



13 STEPS TO
Mastering the Basics

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HOSPITALITY
RESTAURANT POINT OF SALE

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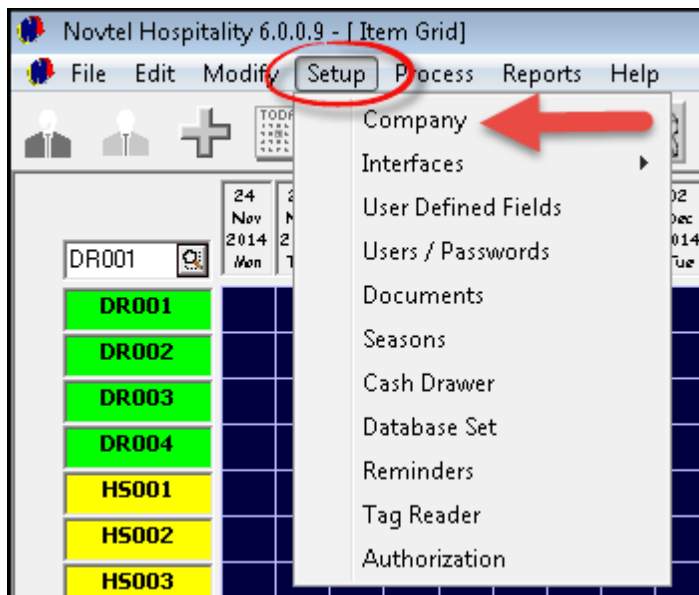
1 Step 1 - Setup Company

Novtel Hospitality Software incorporates a 3-in-1 software system:

"Novtel Reservations" - the main department in Novtel Hospitality where every aspect of the system is set up, and then links to the **Shop's Retail Point of the Sale** system as well as the **Restaurant's Point of Sale** system. For each department specific **"Users and Passwords"** are created, which will only give access to the part of the system pertaining to their area of work (Explained in Step 2)

The entire Company Setup is explained in the **"Hospitality Management: 13 Steps to Mastering the Basics"** manual, which can be downloaded in PDF Format. Or for more information, please register on Novtel's Forum by clicking this link: <http://www.novtel.com/forum/index.php>

- The setup for the **"Restaurant Point of Sale"** part of the system is done in **"Setup - Company - POS"** tab, and we will only look at the **"Restaurant/Bar"** field



The options in this section includes the following:

- **"Reprint Bill with Supervisor Permission"**
- **"Remove Item without Supervisor Permission"** - An item can be removed from a **"Customer's"** bill by a waiter without authorization
- **"Print Kitchen Slip on Kitchen and Waitron's Printer"**
- **"Discount with Supervisor Permission"** - This is recommended
- Set the **"Maximum Discount Percentage"** allowed on Restaurant and Bar transactions
- **"Allow No Charge Transactions"** - This will normally be used when the Restaurant has sponsored a meal. The meal still needs to be accounted for, but it is not charged
- Enter the number of Tables in the Restaurant
- **"Allow Close Table without Transactions"** - When a table has been allocated to a customer, and he or she decides not to eat or drink in the Restaurant, this option enables you to close the **"Table Sitting"** without any transactions done
- If you have set up your document notes in **"Setup - Documents"**, the check-boxes can be ticked in order to display these notes on the Bar and Restaurant documents
- Tick the check-box in order to **"Set Focus on Payment instead of Gratuity"**

Company Setup

Company Details | General | Financial | Membership | **POS** | Images

Front Desk/Shop

Enable Discount Enable Quick Scan

Max Discount Percentage 5 Show Inventory Details

Print Access Permit

Display Footnote on Front Desk Documents

Display Footnote on Shop Documents

In House Charge

Restaurant/Bar In House Charge Code
BAR001 Bar Charge Clear

POS/Shop In House Charge Code
POS001 POS Charge Clear

POS/Shop In House Payout/Credit Note
PAY001 Payout Charge Clear

Allow Back Posting of In-House Charges

Restaurant/Bar

Reprint Bill with Supervisor permission Delay after Card Read (Seconds) 0

Remove item without Supervisor permission Allow close table without Transactions

Print Bill/Receipt combination instead of Receipt Display Footnote on Bar Documents

