible to crash QuickBooks. Make sure you create a backup of your data before importing. Khamu is not liable for any lost or incorrect data.

G/L REPORT

G/L Report will combine the sales data as determined by the G/L Account feature. Each G/L account sales is reported with the percent “contribution” to the total. There is configuration information that can be set and saved with the **Update** button.

QuickBooks Users

Click on the button “QuickBooks Configuration”. Check the checkbox “Create QuickBooks Download File” and click “Update”. This will cause a button on the G/L Report to show up that allows the download of an IIF file that reflects the data in the report. The other fields on the configuration page are accounts that may already have been set up in QuickBooks. Enter the name and account number (the account number is only important if using account numbers in QuickBooks). If account numbers are being used and are left blank on the configuration page, then the account numbers will be lost when the file is imported.

See the documentation in QuickBooks on how to import IIF files.

If the account does not exist when importing into QuickBooks then it will be created. It is important to make sure the names match exactly if the account already exists otherwise a new account will be created. The data is imported as a sale and the sales data shows up in the P&L reports. If data was imported and later determined to be incorrect, the invoice created by the import can be found and deleted.

Warning: QuickBooks will not care if the same data is imported multiple times. Therefore it is important to have processes in place to make sure data is not accidentally re-imported by overlapping report dates (or missed by missing report dates).

NOTE: Due to the nature of importing IIF files into QuickBooks it is possible to crash QuickBooks. Make sure you create a backup of your data before importing. Khamu Solutions is not liable for any lost or incorrect data.

CASH DRAWER REPORT

Cash Drawer Report will simply display the balance from each cash drawer entry. It will also total up the day (across servers) and will total for the server (across days). Click on the **Detail** button to go to the cash drawer checkout page for the day in question. See the section on **Cash Drawer Report** for more information about the cash drawer checkout.

PAID IN/OUT REPORT

Paid In/Out Report will simply show what paid in/out activity took place on a certain day or range of dates.

SERVER TIPS PAID

Server Tips Paid will look at the order payment method to determine the amount of tips paid to a server. The *CC Tips* column will show information based on credit cards processed through Sapphire. The *Method Tips* column will reflect the *Tips* payment method button usage when the orders were closed.

SALES TAX BY MONTH

Sales Tax By Month has been replaced with the Sales Tax Report in the Tax module..

REAL-TIME X REPORT

Real-Time X Report is similar to a cash register X-Report and will let you print the current sales summary to a receipt printer. The information printed is the category sales, payment methods, and server deposit information. This can be a useful way to get a “snapshot” of the

current sales situation throughout the day (for example, between each meal). If a printer is associated with the terminal being used you can click on the **Output To Receipt Printer: xx** button, where xx is the name of the terminal that has the printer attached.

DECLARED TIPS

Declared Tips Report will show the declared tips for any employee who has declared any tips in the given time period. The tips for each day are shown if desired, and the total is shown as well as sales information for that server for that time period. The percentage of the tips to sales is shown purely as an informational measure. The tips, sales, and percentages are broken down by credit cards processed through Sapphire, “other” (which is all non-credit card sales or tips), and the total. It is assumed that the total declared tips are entered when declaring tips.

ORDER PAYMENTS

Order Payments is a report that will show how each order was paid, as determined by the server at the time the order was closed. This could be a useful report to help track down incorrect information.

USAGE REPORT

Usage Report will show the usage of any menu items during the given time period. The report can show menu item usage, modifier usage, and second-level modifier usage depending on which checkboxes are checked. The report will obey the “Exclude Mod Report” setting in the modifier category configuration page (see the section on *Edit Categories / Modifiers*).

DEPOSITS BY TERMINAL REPORT

Deposits By Terminal Report will show payment tenders based on at which terminal the payment was made. This might be useful to help balance a till. This report can be printed to a receipt printer.

Note: This information is determined based on where a ticket is closed. If a ticket is re-opened and closed at another terminal, or if the payments are taken at one terminal and the ticket is closed at another then this report will not be accurate.

EXPORT DATA

Export Data will create a report using the *External #* field that can be set up for each menu item / price size or modifier. The report will show the external number, item name, quantity sold, and raw sales information (i.e. not including discounting, etc.). The intent is to provide a way to get sales information into an external system such as an accounting system. Clicking on the **Download** button will allow a comma delimited text file to be downloaded with the same information (except for the item name).

MANAGEMENT

MANAGE ORDERS

Manage Orders will give you access to all orders from the selected day, including **Open**, **Closed**, and **Cancelled** orders. Each order is broken down by **Order number**, **Table**, **Server**, **Reference**, **Open Time**, **Closed Time**, and **Total**. This is helpful if you need to “fix” an order for a server; you have several options of how to find the order in question. Care should be taken

when working with closed orders as the order may have already been paid for and you may get a reconciliation issue when balancing your bank statement.

Note: Only users with *Manager* and *Owner/Location Manager* rights can look at data in the past.

Any receipt can be reprinted in the Details view of the order. Simply click on the **Details** button and then the **Re-Print Receipt** button. Click on **Back** to return to the main manage orders screen. If a **\$** button appears next to an order item, it is a custom priced item. Clicking on the **\$** will allow the custom price to be changed.

Orders can not be closed through **Manage Orders**. They must be closed through the POS system in order to capture the correct payment method and taxes for the order.

If desired the orders displayed can be shown in a different order by clicking on the appropriate button in the column header.

OPEN ORDERS: In the **Open Orders** section there are three buttons next to each order: **Cancel**, **Close**, and **Details**.

Cancel: By choosing **Cancel**, you will completely cancel the order from the system and it will drop down to the **Cancel** category.

Details: **Details** will bring up the order, listing out all the items. Next to each item there is an X—click on the X to delete this one item. Sapphire will prompt you and ask if you are sure you want to delete this item. From there you can select **Cancel** if you **DO NOT** want to delete this item, or **Ok** if you do want to delete the item. From there you select **Back** to return you to the **Manage Orders** screen.

Transfer To: This option only shows up if there are open orders and multiple servers. Use **Transfer To** if you need to transfer an order from the current server to a different one. Simply select the new server from the drop-down list and the order will be transferred to that server.

CLOSED ORDERS: In the **Closed Orders** section there are three buttons next to each order: **Cancel**, **Re-Open**, and **Details**.

Cancel: By choosing **Cancel**, you will completely cancel the order from the system and it will drop down to the **Cancel** category.

Re-Open: By choosing **Re-Open**, you will re-open the order and it will go back to the **Open Order** category.

Details: **Details** will bring up the order, listing out all the items. From there you select **Back** to return you to the **Manage Orders** screen.

MID-DAY ORDERS: These are **Closed Orders** that have been moved into the AM close, and are waiting to be archived. See the **Closed Orders** section for options. To move an order out of the Mid-Day close, the order will have to be opened and re-closed.

CANCELLED ORDERS: In the Cancelled Orders section, there are three buttons next to each order: **Archive**, **Re-Open** and **Details**.

Archive: By choosing **Archive** you will manually move the cancelled order to an archived status. This is done automatically to closed orders by the **Day-End Close** process.

Re-Open: By choosing **Re-Open**, you will re-open the order and it will go back to the **Open Order** category.

Details: **Details** will bring up the order, listing out all the items. From there you select **Back** to return you to the **Manage Orders** screen.

ARCHIVED ORDERS: In the **Archive Closed Orders** and **Archive Cancelled Orders** sections there are three buttons next to each order. However, only the **Details** button is enabled.

Un-Archive: **Un-Archive** will let an owner or location manager change the status of an order from **Archived** to **Closed**. This is in case a ticket was closed incorrectly and then archived with the Day-End Close process.

Details: **Details** will bring up the order, listing out all the items. The only option with archived orders is so re-print a receipt. Select **Back** to return you to the **Manage Orders** screen.

CASH DRAWER CHECKOUT

Cash Drawer Checkout is essentially a calculator that aids managers (or shift supervisors) in closing cash tills. Initially, the manager can either choose to start a **New Checkout** or look at the **Detail** of an existing checkout entry. The status (balanced, short, or over) is displayed for each entry.

Note: If the **Delete** button is pressed, the entry is actually physically deleted and cannot be retrieved. Be very certain you really want to delete an entry; otherwise the data will need to be re-entered. Only *Location* rights can delete entries.

When either a new checkout is started or a detail entry is viewed, the main cash drawer checkout page is displayed. On this page, there are six areas of information:

Sales:	The initial sales number is obtained from the database for that day, but can be changed for whatever reason. Once the cash drawer information is saved, the saved number is displayed. The manager can enter sales information, broken down by type that are the same as the allowed payment methods.
Payment Method:	The payment methods used to offset the sales. These are the values captured when an order was closed. Note that <i>Change</i> and <i>Tips</i> are expected to be negative values because they reflect money (usually cash) leaving the till/bank.
Till/Bank:	The till section represents the cash in the cash drawer. There is generally a starting amount (initially equal to the last cash drawer entry), and the totals of each type of coin and bill. The <i>Till Owed</i> is simply the difference between the <i>Total Till</i> and <i>Till Start</i> .
Status:	The status is whether the cash drawer is <i>balanced</i> , <i>over</i> , or <i>short</i> . The

	amount off is also shown.
Bank Deposit:	The bank deposit is simply the cash and checks that need to be taken to the bank. The <i>Till Start</i> amount is not reflected here since it is assumed that amount remains in the till for the next shift or business day.
Paid In: (receipts)	The total of paid in items for this person or time period. Only cash entries will cause the status to change; check entries will be reflected in the bank deposit section.
Paid Out: (payments)	The total of paid out activity for this person or time period. Only cash entries will cause the status to change; check entries will be reflected in the bank deposit section.

The *Net Sales* value should always be zero since it is the difference between Sales and Payments and they should be equal and offsetting.

When the cash drawer information is all complete, either the **Save** or **Final** button can be selected. The difference is that the Final button will not allow future changes to the data. Only re-entering new information and deleting the incorrect information can be done to correct the entries. The **Recalc** button will recalculate the data but not record anything. The **Pre-populate Payments** button will read in the payment method information as recorded when orders were closed, and pre-populate the payment method fields.

The till/bank values can either be entered as dollar amounts or as a count. Use the **Use Counts** or **Use Amounts** button to switch between these two features.

Click on **Printer Friendly Report** to print to a regular printer. If a receipt printer is associated with the current terminal click on **Receipt Printer Report** to print the data to a receipt printer.

Note: There is also a way to get to this page for the server. From the front page, click on **Checkout** and choose the server. At the checkout page, click on the **Cash/Bank Checkout** button. Entering in this manner will have just the sales and payments associated with the server pre-populated. Once the Server Report has been printed or Cash/Bank Checkout has been recorded through Checkout the server cannot sign into the POS terminal again until after a clock-out occurs.

Good cash management will have a different employee verifying the cash in the till/bank and paid in/out activity as being correct as entered, and then any out-of-balance entries can be verified with system information. If an employee is trying to steal by altering the sales and payments information, those values can be verified by comparing the sales / payment method information given in this report by the **Server Report** or **Server Deposit** report.

MANAGE LOCKS

Manage Locks will allow a manager to configure order locking and remove any outstanding order locks, if necessary. The different level of order locking are: **Off** – orders are not locked when adding menu items; **Strict** – only a single server is allowed to add menu items at a time; and **Allow Same** – where the same server at the same terminal is allowed to add items to the order. Any order lock is released when the server adding menu items leaves the menu item

screen, under normal circumstances. If something untoward happens, then the lock can be released on this page, by a manager.

CHANGE PAYMENT METHOD

Change Payment Method will allow a manager to correct the payment method determined at the time the order was closed. This interface is useful because after orders are archived at the Day-End Close process, orders cannot be re-opened in order to choose new payment methods at the close time. It is also useful if the wrong credit card type was chosen and the payment method needs to be changed without re-authorizing the credit transaction. Simply choose the day of the order in question, and then find the order. The number of payment methods cannot be changed, but the payment method type and amounts can, as long as the total payment amount remains the same. This change will only affect reporting.

CASH DRAWER OWNERS

Cash Drawer Owners will allow a manager to assign or take away cash drawer ownership. Only servers who have cash drawer rights and are signed in can be assigned cash drawers. See the section on *Employee Info* for information about cash drawer rights. See the section on *Setup Terminals And Printers* for information about identifying a POS terminal as having a cash drawer. See the section on *System Configuration* for information about configuring Sapphire to have cash drawer owners.

HOLDS

The **Holds** feature will allow a manager to release a hold on any held item or order. The ticket number and release time of any current holds are shown. If the order/item needs to be released early simply click on the **Release** button and the order/item will show up at the fulfillment terminal(s) as if it was just entered.

SHIFTS

The **Shifts** feature will allow a manager to move orders between shifts. The intent of this feature is to correct issues that come about from a server not getting the ticket into the correct shift to begin with (e.g. forgetting to clock out and back in again to start the second shift). To change a ticket to a different shift, simply find the ticket and change the shift using the list.

This page can also be used to configure the “order shift” feature.

Disable Auto-Shift – Check this checkbox if you want to disable the automatic moving of earlier orders into prior-shifts at clock-in.

Reports/Deposits Use AM/PM – Check this checkbox for the Server Report, Server Deposit Report, and Cash Drawer Checkout to use AM/PM sales information for the reports instead of the order shift information.

Keep Shift Info – Select the amount of time to keep the orders separated by shift. After this amount of time the shift information is removed, but any AM/PM will remain.

PAID IN/OUT

The **Paid In/Out** feature will allow a manager to enter “paid in” or “paid out” records to reflect money going into or out of a server’s bank or cash drawer. The information from the paid in/out entries will show up in the Server Report, Server Deposit Report, and Cash Drawer Checkout.

By default the **Server Paid**s button is selected meaning that a Paid Out entry will be added for the “From” choice and a Paid In entry will be added for the “To” choice. If the **Vendor Paid**s button is selected then only a Paid Out entry will be added for the “From” choice. The *Server Paid*s assumes money is moving between two people in the system while *Vendor Paid*s assumes money is leaving the system.

The *House Account* “person” is a fictitious entry to be used like a petty cash account.

If a server clocks out and back in again, any paid in/out entries for the current day will be placed into an earlier shift. If the *Order Shift* feature is being used then the shift number is used when displaying the Server Report, Server Deposit Report, and Cash Drawer Checkout.

Use the “Pick new date” field to look at paid in/out records for different dates. If the day-end close process hasn’t yet run an entry can be deleted by clicking on the button. Any new entries will only be for the current day.

Note: A manager with Owner/Location Manager can enter or delete paid in/out entries for earlier days.

Field Meanings:

Employee – Pick the name of the employee the paid in/out entry is for.

Type – Pick “Out” (money going out of the bank or till) or “In”.

Pay Type – Pick the type of tender.

Reason – (Required) Use the keypad to type in a reason for later reference.

Amount – (Required) Use the keypad to type in the amount.

Note: This feature is for tracking money going in or out of the server’s bank or a till. If you use a separate cash drawer for paying out or receiving payments and the *House Account* concept will not work for you, you should use a separate tracking mechanism for that separate drawer.

SETUP

EDIT CATEGORIES

There are four different categories that can be edited. **Price** categories are the names given to different prices for a menu item. **Menu** categories are the groupings for menu items.

Trimming categories are the groupings for the custom trimmings. **Modifier** categories are the groupings for menu item modifier instructions.

Price will allow you to set up the various price categories for the menu items. Each menu item with multiple prices based on, for example, size would need to have a price category set up for each price. Every menu item should have at least one category for consistency of display and reporting. For example, even though there is only one size of a sandwich, you might set up a price category of “Regular”.

Field Meanings:

Short Name – The name of the category – this should be kept short for display purposes.

Long Name – A longer name that is used on some buttons where name length is not an issue.

Display Order – The order in which the category is displayed on screens and in reports.

Status – Whether the category is Hidden or not.

Note: The Short Name is displayed on the fulfillment terminals and receipts, so a two (2) character name is recommended, if possible. The Long Name will help in the description of the category as well as being used for buttons on the POS terminals.

To add a new price category:

- Enter the **Short Name** and **Long Name**.
- Enter the **Display Order** (this is in numerical order – for best ordering, make sure all menu category display order numbers are unique.)
- Click on **Add New** to save the information.
- When done entering price categories, select **Back**; you will then be back in the **Sapphire POS Module** screen.

Menu is where you would go if you needed to add a new **entire** menu category or change some attribute of an existing category. Any active categories will be displayed on the order entry screen for a server to enter menu items on an order. They are also displayed in setting up menu views and in various reports. In order to keep historical data correct, unused menu categories are not deleted, but instead are hidden.

Subcategories are available if they are desired. To set up sub category structure, a menu category needs to be set up and have no items in it. It also needs the **Top Level** checkbox checked. Then, any categories can be defined to have a top level category as a **Parent**. When displaying the categories on the POS terminal, if a top level category is chosen, the subcategories are shown.

There is a “time filter” available if you would like a certain category to only be displayed during certain times of the day. Simply choose the start and end times to display that category. You can choose “All” for having the category display at any time. On the POS terminal, even though the category is filtered out, there will be a **Show All** button so the filtered category can be displayed.

Field Meanings:

Top Level – Checked if this category should be used as a “parent” to subcategories.

Category Name – The name of the category. This is also the display name, so concise is better.

Parent – lists the top level menus for declaring this category as a subcategory.

Display Order – The order in which the category is displayed on screens and in reports.

Primary Time – The time at which this category will be the initial category displayed when starting a new order. This is handy if at a certain time of the day customers generally order from a certain category (such as Lunch or Beer) first, so start a new order with that category.

Show Days – The category will only be displayed on the POS system for the checked days.

Show Start – The start time of when this category is displayed on the POS system.

Show End – The end time of when this category is displayed on the POS system.

Status – Whether the category is Hidden or not.

Note: When multiple categories have the same **Primary Time**, the one with the lowest **Display Order** will be selected at the initial category for a new order. If multiple categories have the same **Primary Time** and the same **Display Order**, then the initial category will possibly be random.

To add a new menu category:

- Enter the name of the **Category Name** and flag if it is a top level or has a parent category.
- Enter the **Display Order** (this is in numerical order – for best ordering, make sure all menu category display order numbers are unique.)
- Select the desired **Primary Time** or leave at the default if you don't care to use this feature.
- If desired set the show start and end times.
- Leave the **Status** as Active since you shouldn't be adding deleted categories.
- Select **Add New**, and then **Back** when done adding categories.

To update an existing category:

- If wanting to update a currently hidden (i.e. deleted) category, click **Show Hidden**.
- Update the information for any menu category.
- Click on **Update** to make the changes.

To view extended configuration settings for menu categories click on the **View Extended Configuration Settings** button. This is where menu category buttons can be colored and attributes can be given to various categories to define which should be printed on an Expedite printer or are bar categories, etc.

To Expo - Check each category to print on the Expedite printer, if one is defined.

Can Round - Select the menu categories to be checked when the “Round” button is clicked on the ordering page. The last menu items ordered in these menu categories will automatically be selected.

Bar - If any menu categories are selected with this setting and an order is placed from a designated bar terminal, the selected menu categories will not be sent to any fulfillment terminal. It is expected that only bar menu categories are selected. This setting could be useful if the bartender has already made the item but there are food items also being sent with the order. In this case only the food items would be sent.

Req. Dine-In - Only enforced on Dine-In orders. If any menu categories are selected an item from one of these categories will be required for each guest (only one if not counting guests) before the order can be placed. This could be useful if the manager wants each guest to have, for example, an item from the Beverage menu category (it would be recommended to have a “No Beverage”, zero dollar menu item for the guests that decline a beverage).

Req. To Go - Only enforced on To Go orders. If any menu categories are selected an item from one of these categories will be required before the order can be placed.

Cash Order Start - This is the starting menu for entering cash orders. It is useful in a setting such as a bar where walk-up ordering is for beer. In this case, choose “Beer” as the configuration option. Another site, where most walk-up orders are for food, could choose “Food”, assuming that is a configured menu category name.

Trimming categories will allow you to group trimmings so that only a specific subset will be displayed with a menu item to allow for customization. The trimming category is selected when a trimming item is set up, and then the category is selected for the menu item as a signal to display the trimmings selections after the menu item is chosen.

Field Meanings:

Category – The name of the category.

Description – An optional place to put a more descriptive phrase.

Receipt – Check this checkbox if you want this trimming to print on the customer receipt.

Status – Whether the category is Hidden or not.

Adding or updating trimming category names is similar to the other categories.

If the “Print custom text on receipt?” checkbox is checked then the custom text for any given order item will be printed on the receipt.

Modifier categories will allow you to group modifiers. By specifying a minimum or maximum required number of modifiers you can “force” the right number to be chosen. For example, if you wanted to require single modifier item to be selected in a category, you would set the minimum and maximum required number to one (1). Up to four (4) modifiers can be set up for any menu item.

Field Meanings:

Category Name – The name of the category.

Description – An optional place to put a more descriptive phrase.

Minimum Required – Setting to a non-zero number will mean at least that many modifiers need to be selected.

Maximum Required – Setting to a non-zero number will mean that no more than that many modifiers can be selected.

Deferred – If all defined modifier categories are deferred for a given menu item then the modifier screen will be displayed only if the user customizes the order item.

Prepared – Selecting this checkbox will allow the modifier to be sent to a fulfillment terminal other than the one to which the menu item is sent.

Mod Report – Select this if you want this modifier category to show up on the *Sales By Modifier* report (not all modifier categories may want to be on the report).

Receipt – Check this checkbox if you want this trimming to print on the customer receipt.

Status – Whether the category is Hidden or not.

Adding or updating modifier categories is similar to the other categories.

EDIT MENU

Edit Menu is the area you will use if you need to add, delete, or edit items on the menu, as well as the price of those menu items. Upon entry to the **Sapphire Menu Edit** screen you will also see all the menu categories listed out. These are the categories that were set up in **Edit Categories (Menu)** and have an active status. To show hidden menu categories, click on **Show Hidden**. To print the current menu structure, click on the **Print Menu Layout** button.

Simply choose which category you need to edit (Beer, Food, etc.) by clicking on the name of the category. From there are you in the **Edit Menu Items for (category)** screen. Again, only active items are shown, so if you want to re-activate or make changes to a deleted item, click on **Show Hidden**. If you want to change all the prices for the menu items in the category at once, click on the **Edit Current Prices** button.

Field Meanings:

- Color:** By default menu buttons are colored an off-white, straw color. Click on the color button to choose from a list of pre-defined colors. Note that the color should be chosen after the menu item has been added or any updates saved.
- Display Order:** This is referring to the order in which the item will appear in the screen menu. This menu has a drop down box with numbers; you would coordinate item placement by the number of other items of where you want the item to be. Items with equal display sequence numbers are then sorted alphabetically. The intent is to put your more popular items first, so they are easier to click on when the display space is limited, as on a handheld device.
- Type:** Choose the type: *Reg (Regular)* has a separate button for duplicating or deleting order items; *Fam (Family-style)* has a single button to set a large quantity or delete the item; or *Scl (Scale)* where a screen will come up to allow the weight to be entered.
- Display Name:** How the item appears on the menu. This should be abbreviated to conserve space, yet meaningful.
- Item Name:** The name of the item (required since it is used in some places).
- Modifier #x:** This is a modifier category that has been set up previously. If any modifier categories are selected, they will be displayed after the menu item is chosen and after the custom item screen is shown (if set up).
- Custom Item:** This is referring to the item and if it can be customized. By choosing a trimming category in the drop down box, you are saying whenever this item is ordered you will automatically be in the **Customize Screen** (see **Modify an Order in Operational Areas** in the Server Guide for more information). By choosing “Any” the **Customize Screen** will be skipped for the menu item chosen but if the order item is clicked it will be shown with all the trimmings categories. By choosing “No”, the **Customize Screen** will be skipped for the menu item chosen but if the order item is clicked only custom text can be added.
- Terminals:** This lists the fulfillment terminals that can satisfy this menu item. Either choose “Any” if any fulfillment area can handle the menu item, “None” if the item is not to be sent to a fulfillment terminal, or select the specific terminals. The terminals are set up in **Set Up Terminals and Printers**. This information is used in the dynamic order resolution when processing an order.
- Taxed:** Menu items can be identified as *Add*, *No*, or *Incl*, meaning tax will be added to the menu item, the item is non-taxed, or taxes are included in the price of the menu item. A special type of taxation is *Flex* which means that taxes will be included if only tax included items are on the ticket, but will be added if there are any added tax items on the ticket. An example

of a non-taxed item would be a Gift Certificate. An example of included taxes might be a site where food is tax added, but bar items are tax included to aid in reducing handling small coins. Taxes are calculated when the order receipt is displayed.

Tax Rate: (Only present when *Tax Rate 2* defined in Config Options). Pick the tax rate for this menu item.

No Dis: No Discounting. Check this box if you do not want the menu item to be discounted with an **Order** discount. The item can still be discounted with an item discount. A use for this would be to allow employee discounts on an order, but certain items are not discountable (such as specialty vendor items that are not available to a discount to the business).

Status: **Status** is saying whether a menu item is **Hidden** or not.

Note: If your site is operating where taxes are added to the prices and you choose to have certain categories where taxes are already included in the price, you can use the **Not Taxed** field to avoid having taxes added onto those menu items (for example, bar items). If you take this approach, the tax information that Sapphire tracks will not reflect the tax included taxes and you will have to determine the tax payable to your state tax agency a different way.

To add a new menu item:

- First, make sure the fulfillment terminals that can handle this menu item are set up, as well as any modifier or trimming categories.
- Enter the name of the **Item Name**.
- Enter an abbreviated yet meaningful name in **Display Description**.
- Enter the **Display Order** (this is in numerical order – for best ordering make sure all menu item display order numbers are unique.) Sometimes it is easier to set up menu items with the same display order, and then re-order them all at once as an update.
- Select any **Modifier** categories or **Custom Item** category if desired.
- Select the appropriate terminal(s) that can fulfill this menu item on an order.
- Select **Add New**.

To update an existing menu item:

- If wanting to update a currently inactive (i.e. deleted) menu item, click **Show Hidden**.
- Update the information for any menu item.
- Click on **Update** for to update all menu items.

Next to each existing Menu item there is an **Edit Pricing** button (new menu items go automatically into the Edit Pricing page). This is used to set up the menu price for each category of menu item. These “price categories” need to be set up prior to clicking this button. See **Edit Categories (Price)** for more information on setting up price categories.

Choosing **Edit Pricing** will take you to another screen where you can make changes to the price and/or item size choices of individual menu items.

Field Meanings:

- Category:** This refers to the size of the item. To change the size of an item, simply select the correct size from the drop down box. These are the sizes set up in **Edit Categories (Price)**.
- Price:** This is where you would change the price of a menu item if needed. Use a dollars and cents decimal format, otherwise errors will occur. Entering a negative number for the price will allow the server to enter a custom price if that price category is chosen for the menu item. There can be a different price entered for Dine-In, To Go, and Delivery tickets. If the same price as Dine-In is desired, leave a 0.00 in the appropriate price field.
- External #:** Enter a value that is used to reference this specific item-price/size in an external system such as an accounting system or other system.
- Status:** You can also change the status of the item to hidden if the size is no longer needed.

Pricing is set up or changed in the same manner that menu items are set up. Enter the information and select **Add New** for a new item. Change the information and click on **Update** to modify information for an existing item.

There is also a **Change Category** button. This is used to move a menu item from one category to another. This is an aid that might be used early in setting up the menu structure.

EDIT MODIFIERS

Edit Modifiers is where you would go to edit any modifiers for menu items. Modifiers show up when modifying a menu item on an order before it is placed, or automatically when a menu item is given a **Modifier** (on the **Edit Menu** screen).

Field Meanings:

- Color:** By default the modifier buttons are grey on the terminal screen. Click on the color button to choose from a list of pre-defined colors. Note that the color should be chosen after the modifier item has been added or any updates saved.
- Modifier Category:** Choose the pre-defined modifier category.
- Display Order:** This is referring to where the item will appear in the screen menu. This menu has a drop down box with numbers; set up the order for the trimmings to be displayed. Items with the same display order will be further sorted alphabetically.
- Item Name:** This is the full name of the trimming.
- Description:** How the item appears on the trimming display, so keep it short yet meaningful.
- Price:** Enter a price to have a "Priced Modifier", leave blank for no pricing. Priced modifiers will show up on the sales receipt.
- 2nd Level:** Choose any existing modifier category as a 2nd-level modifier for this item. *Note that while the Min and Max range of the category is enforced, any price or prepared attribute is ignored.*
- Send To Terminal:** If the modifier category was set up as a **Prepared** item, then a terminal can be chosen. Select **None** if it shouldn't be sent to any terminal, **Same as Item** if the modifier should go to the same terminal as the item, or any

	terminal listed. If the modifier category was not set up as a Prepared item then the modifier will always follow the item.
Taxed:	Flag for the taxation status (added, included, none) if it is a priced modifier.
Tax Rate:	(Only present when <i>Tax Rate 2</i> defined in Config Options). Pick the tax rate for this modifier.
External #:	If a value is placed here the modifier sales info will be added to the External Data report. A non-priced modifier will just have quantity information.
Status:	You can also change the status of the item to Hidden if needed.

Note: Priced modifiers can have a negative value. An example of where this would be useful is if an entree menu item is allowed to be “a la carte” for a reduced price. Instead of needing a separate menu item a negative priced modifier can be used.

Adding or updating a modifier is similar to add or updating a trimming.

EDIT TRIMMINGS

Edit Trimmings is where you would go to edit anything in the **Customize Screen**. Trimmings show up when modifying a menu item on an order before it is placed, or automatically when a menu item is designated a **Custom Item** (on the **Edit Menu** screen).

Field Meanings:

Color:	By default the trimmings buttons are grey on the terminal screen. Click on the color button to choose from a list of pre-defined colors. Note that the color should be chosen after the trimming item has been added or any updates saved.
Trim Category:	Choose the pre-defined trimming category. This is solely used to group the trimmings on the screen when displaying them.
Display Order:	This is referring to where the item will appear in the screen menu. This menu has a drop down box with numbers; set up the order for the trimmings to be displayed. Items with the same display order will be further sorted alphabetically.
Item Name:	This is the full name of the trimming.
Description:	How the item appears on the trimming display, so keep it short yet meaningful.
Status:	You can also change the status of the item to Hidden if needed.

To add a new trimming:

- Select the **Trimming Category**.
- Enter the **Display Order** (this is in numerical order – for best ordering make sure all trimmings display order numbers are unique for a trimming category).
- Enter the full **Item Name** and **Description**.
- Select **Add New**.

To update an existing trimming:

- If wanting to update a currently inactive (i.e. deleted) trimming, click **Show Hidden**.
- Update the information for any trimming item.
- Click on **Update** to update all trimming items.

CUSTOM ACTIONS

Custom Actions is used to enter the different options available when customizing an order. Some examples include Add, Extra, and/or No. These “actions” show up on the fulfillment terminal or printer as instructions to the employee working on the order.

Field Meanings:

- Name:** The name of the action for the custom option. It is also the display name, so keep it meaningful and short.
- Display Order:** This is referring to where the item will appear in the screen menu. This menu has a drop down box with numbers; set up the order for the custom options to be displayed.
- Inventory Action:** This field is for the inventory system. If the inventory system is not being used, this field does not have to be set. Choose the appropriate action for the inventory item (trimming) based on the custom action. The choices are: *Deplete* – remove the correct amount from inventory; *No Action* – take no action on inventory; *Return* – add back the correct amount to inventory; *Warn* – take no action, but generate a warning that a manager can choose to resolve later.
- Inventory Percent:** If depleting amounts from or returning amounts to inventory, use this percentage of the standard amount defined for the trimming in the inventory system. This would be useful for a “lite” or “extra” action where less than a full, standard amount is to be used. Choose the desired percentage.
- Status:** You can also change the status of the item from Active to Deleted if needed.

To add a new custom action, enter in the information in the appropriate boxes and click **Add New**. To update current information already in the system, simply make changes and then click **Update** to record changes. If wanting to re-activate an inactive (i.e. deleted) option, click on **Show Deleted**, change the status, and click **Update**.

DEFINE PIZZAS

Define Pizzas is where a specific type of menu item can be set up – Pizzas. **Define Pizzas** uses all the same concepts as regular menu items but is optimized for pizzas. The pizza items that are defined have a “Pizza Wizard” used on the POS terminals to aid in ringing in pizza.

There are some important notes regarding splitting two pizzas. First, the more expensive pizza will be used to determine the price and the number of toppings allowed. Second, only one crust type will be allowed, and only one sauce type will be allowed. Finally, the split pizza uses the toppings from one pizza recipe on one side and the other pizza recipe on the other side. The user is still free to move the toppings around and add or subtract toppings.

Pizzas are priced based on the named pizza price and any toppings in addition to the toppings defined in a recipe.

Section meanings:

- Configure:** Define some settings that are used through the whole Define Pizza module. Choose the pizza wizard, default menu category for pizza items, an optional “prep” category, the G/L account, the default fulfillment, and how taxation is handled. Use the 2010 Wizard as it has more features and a better user interface.
- Sizes:** Choose the price sizes that the pizzas will use. These are defined in the Edit Categories / Prices section.
- Crusts:** Enter any crust names if there are different types of pizza crusts allowed.
- Sauces:** Enter any sauce names if there are different types of pizza sauces allowed.
- Toppings:** Enter the different toppings names for allowed toppings. These are used in pizza recipes as well as items customers can choose. If want to track the toppings in Inventory then check the “Enable” box.
- Additional:** If additional toppings (i.e. more than the original recipe allows) are used then the additional charges are grouped into this entry. Whatever you name this entry, it acts like a priced modifier.
- Pizzas:** Set up the named pizzas here. Click on the **Recipe** button to set up a recipe for the pizza. The recipe is used for the default choices with the Pizza Wizard in addition to calculating the costs of substituting toppings on a pizza. Pizzas can be put into different categories if desired.
- Price Grid:** Use the price grid to set the prices for the pizza toppings and the named pizzas. If half sizes are allowed then only even dollar amounts for prices can be set up because the toppings could be used on just half a pizza.

If the configuration setting for printing pizza information is “Print Recipe Differences” then only the differences from the recipe will be printed. If the setting is “Print Selected Toppings” then whatever ends up being selected by the user will be printed, regardless if it is the same as the recipe. “Print Detailed” will show the detail of items on the pizza, whether they were originally on the recipe or added or removed.

Pizza can be put into any menu category by clicking on the **Pizzas** button and selecting the appropriate category in the “Category” column.

MENU VIEWS

Menu Views is a useful tool that will display a subset of the full menu. They can be used to set up things like a restaurant lunch menu or if a stadium has certain areas that have a partial menu offering. Once set up, the menu views can be selected by the server while at the **Orders** screen.

When entering the **Menu Views**, the first screen shown will display the names of any currently defined menu views, and allow a new one to be defined. The names shown here are also the ones that are displayed on the **Orders** screen. To set up a new menu view, type in the name and click **Add New**. To update an existing menu view, click the **Update** button by the

menu view's name. Clicking **Delete** will actually delete the menu view and it will have to be re-defined if you want it back.

The second page of Menu Views will show a page with all the active menu categories and all the active menu items. Simply check the boxes for the menu items you wish to have in the view. Any unchecked boxes will cause the menu item to not display in that view.

You can also change the view name by editing it in the text box.

The **Select All** button will cause all the check boxes to be selected; a useful action if only a few menu items are not offered in the menu view. Also, clicking the **Clear All** button will cause all the check boxes to be cleared; useful if only a few menu items are offered in the view.

Click on the **Update** button when done editing the menu view.

ON-HAND SPECIALS

On-hand Specials help manage inventory, but can be used without any inventory item or ingredient lists set up. Instead, they manage information that is associated with menu items. In this sense, the feature is not appropriate to track on-hand quantities at individual inventory stores.

The user can view just an individual menu category or all the categories at once. Enter any whole number amount in the field for the on-hand amount to be managed, or leave blank to ignore. When an order item is selected, the on-hand amounts that are greater than zero are decremented. If the amount reaches zero, the menu item button for the appropriate size is disabled and no more of the item can be ordered. If the menu item is deleted off the order before it is placed, the on-hand amount will be incremented.

Note: If the order is *Placed* but then the customer decides they do not want the item, the level will need to be manually adjusted.

Click on the **Update** button to update any on-hand amounts.

This is also a handy feature to temporarily disable the ability to order an item without removing it from the menu. However, care should be taken that any on-hand numbers are not being updated by a manager at the same time a server is placing an order for one of those items. Unexpected on-hand levels may be the result.

DEFINE DISCOUNTS

Define Discounts is used for defining the discounts that are allowed. These discounts can be applied by a server through the server management feature. There are two different parts that can be set up.

Discount Levels

Set up the percentage discount levels. Any percentage amount can be set up. Set up the amount as a percentage number (i.e. 12.5 would be 12.5%) and corresponding display (e.g. 12.5%).

Discount Reason Codes

Reason codes can be set up to describe why a discount is given. These can be any reason that makes sense. If the discount given for a particular reason should not be displayed on the receipt, make sure the *Show On Ticket* setting is unchecked (this will cause just the percentage to be shown with a generic discount description). The *After Tax* checkbox is to signify if the discount is taken before taxes (e.g. sales tax) or after taxes (e.g. use tax). If you are unsure of what the setting should be, check with your accountant. The *Display* field is shown on the page where discounts are set up, and the *Receipt* field is what is shown on the ticket if *Show On Ticket* is checked.

DEFINE PROMOS

Define Promos is used to define different promotions. Depending on the promotion it can be for the whole order or a specific order item. Click on **Add New Promo** to add a new Promo or **Update** to update an existing one. **Deactivate** will deactivate the Promo so it will not be available to servers.

Promos are essentially discounts that are tied to a reason. On the Promo Setup page you can give the name of the Promo and define the type of Promo. There can be a maximum value of the discount. The rights of who can apply a Promo can also be specified. Once the Promo is defined, check the **Lock Definition** checkbox to help ensure the Promo will not accidentally be changed.

Promo Types

% Ticket:	A fixed percentage will be taken off the total of applicable items on the ticket.
Flat Discount:	A fixed flat discount will be taken off the order, not to exceed the value of the order.
Flat Item Discount	A fixed flat discount will be taken off an order item, not to exceed the value of the item.

When specifying items that are allowed for the Promo the logic is as follows: If no categories are selected then all categories apply. If any categories are selected then only those categories will be allowed. If no menu items in a category are selected then all menu items will apply. If any menu items in a category are selected then only those items will be allowed. If no menu price sizes for a menu item are selected then any price size will be allowed. If any price sizes are selected then only those sizes will be allowed.

A list of menu items that have been selected will be shown. Click on the **Remove** button to remove a Promo choice.

DEFINE SPECIALS

Define Specials is used for setting up specials that are applied when menu items are chosen while a customer is ordering. The specials are only taken on the menu items that are defined for that special. There are six different, pre-defined specials that look at a single item at a time. Advanced specials can be set up to look at multiple items to see if the special is met.

Single Item Specials

- 2 For 1:** This special will ring up a 2nd, equal item when a menu item is selected.
- % Discount:** A fixed percentage discount will be taken on any item that is selected.
- Flat Discount:** A fixed flat discount will be taken on any item that is selected.
- Fixed Amount:** Item gets set to the given amount.
- 2nd Discount:** When a 2nd menu, identical item is chosen a fixed percentage discount will be applied.
- Flat Increase:** Increase a menu item by a flat amount.

Note: Due to the complexity of the 2nd Discount, multiple quantity orders are set back to one.

Advanced Specials can use logic to group categories and/or items in categories as part of the condition for the special.

Advanced Specials

- % Discount:** Can only use one group. Discount the item by the given percentage up to a maximum value.
- Flat Discount:** Can only multiple groups. Decrease the price of the items by the special amount, pro-rating across groups if necessary.
- 2nd % Discount:** Can only use one group. When a 2nd item in the group is ordered reduce the price by the given percentage, up to a maximum value.
- 2nd Flat Discount:** Can only use one group. When a 2nd item in the group is ordered reduce the price by the given amount, up to the value of the item.
- Fixed Amount:** Can use multiple groups. When the special is met the item is set to the fixed price, pro-rating across the items if multiple groups.
- Item:** Can use multiple groups. When an item in each group is ordered, one of those items can be discounted by a percentage up to a maximum value.
- Flat Increase:** Can use only one group. Same as non-advanced Flat Increase but with easier selection logic.

On the first page, a new special can be set up by entering a name and clicking on the **Add New** button. Any currently defined specials are listed and can be edited with the **Update** button.

After starting a new special definition, or editing an existing one, a page is displayed where the definition is built. If you want the special to only be applied at a single or several terminals, check the appropriate terminal name(s). The special can be defined for certain days of the week as well as over a specified time period. If either the **% Discount** or **2nd Discount** special type is chosen, the *Discount* field needs to be filled with a percentage number. If the **Flat Discount** special type is chosen, the *Discount* field needs to have a flat dollar amount. The *Discount* field is ignored for the **2 For 1** special type. The *Maximum Value* field can be used to limit the amount of a discount.

The **Flat Increase** is useful if needing to temporarily increase menu prices in case of a special event, such as a band. The **Flat Increase** special will show the resulting price on the receipt and will not be reflected on the Specials Report. Use the Sales By Category report to see the prices of ordered items.

Set any checkbox for the menu item/price category the special will be applied to, and click on **Update Special** to save the settings.

Example: To set up a % Discount special for Thursdays from 4pm to 6pm that gives 12.5% off up to 6 dollars total, select % Discount for the *Type*, enter 12.5 in the *Discount* field, enter 6.00 in the *Maximum Value* field, check the box for Thursday, and set the time range from 4:00 pm to 6:00 pm. Check any menu items to which this special applies.

Specials can be configured to be only on Dine-In orders or to also include To Go orders.

The **Test Overlap** button can be used to see if a given menu item is in multiple specials at overlapping times.

To allow specials on ToGo orders check the “Allow specials on ToGo orders” checkbox to allow specials to be applied to ToGo orders. The default is that an order must be a non-ToGo order to have a special applied.

DEFINE SURCHARGES

Define Surcharges is used for defining the surcharge types. These surcharges can be applied by a server through the server management feature. Surcharges are items that are added to an order total, but are not reflected in sales. Surcharge prices are always determined at the time the surcharge is applied and any taxation needs to be considered at that time. Examples of surcharges could include room charges, aprons, etc.

G/L ACCOUNTS

G/L Accounts is used for defining the G/L accounts for the system. Set the account information up in this section. Then any Menu Category, Menu Item, and/or Price levels can be assigned to a G/L account. The **G/L Report** will use this information for presenting sales information. Generally a G/L account is assigned at the category level and then only a few menu items in that category will be “overridden” with a different G/L account.

Use the **Show Usage** button to view where G/L accounts are used. This is useful to verify that G/L accounts are set up as expected.

QuickBooks users

To export data for QuickBooks, the best thing to do is to set up the G/L Accounts and map Menu Categories, Menu Items, and Price Sizes (Edit Pricing under Edit Menu) as necessary to get the G/L Report to reflect the way the sales data needs to be presented. Just the Menu Category is needed as a minimum but if there are menu items you want in separate G/L accounts then you can specify the account at the Menu Item or Price Size level.

Example: If a brew pub has beer sales to customers as pints or glasses but can also sell growlers “to go”. They can have the beer category be a G/L account called “Beer”

but specify the price size of Growler to be “Beer To Go” so they can see the amount of growlers sold.

CHOOSE PAYMENT METHODS

Choose Payment Methods is used for setting up which payment methods will be displayed during the Order Close operation. Only the payment methods that are not hidden will be shown.

The **Change** and **Tips** payment methods are presented as special cases of payments. **Change** can be used to show how much change is given out of the cash drawer.

Example: A customer has an order that totals \$16.75 and pays with \$20 cash. The payment can be recorded with the **Cash** button, and the payment method calculator will then show that -\$3.25 is the difference. The **Change** button can be pressed to record that 3.25 went out of the cash drawer in change, and the \$20 will show up as cash coming into the cash drawer. The net of the two (\$16.75) reflects the sales.

Tips can be used to show how much is owed to a server in the case of tips on a credit card charge. This is handy if the servers keep a “bank” and don’t work out of the cash drawer.

Example: A customer has an order that totals \$34.50 and uses a credit card. The customer enters a total of \$40 for the payment and tip. Since the credit card charges go to the “House”, the House owes the server \$5.50 for the tip. If \$40.00 is entered in the payment method calculator and **Discover** is pressed, then -\$5.50 will be shown as the difference. The **Tips** button can be pressed to record that 5.50 is owed to the server.

Payment methods can also be specified if they open the cash drawer. After selecting the *Open* checkbox for any methods that need to open the cash drawer, click **Update** to save the settings.

There is a list of payment methods that are set up by default. If other payment methods need to be set up use the **Add Custom Payment Method** section to add the method name, display order, whether the cash drawer should be opened and if negative amounts are allowed (e.g. for a credit return). The custom payment methods are shown after the default payment methods but before the Change or Tips payment methods.

Note: It is assumed that the custom payment methods are not cash. The custom payment methods will show up on various reports but will not be calculated as part of the Net Cash calculation on reports that show the Net Cash payments.

EDIT TIPOUT RATES

Edit Tipout Rates is used to edit the amount of money designated to tipping out peer employees. Its purpose is to simplify the work for a server to calculate the portion of her tips to other workers or work areas such as the bar or kitchen. Its use only in a report (the **Server Report**) where it takes the rates set up in the tip-out table and multiplies them by the server’s sales.

Field Meanings:

- Role:** The label placed on this calculation for identifying who the tip-out is for.
- Percent Amount:** A percentage number used in the calculation. For example, if you want the tip-out rate to be 1.5%, you would enter 1.5.
- Source Categories:** Select the categories on which this tip-out calculation is based.

To add a new tip-out category, enter in the information in the appropriate boxes and click **Add New**. To update current information already in the system, simply make changes and then click **Update** to record changes. The **Delete** button will actually delete the **Role** information and it would need to be re-entered to be set up again, if necessary.

Example: Suppose the service philosophy is to have the kitchen tip-out be 1% of prepared food and the bar tip-out is 1.25% of beer and wine, and the menu categories are Food, Beer, Wine, Soft Drinks, Desert, and Misc. You could set up a **Role** of *Kitchen*, enter 1.0 in the **Percent**, select the Food category, and click **Add New**. Next you can set up another **Role** of Bar, enter 1.25 in **Percent**, select the Beer and Wine categories, and click **Add New**. When viewing the **Server Report**, the report will calculate what 1.0% of the closed Food sales are, and 1.25% of the closed Beer and Wine sales, and the server will know what to tip out to the kitchen and bar.

AGE CHECKING

Age Checking is used to set up which menu items, when ordered, will need the customer to be age checked. Click on **Turn On Sapphire Age Checking** to enable the feature. Set the age at which servers are allowed to serve alcohol. This feature is used with the employee's age set up in the Employee Module. Check the Use Scanner checkbox if a bar code scanner will be used to scan drivers' licenses. Note that a special scanner must be used.

To set up which items need age checking click on the **Age Check Items** button. This will show a list of menu categories that can be selected. If you want to check individual items in a menu category then select those items from the category. A list of selected items or categories will be shown.

Note: Be sure to keep this list updated when setting up new menu items that need age checking.

The age checking will be done when the menu item is ordered and that item will not be added to the ticket until the age check is successful.

RETAIL MODULE

The retail module is used to track retail sales. When setting up retail items a SKU is required for all items. The SKU is assumed to be numeric. If desired, inventory information can be set up for any retail item and then the various inventory-related reports become meaningful. Inventory transactions are tracked for depletions (items sold), purchases (where cost information is captured), as well as removals and additions (manual adjustments). All quantities are assumed to be in whole amounts so use the most basic unit for any retail item (i.e. each).

REPORTS

SALES BY CATEGORY

Sales By Category will show the retail sales information by top-level category, sub-category, or items in a category, or for all items across categories. This is a managerial report that can help a business owner make decisions based on how different items are selling.

SALES BY PRICE

Sales By Price will show the retail sales information broken into sales price ranges. These ranges are configurable in the Retail Module / Setup page. This is a managerial report that can help a business owner make decisions based on how different items are selling at different price points.

SALES BY CLERK

Sales By Clerk will show the retail sales data just for retail clerks. The item count and sales are shown as well as the percent of sales each clerk did compared to the total. If any retail items were transferred to a restaurant ticket the sales transferred data (which will not show up in the retail sales any more because they are on a restaurant ticket instead of a retail ticket) is shown.

PROFIT MARGIN

Profit Margin will show the profit on retail sales. This report is only meaningful for items that have correct cost information. The **Profit** field is simply the difference between the sales and cost while the **Margin** field is the profit divided by the sales and converted to a percentage.

This report can be used to show information for top-level categories, retail categories (non-top-level categories), and all retail items during specified time period.

RETAIL INVENTORY TXNS

Retail Inventory Txns is mainly a debugging tool to show specific retail transactions (e.g. depletions, purchases, etc) for the specified time period. The transactions are shown from the most recent to least recent. Only a certain amount of transaction history is kept (three months).

USAGE

Usage will show the retail inventory changes for items in specific categories or for all items. Based on the given start date the prior quantity is calculated and the current quantity is shown. A simplistic projection is given based on the on-hand quantity and the amount depleted in the activity period.