Print Kitchen slip on Kitchen and Waitron printer Display Footnote on Restaurant Documents

Allow Restaurant/Bar Discount Set Focus on Payment instead of Gratuity

Discount with Supervisor permission

Max Discount Percentage 5

Allow No Charge Transactions

Number of Tables 25

General

Posting of Shortages/Over Journal by Supervisor Shift Cashup

Hide Shift totals on Money count

Use Detailed Shift Report (Unchecked - Detailed Cash Split Report)

Supervisor Cashup - Print Negative Stock Validation Report

Display Receipt as Invoice (Not recommended)

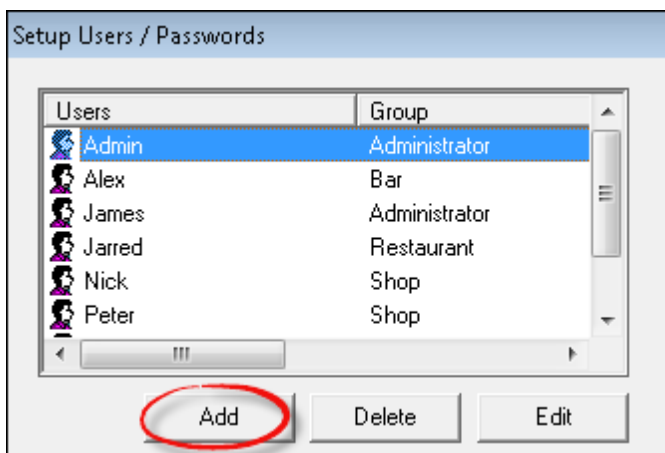
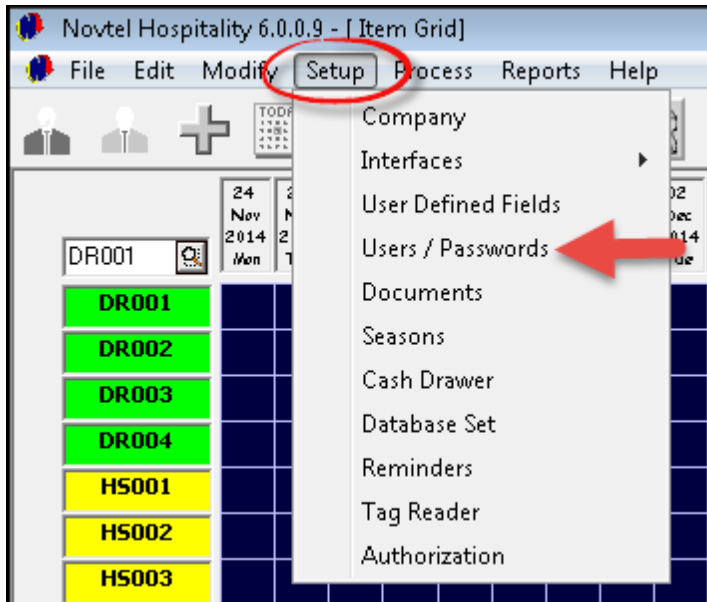
Accept Cancel