INVENTORY ALERTS

Inventory Alerts will show any inventory items that are over the target quantity (in yellow) or equal to or under the reorder quantity (in red). Use this report to aid in reordering retail items.

INVENTORY VALUE

Inventory Value will show current value of the items in inventory based on the costs captured while recording purchases. The value can be calculated for any or all categories but only items with purchase information are used. The **Average Cost** setting, when checked, will calculate the cost using the complete purchase history instead of just the most recent purchase.

VENDOR PURCHASE REPORT

Vendor Purchase Report will show the vendor purchases of retail items. This report can be used to determine how much is being spent on any particular vendor. If the vendor has been set up (i.e. not “ignored”) then a button will be available to look at the purchase detail from that vendor.

SETUP

SETUP

Setup allows you to configure the Sapphire Retail module. The following table helps describe the settings.

Auto-print Sales Receipt	Check this setting if you want a receipt to automatically print when a sale is closed.
Sales By Price Range	Specify the price range breakdown for the <i>Sales By Price</i> report.
Retail Fulfillment Printer	Select a defined fulfillment printer to have fulfillment tickets print out when retail items are ordered through the Sapphire POS module.
Link From Orders	Check this setting to have a button show up on the Menu Item page in the Sapphire POS module.
Terminal Auto Sign-off Time	If you want the retail terminal to automatically sign off when there is no activity, select a time.

RETAIL CATEGORIES

Retail Categories is where the different category information is set up in the Sapphire Retail module. The category information is solely for reporting since the sales side does not display any retail item information grouped into categories.

Field Meanings:

Top Level: This category will be listed as a parent. Parent categories can only contain sub-categories (i.e. no items).

Category Name: The name of the category.

Parent: If “None” then the category is not a sub-category.

Status: The category's status. Check the checkbox to hide the category.

RETAIL ITEM EDIT

Retail Item Edit is where the different retail items are set up. The first task is to choose which retail category the items to be entered will reside (again, this is just for reporting reasons). If the retail category is a sub-category, the parent category name will be in parentheses below the category name.

Field Meanings:

Item Name: The name of the retail item that will be used in the system. It is also shown on the receipt and used when searching for a retail item.

SKU: ***This field is required.*** This is a unique identifier in the system that can be used to find the item in case there is no barcode.

Barcode: Scan the barcode into this field so the item can be looked up by barcode later.

Price: The current price of the item.

GL Acct: Select the appropriate GL Account if the item sales are broken out in the GL Report.

Taxed: Whether the item is tax added, included, or not taxed.

Type: Set to *Regular, Weighed, Bulk, or Browsed*. If it is weighed, the quantity is calculated based on math, and the price field is a price/unit value. The barcode of the item will contain the SKU and price, usually in the form: 2SSSSNPPPPN where SSSSS is the SKU and PPPP is the price of the item. If it is browsable then the item can be found by clicking buttons instead of scanning a bar code. Regular items can be found by scanning the barcode, entering the SKU, or searching. Bulk items can have the quantity entered and the price is calculated based on the unit price for the item.

External #: An optional field that references an external system's number to this item.

Status: A flag used to hide the item when it is no longer needed.

If the **Change Cat** button is clicked the item can be moved to a different retail category. Simply pick the retail category into which the item should be moved.

RETAIL VENDORS

Retail Vendors is where new vendors are added. This optional feature will help make the Vendor Purchase Report useful. If no vendors are set up purchases will be attributed to the "Ignored" vendor. If vendors exist the vendor can be specified during the purchase.

RETAIL INVENTORY LIST

Retail Inventory List is where the inventory information is set up for the retail items. This optional feature helps track the current inventory and purchase cost information. For any specified category there are three actions that can be performed: *Set Par Levels, Purchase, and Adjust Quantity*. Changing the action will change what information can be entered.

The *Par Level* information (target level, re-order point, and the optional G/L account) needs to be set up before any of the other actions can be performed.

The *Purchase* screen will show the current level and allow the vendor to be specified (use “Ignore” if there is no vendor set up, or if you don’t care to track purchases by vendor), as well as the quantity purchased and the total cost of the purchase (the system will do the per-item math).

The *Quantity* screen will let the user add, remove, or just correct the current quantity. Select the action and then input the amount of the adjustment.

ADD RETAIL INVENTORY ITEM

Add Retail Inventory Item can be used to add a single inventory item to the existing inventory information. The item must already exist in inventory. The item can be found by scanning the barcode (if the barcode has already been associated with the item), entering the SKU number, or via an alphanumeric search. Once the item has been found some existing information about it will be displayed. Enter the appropriate information to set par levels, record a purchase, or adjust inventory. Then click on the associated button.

Note: Only one operation can be performed at a time through this interface.

BUSINESS REPORTS

The Business Reports are used to learn business information on a daily basis. The time periods are on business day boundaries. The reports and tools look at data with respect to daily business activities.

BUSINESS SUMMARY RECAP

The Business Summary Recap is a group of reports where different reports can be selected for any given time period.

Total Sales	This report will show sales information and extract out non-cash/check/credit payments to arrive at a calculated deposit (of cash, checks, credit cards). The calculated deposit will be compared against the actual deposit entered in <i>Record Bank Deposit</i> .
Order Types	This report will show a break-down of Dine-In, To-Go, and Delivery sales as well as a break-down of AM vs PM sales. The tendered payments will be shown, too.
G/L Groups	The menu sales (before taxes) will be shown based on the G/L groups.
Menu Groups	Same as <i>G/L Groups</i> but the data is shown based on menu categories.
Paid Outs	The Paid In/Out information is shown for the given day(s).
Guest Count	This report is similar to the POS Module Guest Count Report and will show the Per Person Average of sales. This will only be valid if the <i>Count Guests</i> feature is enabled and it is only as accurate as the data is entered.

SALES USAGE

This report will show the sales and number of items sold for items in the different menu categories. It is very similar to the ***Usage Report*** in the POS Module. This is also a report that can be e-mailed.

LABOR REPORT

This report will show the hourly labor and labor summary information. It is very similar to the ***Labor Report*** in the Employee Module. This is also a report that can be e-mailed.

RECORD BANK DEPOSIT

Use this tool to record the actual deposits. This data will be used in the Total Sales report in the Business Summary Recap section. The payments that were recorded when tickets were closed are shown and the user can enter the actual cash/check/credit payments as well as the till starting and ending values.

Note: The Till Start and Till End values are for the entire site, not broken down by individual till. To balance a till use the Cash Drawer Checkout in the POS Module.

EMPLOYEE MODULE

EMPLOYEE RIGHTS AND PRIVILEGES

There are a number of rights and privileges that can be set up for an employee. When assigning rights to another employee, the user can not give any rights higher than the user currently possesses. Additionally, only the *Owner/Location Manager* can give someone *Payroll* rights.

Rights	Meaning
<i>Employee</i>	All employees should have employee rights.
<i>Driver</i>	Anyone with <i>driver</i> rights will show up as a driver in the Delivery terminal.
<i>Server</i>	Employees with <i>server</i> rights will show up on the front page and can sign in to the POS order entry area.
<i>Super Server</i>	This powerful feature will let anyone with <i>SuperServer</i> rights sign in to any server's order entry area and assume their information. The Super Server can perform any operation the server can. A good use of this feature is if the restaurant has a single cocktail waitress and this waitress can open up new orders for a server.
<i>No Discount</i>	Non-manager employee cannot apply a discount. Useful when don't want to restrict discounts to managers and have some experienced server who know how to apply discounts. Can be used with Super Server rights.
<i>Cash Drawer</i>	The employee has the right to open a cash drawer (depends on the Cash Drawer Rights configuration setting).
<i>Blind Drop</i>	The server cannot see their Server Report or Cash Drawer Checkout and certain sales totals are hidden. Useful when want a manager to determine if the drop is accurate instead of an employee.
<i>See Payroll Data</i>	Can see payroll data (e.g. timeclock, employee wages, labor reports).
<i>Payroll Admin</i>	Can alter timeclock entries.
<i>Shift Supervisor</i>	A <i>Shift Supervisor</i> is a manager with limited rights. This person cannot access all the management features and, on some reports, cannot look at historical data. Shift supervisors need to be clocked in to have manager rights on the POS terminals.
<i>Manager</i>	This is a general purpose <i>Manager</i> right.
<i>Owner/Location Manager</i>	This is the owner or location manager. Only this manager can give payroll rights to anyone.
<i>Administrator</i>	This is a limited right to help initially set up Sapphire.

Any one with some kind of manager rights or *Payroll* rights will show up when the **Manage System** button is clicked on the front page. A *Shift Supervisor* will need to be clocked in to access the Management system. Security rights can be set up for each wage rate (see the section on ***Manage Security Rights***).

REPORTS

All the timeclock-related reports will allow the user to choose the beginning and end dates of the time period. The time component is set to the Employee Setup payroll time. Note that the end date is the last date in the period, inclusive. This is effectively the payroll time boundary of the next morning.

TIMECLOCK REPORT

Timeclock Report will show the time worked for any employee in the given time period. The top-level report will show each employee's time worked and wages for any wage rates worked in the report time period.

Further detail for a single employee can be obtained by clicking on the **Details** button. If the user viewing the report has *Payroll* rights, then **Update** button is enabled and the data can be changed for the employee. After editing an employee's data click the **Back** button to go back to the detailed view. To re-display all the employee's for the time period, click the **Refresh** button.

If the *Detailed* checkbox is checked, the report will show every entry of the timeclock for the given time period. This will allow the ability to see all the entries without consolidation and to easily update the entries if necessary.

EMPLOYEE REPORT

Employee Report simply reports on employee indicative data. Select on which indicative data you want displayed, which employees (employed, terminated, or all) and how you want the data sorted and click on the **Refresh** button.

PAYROLL REPORT

Payroll Report is similar to the Timeclock Info report in that it will show the payroll information for employees based on the timeclock information. The difference is that it reports the wage rate values, the external id (set up in *Employee Info*), and the declared tips for the time period. This report might be useful for external payroll systems that need inputted data values.

The payroll report can be sorted by the employee name or the id. Click on the "Employee" or "Id" link to sort.

It is recommended that if the *Payroll Report* is to be used, first use the *Timeclock Info* report to make sure all the timeclock values are correct. The values can be updated by a user with *Payroll* rights, if necessary.

ADVANCED PAYROLL REPORT

Advanced Payroll Report is similar to the Payroll report except it also handles calculating overtime information. Overtime is determined based on the *Standard Weekly Hours* and *Overtime Rate* setting (see the Setup section). For any given report period, as soon as the *Standard Weekly Hours* (e.g. 40) is reached in a 7-day period based on the start of the report, any additional hours in the payroll week are assumed to be overtime. The *Payroll Week Start* day and time is also a configurable setting. Overtime is calculated based on the payroll week so make sure that setting is what your business payroll system uses.

The *Check Timeclock Warnings* checkbox will cause the report to also check for any type of potential issue, such as timeclock periods crossing a day boundary or not having a clockout value.

This report also handles multiple wage rates (for example an employee clocks in as a Server and a Bartender in the same week). The times used in calculating if overtime has been reached are based on the timeclock information.

LABOR REPORT

Labor Report will show both the labor costs for each wage rate in a given time period, as well as the hourly breakdown of labor costs. In the labor summary section, the number of timeclock entries for each wage rate are shown as the employee count, as well as the hours and wage totals. The *Percent Wages* column shows the relative cost of the wage rate, while the *Percent Sales* column shows the relative cost of the wage rate with respect to sales.

The hourly section will show the hourly periods where an employee is clocked in, and the cost of those employees with respect to sales in that hour (the time the order was opened is used for consistency in reporting sales information). The *Percent Labor* column is simply the wages divided by sales. If the sales are less than wage cost, 100% is shown as the percent of labor.

Salaried wage rates are now considered in the **Labor Report**. Use the Setup screen to define how many hours a week a salaried employee is assumed to be working. The salary rate is entered in the employee's wage history and is assumed to be a **monthly** number. The report simply does the math to convert the monthly salary to an hourly rate for the time the employee is employed.

Note: The hourly equivalent of the hourly labor is calculated as follows: The employee's salary is assumed to be a monthly salary and is entered in their wage rates. The salaried employee's weekly hours are entered in the *Employee Setup* section (it is the same for every salaried employee).

Daily Hours = Weekly Hours / 7

Hourly Rate = (Monthly Salary * 12) / (Weekly Hours * 52)

Daily Salary Rate = Daily Hours * Hourly Rate

The Daily Salary Rate is used no matter how many hours the salaried employee actually works on any given day.

DAILY WAGE REPORT

Daily Wage Report will show the wage costs for a given day (note that the advanced view that spans multiple days is not available). The costs are broken down by the wage rates used in that day. The *Percent Wages* column shows the relative cost of the wage rate compared to the total wages, while the *Percent Sales* column shows the relative cost of the wage rate with respect to the total sales for the period.

The report can be subtotaled at a given time boundary if the user would like information segmented into periods. If this happens, there may be some round-off error as the total

information is for the complete day, not just the sum of the two parts. Simply pick the time at which you would like the report to be subtotaled and the report will re-display the information.

This report uses the Order Day Boundary to determine the daily wage information.

LABOR BY DEPARTMENT REPORT

Labor By Department Report is essentially the same as the **Labor Report** except that it breaks the labor information into the pre-defined departments that each employee is identified with. The department is set in the **Employee Info** area.

OVERTIME REPORT

Overtime Report is an informational report that will show any historical or current work periods that are longer than a configurable number of hours. Simply select the number of hours (between 8 and 23 ½), and **Overtime Report** will find any work periods in the given report period that have a duration longer than that number of hours. Current work periods (i.e. where the employee is still clocked in) are also shown.

This report will be helpful to find people who have worked overtime as well as people who forgot to clock out at the end of a previous day.

MANAGEMENT

EMPLOYEE INFO

Employee Info is where you can add/delete/edit employee information. Any employee that will be working on the *Sapphire* system will need to be added to the system. If you are using *Sapphire* to keep track of the time worked of ALL employees, then every employee will need to be added. When displaying employee names during clock-in/out and on the front page, only the first name and last initial are used.

The first screen in Sapphire Manage Employees will list all the employees. They are listed alphabetically, by last name, first name. If there is no last name then they are only listed by first name. A second field shows whether the employee is currently active (i.e. clocked in). An **Update** button is available if you want to make a change to the employee's information. Use the **Add New** button to add a new employee.

The default view of this first page only displays employees whose status is *Employed*. If you would like to also see employees who are no longer employed, click on **Show Terminated**. Clicking on **Hide Terminated** will again show only the employees who are *Employed*. Terminated employees are shown in red.

After clicking the Update button, a second screen displays the information for just that employee, and allows you to change that information.

Field Meanings:

First Name: The employee's first name.

Last Name: The employee's last name.

Status: The employee's employment status. Either *Employed* or *Terminated*.

SSN:	The employee's SSN. This is only used in reports.
Phone:	The employee's phone number. This is only used in reports.
Alt Phone:	An alternate phone number for the employee. This is only used in reports.
External Id:	An optional id if employee has an identifier in an external system, such as a payroll system.
Dept:	Select one of the pre-defined departments to make the <i>Labor By Dept</i> report meaningful.
Req. Tips:	Set this flag if the employee is required to declare tips before clocking out.
W-4 Exempts:	Information about the employee's withholding status. This is only used in reports.
Various:	There are various checkboxes to help track information or policies given to employees. These are only stored for informational purposes as a reference.
Rights:	These are the employee's privilege level which is used for security.
Addr:	The employee's address (with City , State , and Zip). This is only used for contact information or in reports.
DOB:	Select the date of birth in order to set the employee's age. This is used as part of the age checking feature to make sure the server is old enough to sell alcohol without a manager override.

To add an employee:

- Click on the **Add New** button on the first page. This will bring up a second page.
- On the second page, fill out the necessary information. As a minimum fill out the **first and last name** and at least *Employee rights*.
- Enter any other information that you would like to keep track of.
- Click the **Add Employee** button.
- Once the employee is added, click on **Reset Password** to set the password.
- If desired, click on **Access Card** to set up the ability to use a Magnetic Stripe card for accessing Sapphire.

To update an employee:

- Click on the **Update** button on the first page. This will bring up a second page containing the employee information.
- Update the employee information as necessary.
- To terminate the employee, update the **Status** to *Terminated*.
- Click the **Update Employee** button to update the information.

To terminate an employee:

- Click the **Terminate** button to make the employee inactive and add a termination record to the employment termination.

To set up a Magnetic Stripe Card:

- Click the **Access Card** button on an employee's information page.
- When the next screen is shown, simply swipe the card to read the access code on the card. The code should be submitted automatically.
- To clear an access card click on **Clear**.

You can also set up employee Wages and Employment History. Prior to any wages being set up the necessary Wage Rates need to be set up (see the section on **Wage Rates**). Enter the new wage information and click on **New Wage**. If a wage rate of the same category already exists it will be ended. If multiple wage categories are set up for an employee, the employee is given the chance to select which wage rate they are currently earning.

Employment History will be set up naturally as employees are added, terminated, and re-hired. If necessary you can build an employment history by entering new hire and, if necessary, termination dates.

WAGE RATE NAMES

Wage Rate Names is where you can set up the rate category names. Simply enter the category name (e.g. Bartender, Server) and the type of rate. The type choices will change the way the **TimeClock Report** will calculate the wages. *Hourly* is for an hourly rate where the wage is the time worked times the rate. *Per Shift* is where the employee is paid a flat rate per shift, no matter how many hours they work. The flat amount is entered in the Wages section of the employee information. If *Salary* is chosen no calculation is done.

DEPARTMENT NAMES

Department Names is where you can set up the names of wage departments for the **Labor By Department** report. Simply enter the department name (e.g. Driver). Some department names are present by default to match older versions of Sapphire.

LABOR SCHEDULER

Labor Scheduler is where you can specify a starting work time for employees. This scheduler is tied to the clock-in feature of the time clock, and if an employee tries to clock in at a time other than the scheduled time a manager override is needed. If you specify the wage rate the employee is scheduled to work then that wage can be selected by the employee without need for an override, but other rates will need a manager override. The manager override is simply the manager entering their password or access card swipe. The labor scheduler is enabled in the Employee Module Setup.

The schedule can be set for up to eight weeks ahead. When showing the schedule, the previous week can be shown and up to eight weeks ahead can be shown. Click on **Show Schedule** to see a weekly view of the current schedule. Entries that are older than 30 days can be deleted – a button will be shown if any old entries are found.

To set up a schedule for a single employee, click on **One Employee**. Use the dropdown box to select which employee, and then set the date, shift start, and wage rate for that employee. Clicking on **Add New** will add the entry into the scheduler. The current schedule for the employee is listed. To remove a schedule entry, click on **Terminated**. This will permanently delete the entry so it will need to be re-entered if it was deleted by accident.

To set up a schedule for multiple employees, click on **Multiple Employees**. Picking a wage rate will show all the employees that have that wage rate. You can click on multiple employees by using the <shift> or <cntl> key while clicking with the mouse. Then pick a date, start time, and days of the week for that schedule. Clicking on **Add New** will save the information. To

show all the schedule information, check the *Show All* checkbox; otherwise, only the current week's schedule information will be shown.

SETUP

Setup is where various settings for the employee module are set.

After setting the values click the **Update** button to save the values.

Field Meanings:

Payroll Week Start:	The day of the week (and time of day) to start the payroll week. This should match your payroll system.
Standard Weekly Hours:	The number of hours in a standard work week (e.g. 40).
Salary Weekly Hours:	The number of hours a salaried employee is assumed to work in an average week. This setting is used in the wage reports to convert salaried employees to hourly. If the manager wants to "hide" the salary information from other employees it is suggested to add up all the salaries and place them under one employee (e.g. the manager).
Overtime rate:	The rate (multiplier – e.g. 1.5x) an hourly employee is paid for overtime.
QuickBooks Company Create Time:	Enter the value from QuickBooks to enable the download of timeclock data.
Export Payroll Data	Check this checkbox if you want a button to show up on the Advanced Payroll Report to export the data.
Timeclock PIN required	If checked then a PIN will be required to clock in/out.
Mini Timeclock Report	Set how you want the mini-timeclock report to show when clocking out: <i>Show and Can Print</i> (default) will show the report and the user can print to an attached receipt printer; <i>Show Only</i> will only show the report; <i>Do Not Show</i> will not show the report at all.
Show wages on clockout	If checked then the wage math (rate time hours) will be shown. Otherwise just the time will be shown.
Labor Scheduler	Enable the labor scheduler. <i>Disabled</i> means cannot access it. <i>Enabled</i> means it can be used to set up labor schedules. <i>Activate</i> means it will be used as a "gatekeeper" to keep employees from clocking in before their scheduled time.
Week Starts On Monday	If checked then the schedule's week start on Monday. Unchecking the box will have the week start on Sunday.

To download the timeclock data for use in QuickBooks you will need to do the following:

1. Obtain the QuickBooks Company Create Time by using QuickBooks to export the timer lists and opening up the export file and finding the create time value.
2. Enter that value into the field mentioned above.
3. Go to the Advanced Payroll Report and create your payroll report.
4. Click on the *Download QuickBooks Timer Data* button.

5. Use QuickBooks to import the timer data (see the QuickBooks manual).
6. For each timeclock data entry QuickBooks will ask for the pay rate so QuickBooks can turn the timeclock data into payroll data.

NOTE: Due to the nature of importing IIF files into QuickBooks it is possible to crash QuickBooks. Make sure you create a backup of your data before importing. Khamu is not liable for any lost or incorrect data.

MANAGE PASSWORDS

Manage Passwords is where manager passwords are managed, as well as an alternate place to manage PINs and access cards for employees. PINs and access cards are handled just like on the Employee Data page. If a manager forgets their password or needs a new one, simply click on the **Reset Password** button and a randomly generate passwords will be displayed. This temporary password is needed by that manager to access the Management system and at that time the manager can choose a new password that will last for 90 days.

MANAGE SECURITY RIGHTS

Manage Security Rights is where the security rights can be set up for each employee based on their wage rate. The information on the Employee Data page is the default if nothing has been set up for a wage rate for the employee. If an employee has multiple wage rates just check the appropriate rights for each wage rate and click on the **Update All** button. If the employee does not have any wage rates set up the row will be colored red. A wage rate of “Default” reflects the settings chosen before wage rates were set up.

Examples: If you want a cash drawer to only open for an employee when they are a bartender and they may also be a server, check the “Cash Dwr” checkbox for the Wage Rate relating to the Bartender. If you want an employee to be a shift supervisor sometimes and a server others, check the “Shift” checkbox for the Wage Rate relating to the shift supervisor and not the server.

CUSTOMER MODULE

There are three different areas of the custom module. The **Delivery** area is for customers who are set up through the delivery terminal. The **Pre-paid Cards** area is for customers using pre-paid cards. The **Loyalty** area is for customers who use loyalty cards.

MANAGE CUSTOMERS

This area will display all customers and allow the customer information to be edited or deleted.

DELIVERY

The *delivery terminal* is a terminal that will show the current status of any delivery orders. It is enabled by entering the Setup area (see the Delivery management section below). Once the delivery module has been enabled, the delivery terminal is accessed through a button on any server's Orders page. When first clicked, it is assumed a new order is being placed. However, clicking on the **Terminal** button will show the Delivery terminal.

Orders can be initiated through this terminal by clicking on **New Order**. If you want to create a delivery order for a future date click on the **Future Order** button. Any clocked in servers will be shown to allow as an "owner" of the order. The customer can be looked up using the appropriate search method (id – usually the phone number, last name, or address).

Note: Partial searches can be done by typing in just the first few characters and then clicking on **Search**. All matching entries are displayed.

If the customer is not found they can be added. If they are found, they are selected by clicking on the button that is their Id. Their information can be changed by clicking on the **Edit** button. To see their order history click on the button with the last order date on it.

If the customer qualifies for a reward as defined by the system, the reward choices are shown, allowing the user to select one or skip it for this order.

Once the order has been placed, it is tracked on the Delivery terminal by showing the time it has been opened, and the current status. If fulfillment printers are used, the order may show as "Ready" right away. If fulfillment terminals are used, when the order is cleared from the terminal the status will be shown as "Ready".

A receipt can be printed by clicking on the button that shows the order total. This delivery receipt has additional information to help find the customer's address.

To assign a driver to an order, simply click on the button under the **Driver** column. This is for tracking purposes on some of the Delivery Reports and is required to complete the delivery.

When the order is ready to be delivered, the **Deliver Order** button can be clicked. When the driver is back the same button, now reading **Close Ticket**, can be clicked to close the order. Using these buttons correctly will help in obtaining useful delivery statistics for possibly identifying issues with the delivery process. A driver will need to be assigned to move the status passed the “Ready” state.

Clicking on the **View Closed** button will show orders that have been completed. Clicking on **Sign Out** will close the terminal.

The terminal can be refreshed manually, but will use the default configured refresh setting (see the section on System Configuration for more information on this setting).

Note: Due to the potential to add a lot of customer information, it is recommended that a keyboard be available on the delivery terminal.

REPORTS

DRIVER REPORT

Driver Report will show information for any given driver on any given day. This report can also be reached from the **Checkout** page but only for a single driver for the current day.

DELIVERY REPORT

Delivery Report will show information about deliveries for the specified period. Information about each delivery order will be shown. The total order amount for deliveries for the period is also calculated.

DELIVERY STATS

Delivery Stats will show various delivery statistics as a way to measure performance of the delivery process for the organization.

CUSTOMERS

Customers Report will show information about delivery customers. The information can be used for a mailing list. Customers can be selected by how recently they have had a delivery. The report can be sorted various ways for presenting the information.

DRIVER STATISTICS

Driver Statistics will show information about drivers for deliveries. Statistical information is shown to help measure driver performance. A detailed view will show the time a delivery started and how long the driver was out. The summary view will show the number of trips and the total time out, as well as the average time per trip.

BIRTHDAY REPORT

Birthday Report will allow the user to show any customers who have a birthday in a given month. The birthday information will need to be captured for the customer to show up on the report. Choosing the month “All” will show all customers, including the ones that do not have a birthday entered. The report can be sorted different ways, for mailing lists or other informational purposes.

MANAGEMENT

SETUP

Setup is where the Delivery button on the server's orders page gets enabled, and various configuration settings can be applied.

Note: Delivery Rewards have been removed as of Sapphire version 5.4.6. Use loyalty rewards instead.

The ordering terminal can be chosen to be the Cash Service terminal or the Dine-In terminal. An existing surcharge can be used to set up a delivery surcharge/fee, if desired. The ability to auto-print a delivery receipt can also be set up. Other settings will help configure how identifiers are used and default customer information.

Which Ordering Terminal	Choose if the delivery ordering terminal should be the Cash Service terminal (default) or Dine-In terminal.
Delivery Surcharge	If delivery tickets have a surcharge fee, choose which previously set up surcharge will be used.
Server is driver default	Check this setting if the server will be selected as the driver when the ticket is created.
Driver Commission	Enter the commission a driver will get for each delivery ticket. This number will be used on the Driver Report. Warning: changing this number might cause changes in earlier driver reports.
Driver Cash Start	Enter the amount of starting cash a driver will have. This is similar to the Till Start a server might have.
Identifier is phone number	Check this box if the identifier for a delivery customer is their phone number. This is the recommended way to identify delivery customers but is not the default due to backwards compatibility reasons.
Default Area Code for Identifier	If using the phone number as an identifier the default area code can be entered and will help minimize typing when searching for a customer.
Default State for Customer Info	Enter a default state code for customers. This is used to populate the customer information and can be used to save typing for new customers.
Auto-Print Delivery Ticket to Printer	If a printer is selected delivery tickets will be automatically printed at that printer when a ticket is completed.
"Deliver Order" Auto-Print Receipt	If checked a receipt will automatically be printed when the "Deliver Order" button is clicked in the Delivery or P.O.D. terminal.

CUSTOMER LIST

Customer List will show all the customers and allow their data to be edited.

DELIVERIES

Deliveries lets the user edit delivery information to correct any issues with delivery information. The server and driver can be changed in this area.

PRE-PAID CARDS

The pre-paid cards enable the location to issue gift cards or employee meal cards, or any form of card where a monetary amount is placed in an “account” prior to being used as a payment method. This can include paper gift certificates, if the owner places an “account number” on the certificate so the amount can be referenced by the system at time of payment.

Note: The Sapphire pre-paid cards feature is for use in tracking customer information. If you want to share gift cards between sites use the Gift Card feature. The Gift Card feature can also be used at just a single site, and is easier to use. Sapphire gift cards can only be used at a single site.

When setting up an account, the term “Account Number” is assumed to be a manually entered value that is set up via the management interface, whereas the term “Account ID” is assumed to be a swiped in or typed in number when the account is first set up. Either value can be changed via the management interface. A default account number is suggested based on parsing the magnetic stripe data at the time the card is first purchased.

When the card is set up no expiration date is captured unless configured (see Setup). However, an expiration date can be set or changed at any time. The system will not allow any activity with the account upon expiration, but the manager can optionally “expire and remove” the remaining amount in the account. A report exists to show the amount that was expired and removed in any given time period.

Note: Different states have different rules about how to handle expiring pre-paid accounts and removing the money from the account. Please contact your state’s tax commission to determine the rules you need to follow. Possible areas to explore are “usury laws” and “unclaimed gifts.”

An adjustment can be made at any time to any account as a mechanism to correct mistakes or manage any aspect of an account with respect to specific state laws.

Money is added to an account through the POS system, where an “order” is recorded that reflects the amount added to the account. The order “item” is a \$0 entry and a “Surcharge” will be recorded that is the amount being added. (A surcharge is used to keep the prepaid account sales from inflating “normal” sales.) New cards can also be set up this way. Cards can also be set up through the management system by first creating a new customer entry and then setting up a prepaid account for that customer.

Note: If associating a magnetic pre-paid card with an account, an MSR (magnetic stripe reader) will be needed on the management terminal. Alternatively, the management can be done at a POS terminal, if necessary.

When using pre-paid cards as a payment method, if there is a mistake, and the payment is deleted, the related account transaction should also be deleted. If the transaction was not deleted, a manual adjustment will be needed. The transaction should be deleted if it was the last transaction on the account. This restriction is due to how the running balance is calculated. A server with manager rights can delete the transaction from the account during the Order Close process.

Note: The same account number cannot be used for both a Prepaid account and a Loyalty Account. This is to avoid confusion if the Cash Back program is ever used.

ACCOUNT MANAGEMENT

Prepaid accounts can be managed by first finding the customer's account. There are several ways to find the account: Find the customer, find the account by customer (see section below), find the account by account number (see section below), or by account activity.

Once the account is found, make sure the pre-paid account information is shown, possibly by clicking on the **Prepaid Acct** button when the customer information is shown. This is where account numbers can be set/changed, a new magnetic card associated with the account, and adjustment transactions applied. The account history can also be shown.

If the card has been depleted (i.e. the account balance is zero) the card can be marked for reuse so the new owner cannot see the old activity on any balance checks. Simply click on the **Mark For Reuse** button and an entry will be added that will prevent showing activity prior to that entry.

Note: If a pre-paid customer account is deleted, the customer entry in the database is what is deleted. Therefore, make sure the customer does not have any other accounts (charge, delivery, etc) before deleting.

REPORTS

SUMMARY REPORT

Summary Report will show high level, summary information about activity in the pre-paid accounts. More detailed information can also be obtained regarding area of the report. The following information is summarized for any given time period: new accounts and initial deposits, expired accounts and amounts, deposits and amounts, uses and amounts, adjustments and amounts, and expired/removes and amounts. There is some redundancy with detailed reports in this area and other reports.

ACTIVITY REPORT

Activity Report will show the activity on all accounts for the given time period.

EXPIRATION REPORT

Expiration Report will show two different sets of information. It will show which accounts have expired in the given time period and allow the remaining balance to be removed. It will also show the amount of any account that has had its balance removed due to expiration. This removal is based on the time the money is removed, not the time the account expired.

OPEN ACCOUNT REPORT

Open Account Report will show information about any account that is open. The *Ident* field is part of the optional customer information that can be set up to find the customer in the customer database. Click on any underlined field to change the sort order.

IMPORT/EXPORT

Important Note: Sharing cards between sites is not supported as of version 4.2. In order to share cards between sites you must select a third-party Gift Card processor.

MANAGEMENT

NEW ACCOUNT

New Account is a quick way to set up a new pre-paid account. Simply swipe the card and a new pre-paid account will be created. Then any information can be added or changed if necessary.

MANAGE BY CUSTOMER

Manage By Customer is used to manage different aspects of the Pre-paid Account system where the account is found based on customer information. All accounts are shown, and the list can be sorted in different orders by clicking on the column name. When there are more than 50 accounts, the list can be grouped by the customer Last Name. From this screen, information on any individual account can be managed or the account itself can be deleted. This is where cards with magnetic stripes can be associated or re-associated with an existing account.

There is a keyword search capability, and if used the keyword is searched for in the first and last name, identifier, notes, and account number fields.

MANAGE BY ACCOUNT

Manage By Account is used to also used to manage different aspects of the Pre-paid Account system except the account is found based on the account number. This is useful when customer information is not being captured at the time the card is issued. The management functionality is similar to **Manage By Customer** described above.

SETUP

Setup is where the pre-paid account system is **enabled**. There is also a setting to allow an **external** pre-paid system to be used. If an external pre-paid system is used at time of payment, only the payment method information is captured and no account activity takes place in Sapphire. If cards need to be automatically **expired**, check that box. The two choices for an automatic expiration date are *This Date* meaning this same date next year, or the end of the current month next year. If you don't want a tip line to print on the pre-paid slip, then check the *Hide Tip Line* checkbox.

CARD TEST

In **Card Test** the user can swipe a card that has an MSR to see if the system can recognize the magnetic encoding. The ensuing account number will be shown and if that matches the card's printed number then that style card can be used in the Sapphire Pre-paid or Loyalty system.

CUSTOMER CHARGE ACCOUNTS

Customer charge accounts allow the business to extend credit to preferred customers. Sapphire will track the charges and report on outstanding balances. Simple invoices and statements can also be printed.

Note: The customer's account must be set up prior to the server being able to use it as a payment method. It is recommended to use a phone number as the customer identifier. The account number, which is required, can be letters or numbers and needs to be unique for each customer.

If desired, an upper limit can be placed on the customer charge account to limit the amount of outstanding balance. See the *Manage Accounts* section below.

When using customer charge accounts as a payment method, if there is a mistake, and the payment is deleted, the related account transaction should also be deleted. If the transaction was not deleted, a manual adjustment will be needed. The transaction should be deleted if it was the last transaction on the account. This restriction is due to how the running balance is calculated.

REPORTS

ACTIVITY

Activity will show transaction information for the given day or date range. Customer charge slips can be reprinted through this report.

OPEN ACCOUNTS

Open Accounts will show any customer charge account that has a non-zero balance. The customer name, account number, and current balance are shown. An invoice can be generated by clicking on the **Invoice** button. A statement can be generated by clicking on the **Statement** button. The difference between a statement and an invoice is that the invoice shows only new charges while a statement will show the beginning balance, charges, and payments. To make a payment on the account, click on the **Make Payment** button. To print all the customer statements at once click on the **Print All Statements** button.

ALL ACCOUNTS

All Accounts will show account information for all charge accounts, regardless of the balance or if the account is deleted. If the account is deleted, click the **Undelete** button to re-activate the account. The accounts can be shown just for a name range, too.

MANAGEMENT

SETUP

Setup will allow the customer charge account feature to be enabled or disabled.

NEW ACCOUNT

New Account will allow a new customer account to be created. Fill in the important information. The customer identifier is recommended to be an eight digit phone number. If the customer is a business, use the *first name* field so the account can be found correctly using the filtering on the **All Accounts** report. Just setting up the customer will not create the charge account. To create the charge account, once the customer information has been submitted, click on the **Show/Edit Cust Chrg Account** button and enter an account number. This account number needs to be unique. If you forget to enter this account number, you can re-find the customer by going to the main page of the Customer Module and clicking on **Manage Customers** and then finding the customer and clicking the **Edit** button.

MANAGE ACCOUNTS

Manage Accounts will allow you to edit customer information for customers with a charge account. You can also enter adjusting transactions through this screen by finding the customer, clicking on the **Edit** button, and then clicking on the **Add Adjustment Transaction** button. The charge account can have a maximum charge limit if you enter a value in the *Charge Limit* field.

LOYALTY

The Sapphire Loyalty feature is used to track customers to give them an incentive for repeat visits. The same swipe cards as for pre-paid accounts can be used for the Loyalty accounts. The difference is that Sapphire Loyalty accounts need to be set up before the account is used for a customer. The server can give a customer a Loyalty card without having to enter any information at that time. The customer-specific information can be added later by a manager.

There are four different types of loyalty programs that can be set up: *Add Up Sales* which will simply track sales and add up the total until a specified reward level is reached; *One Each* where a list of menu items are chosen and customers have to purchase one each of those items; *Certain Number* where a list of menu items are specified and customers have to purchase a certain number of any of those items (with multiple purchases being allowed); and *Cash Back* where a percentage rate can be specified and that amount of the ticket will be put into a Prepaid account for the same card.

Other than for the *Cash Back* type, the Loyalty program will only track the sales side; it is up to each site to specify how the reward is given, once it is achieved. Some examples can include a discount off a meal or item, a plaque, a shirt, etc.

Note: If a reward is being applied to a loyalty account it is the server's responsibility to signify the reward is being applied so the loyalty account is reset to start counting over.

The server will apply credit towards the loyalty program or show that the reward is being taken. That feature is accessed through the Server Manage page. Simply specify the ticket, find the loyalty account using the magnetic swipe card and apply the loyalty credit.

The current "balance" on a loyalty account can be obtained by clicking on the **Loyalty Acct Balances** button on the Front Page. Swipe the card or enter the account number and the account

history will be shown. If the type of program is *One Each* the remaining items to be filled will be shown as well. For all types of loyalty programs the number of remaining points needed to achieve reward level will be shown. If a printer is associated with the terminal the transaction history can be printed out.

For the *Cash Back* program information about each ticket being applied to the loyalty account is recorded while a simultaneous entry into a Prepaid account (for the same customer and loyalty card) is recorded. When looking at the current loyalty account balance for a *Cash Back* program only the loyalty entries are shown – the uses of the related prepaid account are not shown. This means the account will keep growing and to get a true representation of the currently prepaid liability for a reward account, the prepaid account should be looked at.

Note: The same account number cannot be used for both a Loyalty account and a Prepaid Account. This is to avoid confusion if the Cash Back program is ever used.

REPORTS

ACTIVITY

Activity will show transaction information for the given day or date range.

OPEN ACCOUNTS

Open Accounts will show any loyalty account that has a non-zero balance. The customer name (if captured), account number, and current points are shown.

ALL ACCOUNTS

All Accounts will show account information for all loyalty accounts, regardless of the balance or if the account is deleted. If the account is deleted, click the **Undelete** button to re-activate the account. The accounts can be shown just for a name range, too.

MANAGEMENT

SETUP

Setup will allow the type of loyalty program to be chosen. A choice of *None* will disable the feature; any other choice will enable the feature. For the *Add Up Sales* program simply specify the amount of sales needed to achieve the reward. For *Cash Back* specify the reward rate as a percentage. For the other programs use the lower section to specify the menu items (and price size if necessary) to build up the list of items that are in the loyalty program. An item can be removed from the program click on the **Remove** button next to the loyalty choice item.

NEW ACCOUNT

New Account will allow a new loyalty account to be created. Swipe the magnetic loyalty card to create an account. The account number and customer identifier are based on the account number encoded in the card.

Note: Since the customer information may not be known at the time the customer enters the loyalty program you may want to create several “blank” accounts that have a card set up. The card can then be given to the customer and the customer information can be added later.

If the customer is a business, use the *first name* field so the account can be found correctly using the filtering on the **All Accounts** report.

MANAGE ACCOUNTS

Manage Accounts will allow you to edit customer information for customers with a loyalty account. You can also enter adjusting transactions through this screen by finding the customer, clicking on the **Edit** button, and then clicking on the **Add Adjustment Transaction** button.

GIFT CARD MODULE

The gift card module has three interfaces: the management interface, discussed here, a terminal used for selling gift cards, and the authorization interface. The latter two interfaces are discussed in the Server Guide as they can be used by the servers.

Sapphire will store the complete gift card account number. The card account number must be less than 20 characters

The Sapphire Gift Card gateway only works at the local site. If that gateway is chosen then there will be additional reports available to help manage the gift card accounts. Any other gateway goes through the Internet to a third-party processor.

Tip adjustments are not allowed on gift cards. In order to process a tip a second transaction will be needed but it will not be identified as a tip.

Note: If the Internet connection is not working and a non-Sapphire gift card needs to be processed, the card information will need to be captured some other way. A “dial-up” type terminal or some kind of manual copying of the account number can be used to capture card information. Alternatively, if the card information is saved to be processed later there is a risk the balance on the card is less than the transaction amount.

PROMO GIFT CARDS

This is a feature specific to Sapphire Gift Cards. When a manager signs into the Gift Card Terminal a new button shows up that allows “promotional” gift cards to be activated and used. Promotional gift cards are gift cards that can be activated with a balance but no ticket is created to pay for the gift card. When used the balance goes towards an order discount instead of a payment method. The discount reason code should be set up beforehand and identified in the *Setup* area.

These cards can be used for promotional purposes or if, for example, a Comp is needed to satisfy a customer due to a service error. Be aware that there is potential for fraud since value is being created on the gift card without an exchange of tender like a regular gift card.

SAPPHIRE (GIFT ACCOUNT) REPORTS

These reports are only available if the selected gateway is “Sapphire”. In this case the account transactions are processed at the local site. It is not possible to share gift account information between multiple sites (choose a different gateway processor in this case).

OPEN ACCOUNTS

Open Accounts will show information about gift card accounts that have an outstanding balance. There may be accounts that are still active with no balance, but they will not show up on this report. If further detail is needed on the account and its transactions, click on the **Detail** button next to the account information.

If the **Detail** button is clicked then the transactions on the account are listed. There is also the opportunity to change the expiration date on an account. This transaction detail information can be reached from any of the account reports.

EXPIRATION REPORT

Expiration Report will show any gift card accounts that expire in the given time period. The default is the current month. This report can be used to manage how gift cards are expired with respect to the customer's usage.

Important Note: Many states have laws (usury laws, unclaimed property laws) that regulate how expiring accounts are handled, including charging service fees for inactive accounts. Please be sure you understand your state's laws when handling expiring accounts and/or service fees.

MANAGE ACCOUNTS

Manage Accounts will show information about all gift card accounts (active or inactive). The accounts can be look at in descending order if desired, or a filter can be used to look at a partial list. Simply enter a portion of the account number and any account with matching information is shown. If further detail is needed on the account and its transactions, click on the **Detail** button next to the account information.

Note: Sapphire gift cards can be re-used by either Deactivating the account or adding value back onto the account. If the account is deactivated and then re-activated, a new issue date and (optionally) expiration date will be assigned to the account. The account transaction detail will still show all transactions ever performed on that account.

REPORTS

These reports are essentially the transactions performed on an account. The information is "captured" as the actual transaction is sent on to the processor.

GIFT CARD REPORT

Gift Card Report will show information about gift card activity for the specified period. It will list all transactions. There is a summary section at the end of the report. Any of the report column names that are underlined can be used to re-sort the transaction list (e.g. to sort by account number click on the Account column header). By default the report lists the transaction in natural order.

DAILY ACTIVITY

Daily Activity will show gift card activity for a given date. The default view is to show summary only successful transactions, excluding voids. If the *Show Unsuccessful Txns* checkbox is checked, then transactions that were not successful are shown. (This information may be more useful in tracking down issue than just seeing what transactions were successful.) If the *Show VOID Txns* checkbox is checked then the VOID transaction **and** the transaction that was VOIDed will be shown.

MANAGEMENT

Not all management functions are available to all gateways. The name of the gateways that support the functions will be listed. Additional card management features are available in the Gift Card Terminal (see the Sapphire Server Guide for more information).

VOID

Supported by: Sapphire, Mercury, Heartland, Valutec

Void will void an existing transaction. Generally, only the last transaction on a given account can be voided. Due to issues it might create, a *Use* cannot be *Voided* unless the corresponding ticket is open. Additionally, transactions cannot be *Voided* after the *Day-End Close* process runs.

REFUND

Supported by: Sapphire, Mercury

Refund will allow the user to apply a credit to a gift card. It is similar to the *Add Value* except that the amount refunded does not need to be paid for by the customer. *Refund* is useful for managing the account balance.

SUBTRACT VALUE

Supported by: Sapphire

Subtract Value will cause the balance on the card to be reduced. If an amount larger than the current card value is subtracted, only the remaining balance will be reduced. There is a button available to obtain the current balance (click on **Check Balance** once the card has been swiped or account number entered). The main difference between a *Use* of the account and *Subtract Value* is that *Subtract Value* is not tied to paying for a ticket. It is useful for managing the account balance or removing the balance from an expired account.

DEACTIVATE

Supported by: Sapphire, Heartland, Valutec

Deactivate will cause the account to become inactive. At this point the card can be re-issued with an Activate transaction (see Gift Card Terminal in the Sapphire Server Guide for more information).

Note: An account can only be Deactivated with a zero balance.
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CARD TEST

Supported by: Sapphire

Card Test is available to test out a card to make sure that Sapphire can parse the account number. There are also guidelines for purchasing cards.

TEST COMMUNICATION

Supported by: Sapphire, Mercury, Heartland, Valutec

Test Communication will send a test communication to the gateway to verify that the configuration is working correctly.

ADD ACCOUNT

Supported by: Sapphire

Add Account is available to help import card numbers and balances into Sapphire if the site is switching from a different system. The main difference between **Add Account** and starting new accounts from the Gift Card Terminal is that no payment is required to start a new account.

SETUP

Setup is where the Sapphire gift card interface is enabled. Selecting Sapphire as the gateway will allow gift cards to be used only at the local site. In order to share gift cards between multiple sites, another gateway will need to be chosen.

Note: There are certain fields that are specific to the selected gateway.

Field meanings:

Sapphire

Expire Gift Cards:

Check this checkbox if you want an expiration date to be automatically entered.

When Expire Next Year:

Select *This Day* to expire on this day next year; select *End Of Month* to expire at the end of the month next year.

Promo Discount Code:

Select an existing discount reason code in case Promo Gift Cards are being used.

Mercury Fields

Merchant ID:

The Merchant ID given to you by Mercury Payment Systems.

Password:

The password given to you by Mercury Payment Systems.

Valutec Fields

Terminal ID:

The Terminal ID given to you by Valutec.

Heartland Fields

License ID:

The License ID given to you by Heartland Payment Systems.

Site ID:

The Site ID given to you by Heartland Payment Systems.

Device ID:

The Device ID given to you by Heartland Payment Systems.

User ID:

The User ID given to you by Heartland Payment Systems.

Password:

The password given to you by Heartland Payment Systems.

Common Fields

Processing Server URL:

The Internet address of the processing server (including path).

Processing Server Port:

The port on which the gateway is listening.

Secondary:

Optional paths, if needed, for secondary server addresses.

Txn Timeout (seconds):

The length of time to “timeout” a transaction. 90 seconds should be optimal and is the default if left empty.

Don't Auto-print Gift Slips:

If checked, gift card slips will not be printed automatically when an authorization is successful. The default is to print them automatically.

Allow External Processing:

Check this if it is possible to process (use) gift cards with an external service. A button will be present on the swipe screen that will allow just the payment method to be displayed.

Test Mode:

A flag that will cause some extra behavior (NOTE: setting this flag will not affect transaction processing, only debug information being displayed on various pages).

Debug Logging:

A flag that will cause some communication data to be logged in the Error Log. This should only be used when instructed by a Khamu Support person.

CREDIT CARD MODULE

The credit card module has two interfaces: the management interface, discussed here, and the authorization interface, which is discussed in the Server Guide as it is used by the servers.

The management interface is broken down into four sections.

Sapphire does not store credit card id information. Only the last four digits are stored, and no cardholder information is stored.

Note: If the Internet is down and a credit card needs to be processed, the card information will need to be captured some other way. A “dial-up” type terminal or some kind of manual capture device such as an imprint machine can be used to capture card information.

Notes on Voiding transactions

Transactions initiated through the POS interface can only be voided through that interface. This is to make sure the order payments match the sales information. Transactions initiated through the management interface (i.e. offline sale, voice authorization) and not associated with an order/ticket can only be voided through the management interface (Adjust Payments). With any Void the card must be swiped or the card number entered. This means that a Void is a “card present” operation. This is so the wrong transaction is not accidentally voided.

REPORTS

CREDIT REPORT

Credit Report will show information about credit card activity for the specified period. It can list all transactions. The default view of this report is to group the transactions by server, and exclude **Void** transactions. The *Show Detail* checkbox will show each transaction as well as additional information about each transaction. The *Show Void* checkbox will cause the voided transactions to be shown. The *Subtotal* checkbox will subtotal each day.

DAILY ACTIVITY

Daily Activity will show credit card activity for a given date. The default view is to show summary information for each card type, excluding voids. If the *Show Detail* checkbox is checked, then detailed information about all the transactions is shown, as well as the summary information. The *Subtotal* checkbox will subtotal the activity by server.