- Click **"Accept"** to save the settings

2 Step 2 - Creating Usernames and Passwords

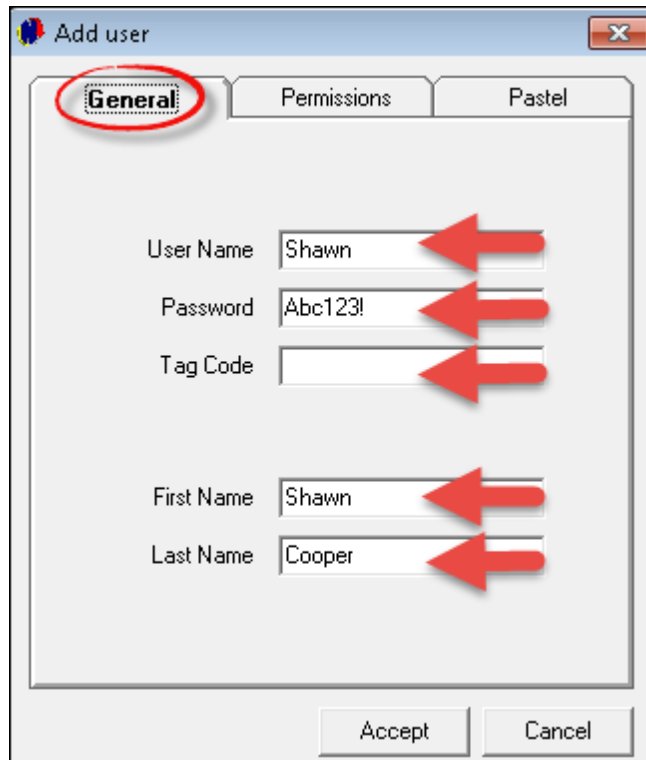
As said before, "Users" are created for different parts of the facility, and according to the permissions set for the "User", access will be restricted to the specific "Area". Depending on the password entered, the appropriate part of the Hospitality Software will open

- Click on "Setup - Users / Passwords", and then on "Add"



➤ In the "General" Tab, enter the following:

- User Name
- Password (Novtel is case sensitive - be sure to enter the "Password" exactly as it has been created in upper and lower case, when logging into the system)
- Tag Code (When "Novtel Access Control" is installed at the entrance of the facility, and a "Tag" system is used for access to the facility, the "Tag Code" for this user can be entered here)
- Enter the User's First and Last Name, and proceed to the "Permissions" Tab

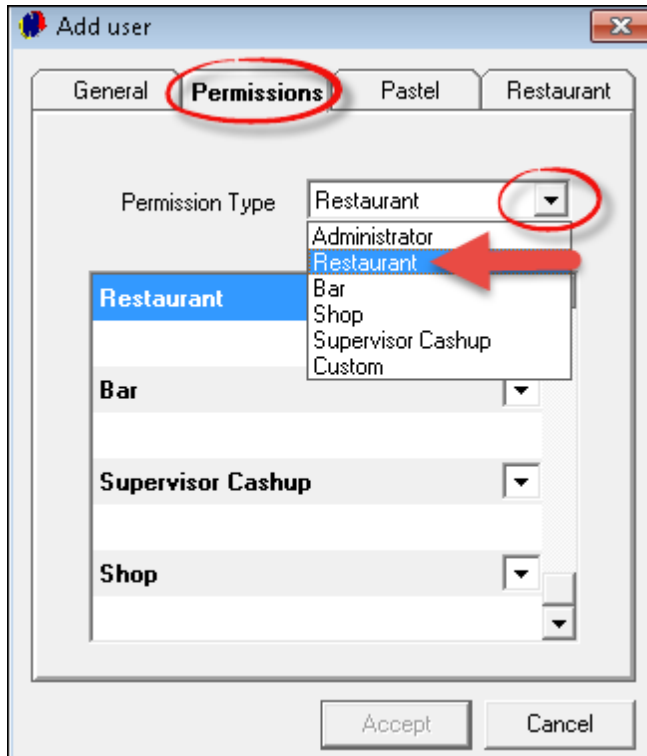


The screenshot shows a window titled "Add user" with three tabs: "General", "Permissions", and "Pastel". The "General" tab is selected and circled in red. It contains five input fields with red arrows pointing to them from the right:

- User Name: Shawn
- Password: Abc123!
- Tag Code: (empty)
- First Name: Shawn
- Last Name: Cooper

At the bottom of the window are "Accept" and "Cancel" buttons.

- For the "Permissions Type", we have selected "Restaurant"



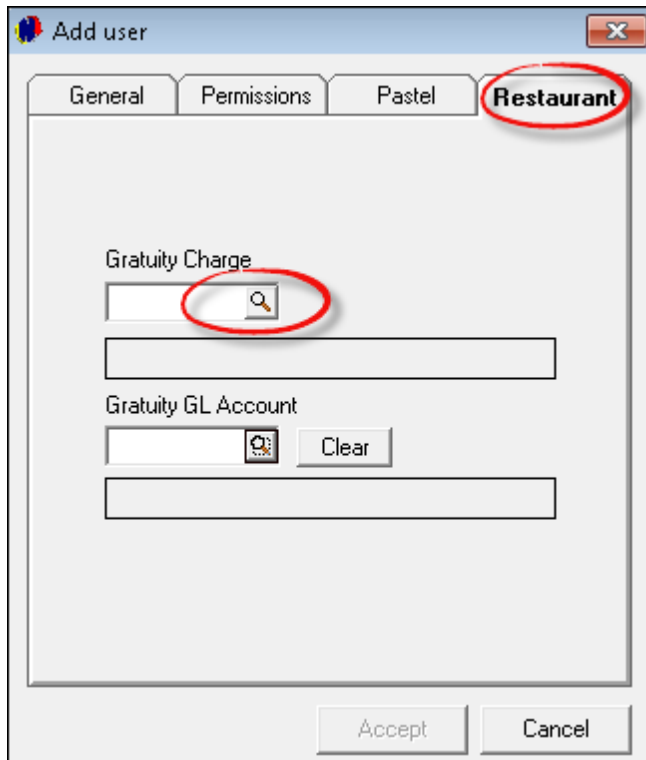
- In the "**Pastel**" tab, you can select "**Multi-Stores**" for the Restaurant and Bar - provided that the module has been installed in Pastel. Alternatively, the "**Default Store**" will be selected automatically
- If Shawn has access to Pastel, he - as a Pastel User - can be selected to import Customer and Supplier Documents too. If not, the appropriate User in Pastel can be selected to whose set of books Shawn's transactions will report - in this case it is James
- Tick the check-box to "**Link to Pastel Database**"

The screenshot shows the 'Add user' dialog box with the 'Pastel' tab selected. The 'Pastel' tab is circled in red. The dialog contains the following fields and controls:

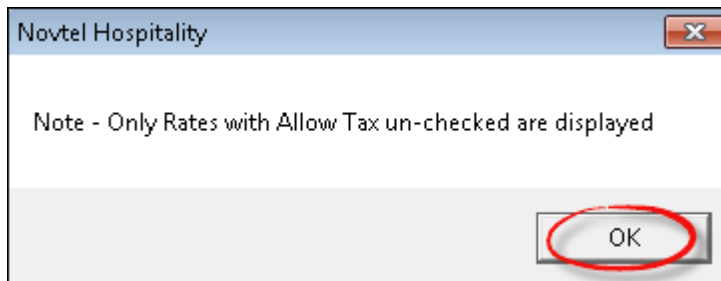
- Restaurant Multi-Store:** A search box containing '001' and a dropdown menu showing 'Default Store'. A red arrow points to the dropdown.
- Bar Multi-Store:** A search box containing '001' and a dropdown menu showing 'Default Store'. A red arrow points to the dropdown.
- Import Customer Documents to Pastel User:** A dropdown menu showing '00 - James'. A red arrow points to the dropdown.
- Import Supplier Documents to Pastel User:** A dropdown menu showing '00 - James'. A red arrow points to the dropdown.
- Link to Pastel Database:** A checkbox that is checked. The checkbox and its label are circled in red.

At the bottom of the dialog are 'Accept' and 'Cancel' buttons.

- In the "Restaurant" tab, a "Gratuity Charge" can be selected which links to this specific "User". Creating these charges are done in "Edit - Charges" as explained in Step 4. In order to insert this charge in the "Restaurant" tab, click on the magnifying glass