If the day-end close has not yet been run, the **Fix** button is enabled, allowing the transaction information to be fixed. This is only to allow corrections to the Sapphire data in the case the credit card gateway processor’s information is different than Sapphire’s. It is assumed that the gateway processor’s information is the accurate information, or can be fixed through the processor’s interface.

To re-print an old credit card authorization slip click on the **Reprint** button.

The *Invoice* field will help tie Sapphire information to the credit card processor's system information.

MINI REPORTS

Mini Reports are reports that can be printed on a receipt printer, and essentially contains similar information that is found on other reports. The data shown is for any transactions that have not been archived with the day-end close process. The *Basic* report shows the employee by number (to match with an employee name, please go to the Employee Info screen), the card id, and the amount. The *Detailed* report will show the basic information plus the daily transaction id, the current status of the transaction, and the card type. The *Verbose* report will show even more detailed information.

Note: The Mini reports do not show voided transactions.

UNTIPPED TRANS REPORT

Untipped Trans Report will simply show all credit card transactions that currently have a zero amount for the tip.

BATCH HISTORY

Batch History Report will show the batch totals information for the given date range. The history is saved during the batch close process.

Note: If Auto Close is used the batch history is not captured.

MANAGEMENT

ADJUST PAYMENTS

Adjust Payments is where individual authorizations can be managed.

If a credit card swipe was "Saved For Later," authorization can be obtained for the transaction at this screen. This is required before the transaction can be batched. If a tip adjustment is needed the tip can be added after obtaining authorization. The "Saved For Later" information can be deleted if it is no longer necessary to obtain an authorization on that credit card. All credit card transactions must be settled or voided in order to close the day with the "Day-End Close" process.

Note: If the "Saved For Later" information is deleted, it is permanent.

Tips can be added to transactions by putting the tip amount into the appropriate field. If moving transactions to the batch for later submittal, check the *Batch* box. If the tip amount is meant to be zero, check the *Zero OK* box. After all the transactions desired to be put into batch are tip adjusted and the appropriate checkboxes checked, click on the **Move To Batch** button.

If the authorization is to be settled right away, instead of waiting for the next batch, click on the **Settle** button.

If the transaction is to be voided prior to settlement, click on the **Void** button. If the Void is done from a terminal with a receipt printer defined, a void slip will print out.

Note: Some of the features on this screen are available to each server to tip-adjust and move their transactions to the batch.

Note: Voice referrals are handled by voiding the transaction and running a separate Voice Authorize transaction after the authorization code has been obtaining from the processor.

To remove a transaction from the batch, click on the **Remove From Batch** button.

APPLY CREDIT

Apply Credit will allow the user to apply a credit to a credit card. Enter the amount of the transaction, and then either click in the “swipe” box or enter the credit card information manually. Once entered, click on the **Send** button to submit the request. The credit can be settled similar to regular credit authorizations. If the Credit is done from a terminal with a receipt printer defined, a credit slip will print out.

OFFLINE SALE

Offline Sale will allow the user to process a credit card transaction without having to have an open ticket. The transaction can be linked to an open ticket if desired. Enter the amount of the transaction, and then either click in the “swipe” box or enter the credit card information manually. Once entered, click on the **Send** button to submit the request. The authorization can be tip adjusted and settled similar to regular credit authorizations. If the Offline Sale is done from a terminal with a receipt printer defined, a credit transaction slip will print out.

VOICE AUTHORIZE

Voice Authorize will allow the user to process a credit card transaction where the authorization code was obtained in advance. This is usually because of some issue that caused the user to contact the processor (e.g. referral, fixing prior issue, etc.). The transaction can be linked to an open ticket if desired. Enter the amount of the transaction and the authorization code, and then either click in the “swipe” box or enter the credit card information manually. Once entered, click on the **Send** button to submit the request. The authorization can be tip adjusted and settled similar to regular credit authorizations. If the Voice Authorize is done from a terminal with a receipt printer defined, a credit transaction slip will print out.

Note: Depending on the credit card processor a Voice Authorization transaction may have be settled separately from the batch.

SETTLE AND CLOSE BATCH

Settle and Close Batch will allow the transaction settlement (tip adjustment) to be sent to the processor. After all transactions have been “settled” the batch can be closed. If the button is yellow there are “un-settled” transactions that need to be settled. If the button is green then the batch can be closed. Click on **Settle and Close Batch** to start the process. The batch totals will be returned and saved until the next close. If they are important to you, write them down.

Note: If the Close Batch feature does not exist at the processor (e.g. Shift4), performing the Close will change the status of any “settled” transactions to “Closed”.

VOID CREDIT TXN (HEARTLAND, MERCURY, NOVA)

Void Credit Txn will cause a “Credit” credit card transaction to be voided. Once the batch has been closed the Credit transaction can no longer be voided.

GET VOICE CENTER (SHIFT4 ONLY)

Get Voice Center will let the user obtain the credit card issuer’s voice call center phone number, as stored at the gateway processing system. This can be used to contact the call center. Enter the card number and click on **Submit**.

TEST COMMUNICATION (HEARTLAND, MERCURY, CYNERGY, NOVA)

Test Communication will simply send a test packet to the processor to see if communication is possible. Click on **Send Test** to send the test packet. Success or any errors will be displayed.

RESET ENCRYPTION PASSWORD

Reset Encryption Password will cause the encryption password to be reset to a new, automatically generated, value. This can only be done if no credit card information is currently encrypted. The *Day-End Close* process will automatically regenerate the encryption password so this manual feature should never really be needed.

Note: The encryption password is needed to encrypt *Save For Later* transactions. It is also used to encrypt credit card numbers briefly for Elavon and Mercury credit card processing for the settlement process and in case a void transaction is needed.

SETUP

Setup is where the Sapphire credit card interface is enabled. In order to use Sapphire for credit card processing, you will have to obtain an account through the processor of one of the supported gateway interfaces.

If you are a retail environment where tipping on the credit card transaction is not expected you can have your credit card processor set up your account to perform an auto-close of the credit card batch. In this case you will want to click on the **Disabled At Processor** button so that Sapphire acts accordingly. If the button reads “Enabled At Processor” that means that if the Day-End Close process runs the next day it will automatically change the status of credit card transactions to be Settled (Closed). If the Day-End Close process is run on the current day Sapphire will verify the batch has been manually settled before letting the Day-End Close process continue. If the button reads “Disabled At Processor” Sapphire will test to make sure the batch is closed before allowing the Day-End Close process to continue, no matter which day the credit card transactions ran.

Note: If there are tip adjustments made to transactions and the batch is auto-closed by the processor before the tip adjustment is sent to the processor the tips will **not** be part of the batch. It is strongly recommended that in a tipping environment that manual batch closes are used.

Note: There are certain fields that are specific to the selected gateway.

Configuration Fields:

Heartland Payment Systems Fields

Site ID, Device ID, User ID, Password

Shift4 Fields

Account Number, User Name, Password, Merchant ID

Mercury Fields

Merchant ID, Password

Cynergy Fields

User Name, Password

Elavon Fields

Bank Number, Terminal Number, Merchant ID

First Data Fields

Terminal ID, Merchant ID

Common Fields

Do not require CVV2:

If checked transactions can be submitted without a CVV2 value. *Note that this can cause an increased transaction cost.*

Merchant ID (for receipts):

Enter the Merchant ID that you want to print on credit card receipts.

Authentication Server URL:

The Internet or network address for credit card processing.

Authentication App Path:

An optional path if needed to the gateway application.

Authentication App Port:

The port on which the gateway is listening.

Txn Timeout (seconds):

The length of time to “timeout” a transaction. 90 seconds should be optimal and is the default if left empty.

Server CC Tip Chargeback:

Used to calculate a “chargeback” percentage on credit card tips that were processed through Sapphire. Shows up in the Server Report and Server Tip Report.

Don't Auto-print Credit Slips:

If checked, credit cards slips will not be printed automatically when an authorization is successful. The default is to print them automatically.

Credit Card Print Threshold (e.g. 25.00)

If a non-zero value is entered credit card transactions below that amount will not print a slip. For **Which slip to print** select *None* to not print either slip, or *Cust* or *Merch* to print the customer or merchant slip, respectively.

Enable Tip Calculator:

If checked, various percentage tip amounts will be printed on the credit card slip. The suggested tip amounts will be used from the regular Config Options settings (in Setup area).

No Tip On Slip:	Check this to not print a tip line on the slip. This will be for quick service type environments where credit card tips are not desired.
Allow External Processing:	Check this if it is possible to process credit cards in using an external service. A button will be present during the swipe screen that will allow just the payment method to be displayed.
Always Show “Save For Later” Button:	Check this to always show the “Save For Later” button on the POS credit card transaction page. Normally this button will be displayed upon an Internet communication failure. NOTE: This button will not be shown if the system does not have the right level of encryption.
Don’t Print Additional Tip Line:	When auto gratuities are in place prior to the credit card being processes, the gratuity will automatically print and an “Additional Tips” line will print. Check this flag to not have the additional tip line print.
Test Mode:	A flag that will cause some extra behavior (NOTE: setting this flag will not affect transaction processing, only debug information being displayed on various pages).
Debug Logging:	A flag that will cause some communication data to be logged in the Error Log. This should only be used when instructed by a Khamu Support person.

CLOSING THE BATCH

Note: Even though the transactions are settled and the batch closed through Sapphire, the processor may require additional steps to be taken for the transactions to be sent to the merchant bank. Alternatively, the batch at the processor may be automatically closed. Please obtain the correct process documentation from the credit card gateway company (e.g. Shift4).

NOTES ON SHIFT4 SETUP

The interface between Sapphire and Shift4 is the Shift4 Universal Transaction Gateway (UTG2). UTG will need to be installed on a Windows computer on your internal network. That computer will have to know how to get to the Internet, and will need a static ip address on the subnet. Most likely it already has a static ip address if it is also a terminal. To get to the Internet, make sure that a gateway and DNS entry is in the tcp/ip properties for the network card on the computer. You can enter the router address and pick up the DNS information from the router (most likely 192.168.1.1). **This workstation becomes a critical machine in order to process credit cards – if it fails or is turned off cards cannot be processed through Shift4.**

When installing UTG (you will have downloaded it from the Shift4 web site), make sure to set up an HttpApi interface. It will ask for a port number. Any number will do, but remember what the

port is because Sapphire will need to know what it is. The suggested port is port 8080, which is the default on Sapphire if no authentication app port is configured.

Shift4 should have sent configuration information (via pdf) prior to doing the install. It might be handy to copy this into a txt file and have that reachable by the computer where UTG is installed so one can cut-n-paste the lengthy input info, especially the passwords.

Go to the Sapphire Manage System / Credit Cards / Setup to set up Sapphire to use the UTG. Choose Shift4 as the gateway, enter the account number and merchant id that Shift4 gave you, enter “tcp://xxx.xxx.xxx.xxx” (without quotes, and use the ip address of the computer where UTG was installed) for the authentication server url, and the port number used when setting up UTG for the authentication app port.

Since you are using UTG, you do not need the user name or password.

Select any of the other options you want.

The default timeout value is 90 seconds, and you can enter 90 in that field if you want to.

If you want to test out the configuration before running credit cards, you can do the “Get Voice Center” feature which simply queries Shift4 to get a phone number for a given credit card. If that works, then you know you can communicate with Shift4.

Note: The UTG2 first installs as an application. It also installs a service to be available automatically if the UTG machine is rebooted. To verify if the service is running (or to stop the service if the GUI application is desired) go to Start / Control Panel / Administrative Tools / Services (the icon looks like gears) and find the Shift4 entry in the list.

NOTES ON HEARTLAND SETUP

Heartland Payment Systems is accessed directly by the Sapphire Server through the Internet. The configuration information will be supplied to you by Heartland. Use the server portion of the URL address for the Server URL setting, and the path and page for the Application Path setting. Always use port 443 (Secure Socket Layer) with Heartland.

HEARTLAND (INTERNET) REPORTS

Certain reports are available when the Heartland Payment Systems gateway is selected. The reports will query the Heartland gateway directly to obtain the information (as opposed to obtaining the information from data captured by Sapphire).

ACTIVITY

Activity will show information relating to gateway activity. This can include report requests, which can be filtered out using the *Exclude Reports* checkbox. Select the date and time range of the report. Any information with a link underline can be clicked on for further detail (for example, specific information on a transaction).

BATCH HISTORY

Batch History will show information about previous batches. Further detail can be obtained by clicking on the batch id.

OPEN AUTHORIZATIONS

Open Authorizations will show which authorization are still open. Click on the transaction id to obtain more information about the authorization.

NOTES ON MERCURY SETUP

Mercury Payment Systems is accessed directly by the Sapphire Server through the Internet. The configuration information (ID and Password) will be supplied to you by Mercury. Use the server portion of the URL address for the Server URL setting, and the path and page for the Application Path setting. Always use port 443 (Secure Socket Layer) with Mercury.

A secondary server can be set up in case the primary server is unavailable. Mercury will provide the address. Enter the full address in this location (e.g. server/path/app). Sapphire will extract the parts as necessary. If the primary server is unavailable the secondary is used for that transaction. On the next transaction the primary server is attempted to be used again.

If a batch is not closed within five days of the transaction, future transactions will get an error. Make sure to close the batch daily.

Note: Auto-close of the batch is not allowed with Mercury because if the transaction is not specifically in the batch then it will be treated as a voided transaction.
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NOTES ON CYNERGY SETUP

Cynergy is a gateway accessed directly by the Sapphire Server through the Internet. The configuration information will be supplied to you by Cynergy. Use the server portion of the URL address for the Server URL setting, and the path and page for the Application Path setting. Always use port 443 (Secure Socket Layer) with Cynergy.

NOTES ON FIRST DATA SETUP

First Data is contacted directly by the Sapphire Server through the Internet. The configuration information will be supplied to you by your First Data representative. Use the server portion of the URL address for the Server URL setting, and the path and page for the Application Path setting. Always use port 443 (Secure Socket Layer) with First Data.

Note that a site using First Data first needs to be Provisioned one time. It should not need to be provisioned again unless there are special circumstances.

Only the First Data North platform is supported.

NOTES ON ELAVON (NOVA) SETUP

Elavon is accessed directly by the Sapphire Server through the Internet. The configuration information will be supplied to you by Elavon. Use the server portion of the URL address for the Server URL setting, and the path and page for the Application Path setting. Always use port 443 (Secure Socket Layer) with Elavon.

Elavon only allows a manual batch close. Only a maximum of 999 transactions can be in a batch otherwise an error will occur and new transactions will return an error. The tip adjusting is done during the batch process and once the batch is closed the tips can no longer be adjusted.

TAX MODULE

Sapphire's **Tax Module** is used to manage tax rates. It is a sophisticated feature that will allow multiple tax rates and surcharges to be applied to tickets.

SALES TAX REPORT

Sales Tax Report shows the total sales tax for each month for the give time period. This is simply the sum of the sales tax on each ticiet within that month, broken out by tax added and tax included order items. If any tax exclusions were entered for an order, a button is displayed that, when clicked, will list the ticket, exclusion id, and amount of tax that was excluded.

To view the approximate tax calculation click on the **View Approx Tax Calc** button. This will take the actual taxes calculated for each ticket for the month and back out the sales numbers based on the tax rate (only single tax rate) and any discounting. Surcharges are not used in the tax calculation because any taxation is assumed to be part of the surcharge.

MANAGE TAX RATES

If Sapphire has been upgraded from an older version the old way of managing tax rates will be shown with the Sales Tax and Sales Tax 2 configuration fields.

Default Taxation	This setting is used during the menu item set up as the default taxation status of the menu item. Select <i>Added</i> , <i>None</i> , or <i>Included</i> depending on the most common taxation of menu items. Note: after conversion to the Advanced Taxation this configuration setting can still be used.
Sales Tax	The sales tax for this site.
Sales Tax 2	Optional field if there is a 2 nd tax rate. If this has a value then a new column shows up in the Edit Menu area and the appropriate tax rate can be chosen for the menu item. Only use this if there really are two tax rates for menu items.

To upgrade to the Advanced Tax Management click on the **Convert to Sapphire Advanced Tax Management** button. This will set up the advanced taxation based on the current tax rate specified.

Newer installations will already be using the advanced taxation. Advanced Taxation uses the concepts of "Tax Groups." A tax group can be set up to have multiple tax rates. Tax groups are then used to assign taxation rates to menu items.

Example: a site might have a 6% state sales tax as well as a 1% local tax on beer and wine. A tax rate can be set up for the sales tax and another tax rate for the local tax. A tax group can be set up that groups together the two tax rates. This tax group can be used for any beer or wine menu items. When tax is calculated Sapphire will know that two tax rates are used for beer and wine and the respective tax is calculated and stored and can be seen on reports separately.

Manage Tax Rates will show the current default taxation configuration setting as well as the old sales tax rates. Click on the **Update Config** button to update the configuration setting. *Current Tax Groups* will show which tax rates are in any configured tax groups. *Current Tax Rates* will show the sales tax name, start date, rate, and any flags (explained later). **Edit Taxes** will let the tax rates and groups be edited while **Tax Rate History** will show historical tax rate information.

EDITING TAXES – TAX GROUPS

Sapphire’s advanced taxes are tied to menu items via a Tax Group. To add a new tax group enter the group’s name in the *New Group* field and click on **Add Group**. To remove a rate from a group click on the **Remove Rate** button. To see which menu categories have items that use a specific group click on the **Check Usage** button. Groups cannot be removed unless no menu items are using that group.

Note: Since a Tax Group is a “glue” that links tax rates to menu items and there is no history information with tax groups it is advised not to delete a tax group unless it absolutely makes sense.

EDITING TAXES – TAX RATES

To add a new tax rate enter the rate’s name under *Tax Name*. Chose a start date and specify the rate. The start date can be in the future if the tax will start being collected at a future date. Set the correct flag for the rate and click on **Add New Rate**. Not all flags may be used and it is unlikely that all flags would be set for any given tax rate.

Tax Rate Flags and meanings:

- Auto-Grat Tax (A)** Checking this checkbox will allow sales tax to be calculated on auto gratuity amounts. Please check with your tax accountant or state taxing authority to see if this applies to this tax rate at your site.
- Can Exempt (E)** When checked this tax can be removed with a tax exemption. Certain taxes may not be able to be exempted so please check with the appropriate tax authority.
- Subtotal Only (S)** A subtotal-only tax will just apply the rate to the ticket’s subtotal instead of individual items on a ticket. This could be the case for a local heath tax or something.

Note: Always check with a tax accountant or taxing authority if there is any question on what tax rates should be used or what items should be taxed at any given tax rate.

To remove a tax rate first it will need to be removed from any tax groups using the rate and then click on the **End** button on the line that describes the rate. A rate can be ended at a future date if you know the rate is changing. For example, a sales tax may change on July 1 of a year so you will need to end the current rate on that day and add a new rate for that day.

Tax rates can also be updated with out being ended and re-added. Pick the rate, set the other information and click on the **Update Rate** button. In the above example it would be easier to update the rate than end it and add a new one.

ONLINE ORDERING MODULE

Sapphire's ***Online Ordering Module*** is used with a third-party online ordering system. To activate this module please contact Khamu Solutions, LLC. The online order module uses a "middleware" piece that acts as a translator between the online ordering system and Sapphire. This middleware piece must be installed by a Khamu Support Representative.

Online ordering is viewed as just another way to input tickets into Sapphire. The two types of tickets that can be created are Delivery or Pick-up tickets. The customer database is used and the customer's phone number is expected as the identifier for that customer. A new terminal, the P.O.D. (Pick-up, Online, Delivery) terminal is available to view and manage online orders. Pick-up and Delivery tickets can also be created and managed through the P.O.D. terminal. The P.O.D. terminal is activated by enabling the delivery feature in the *Customer Module*.

Sapphire does not accept credit card authorizations as part of the online order. The online ordering site is responsible for accepting payment and notifying Sapphire of the payment method used in the transaction. The online ordering site is also responsible for any discounting, coupons, promotion handling, etc.

Note: If an online order needs to be changed after it is entered into Sapphire the user will need to ring in a new ticket using normal order entering and cancel the online ticket. Online tickets cannot be modified in Sapphire. The transaction will also need to be cancelled through the online order systems management interface.

It is recommended to set up new, user-defined payment methods for payment tracking. This will make it easier to determine where the money is coming from for balancing at the end of the day. Additionally, you may want to set up separate menu categories in Sapphire for online orders. This will help break out the online orders in some reports and might make it easier to handle price or promotion differences between online orders and customer-present orders.

Note: The Sapphire Online Ordering should be viewed as just a different way for orders to be entered into Sapphire. Since there is no employee entering the tickets there is a configuration setting where a server can be designated as owning the online tickets that are entered. This employee does not need to be clocked it. There is another general configuration setting where the server closing the ticket can own the ticket and that might be useful to "transfer" the ticket at the time it is closed.

When setting up Online Ordering you can specify the password for access credentials by the online system. The serial number for your site is also part of the access credentials.

REPORTS

When viewing the reports pick the single day in Basic View or the date range in Advanced View. The date range will be the starting and ending dates for the report; the time boundary for the report is the order day boundary.

Online tickets will remain in the system as online tickets, just like delivery or pick-up tickets. However, some reports will only have customer-related information for a short time based on a configuration setting.

ONLINE SALES

Online Sales will show sales information specifically for online orders. The first page of the report will show the breakdown of sales by menu category and the payment methods used in paying for online orders.

To “drill down” to look at what was sold in any particular category click on the menu category name field in the Sales portion of the report. In the categorical sales report the data can be sorted based on one of the columns with its name underlined.

CANCELLED SALES

Cancelled Sales will show online sales that have been cancelled. This data is temporary based on the online configuration as to how long to keep online information. This report could be useful if the order was cancelled in Sapphire for some reason and the customer needs to be refunded through the online ordering system.

CUSTOMER SALES INFO

Customer Sales Info will show recent online sales. This data is temporary based on the online configuration as to how long to keep online information. This report will help with reconciling specific customer sales with the online ordering system.

MANAGEMENT

VIEW REQUEST HISTORY

View Request History will show recent online ordering requests. This feature is intended as a way to see the “raw” XML and other information as a way to diagnose issues that might arise between the online ordering system and Sapphire. It is not useful for any day-to-day management or reporting.

EXPORT MENU CATEGORIES

Export Menu Categories allows the menu category information in Sapphire to be exported in XML format. This could be a way to get menu information into the online ordering system. It is not useful for any day-to-day management or reporting. You can click (or <cntl>-click for multiple choices) on the desired menu category and payment methods you want to export. Download the resulting file and follow your online ordering system’s instructions to get this information inputted into that system.

SHOW SYSTEM ID MAPPINGS

Show System ID Mappings will show the internal Sapphire identifiers for the menu and payment information so they can be entered into the online ordering system. This is an alternative way to get menu information into the online ordering system XML importing is not available. It is not useful for any day-to-day management or reporting. Choose which menu items, modifiers, trimmings, pizzas, prices, or payment methods for which you would like to see the identifiers.

SETUP

Setup is where the Sapphire online ordering system is configured. The individual configuration settings are shown below.

Field Meanings:

Activation Code:	A valid activation code will need to be entered to use Sapphire's online ordering system.
Online Order Server	The server who will "own" the online tickets by default.
Online Password	The password the online system will need to submit orders to Sapphire.
Terminal Refresh Rate	How often the P.O.D. terminal will refresh.
Auto-place Tickets	If checked the online tickets will automatically be submitted to Sapphire's order fulfillment.
Online Surcharge (fees)	A surcharge that has been set up in Sapphire as a way to map online surcharges into Sapphire for reporting.
Online Default Fulfillment	If a menu item is set to go to "Any" fulfillment printer, this is the default printer. It is recommended that all online order menu items be assigned to a specific fulfillment printer to avoid potential confusion.
Save Online Info	The number of days to save temporary online information.

Note: Even though a server can be set up to "own" an online ticket, a good practice would be to have the ticket closer own the ticket. This can be accomplished through a setting in the **System Configuration**, *Ticket closer owns ticket*.

HISTORICAL ARCHIVE

The ***Historical Archive*** is a feature that lets any prior year get archived. The archival process will extract all the necessary data from the main database and puts it into an archive database. The oldest year not yet archived will need to be archived first.

There are several benefits to archiving data. First, the main database size is reduced allowing the performance of reports and other database access to increase. Second, there are a set of reports that will compare one year against another giving the manager more information about various aspects of the business. A third reason is that once menu items are no longer referenced by any sales then hidden menu items can be permanently deleted reducing clutter if there are a lot of hidden menu items. Finally, backups will be smaller and quicker to download.

REPORTS

The reports will create a temporary table to hold calculated data. This will cause the initial access of any given report to be slow but later access to be much faster.

YEARLY COMPARISON

Yearly Comparison will show monthly sales information for each archive year. Select the years to compare. The data can be copied into a spreadsheet to create a graphical view of the comparison.

YEARLY STATISTICS

Yearly Statistics will show select sales and employee data for given years. Select the desired archive years to compare.

MANAGEMENT

ARCHIVE DATA

This will perform the archival of the specified year. Only the oldest year will be able to be chosen. The archival process time will vary depending on the size of the data files.

Note: There should always be a backup of the current data before the archival process starts in case there is a problem. Additionally if a new feature is available later the archive can be re-performed to include that feature.

Note: A backup of any given archive year should always be made and kept in a secure location. Archives are not part of the daily backup process and a disk failure could cause permanent data loss.

CLEAN UNUSED DATA ITEMS

This feature will find any data items that have been “left” behind by the archival process. Occasionally, due to interrupted processing or other issues some low level data items may not be

cleaned up at the time they are no longer needed. For example, a trimming might have been left behind when the order item is deleted. Once cleanup is done the database can be re-optimized. Cleanup will run for a certain amount of time and clean up what it can so it may need to be run multiple times.

CLEAN UNUSED MENU ITEMS

This feature will locate any hidden menu items that are not tied to any sales data. There might be quite a number of such menu items because the archival process may have moved the sales data from the current database to an archive database. Depending on the size of the menu it might take a while to locate all the unused menu items so it might be faster if ***Clean Unused Data Items*** is run first. Individual menu items can be cleaned up or complete categories if the **Remove ALL** button for the category is clicked. Click the *Confirm* checkbox before clicking the button to make sure nothing is accidentally removed. If a lot of items were cleaned up the menu tables should be optimized.

MESSAGING MODULE

The **Messaging Module** is where a manager (not a shift supervisor) can “send” a message to any employee or to Khamu Support (assuming your site is on the Internet).

Click on the **Compose Message** button to compose a new message.

For an *Employee* type of message select the employees who are to receive this message and compose the message. Click the **Send** button when read to send the message. There is no spelling or grammar checking.

For a *Support* message simply type in the subject and message and click on the **Send** button. The message will be sent right away. Sapphire will check for reply messages whenever it notifies the Khamu.com web site for the remote assist feature.

Received support messages can be viewed by clicking on the **Received Support Messages** button. Once read they cannot be deleted for a day. This gives a chance for other managers to see the message if the received message was read by accident. If there are unread received support messages the *Messaging* and *Received Support Messages* buttons will be colored red.

Old (read) employee messages can be viewed by clicking on the **Old Messages** button. Click on the **Delete** button to delete any message before the system automatically deletes it.

A message can be sent to anyone who is not terminated (either all, individually, or a list that is <ctrl>-Clicked to be chosen). Anyone with un-read messages will either see them when they clock in (prior to the timeclock entry being made), clock out (after the timeclock entry is made, but before the screen that shows their mini timeclock report for the last shift), or via the Checkout feature (a button will show up after they authenticate if there are any unread messages). Servers will also get a small line on their screen saying they have unread messages (but they need to go to the Checkout to read them).

The manager can also view old (read) messages, and can delete any message (read or unread) they want. There is an aging mechanism that cleans up whenever the Messaging module is accessed. Select the appropriate number of days for the *Keep Read Messages* setting. Employees cannot re-read a message after it has been read once.

DOCS MODULE

The ***Docs Module*** is where the user can access any available Sapphire documentation. Each document can be retrieved with a click of a button. Simply click on the appropriate button.

The documents are in Adobe PDF format, and it is assumed Adobe Reader ® is installed on the computer being used to view the documentation. If Adobe Reader is not installed, the user is asked to specify the location to save the document.

TRAINING MODE

The ***Training Mode*** module is where the user can set up a training mode database and configure Sapphire to allow terminals to enter training mode. There are two flags that help give the current status of the training mode. The first, **Training Mode**, which can be set to *Enabled* or *Disabled* depending on whether the database is set up and if the training mode has been enabled. The second flag, **Training Database**, when set to *Valid* shows whether there is a valid training database that has been set up on the server.

Click on **Enable Training Mode** to enable the training mode. If there is no training database set up, one will be set up. This process may take a short time as all the production database needs to be copied. If a training database already exists, only a flag is set. Click on **Delete Training Data** to delete the training database, and click on **Refresh Training Data** to make the data in the training database current. The refresh will take a short time to copy all the production data.

Note: Just because there is a valid training database, there is no guarantee the data is current. To ensure current data, click on **Refresh Training Data** to copy the current data to the training database.

Once the training mode has been enabled, any terminal can enter training mode by clicking on the **Enter Training Mode** button. The screen changes color and some other screens will declare that the user is in training mode. Any fulfillment tickets that print will show that the order came from a terminal in training mode. To exit training mode, click on the **Exit Training Mode** button on the front page.

It only makes sense to disable training mode when you are not in training mode. If you are in training mode and disable it, the setting is changed in the training database and effectively ignored.

Note: Be very careful to know if you are in training mode or not as you don't want training data to show up in regular sales, and you don't want regular sales data to be lost in the training database. Two separate databases are used to separate training mode operations from regular, production operations.

TICKET AUDIT

Sapphire Ticket Audit is a feature that can be used to track actions done to tickets. This could be useful to help determine if fraudulent activities are occurring.

To enable Ticket Audit click on the **Activate Sapphire Ticket Audit** button. If the Ticket Audit feature is active it can be deactivated by clicking on **Turn Off Sapphire Ticket Audit**. Ticket Audit information can be saved for a specified amount of time – between 30 and 120 days.

AUDIT REPORT

The **Audit Report** will show the audit information. It can be looked at for tickets, employees, or non-tickets. When looking at the Tickets view one can see all actions done to a ticket including adding items, splitting, merging, discounting, closing, etc. Since employees are accountable for tickets you can click on an employee to see what that employee has done to their tickets.

When looking at the Employee view a given employee can be selected. Then you can click on any given ticket for that employee to help see all that was done with that ticket.

The Non-Tickets view will let you see audit information that is not attributed to a ticket, such as till start amounts or paid out transactions.

AUDIT WARNINGS

The **Audit Warnings** will go through the audit information and look for certain patterns that might be an indication of fraud. Choose the time period you would like to look back in time to check for warnings.

Note: Many of these warnings can happen in the normal course of business and are more of an indication of potential fraud. A stronger case can be made if there is a consistent pattern of behavior.

Warning descriptions

Items that were on multiple tickets

This is to test if a server is moving an item to different tickets in order to take a portion of a cash payment from one ticket by having the same item paid for on another ticket.

Manual Gratuity greater than house rate

This test is to see if the server is actually applying a slightly higher gratuity than the automatic house rate in order to get a slightly larger tip.

Ticket payment greater than ticket total

This is a simple test to see any tickets where there is a lot of cash back or tips back. It is possible the server might be a side effect of the items on multiple tickets fraud or the manual gratuity fraud.

Cash Drawer Checkout till start does not match server's declared till start

Simple test to make sure the server isn't altering their checkout till start compared to the till start at the beginning of the shift.

Tickets that had payments change after ticket closed

This could be a symptom of fraud because payments should rarely change after a ticket is closed.

There will be links available from the Audit Warnings for tickets and employees that are associated with the warning. Clicking on these links will place the user into the **Audit Report** area as if they got to that point by looking at the **Audit Report** feature.

ACTIVITY LOGGING

Sapphire Activity Logging is a feature that can be used to determine what activity occurred in Sapphire. Different levels of logging can be set for the management side and for the POS side.

Activity logging is always turned on for credit card activity. This is due to PCI-DSS compliancy issues. The activity log information is recorded and must be retained for at least one year. Due to the large quantity of information it is necessary to offload this information periodically to help maintain the performance of Sapphire. Log entries can be removed once they are downloaded.

No log information is gathered if the activity log is not enabled and credit cards are not used through Sapphire.

If credit cards are processed through Sapphire, it is up to the site to maintain the activity log in a secure manner where they can be viewed if necessary. It is suggested to download and store the logs on a separate flash drive that can be removed from the system in order to protect the log information from malicious users.

CONFIGURE

The **Configure** page is where the level of logging can be set. For the management side there are many different levels that can be set, each one giving a greater level of detail. The POS side has two levels of detail.

Management Settings		POS Settings	
Level	Meaning	Level	Meaning
0	Off	Off	Off
1	Management Entry	Basic	Ticket Management
2	Module Entry	Detailed	Ticket Changes
3	Order Canceling (or any order changes)		
4	Employee Changes		
5	Customer Module Changes		
6	Non-Menu Changes		
7	Menu Changes		
8	Inventory Changes		
9	Report Viewing		
10	Super Verbose		

To enable Activity logging simple chose the desired levels and click on the **Update** button.

VIEW

This feature allows you to **View** the activity log entries. You can set how much data to view in the “Data” field as values in that field might get very long, depending on what is being logged.

DOWNLOAD

All the current log entries will **Download** in a text file. Make sure the file is saved in a secure location. The download should be done periodically but will be required if not done at least

every five days. The *Day-End Close* will not run if it has been more than 5 days since the last download and **Clean Log**.

CLEAN LOG

Clean Log will delete any log entries that have been downloaded. This is necessary to keep the log small enough so performance isn't affected.

SETUP MODULE

BACKUPS

The **Backups** page is where backups configured and restores can be managed. When setting up the backups, the name of the database must be given. For most sites this is "main". The backup directory must also be specified. Generally "/tmp" is the best value. Then, the backup schedule can be set up. Simply check the *Enabled* box in the daily section and choose the time.

Since Sapphire must be taken offline for this complete backup, the best time for the backup is when the system is not in use, such as very early in the morning. Sapphire could be offline up to several minutes (depending on the amount of data to be backed up), and no activity can take place while the backup is happening. Generally 4am is a good time.

If, for some reason, an immediate backup is needed, simply click on the **Backup Now** button. This operation will take Sapphire offline, so be very certain no activity is currently taking place, otherwise it could be lost.

The backups found in the defined directory are listed. To restore a backup, contact Sapphire support. The backups are labeled with a time value in their name in the format YYYYMMDDHHmm where YYYY is the year, MM is the month, DD is the day, HH is the hour (in 24 hour format), and mm is the minute of the backup.

<p>Warning: If a restore is done, any activity that took place since the last backup will be irretrievably lost. BE VERY CERTAIN BEFORE PERFORMING A RESTORE!</p>
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Generally, there is no reason to keep many backups since it is usually more difficult to restore and recreate data than it is to fix incorrect data. In case of a total system failure (e.g. a hard drive failure), the most recent backup is the one to use. A good reason to keep later backups is if a Khamu representative needs older data in the unlikely case of a bug. Set a value in the *Retain* field for the number of backups to retain.

It is recommended to make sure a copy of the backup is on a separate machine than where Sapphire is running. This will help in the case where the machine or hard drive crashes and is unrecoverable. Use the **Download** button to move any of the backups to a different machine. Simply click the button and then specify where to save the downloaded file.

Note: On Windows machines the automated back is done with the Task Scheduler. If the scheduled time is missed it will not be tried again until the next day. In this case a “Backup Now” can be performed, or the data can be backed up manually by going to the data folder (generally in c:\Sapphire\mysql\data\main) and simply copy all the files into a different location. You can copy the files to a .zip file first to facilitate the transfer. Contact Sapphire support if you have any questions.

CONFIG OPTIONS

Please turn to the section discussing *System Configuration* for information on setting and changing configuration options.

DEFINE SEATING

Define Seating is used for defining the seating layout of the restaurant or stadium. The seating definitions are used to identify where an order is being delivered, so it is important to fill out the seating definitions accurately.

Spectra Version

For Sapphire Spectra, table seating is used. If configured for *Grid* seating, each section shows a 10 x 10 grid of squares. Each square can represent a table to give a pseudo-graphical layout of a section, if desired. To add a new section click on the **Add New Section** button and enter the section name. Click **Update Section** to save the section name, or **Delete Section** to remove the section.

To define a table, simply click on a square. If the square is blank a new seating definition is needed, so enter the name of the table (shorter is better) and the number of seats and click on **Add Seat**. If the square already has information in it you will have the opportunity to change the seating information and then click on **Change Seat** when you are done. If you want to remove the seating definition click on **Delete Seat**. Tables can be assigned a color.

When choosing a table in the POS section only the squares with a defined seat show up, giving the pseudo-graphical layout effect.

There are three types of tables that can be defined in with “Grid” seating. Regular tables are just tables. You can also define them to have stools, if each stool has potential of having a different ticket. An example is in a bar where a table might be shared but tickets are opened for different people at that table. Up to four stools per table are allowed. Another type of table is a “Bar”. There can only be one table of type “Bar” and it can have up to twenty (20) stools where separate tickets can be opened for each stool.

To exit the table seating definitions click on the **Done** button.

If configured for *List* seating, the table names are in a list that is available for choice at the time an order is started. The list is arranged alphabetical. To add a new table click on the **Add New Table** button.

Stadia Version

If arena seating is used, the categories are **Section Name**, **Box/Row List**, and **Seat List**.

Hint: When entering table or row lists, ranges can be used to save time. For example, A-J will expand to be individual entries of A, B, C, ..., J. Numerical ranges such as 1-10 can be used, also. Non-single character ranges cannot be used, but can be added as a comma delimited list. For example, A-J, AA, AB, AC, AD is a valid list.

The Seat lists do not expand, but should be entered as a range.

If a range is used, the same section will be duplicated for each item in the range.

To add a new section/row/seat, enter in the information in the appropriate box and click **Add New**. To update current information already in the system, simply make changes and then click **Update** to record changes. If you need to delete an entire section/row/seat, click **Delete**.

*Note: **Delete** will permanently delete the information and you will not be able to retrieve it, so make sure you no longer need the section/row/seat. If you do erroneously delete a record, you can re-add the information.*

LICENSING

Licensing is where the Sapphire license is applied to limit the maximum number of tables (for Spectra) or seats (for Stadia) that can be configured. For the Stadia version, the license will also configure the number of fulfillment terminals that can be defined. Simply copy in the serial number and license validation key that was obtained from Khamu Solutions and click the **Apply License** key. If the license is valid, the license information is displayed.

SET UP PRINTERS AND TERMINALS

Sapphire terminals can be set up to use dynamic IP addresses (as opposed to static addresses). Printers can be “attached” to terminals so their definitions can be changed automatically if the dynamic IP address changes. To make changes to printer definitions the printer will need to be detached, the changes made, and then re-attached.

Sapphire now uses a MAC address to identify a terminal. When first accessing Sapphire a new definition may need to be set up or an existing terminal definition may be used. Another choice is to be an “Unassigned” terminal. This may be a computer that is only used occasionally, such as accessing from a location away from the site. An “Unassigned” terminal cannot enter the POS system but can enter the Manage System. A Management Terminal can enter the POS system but cannot have an attached printer so receipt printing will not work.

If Sapphire cannot match a terminal entry to the current terminal the user will be prompted with an authentication screen and will need to enter a manager’s last name and password. If there is a manager with no last name then the first name will be checked. POS, Handheld, and Management terminals will need to be identified in this manner. Once identified the MAC

Address is recorded and the terminal should never have to be identified again unless the networking structure changes somehow.

Set Up Printers and Terminals is used to set up printers for receipts, reports, and runners (fulfillment areas), as well as setting up fulfillment terminals. Since the terminals use the printer information, it is necessary to set up your printers first.

Printers/Pole Displays

The printers being defined here are receipt or kitchen printers. It is important to note that these printers are not the traditional wide printers such as laser or ink jet printers. When a printer is set up, it can be used for more than terminal or use. The pole displays would be used for showing the order total and any change to be given to the customer.

Field Meanings:

- Type:** *Local* is when CUPS is used and the configuration string is typed in full; *Std* is for non-CUPS and the configuration string is typed in full. *Unix* will place a “lpd://” in front of the given IP address, and use the printer name as the print queue; *Win* is similar to *Unix* except it uses “smb://” and *Socket* uses “socket://” and port 9100. Choose *Pole* if a pole display is being defined.
- Display Name:** How the printer will be referenced in other areas, usually in a drop-down box in the terminal definitions.
- Description:** Simply a description so the user will know what printer it is.
- Attached To:** Used to signify the printer is attached to the specified terminal (fulfillment or POS) and the IP address is obtained from the terminal. This is useful when using a dynamic IP address for a terminal with attached printers, poles, or cash drawers.
- Printer/Pole:** A pre-defined printer or pole display definition of supported printers or pole displays.
- Access:** This read-only field shows how Sapphire will send information to the printer. Values would be like ttyS0 for serial ports, or ip:192.168.0.201 for client terminal printing. The prefix of “ip:” is a signal to use CUPS. The prefix of “tty” or “lp” will assume a Linux server based serial or usb printer, respectively, while “com”, “lpt” would be used on a stand-alone Windows terminal. It should only be changed by qualified users and/or with help from Khamu Support.
- Config:** This important field defines how Sapphire will send information to the printer. Values would be like ttyS0 for serial ports, or ip:192.168.0.201 for client terminal printing. The prefix of “ip:” is a signal to use CUPS. The prefix of “tty” or “lp” will assume a Linux server based serial or usb printer, respectively, while “com”, “lpt” would be used on a stand-alone Windows terminal. If CUPS is being used, the value would be identical to the CUPS definition since it is used to update the CUPS configuration. It should only be changed by qualified users and/or with help from Khamu Support.
- Options:** **Color** will have the printer attempt to send a color printing code for any modifiers and customization instructions. The menu item will remain in black. Color support is printer dependant, and may not always be available. **Bell** is checked if you want to attach a bell to ring when a ticket is printed.

To add a new printer or pole display, enter in the information in the appropriate boxes and click **Add New**. If entering a pole display, choose the display type after a new entry is added as the default choices are for printers. To update current information already in the system, simply make changes and then click **Update** to record changes. The **Delete** button will actually delete the printer information and it would need to be re-entered to be set up again, if necessary. The **Test** button will send test output to the printer or pole display the way the system uses the device as a mechanism to verify the system can print to that printer. The **Enable** button is meaningful only when CUPS is being used and the system determined the printer had been disabled.

The Printer failover feature uses two configuration settings: *Disable Printer Status Checking*, which, when checked will cause the system to not check for stuck printer jobs, and *Printer Status Check Threshold* which is the time, in seconds, to wait to determine if a job is stuck. The status of the printer queues are only checked when a job is sent to a fulfillment printer.

Note: The Printer fail-over feature only works with CUPS-defined printers. Each time an order is sent to a fulfillment printer the print queues are checked for “stuck” jobs. If any stuck jobs are found the user will be asked if they want those jobs moved to another printer’s queue. A list of printers will be displayed as well as a “do nothing” alternative.

Terminals

Once the printers are set up, the fulfillment area terminals can be set up. It is possible that a fulfillment area doesn’t use an actual terminal screen, and only uses a printer. That is set up here, also.

Field Meanings:

- Type:** The type of terminal being defined. *Fulfillment* terminals are destinations for order fulfillment; A *Seating* terminal is used to show the current seating status of tables (see the section on Seating Terminal for more information). A *Management* terminal is useful to specify a friendly IP address to avoid the authentication check. A *Delivery* terminal needs to be set up in order to use the delivery features. A *POS* terminal needs to be set up to relate a printer to a terminal. *Handheld* type terminals are no longer supported.
- Display Name:** The name that will be displayed when selecting a terminal at **Terminal Sign-in** on the front page or for identifying a POS terminal. It is also used when setting up menu items to help define what fulfillment areas are used to satisfy what menu items on the order.
- Description:** An optional description to help the user know more about what terminal is being defined.
- Printer Only:** This setting is used if only a printer exists for the fulfillment area (i.e. no video terminal). If checked then the order will automatically print out on that printer.
- IP Address:** The IP Address of the terminal. This setting is used to maintain the list of “friendly” terminals so authentication is not needed. If any entry changes the web server may have to be restarted.

- MAC Address:** This field is informational and shows the MAC address of the terminal using the given terminal definition. Useful for debugging.
- Printer:** This lists any printers that have been set up. Select the defined printer for the fulfillment area or POS terminal being set up. The other terminal types don't need a printer defined.
- Cash Drawer:** Set to a printer definition if a cash drawer is connected directly to a terminal that supports such a configuration (e.g. a Posiflex terminal). A print queue needs to be set up on that terminal for Sapphire to communicate the Drawer Open command. Note: for terminals with multiple tills (cash drawers) the 2nd till is always through the receipt printer connection).
- Duplicate:** For fulfillment printers only. Select a printer name if you would like a duplicate fulfillment ticket to print out at the same time as a regular fulfillment ticket.
- Default Fulfillment:** The default fulfillment terminal for the *Dynamic Printer Routing* feature, where a menu item with a terminal of "Any" will look to the default fulfillment setting. Choose *None* if by default no fulfillment printing is required at this terminal (e.g. a counter terminal where the person ringing in the order can verbally communicate the order, while a distant terminal will want to print the fulfillment ticket).
- Menu View:** Set the menu view for the given POS terminal. Menu Views are set up in the POS Module management area.
- Config:** *For fulfillment terminals:* Choose any appropriate setting. **Footer** will have the last four digits of the Order Id print in a big size as well as the time the ticket was printed. **One/Line** means to print the modifiers and custom items with one per line. If checked, then the category name and modifier or trimming will be printed with one per line. If unchecked, then only one category name will be printed with all modifiers or trimmings in that category on the same line. **Not Wide** will cause the fulfillment ticket to be printed using taller characters that are not any wider than the normal characters.
For POS terminals: Choose any appropriate setting. **Till** is used to identify if the terminal has a cash drawer associated with it. One or two cash drawers can be supported per receipt printer. If the Cash Drawer field is used then the till is opened through that connection; if not then the Drawer Open command is sent to the receipt printer. This setting is used in conjunction with the Cash Drawer Ownership feature. **Bar** is used to identify if the terminal is a bar terminal. This will cause specific behavior such as allowing the order to be placed but not printed on a fulfillment terminal, or when a cash order is placed the next screen shown is the receipt so the order can be closed easily. **CshSvc** will allow a cash service terminal to be started from the orders page on this terminal. Choose the correct **Pole** display definition if the POS terminal has a pole display.
- Stores Inventory:** Check this if inventory is stored at this fulfillment area. This is really intended for stadiums that might have inventory spread across fulfillment areas. This is used in conjunction with the inventory module.

To add a new terminal, enter the information in the appropriate boxes and click **Add New**. To update current information already in the system, simply make changes and then click **Update**

to record changes. The **Delete** button will actually delete the terminal definition and it would need to be re-entered to be set up again, if necessary.

RESET TERMINAL

Reset Terminal is used to reset information about which receipt printer is the default for the terminal. The default printer is chosen once by the user selecting which POS Terminal (see section on **Set Up Printers and Terminals**) is defined for a station. Clicking on **Reset Terminal** will cause the POS Terminal to need to be reselected. A list of POS terminals will be shown so the user can select the right terminal

Note: If receipt printing suddenly stops working, there is a good chance that either the cookie handling the terminal / printer association was corrupted, or someone reset the terminal by accident and printing is happening at another printer. Try to reset the terminal and select the correct terminal definition as a first step in debugging this issue.

SOFTWARE UPDATE

Software Update is used to apply updates onto the Sapphire system. There are two different mechanisms to apply an update – integrated or manual.

INTEGRATED

If you have Remote Assist enabled (see Config Options) and a current support contract Sapphire will automatically check if updates are available. If an update is found a notification message will be presented on the Manage System main menu page. On the Software Updates page the **Check For Updates** button will query the Khamu.com web site for any new updates. If updates are available the **View Updates** will let you see what updates are available and to download and apply the updates. The **Update History** button will show what updates have been applied. Use **Configure Updates** to configure the time to check for updates or to automatically check for fixes (and to set Remote Assist, if necessary). The **One-Touch Fixes** button will check for fixes and automatically apply them if any are found, with just the single click of the button.

Note: Updates are checked for once a day automatically. Clicking the **Send Remote Assist** button on the front page will also check for updates.

There are two different types of updates: *software updates* and *system updates*. Software updates can be fixes to the current version, an update to a new revision (minor improvements), or an upgrade to a new version (major feature additions). System updates are patches to the operating system.

Note: System updates might be very slow due to the way the operating system applies patches.

MANUAL

You should have received a file or set of files from Khamu, and they should be reachable by the machine used to manage the system. Click on the **Browse** button to search for the file, and then once the file is found and the path is correct, click on the **Update** button. If the file uploads successfully, on the next screen click the **Process Update** button. The updates should be installed automatically. If any secondary operations are needed, such as running a process to update the database, you will have received instructions for that with the patch or update.

If remote assistance is enabled, Sapphire will check if an update exists on the Khamu.com web site during the remote assist call. If one exists a message will be shown on the Main management page.

SET CLOCK

Set Clock allows the user to set the time on the Sapphire server. Pick the correct date and/or time and click on the **Update Time** button. Be sure to use 24-hour time values. If the time fails to update a configuration change may be needed on the server to allow the update. Contact Sapphire support if this is the case.