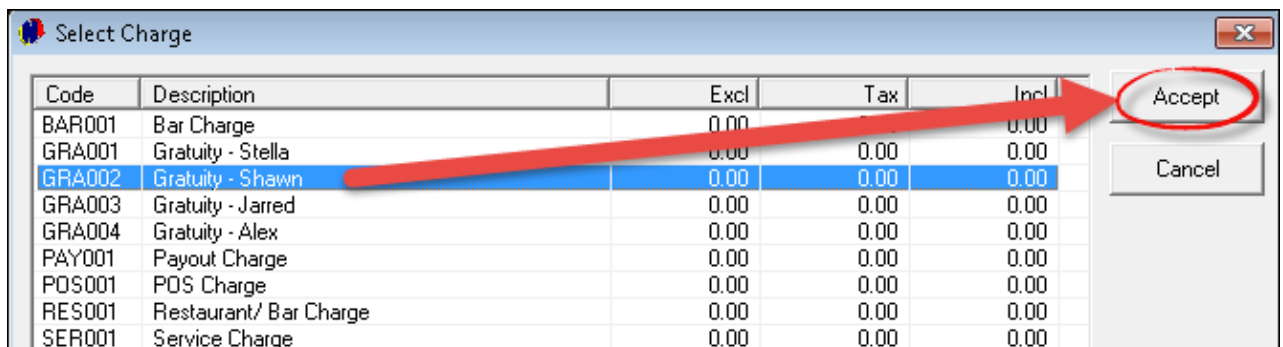


The screenshot shows the 'Add user' dialog box with the 'Restaurant' tab selected. The 'Gratuity Charge' field contains a magnifying glass icon, which is circled in red. Below it is the 'Gratuity GL Account' field with a magnifying glass icon and a 'Clear' button. The 'Accept' and 'Cancel' buttons are at the bottom.



The screenshot shows the 'Novtel Hospitality' dialog box with a note: 'Note - Only Rates with Allow Tax un-checked are displayed'. The 'OK' button is circled in red.

- Select the "Gratuity Charge" for the appropriate "User"



The screenshot shows the 'Select Charge' dialog box with a table of charges. The 'Accept' button is circled in red, and a red arrow points to it from the 'GRA002' row in the table.

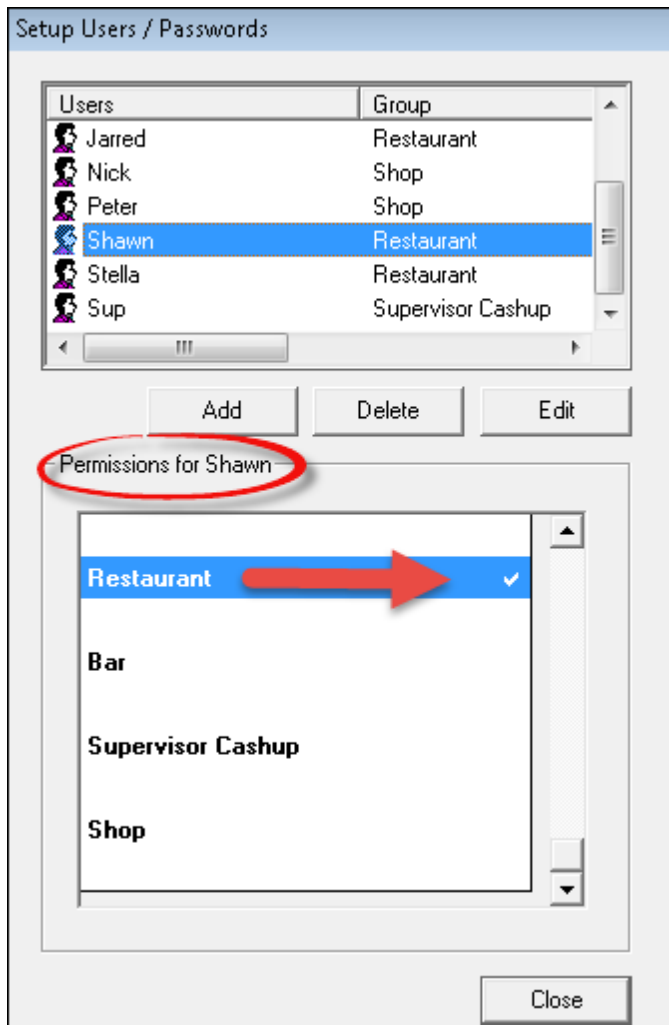
Code	Description	Excl	Tax	Incl
BAR001	Bar Charge	0.00		0.00
GRA001	Gratuity - Stella	0.00	0.00	0.00
GRA002	Gratuity - Shawn	0.00	0.00	0.00
GRA003	Gratuity - Jarred	0.00	0.00	0.00
GRA004	Gratuity - Alex	0.00	0.00	0.00
PAY001	Payout Charge	0.00	0.00	0.00
POS001	POS Charge	0.00	0.00	0.00
RES001	Restaurant/ Bar Charge	0.00	0.00	0.00
SER001	Service Charge	0.00	0.00	0.00