Note: If any employees are currently clocked in and the time is changed it is important to verify the timeclock entries because they may have clocked in under the incorrect time.

RESTART (SUPPORT FEATURE)

Restart feature allows various services used by Sapphire on the central server to be restarted. This is only available when there is a central server and only if certain utilities are available.

Very Important Note: THIS FEATURE SHOULD ONLY BE USED BY A QUALIFIED SUPPORT PERSON. Use of this feature will cause interruption of Sapphire.

SET COLOR SCHEME

The color scheme of Sapphire can be changed through **Set Color Scheme**. This will change the color of the pages and buttons. Depending on your browser the color information may be cached and might take a few page refreshes to take effect. Use the “Custom Color” scheme to pick a custom header and detail row color.

SET CUSTOMER LOGO

A logo can be added to the *Front Page* through **Set Customer Logo**. The logo will be sized to fit on that page so make sure the logo is one that looks good in the size provided.

E-MAIL REPORTS

You can configure Sapphire to send out periodic e-mail reports to an e-mail address of your choice. The configuration is done through the Khamu.com customer login. Use registered e-mails and pick the desired report and time to run. Reports will be sent every day. Sapphire will check the list periodically and will send only one report at a time so if multiple reports are set up for the same time there may be some delay. Clicking on **E-Mail Reports** will show a report of which reports were sent over the last 24-hour period.

Note: To purchase an E-Mail Reports subscription contact Khamu Solutions.

ERROR LOGS

Sapphire records certain errors in an error log. Error logs are kept for five days and are simply a support tool. To download an error log, click on the **Error Logs** button and then click on the desired error log. To upload an error log to Khamu Support click on the **Upload To Support** button next to the desired error log. The error logs only need to be accessed if the Khamu Support representative requires it.

IV. FULFILLMENT ROUTING

Sapphire has the ability to re-route fulfillment printing. It can be done on an “as needed” basis or can be set up to automatically re-route at a given time of day. To enter the Fulfillment Routing click on the **Fulfillment Routing** button on the front page. You will be prompted for a PIN. Managers will be allowed to make changes; non-managers can only view the settings. If no button is pressed for a certain amount of time Sapphire will return to the front page.

To re-route a fulfillment terminal select the original fulfillment terminal in the *Fulfillment* section. Select the new destination in the *Destination* section. If the routing change is for only a given time period set up the *Start* and *End* times. Select the appropriate Status and click on **Add New**.

The status choices are:

- | | |
|----------------------|---|
| Use Time | Use the time start and end values for when the override will occur. |
| Always On | The routing will be used regardless of the time. This is good for when a fulfillment printer is not working. |
| Always Off | The routing will never be used. This is good for when a routing change is useful on a periodic basis and the setting may be used again soon. |
| Temporary Off | The routing is temporarily Off but the Video or Bump terminal can turn it back on. This is useful for when a terminal gets a large order and needs to be taken out of the list of available terminals so nothing gets sent to it that could get held up by the large order. This is useful if the <i>Video Load Balancing</i> feature is used |

Sapphire also has a feature when just video terminals are used. The Video Load Balancing feature will have Sapphire look at the number of tickets on a given Video fulfillment terminal (or “Bump” terminal) and send the order to the terminal with the shortest list. For this feature to work best the menu items should all be sent to the “Any” terminal. When Video Load Balancing is Enabled then the fulfillment list is just the list of available terminals for fulfillment and re-routing is not an option and the loading balancing is determined when the ticket is placed.

Video Load Balancing is enabled in Manage System / Setup / Setup Printers & Terminals.

V. INVENTORY MANAGEMENT

The Sapphire Inventory Management is a very powerful tool in tracking the movement of food, drinks, and goods through the business. It can also aid in managing your inventory to minimize the capital invested in inventory.

By default, inventory management is disabled. To enable it, go to the Config Options page and find the “Enable Inventory” setting. There are three choices: *Disabled*, which keeps the **Inventory Management** button disabled and doesn’t deplete any inventory, even if ingredient lists are set up; *Setup* which allows for any facet of the inventory to be set up, but will not deplete any inventory items; and *Active* which activates the real-time depletion of inventory as menu items are sold. This mechanism will allow the system to be set up over time and then can be “switched on” at the appropriate time.

BASIC CONCEPTS

The Sapphire Inventory Management uses the perpetual inventory concept. There is no beginning or ending inventory period – inventory levels are updated as actions occur on the inventory.

Inventory is depleted when an order is closed. This means that as inventory levels are observed throughout the day, the levels accurately reflect what is remaining in inventory. However, if an item or ticket is cancelled the inventory amount may need to be adjusted to reflect the fact that inventory was used. The best way to cancel a ticket if inventory was used would be to discount the item or ticket at 100% and close the ticket normally.

The inventory system is a tool that the manager/owner can use to make decisions. If an inventory item level drops below zero, nothing will stop an order from taking place that further depletes that inventory item. The assumption is two-fold: first, due to human inaccuracies the amounts actually used may not be the amounts expected to be used, and, second, items should be re-stocked prior to the level reaching zero.

Inventory item prices are only tracked if the vendor ordering portion of the system is used. This is how prices are entered into the system. A manager/owner can decide not to use the vendor portion and just manage inventory levels by adding appropriate quantities.

Inventory can be stored in any fulfillment area or in a default “Single Store.” For restaurants, simply using the “Single Store” is easiest and is highly recommended. However, for stadiums or

arenas, inventory is kept in each different walk-up window (i.e. the fulfillment area), and so inventory can be allocated to any number of fulfillment areas for more accurate tracking.

Note: To enable a fulfillment area to store inventory, check the “Inventory” checkbox for the terminal definition to signify that it stores inventory. See the section on **Set Up Printers and Terminals** for more information.

“On-hand Specials” is a feature where there are a limited number of complete (not made up from an ingredient list) menu items available and they cannot be oversold. Examples could include hats, shirts, and slices of pie. This is primarily a feature for restaurants as only the total amount on hand is counted (not per inventory store). It can be used without any inventory items or ingredient lists set up. See the section on **On-hand Specials** for more information.

“Prepared” inventory items are items in inventory that are made up from other items in inventory. The best example is Chili, which is stored and sold as a prepared item, but is made up from items in inventory (such as olives or chorizos) that might be used in other sold items. The Prepared Item feature lets the prepared item be defined and batches made to replenish the prepared inventory item.

Item costs are determined by the most recent price in the system. When calculating inventory value, the most recent price is applied to all of an inventory item. There is no weighted average costing of inventory.

RELATING UNITS (CONVERSION)

Probably the most difficult concept in the Sapphire Inventory Management system is how the various uses of an inventory item are related to each other. This “unit relate” concept helps the system perform the math necessary to adjust the inventory item levels by converting between the ingredient list units or the ordering units and the inventory units.

The person setting up the system needs to determine the best unit (e.g. ounces, cans, slices, gallons, etc) for the inventory item storage. This would be one that is easy to count by employees and is either the same as how the item is used or purchased, or in between. The basic idea behind this value is:

item usage units <= inventory storage units <= vendor purchase units

To illustrate, consider the following example.

Example: Assume that an inventory item is “olives.” They are used on pizzas (5 ounces each), come in 22 oz cans, and need to be purchased by the box, which holds 10 cans. The most optimal inventory storage unit is cans because they are easy to count. In setting up an ingredient list, the most likely unit chosen is ounces because only several ounces are used per pizza. In the ingredient list, the “unit relate” value would be 22 since there are 22 ounces in a can. In setting up the vendor ordering information the most likely unit chosen is “case” or “box” since it can only be ordered by the box. In this case, the “unit relate” for the vendor ordering would be 10 since there are 10 cans in a case.

With these relationships, Sapphire can now perform the math to manipulate inventory correctly. For each pizza sold, inventory will be depleted by 5/22 (or approximately 0.2273) cans. If two boxes were ordered, inventory will be increased by 20 cans.

Unfortunately, in order to handle the complex situations where the relationships differ with different items, the “standard” relationships also need to be defined. Even though it may be common knowledge that there are 16 ounces in a pound, using the definition helps differentiate from the 128 fluid ounces in a gallon. And if an item is stored by the bottle and sold by the bottle, a “unit relate” value of 1 (one) is still needed.

WHAT IS TRACKED?

Items in inventory are depleted only if an ingredient list is set up for them. If there are menu items sold that are managed by an outside vendor (soda, for example) or have unlimited refills (again, soda) it could be inefficient to track those items.

An owner/manager might also want to get into the inventory tracking slowly and start by managing high value or other important inventory. It is really up to the needs of the owner/manager to determine what is important to be set up.

CUSTOM ACTIONS

If there are Custom Actions defined for your menu, they will need to have an inventory action defined so the inventory system knows what to do with custom trimmings. Additionally, a percentage needs to be set up to designate how much inventory is affected. This is to differentiate between actions, such as an “Add” versus a “Lite” action. See the section on ***Custom Actions*** for more information.

GETTING STARTED

Before any data is entered, the person setting up the inventory should do some research as to how inventory is currently stored and used. Information should be gathered that includes:

- 1) What items are important to track? One can track all items, or figure out where the optimal line is between effort of managing the system and payback in efficiency.
- 2) What units will be used? This includes inventory storage, usage, and ordering.
- 3) How should inventory be categorized? Sapphire allows items to be grouped in categories for easier reporting and viewing. Categories can be anything the owner/manager wants, and examples include dairy, frozen, vegetables, meats, etc. Inventory items can be moved to other categories later but it is easier to get it right the first time.
- 4) What items are prepared versus made up of raw materials? This will help identify where the ingredient lists need to be set up.
- 5) What are the various ingredient lists? Include information about each ingredient such as the amount and units, as well as the mathematical relationship to the unit storage in inventory.
- 6) What inventory items come from what vendors? Include ordering information such as minimum amounts.
- 7) How much inventory is currently on hand? This can be done as a last step, after all the ingredient lists are set up. For best results, enter all the current levels at once so the system is accurate. However, if there are time constraints, subsets of the current inventory can be entered or updated after the system is live using the ***Adjust Inventory*** feature.

INVENTORY MANAGEMENT

This is the core of the inventory system, where all the inventory items are set up and maintained, and where ingredient lists are defined.

SET UP UNITS

Set Up Units is where the different unit names are entered, regardless of where in the inventory system they are used. Enter the names here; shorter names are helpful in keeping displayed information concise on other pages. Don't worry if you miss a name and need to come back and add it later.

INVENTORY CATEGORIES

Inventory Categories can be set up to help group the inventory items for easier management. New categories can be added later, if desired. At least one category is needed. To add a new category, simply enter the category name and an optional description and click the **Add New** button. To change the name or description or delete the category, make the change and click the **Update** button. To bring back a deleted inventory category name, click the **Show Deleted** button and update the appropriate entry.

SHOW INVENTORY

Show Inventory is where each inventory item is set up or edited.

Entering New Items

The first time this page is accessed, or if a new inventory item is added, click on the **New Inventory Item** button. A new window will pop up that allows the user to enter information about each inventory item. After each item is entered, click on **Add/New** to add this item. When all items are entered, click on "Close" to close the window.

Field Meanings:

Inventory Name	The name of the inventory item. Meaningful but short.
Description	This description is only displayed on this page, but can be used to describe the item better, if necessary.
Units	The unit by which this item is stored in inventory. Once the item is used with these units, it cannot be change; a new inventory item will have to be added, and this one deleted.
Store	The "store" or fulfillment area where this item is stored. Restaurants are suggested to use "Single Store" here, for simplicity.
G/L Account	An optional value to tie this inventory item to an accounting system.
Target Qty	The target level this item is to be kept at. If the current level is over this, then it is signified on a report. Used to help manage the optimal inventory level.
Reorder Point	The point at which this item should be reordered. If the current level is at or under this, it is signified on a report, and an alert is generated.

Editing Existing Items

The inventory items can be viewed and edited on this screen. Select either “All” or a single inventory category to limit the information. Checking the “Show Inventory Stores” will create a separate frame where the individual stores can be displayed. The “Show” link to the left of the inventory item will need to be clicked in order for the stores to show up.

Note: If more than one store is used for any inventory item, the expanded table of inventory information can no longer be used. This ability to see all the information in one area is why it is recommended that most restaurants can use a “Single Store” for their inventory.

The **Show Menu Items** button will open a “helper” window that shows all the currently active menu items. This is to aid in remembering what inventory items may be needed to be set up. The “Tracked Items” table shows what items are currently being track in inventory.

Field Meanings:

Category	The inventory category.
Inventory Name	The inventory display name.
Description	An optional description if more wording is necessary.
G/L Account	An optional account number to link the item to an external accounting package.
Target Qnty	The target level to which the inventory item should be replenished, if possible. The Current Levels report will flag any inventory item that has a current quantity greater than this value.
Reorder Point	The point at which the inventory item should be re-ordered. The Current Levels report and Alerts page will flag any inventory item at or below this amount.
Current	The current level of this item. The value is modified by adjusting the inventory level or entering purchases, as well as by being depleted through the system.
Unit	The unit value used in inventory storage.

Note: The **G/L Account**, **Target Qnty**, and **Reorder Point** fields only show up if only a single inventory store is used. If they do not show up in the **Tracked Items** table then one or more inventory items are using more than one inventory store. In this case those fields can only be seen if the “Show Inventory Stores” box is checked, and the “Show” link is clicked.

After making any changes to an inventory item, click on the **Update** button for that item in order to make the changes take place. Clicking on the **Delete** button will remove the inventory item from being tracked. To re-activate the item, please see the **Recall Inventory Item** feature.

Warning: Make sure the Inventory item is not being used in any ingredient lists prior to deleting it; otherwise the system will continue to deplete that item. This may cause information to be incorrectly reported.

When showing the inventory stores, a new frame appears in the lower part of the page. When the “Show” link is clicked, the store’s information will appear. If it is desired to store inventory in more than one location, click on the **New Inventory Store** button. A new row will appear with some default values in it. Make sure the correct values are entered, and then click the Update button for that row. Click on the Delete button to remove a store. At least one store has to exist for any inventory item.

Note: The “Show” link has to be clicked to update the lower frame to show the stores for the desired inventory item. Make sure the correct store is being viewed when editing.

The field meanings for the inventory stores table are the same as above. The possible store choices are the fulfillment terminals that have been configured to store inventory.

SET UP INGREDIENT LIST

Set Up Ingredient List is used to define the ingredient lists for the different menu items. Ingredient lists are essentially recipes for creating the menu item. The first page will show a table of all the menu items, by menu category. A button is displayed for each price/size for the menu item. This is because the different sized menu items will have different sized ingredients. Once an item has an ingredient list, an asterisk (*) is shown on the button. Click on any button to see the ingredient list for that menu item and size.

The first time an ingredient list is set up for a menu item (prior to any list items being defined) the user has the opportunity to replicate an existing ingredient list. This is a short-cut that will create an identical list for the current item that can then be edited. Simply find the desired menu item that will have a similar ingredient list and then click the **Replicate** button. This feature will go away when there are any active ingredient list items.

To add a new list item, simply select the inventory item, enter the quantity and units of that quantity, the relationship between the ingredient list units and inventory units and click the **Add New** button. To update an item, make any changes necessary for the list item and click on the **Update** button for that item.

Note: It is very important to get the Conversion value correct so the correct amount is depleted from inventory when a menu item is consumed. This is the numeric value that relates the ingredient list units to the inventory units (shown in parentheses with the inventory item name). The following mathematical relationship is used:
$$\text{Depleted amount} = \text{Ingredient Quantity} / \text{Conversion.}$$

Field Meanings:

- | | |
|-------------------------------|--|
| Inventory Item (units) | The inventory item for the ingredient list. The inventory units are in parentheses. |
| Quantity | The amount of an inventory item to deplete when the current menu item is sold. |
| Waste | The estimated amount of the ingredient that is wasted each time the menu item is served. This could be a few ounces of beer each time the tap is poured as foam is cleared out. This value is also |

	subtracted from the inventory level, but is tracked separately for managerial and/or accounting purposes.
Units	The units for this ingredient list item. This may be a different unit than what is stored in inventory.
Conversion	The mathematical relationship to convert between the ingredient units and the inventory storage units.
Status	Whether the item is active or deleted. Only active list items are depleted from inventory.
Prep Instructions	Fill out the preparation instructions to give information that is separate from the ingredient list. This will print on the <i>Ingredient Lists</i> report.

Example: A sandwich might use 4 ounces of sliced cheese that is stored in inventory by the pound. A possible entry could have the “Cheddar Cheese – Sandwich (lb)” as the **inventory item**, 4.00 as the **quantity**, oz as the **units**, 16.00 as the **conversion**. Each time this sandwich is sold, 4.00/16.00 (or 0.25) lb will be depleted from inventory.

Deleted, or inactive, items are shown in a separate list on this page. To make the item active again, simply change its status.

To see a different item, click on the **Change Item** button to go back to the selection page.

PREPARED ITEMS

Prepared items are inventory items that are prepared from other inventory items, and then are part of a menu item in their prepared form. An example could be Salsa, which is made from produce that can also be used on other menu items such as sandwiches. However, there is also a menu item of “Chips and Salsa”, so it makes sense to have batches of Salsa prepared in advance. This simplifies the inventory system as the prepared inventory item is depleted when “Chips and Salsa” are ordered, instead of all the individual raw materials of Salsa. It also allows the prepared item to be made with variations if there is a different available mix of raw materials.

In *Prepared Items*, select the inventory item that is to be defined as a prepared item and click on **Create Prep Item**. The ingredient list screen is then displayed, and the ingredients for the prepared item can be set up. It is assumed that the ingredient amounts are enough to create a single, standard batch amount. Set the section on **Set Up Ingredient List** for more information on setting up ingredient lists. On the ingredient list page, click the **Change Item** button to return to the *Prepared Items* page.

Previously defined prepared items are also listed. To edit the ingredient list, click on the **Update List** button. To remove a prepared item definition, simply click the **Remove** button. It will be permanently deleted, so be certain this is what you want.

To create a new batch of a prepared item, click on the **Make Batch** button. This will take you to a new page that will show the previously defined ingredient list in a table.

Field Meanings:

Ingredient The raw material ingredient item.

Amount	The quantity of the raw material ingredient to be used in the batch. The entry defaults to the amount set up in the ingredient list. This can be changed if a non-standard amount of the ingredient was used. If none of this ingredient was used, change the value to zero.
Source	The inventory store from which the raw material is being depleted when the batch is made. Select the correct store so the depletion occurs in the correct place. Most likely the source will be “Single Store” for a restaurant that stores inventory in a single location.
Multiplier	This value will be multiplied by each of the amounts in the ingredient list. It is in the cases where possibly a double or triple sized batch was prepared. If the amounts are changed from the standard batch size, keep in mind that they will be further multiplied by this value.
Amount	This amount is the amount added to the prepared item in inventory. Due to variations in preparation, it may not be the same amount each time, so this gives the user an opportunity to enter the exact amount made.
Destination	Select the location of the prepared item so the inventory level of the prepared item will be adjusted correctly.

If the amount added is a standard amount, check the “Save amount added as standard Prepared amount” checkbox. That will cause the amount to be saved and used as a default the next time the batch is prepared. Click the **Process Batch** button to cause the raw material ingredients to be depleted from inventory and the prepared item’s current quantity to be increased. Click on the **Cancel** button to return to the prepared inventory items main screen.

ADJUST INVENTORY

Adjust Inventory is used to manually change the current quantity of an inventory item. It can also be used to bring in more inventory amounts without having the **Vendor Management** feature set up, but if used in that manner price information will not be tracked. In order to transfer inventory from one location/store to another, use the **Transfer Inventory** feature.

Field Meanings:

Inventory Item	Select the inventory item whose current level will be changed from the drop-down list.
Store	Select the inventory store at which the adjustment will take place. If there is only a single store being used, then “Single Store” will be shown.
Target Level	Helpful information about how the inventory item was set up.
Reorder Level	Helpful information about how the inventory item was set up.
Current Level	The current quantity at that inventory store location.
Units	The units defined for that inventory item.
Action	The action to be performed on inventory. The choices are: <i>Add</i> Add an amount to inventory. <i>Correct</i> Set the inventory amount to a new level. <i>Remove</i> Remove an amount from inventory. <i>Zero</i> Set the inventory amount to zero.
Adjustment	The adjustment amount for that action. No amount is needed if the <i>Zero</i> action is selected.

The correct action to use depends on what is the desired effect. If some inventory was purchased and is to be added to inventory, then *Add* would be the appropriate action. *Correct* is used when a correction is needed to be made to a level due to a manual count finding a difference. *Remove* would be used when some inventory is actually physically removed from the inventory store for some reason (such as a custom employee meal). *Zero* would be useful if the inventory level is known to be zero so new purchases added can start at zero.

Using the correct action is mostly to benefit various reports, but also helps maintain an accurate trail of actions performed on inventory.

Click on the **Submit Adjustment** button to enter the change into the inventory system.

TRANSFER INVENTORY

Transfer Inventory is used to move items from one inventory store to another. An example of this is if fulfillment areas need 500 cups each and one area finds they have 650 cups, and another has 400 and a third has 400. The user can easily transfer 100 cups to the second store, and 50 to the third.

Select the inventory item from the drop-down list. If there is only one store for an inventory item, no transfers are allowed. Information about the current levels, reorder points, and target quantities of each store are shown. Select the source or **From Store** and destination or **To Store** and enter the **Adjustment** amount to be transferred. Click on the **Transfer** button and the correct amount will be removed from the source and added to the destination.

Note: It is possible to perform this same option on the **Adjust Inventory** page, but using this page keeps it all in one operation, reducing the chance for errors.

RECALL INVENTORY ITEM

If an inventory item was deleted, either accidentally or on purpose, use the **Recall Inventory Item** page to make that item active again. On that page, the deleted inventory items are listed. Click on the appropriate one in the list and its information is displayed. To make this item active again, simply click on the **Recall** button.

Note: When recalling an inventory item, it is most like the inventory levels and inventory store information will need to be reviewed for correctness. Also, ingredient lists may have to be reviewed to make sure the correct inventory items are being used.

VENDOR MANAGEMENT

The primary benefit of the Vendor Management feature is to track historical prices. It will help maintain a price history, show what menu items cost, and calculate the current inventory value.

VENDOR INFO

This is where the contact information for vendors, as well as what inventory items they supply are set up. To add a new vendor, make sure the “Add New Vendor” selection on the list is

highlighted. Enter the necessary contact information. Only the vendor name is required. Check each checkbox for inventory items this vendor carries. This requirement helps maintain selection lists on other screens. Click the **Update Vendor** button to save any changes.

If items need to be ordered from a vendor make sure the “Require vendor ordering information” checkbox is checked. This allows ordering information to be set up for easier maintenance. If the vendor does not require ordering (such as a local grocery store), then leave the check box unchecked. When unchecked, purchases can be entered directly on the **Receiving** page.

When a vendor is selected, the user can check the “Show only selected” checkbox to display only the inventory items that vendor supplies.

To make a vendor inactive, update its status to “Inactive.” Inactive vendors are also shown on this page, at the bottom. To make a vendor active again, select the vendor and click the **Make Active** button. Only active vendors are shown on various select lists in the system.

VENDOR CONTACT REPORT

The **Vendor Contact Report** is accessed from the **Vendor Info** page. Click on the **Vendor Contact Report** button to display the report. The desired information for the vendor can be selected and displayed.

ORDERING INFO

Ordering Info only needs to be set up for vendors that require advanced ordering. If the checkbox signifying that is checked on the **Vendor Info** page, then order information needs to be set up prior to receiving orders from the vendor.

On entry to the page, the vendor must be selected. Once selected, all inventory items that vendor carries are displayed in a drop-down list. Each one can be set up as desired by the user. The most important item is the Conversion field. This value relates the ordering units for the vendor to the inventory units in the system. Click the **Add New** button to add an inventory item’s ordering information.

Note: It is very important to get the Conversion value correct so the correct amount is added to inventory when an inventory item is purchased. This is the numeric value that relates the ordering units to the inventory units (shown in parentheses with the inventory item name). The following mathematical relationship is used:
$$\text{Added amount} = \text{Ordered Quantity} * \text{Conversion.}$$

The table shows all the ordering information.

Field Meanings:

Inventory Item	The name of the inventory item.
Vendor SKU	(Optional) The vendor’s SKU (stock keeping unit) for this item. Any value that the vendor uses to identify this inventory item in their system. This will be used on any system-generated orders.

Min (Re)order	This value is checked when items are received to make sure the correct amount is being received. It will also be used on any system-generated orders.
Std (Re)order	This value is the default value shown when receiving orders. It is simply an aid in having to enter less information while receiving orders.
Order Units	The unit by which the vendor requires the item to be ordered.
Conversion	The mathematical relationship between the ordering units and the inventory units.