- Select the "Gratuity General Ledger Account" this charge reports to, by clicking on the magnifying glass to open the window containing all accounts as set up in Pastel

The screenshot shows the 'Add user' dialog box with the following fields and controls:

- General** | **Permissions** | **Pastel** | **Restaurant** (selected tab)
- Gratuity Charge:
- Gratuity - Shawn:
- Gratuity GL Account:
- Salary_Wages Control:
-

- Click "**Accept**" to save the User and all settings associated with him
- When you click on Shawn's profile in the "**Setup Users / Passwords**" window, his "**Permissions**" are displayed as follow:



- Repeat the steps in order to create all other "**Restaurant POS Users**"

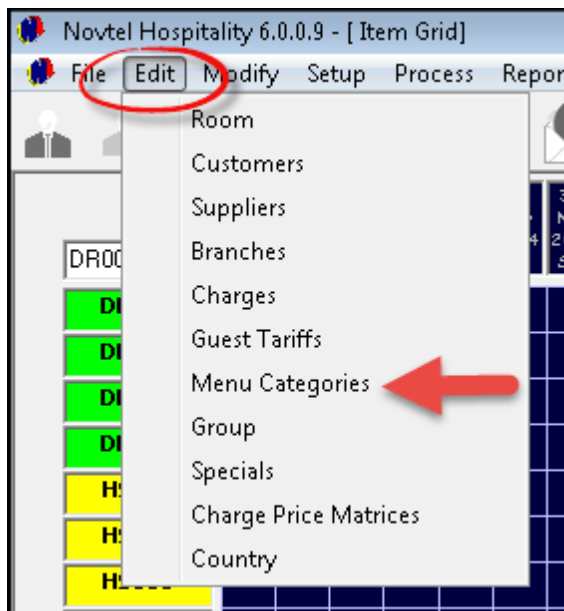
3 Step 3 - Creating Menu Categories

Creating "**Menu Categories**" are extremely important for the "**POS Restaurant**" module. This will ensure that charges are grouped together when linked to the specific "**Category**". It will all make sense when we create the charges itself

"**Categories**" may include:

- Beverages - Hot - which includes different types of coffees; teas; hot chocolate etc.
- Beverages - Soft Drinks (Coke, Sprite etc.)
- Beverages - Alcoholic (Beer, Wine, Spirits etc.) Or you can create separate "**Categories**" for each "**Alcoholic Drink**" type
- Beverages - Juices
- Beverages - Milkshakes
- Beverages - Smoothies
- Breakfast
- Burgers
- Deserts
- Pastas
- Pizzas
- Salads
- Seafood
- Steaks and Ribs
- Toasted Sandwiches
- Extras
- Preparation

In order to create these "**Categories**", click on "**Edit - Menu Categories**"



Code	Description	Extra
BEV001	Beverages - Hot	<input type="checkbox"/>
BEV002	Beverages - Cold Soft Drinks	<input type="checkbox"/>
BEV003	Beverages - Alcoholic	<input type="checkbox"/>
BEV004	Beverages - Juices	<input type="checkbox"/>
BEV005	Beverages - Milkshakes	<input type="checkbox"/>
BEV006	Beverages - Smoothies	<input type="checkbox"/>
BRE001	Breakfast	<input type="checkbox"/>
BUR001	Burgers	<input type="checkbox"/>
DES001	Deserts	<input type="checkbox"/>
PAS001	Pastas	<input type="checkbox"/>
PIZ001	Pizzas	<input type="checkbox"/>
PRE001	Preparation	<input checked="" type="checkbox"/>
SAL001	Salads	<input type="checkbox"/>