Click on the item's **Update** button to save any changes for the item. Clicking on the **History** button will bring up a new window to look at previous entries for the item. The items are shown with the date the change was made. Click on the **End** button to stop being able to enter receiving information for this item from the vendor.

RECEIVING

Receiving is the page where price information is associated with inventory items. It is also the best way to increase the level of inventory items because then pricing information is available.

To enter information, first select the vendor. If the vendor information was set up with the "Require vendor ordering information" checkbox checked, then only inventory items for this vendor that have been set up on the **Ordering Info** page will be shown. If the checkbox is unchecked, then all inventory items for this vendor are shown.

Field Meanings:

Inventory Items	The inventory item to be received.
Vendor SKU	Displays the SKU for the vendor, if one has been set up. Simply used to aid in finding the correct item on the order form.
Purchased Quantity	The total quantity purchased, in the order units.
Order Units	The units by which the item is ordered from the vendor.
Purchased Cost	The total cost of the item. The system will translate this into a per-unit cost by dividing the cost by the quantity.
Receiving Store	The store into which the item will be received (and where the quantity is increased). If the items need to go into more than one store, then they will need to be transferred from the Receiving Store into the other stores, in the correct amounts.
Purchase Date	The date the item was purchased. This is used to put pricing information into the correct time period for reports.

Note: If the "Require vendor ordering information" checkbox is unchecked on the **Vendor Info** page, then it is very important to enter the quantity in the units by which inventory is stored as there is no conversion information set up for that item.

Up to ten items can be entered at a time. Click on the **Record Purchase** button to record the purchase information and adjust inventory.

FIX RECEIVING

Since information is occasionally entered incorrectly, Fix Receiving allows purchase information to be corrected. Find the entry to correct by using the **<< Prev** or **Next >>** buttons. Then enter the correct values for **Quantity**, **Order Date**, or **Purchase Cost** and click the **Update** button.

PURCHASE HISTORY

The **Purchase History** is a vendor-related report simply shows purchase information for the given date range. The report can be limited to individual or multiple vendors and/or destination stores. Hold the control (<ctrl>) button while clicking the desired choices. Then click the **Refresh** button to generate the new report.

REPORTS

CURRENT LEVELS

The **Current Levels** report will show what the current inventory levels are for inventory items. If desired, a subset of the inventory items can be displayed by selecting individual menu categories. The list can be further limited by selecting which status to display.

Note: If displaying a single menu category, the inventory items in that menu category will only show up if an ingredient list has been set up for the menu items using the inventory item. Ingredient lists are the only place in the system where menu items are related to inventory items.

Each store that holds an inventory item is shown. The report will also show the pre-defined target quantity and reorder level that was set up for each inventory item. The current, real-time quantity is shown as well as the inventory units.

Status:

- Reorder** The current level is at or below the reorder point. This status is highlighted in red.
- Over** The current level is over the target quantity. This status is highlighted in yellow. It is possible that the quantity could increase past the target quantity if the vendor requires ordering certain minimum amounts.
- Blank** A blank entry means the current level is between the target quantity and reorder point.

Note: If displaying a single menu category, the inventory items in that menu category will only show up if an ingredient list has been set up for the menu items using the inventory item. Ingredient lists are the only place in the system where menu items are related to inventory items.

ITEM COST

The **Item Cost** report will show the current cost of each ingredient list. The first page of the report lets the user select an ingredient list. If the ingredient list is set up, a link for the menu size is shown. Clicking on that link will show the ingredient list with price information. Only

items that have purchase information will show a price. If any item does not have a price, the total cost is not known.

REVERSE LISTING

The **Reverse Listing** report will show what menu items currently use each inventory item. The list can be shortened by just looking at just a single inventory category and/or a single vendor. The current quantity in inventory is shown highlighted. The amount of inventory used by each menu item is shown next to that menu item.

INGREDIENT LIST

The **Ingredient List** report will allow printing of any or all ingredient lists and their preparation instructions. If desired all the ingredient lists for a single menu category can be displayed and printed. The ingredient lists are shown grouped by the POS menu category and price size, as that is the way they are set up.

WORK LIST

The **Work List** report will create a printable work list for counting inventory. All the inventory items are shown, but can be limited by inventory **Category, Store, or Vendor**. If desired, the current inventory item levels can be shown on the work list. In order to maintain a good “checks and balances” system, it might be useful to have the person counting inventory not know what the current level is, in order to avoid accidentally agreeing with the printed levels.

USAGE

The amount of inventory used is shown in the **Usage** report. Select the starting and ending dates and refresh the report. Then the inventory items shown can be limited by selecting the inventory category, individual items, and/or inventory stores. The “Chart” checkbox will allow the data to be shown as a chart when checked, or as raw data if unchecked. The “Show Values” checkbox only has meaning when the “Chart” checkbox is checked and will show the actual values as part of the chart.

The **Usage Interval** will allow the data to be grouped into intervals. The *Daily* interval is the most granular and will show each day’s use. The *Weekly* interval will show the usage over a seven day period, and the *4 Week* interval will group data into 28-day periods.

Note: When any interval other than *Daily* is selected, the data is grouped started from the ending date and working backwards. No partial intervals are displayed, so the data shown may not start on the starting date if it doesn’t land exactly on the beginning of an interval.

PROFIT BY CATEGORY

The **Profit By Category** report is similar to the sales by category, but shows the profit instead of the gross sales. It only shows profits when the inventory prices are known.

ACTIVITY (NOT IMPLEMENTED YET)

The **Activity** report shows the inventory level fluctuation over the given time period of the report.

TRANSACTIONS

The **Transactions** report will show that actual transactions in the inventory system over the given time period of the report. The report can be narrowed down to an hour interval. Either all the transaction types can be shown or individual types.

Transaction Types:

<i>Add</i>	A quantity was manually added to the inventory item.
<i>Correct</i>	An inventory item's level was manually corrected to this new quantity.
<i>Deplete</i>	An item was depleted by the ordering system.
<i>Make Batch</i>	A batch of a prepared item was created. This will show the depletions of the raw materials and the increase of the prepared item all with the same transaction type.
<i>Purchase</i>	A quantity was added to the inventory item through a purchase being received.
<i>Remove</i>	A quantity was manually removed from the inventory system.
<i>Warning</i>	The ordering system could not resolve an inventory item and generated a warning. Most likely a manual operation will be needed to adjust inventory to make up for this warning. The ingredient lists for menu items (including trimmings) should be examined to see if the right instructions exist. An example of a warning could be if an ingredient was substituted and the custom action instruction was set to generate a warning.
<i>Waste</i>	The amount of waste as defined in the ingredient list(s).
<i>Zero</i>	The inventory item's quantity was manually set to zero.

Note: The inventory system cannot handle a "substitute" custom action because it cannot be determined what was being substituted. It is recommended to have the server use a <i>Deplete</i> action to remove an item, and a <i>Return</i> action to add the substitute.

Note: Some transaction types, such as <i>Deplete</i> can be quite numerous and can make the report slow to display and crowded with data. For this reason the initial transaction type displayed is <i>Purchase</i> .

The report can also be limited by multiple transaction type and/or inventory items and/or inventory stores. Just hold the control (<ctrl>) button while clicking on the desired choices. Then click the **Refresh** button to generate the new report.

ANALYSIS

ALERTS

The **Alerts** analysis will show all the current alerts for the inventory system. There are several different types of alerts:

<i>Warnings</i>	Warnings are generated by the inventory system when it is trying to deplete an ingredient and cannot find the correct ingredient list. Also, if a custom action, such as <i>substitute</i> occurs, which the system cannot handle.
<i>Low Levels</i>	Any inventory item that is at or below its reorder point will show up here.

System Errors A system check is made to look for data inconsistencies that are pointed out for the user to fix.

As *Warnings* could be happening throughout the day, and are recorded in the inventory transaction log, a time period to look back at warnings can be specified. There is also a setting, **Manager Alerts** that can be enabled. This will cause a button to be displayed on the front page of the Sapphire system to show which menu items are at or below the reorder point. The Manager Alerts screen will show the estimated remaining number of menu items that can be sold for the current level of each inventory item used in that menu item. The estimate is based on the defined ingredient list for that menu item, which specifies the usage per menu item.

PROJECTIONS

The **Projections** analysis will look back over a historical period to determine the daily usage of an inventory value. Then it will project forward the time it will take inventory to run out based on current levels.

Note: If an item has not been used in the look-back period the projection cannot be calculated. Also, items with negative current inventory levels are excluded.
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If multiple stores are selected, the current level shown is the sum of the levels of each store.

The analysis also allows for a **Current Usage** period to be selected, as well as **Overuse** and **Underuse** settings. The report will show what the usage in the **Current Usage** period is compared to the historical look-back period. If the relative current usage falls below the underuse level, or is above the overuse level, it is flagged.

The user can then determine if items should be ordered more or less frequently to make up for the new demand, or even if promotions should be made to stimulate under used items.

INVENTORY VALUE

The Inventory Value analysis will calculate the current inventory value based on the latest price information. If the price does not exist for an item, it remains "Unknown." Likewise, an inventory item with a current negative level is also "Unknown." The total value is shown only for known prices.

The analysis can be limited by inventory category or store. Hold the control (<ctrl>) button while clicking the desired choices. Then click the **Refresh** button to generate the new report.

PRICE HISTORY (NOT IMPLEMENTED YET)

The **Price History** analysis will show the price history for any given inventory item. The history is dependant on the pricing information being entered into the Sapphire inventory system. The items can be limited by inventory category, vendor or individual items, as well as by the given date range.

Note: This information will only be as accurate as the purchase information entered with the Receive page in the Vendor Management section. It is dependant on the date and price being correct.

WHAT IF? (NOT IMPLEMENTED YET)

The *What If?* analysis allows the user to enter a different price for an inventory item and see what the effect would be on profits using historical sales data. It also allows the user to change ingredient list quantities to see what the effect would be on historical profits.

VI. SYSTEM CONFIGURATION

This is where Sapphire can be configured to the environment in which it is being used. Some settings will change how Sapphire operates, and some are just for display purposes.

Company Name	This value will print out on receipts (single line) and show up on the front page of Sapphire.
Company Addr 1	Printed on receipts (single line).
Company Addr 2	Printed on receipts (single line).
Company Phone	Printed on receipts (single line).
Company Banner	Address to an image file that will be shown on the front page, a banner-style (not very tall and about as wide as the front page table) image is recommended.
Receipt Message	A message that will display on the receipt after the receipt data is printed. Any number of lines can be entered; each line will be centered.
Disable Receipt Logo	By default Sapphire will attempt to print a logo with any receipt. A logo will need to be installed on the printer for this to work. Checking this setting will Disable the logo printing.
Main Message	This is the main message that will display on the front page of Sapphire. If no message exists, then that space isn't used on the front page. The message can be as long as you would like, but the display is limited to 10 lines before readers will have to scroll to read the complete message.
Enable Seating Terminal	Checking this box will allow the seating terminal button to be displayed on the front page. This feature is only useful for restaurants with assigned table seating.
Terminal Refresh Rate	This is the rate (in seconds) at which the video fulfillment terminal will refresh its information. A number that is too high may cause an unnecessary delay in an order being displayed on the terminal. A number that is too low may make it difficult to click on the Clear button because the screen is refreshing and ignoring clicks.
Other Terminal Notification	This is a feature exclusively for fulfillment printers. The setting will cause information about items at other terminals to be printed on a fulfillment ticket. Set to <i>Verbose</i> to have the other terminal name and all items print out. Set to <i>Name Only</i> to have just the terminal name print out. Set to <i>None</i> to have no notification to print out (useful when an expedite printer is available).
Expedite Printer	If using any fulfillment printers, setting this will have the entire placed order printed out on the identified expedite printer. The printer is identified by the terminal name. Set to <i>None</i> if not using an expedite printer. Check the <i>Big</i> checkbox to get large size printing. If <i>Big</i> is checked you can also check <i>Not Wide</i> to have the printing not be as wide.
Big Fulfillment Header Font	Check this to use big fonts on the fulfillment ticket header. When displaying the information in a big font the information descriptor is not shown.
Condense Fulfillment	Checking this checkbox will instruct the fulfillment printers to combine any menu items of the same size. If the modifiers and customizations are the same, then those are combined, also.

Print quantity on line with item	Checking this box will change the behavior of how the fulfillment printer prints the quantity for the order item. If checked it will be printed on the same line as the order item. If unchecked the quantity will be printed like a modifier with the line “How Many: X” (where X is the quantity) following the order item. The “How Many: X” line will only show up if the quantity is greater than one (1).
Fulfillment Sort	<i>Natural Order</i> will print fulfillment items on order rung in; <i>Cat Disp Order</i> will print items based on menu category display order.
Don't print modifier category names	Checking this box will cause the modifier category names to not be printed on the fulfillment ticket. This might be useful where the category name is not important to the cook reading the ticket so the modifier information can be read quicker.
Don't print modifier's menu item from other terminals	Checking this box will remote the menu item name for a modifier that prints on a fulfillment terminal <i>different</i> than the menu item. Unchecked will have the menu item print in parentheses.
Print Seat with Item	Checking this box will have the seat number as entered on the <i>Confirm Order</i> screen print out with the menu item. This setting is ignored if <i>Condense Fulfillment</i> is checked.
Which Cash Service Terminal	Checking this box will allow the old cash service terminal to be used. <i>Note: the old cash service terminal is being deprecated and will not have as many features as the new one.</i>
Video “Bump” Terminal	The Video Bump Terminal will show a red label for items older than <i>Age</i> minutes, can pre-show items that are rung in but not placed yet, and can show a detailed view if chosen.
Use Keypad Sign-in	Checking this box will change the server sign-in to be a keypad instead of the default buttons with the server's names. Entering the sign-in password or swiping an access card will take the server to the Orders page.
Hide Quick/Cash Button	Checking this box will hide the Quick/Cash button on the server's order screen, effectively disabling the feature.
Auto-print Quick/Cash Receipt	Checking this box will cause a receipt to automatically be printed when a quick/cash order is placed.
Enable Confirm of Placed Item	Select this to have the ability to verify the order before it is placed and to add reference information to the order (e.g. identify customer by printing information on the fulfillment ticket).
Only Super Servers can close orders	Checking this box will only let a server with Super Server privileges to close a ticket. An example is having a cashier to close tickets but not letting servers close tickets.
Super Server sees all tickets	Check this box to set servers with Super Server privileges to see all server's tickets. This could be useful if a cashier is being used to close tickets.
Ticket closer owns ticket	Check the appropriate checkbox where the server closing the ticket will own the ticket based on the ticket type or terminal used to close the ticket.
Only Managers Can Discount	Checking this box will make it so only managers can discount an order or order items. The manager can either own the tickets being discounted, or can sign in as a “Super Server” to discount a server's orders.
Show Menu Button	Check this checkbox to have a button or link available on the server's order page or order item page that, when clicked, will show the menu items and pricing.

Show Quantity Buttons	Select the number of quantity “quick choice” buttons to display with the menu item choices.
Seat Buttons	If <i>Count Guests</i> is checked then checking this box will show a button for each seat (guest) on the menu item page as a way to identify what seat an order item is assigned. If <i>Print Seat With Item</i> is checked then the seat number will print on the fulfillment ticket in the kitchen. The seat assignment can also be used with the Pre-Split feature (see <i>Splits</i> in Server Guide).
Require Custom Choice	Check this to require a choice from any custom category that a menu item specifies.
Receipt Tip Helper	Enter any numbers in the boxes to have the receipt show the tip rates for those percentages. Enter as a percentage (e.g. 15, 18.5). Leave entries blank to not show on receipt.
Print large total on receipt	Checking this will cause the “Total” line to print on the receipt in a larger font. Note: the formatting may not look as clean as using the regular font.
Show Guest Number on Receipt	Checking this setting will cause Sapphire receipts to have the ticket number (last 3 digits) to print on the receipt. This can be used as a guest number if the fulfillment style is to call out a number for the guest to pick up.
Spectra Seating Type	Choose <i>Grid</i> to have the seating be a 10 x 10 grid for pseudo-graphical seating; choose <i>List</i> for just a list of names. The <i>List</i> seating type might be most useful for sites that have open seating but the customer gets an identifying sign so the food server can bring their food to the right table. This setting is only applicable on Spectra.
Transferring Tables	There are three settings for configuring the transfer of tables from one server to another. The default is Any Server which means that any server can transfer any of their tables to any other server. The Only Managers setting means that the <i>Manage Orders</i> feature must be used by a manager to transfer an order, or a manager needs to sign in as a “Super Server” to do the transfer. The Needs Acceptance setting will put any transferred orders into a “pending” status until the server the orders are being transferred to accepts them.
Reprint Tickets	The ability to reprint a fulfillment ticket. The default is Allow which means anyone can reprint the ticket. No Reprint means no one can reprint the ticket. Mgr Only Reprint only allows a manager to reprint. Disable Ready Button means no one can even click on the Ready Button to see the order items.
House Gratuity Rate	Entering a number here (as a percentage, such as 12.0) will allow servers to add a gratuity to a receipt that will print on the receipt. This can be set up to be automatically calculated whenever this page is entered, or can be manually set to a fixed number. Note: <i>If using Sapphire credit cards this gratuity will be picked up and sent with the authorization request. If Even Splits are used, the total gratuity will be picked up since the system doesn’t know that Even Splits were used.</i>
Mgr Only Auto / Manual Grat	Check this setting if you only want managers to be able to enter an automatic or manual gratuity on a ticket (as opposed to allowing any server to set it to automatically calculate the gratuity).
Cash Drawer Ownership	There are three levels of cash drawer ownership – <i>Open</i> , which means a cash drawer will open for any server/clerk; <i>With Rights</i> , which means the cash

	drawer will open for any employee who has that privilege set in their Employee Info security rights section; and <i>Owner</i> , which means a single server is identified as the owner of a cash drawer at a time (that server or a manager can add other servers as owners, if necessary).
Need Cash Drawer Password	Check this setting if you want to require a password with the No Sale button.
Skip Till Start	Check this setting if you do not want to enter a starting till/bank amount for every server for every shift.
Hide “No Print” Button	Check this setting to hide the “No Print” button for bar terminals. This will mean that non-bar items will always be sent to a fulfillment terminal if configured that way.
Sign-in Starting Location	Choose where to start when signing in as a server: Orders page (default) or the Choose Table page (if usually starting a new ticket when signing in) or Cash Service (if using the Cash Service terminal. Note that this is a global setting so all terminals will use the same starting location.
Declared Tip Rate	This is a suggested tip rate for calculating suggested declared tips when an employee is declaring tips. The suggested value is Dine-In Sales * Rate.
Tips Left In Drawer/Bank	Check if the site policy is for servers to leave tips in their drawer/bank. This will adjust the math on certain reports to reflect this behavior.
Count Guests	Setting this to “Yes” will enable a screen for the server to input the number of guests at the table. This number is only used for statistical purposes and is for Restaurant seating. The number of guests will then show up in the third portion of the Section:Table:Guests identifier.
Require Discount Reasons	Set to “Yes” will cause discount reasons to be selected for any discount given. This is a mechanism to add feedback for discounting.
Order Display	This Stadia setting affects how orders are displayed on the server’s orders screen. Setting it to “All for server” will show all seats for the currently selected section. Setting it to “By table/row” will allow the server to choose what row to limit the information displayed.
Order Day Boundary	Select the time as the point in the day order ids roll over. The order ids are date based. This is useful for a location that is opened until after midnight, but you want the orders between midnight and closing to show up on the previous day’s report. The basic view on reports is based on the date portion of order ids. For example, if the location closes at 2:00 am, the value of 3:00 am can be used to have order ids roll over after 3:00 am so orders before 3:00 am show up under the previous day.
Enable Inventory	The inventory system can be enabled in stages. A “Setup” setting will allow for data to be entered, but the ordering system won’t use that information. When the inventory system has been set up, change this setting to “Active” to activate the automatic inventory management features. See the section on Inventory Management for more information about managing inventory with Sapphire.
Enable Remote Assistance	This feature will allow Sapphire to register its internet address with Khamu to aid in remote assistance. It is useful for sites that do not have a static ip address. Select the update frequency to enable. The last time a remote assist call was attempted to be sent is also shown.

VII. TROUBLESHOOTING

There are some basic things that you can do to troubleshoot issues.

Application Errors

While rigorous testing is done to the product before being considered ready for use, occasionally defects exist in the code. Try to re-create the issue and notify Khamu Solutions. The support staff will help identify if there is a work-around or if there actually is a defect that needs fixing.

SQL Errors

If an SQL error occurs, an error page is shown with the file name, line number, SQL statement, and the error. It is important to capture the filename and line number as a minimum, so the Khamu Solutions support staff can help fix the issue. The best information to capture the whole page and send it in an e-mail to Khamu Solutions, or download the appropriate error log and e-mail that. To return to the front page, click on the link specified.

Hardware Failures

Occasionally a hardware failure may occur. There are several points of potential failure and locating that point can be done by some simple analysis.

If all terminals (POS and fulfillment) are not responding and showing an error page such as “Page Not Found”, there is a good chance the failure is at the Server or Router. If a monitor can be attached to the Server machine and it is showing the same error, then the first step is to reboot the server. If the server is showing the Sapphire system working correctly, then the point of failure is most likely between the server and terminals, and is probably a router. Locate the router and reboot it (this may entail unplugging it and waiting a few minutes before plugging it back in).

If wired terminals are working correctly, but the handheld devices are not showing pages, then the point of failure is possibly the wireless access point. If there are multiple access points in your establishment, move around to different areas to try to figure out which access point isn't working. Try rebooting the access point.

Sometimes handheld devices will stop responding. Do a soft reset (see device manual) to see if the device will start responding again. It is possible that a 2.4GHz cordless phone will cause interference in the wireless signal. Make sure there aren't any in the area (which could include a neighbor).

Receipt printer stops working

Sometimes the receipt printer will stop working. Usually CUPS is used on the Linux server to route the print jobs from the server to the terminal with the receipt printer. For this reason, either make sure there is no firewall on the terminal (sometimes it gets restarted accidentally), or make sure the correct port (port 515) is open. See the terminal configuration document at khamu.com for more information.

Contingency Planning

The most important thing with respect to contingency planning is to have a process ready to switch to a paper-based approach to order processing. This is important in case of a power outage or some kind of system failure.

Having a UPS (Uninterruptible Power Supply) on the server will help in case of a power outage. It will keep the server running and protect it from corruption due to sudden power failure. However, being able to protect the whole system from power failure is potentially an expensive undertaking.

A backup strategy where data is moved offsite will help protect from a server hard disk failure. The backups can be downloaded to any other terminal on the network by going to the Backups screen. Depending on the infrastructure, the data can be moved off by an automatic ftp process, copying to a CD, or some other process. Contact Khamu Solutions for help in setting up a usable process.

If there is concern about always being able to print, it might be advantageous to have a spare printer on site. If there is a failure where the printer stops working it could take several days to order and receive a new printer.

TekVision Soloist Terminals

TekVision terminals are manufactured with a low-power approach. The terminal should not have to be turned off each night. However, if the terminal does need to be shut off, and cannot be turned off through Windows XP, the power button is a small button on the back of the terminal. Just hold the button in for at least five seconds, and it should turn off. To turn it on again, just click on the button once.

When turned off, sometimes the terminal gets into a mode where clicking on the button does not turn the terminal back on. If this happens, unplug the power to the terminal from the wall, wait a few seconds, and then plug it in again. You might have to briefly click the power button right after plugging in the power cable.

Khamu web site

An account can be set up for you on the Khamu web site. This will allow you remote access to your data (if an internet connection exists at your site) as well as support documentation for setting up terminals, handhelds, etc.

Internet access

Khamu can help you set up remote access to the Sapphire server. The important steps are to set up Port Forwarding on any routers between the Internet and Sapphire. Occasionally these routers might get into a state where they are not sending information to the Internet, or have lost their port forwarding settings. Be sure to write down the passwords and settings when the router is first set up as this will be a tremendous aid in resetting up any of the routers.

VIII. LINUX COMMANDS

Below are some basic commands for performing system functions in Linux. These can be run from a terminal command line, and are case sensitive. A good resource for Linux can be found at <http://www.tldp.org/LDP/lame/LAME/linux-admin-made-easy/>.

Command	Description
date MMDDhhmm	Sets the system date and time. Type it without any parameters to see the current date/time. MM is the two-digit month, DD is the two digit day, and hhmm is the two-digit hour and two digit minute in 24-hour time.
df -a	Shows disk space statistics.
Top	Shows process information, CPU utilization, and memory utilization.
lpstat -a, lpstat -t	Show CUPS printer information.
htpasswd .htpasswd username	Sets/changes passwords for remote access authentication. Type it in the /var/www directory. It will ask for the password. The username will be the user name for remote access.
shutdown -h now	Used to halt the server.