Buttons: Add (circled in red), Edit, Delete, Close

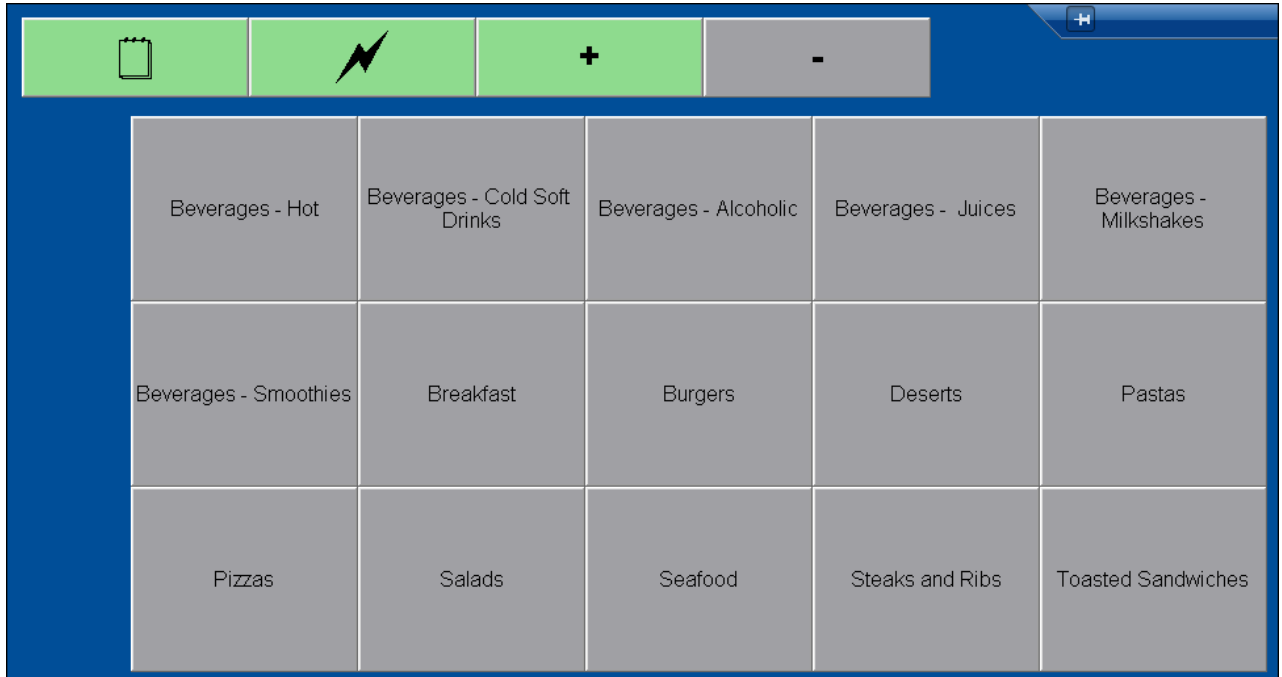
- Enter the **"Code"** for the **"Menu Category"** - in this case it is **"TOA001"**
- The **"Description"** is **"Toasted Sandwiches"**. Please note that the descriptions entered here, will display in the **"POS Restaurant"** screen
- Leave the **"Extra"** check-box un-ticked for all **"Categories"** - except for those we will explain in a moment
- Click **"Accept"** in order to save the **"Category"**

Code **1** TOA001 **Extra** **3**

Description **2** Toasted Sandwiches

4 Accept Cancel

- Logging into the "POS Restaurant System", this is how the "Menu Categories" display. Notice that the "Preparation" and "Extra" Categories do not display with the rest of the "Categories"



- When creating the "Preparation Category", tick the check-box to classify the "Category" as an "Extra". We will explain how this works when adding charges to a "Table Sitting" in Step 7. Also, please refer to Step 4 - "Preparation Charges", for more details

Code: PRE001

Description: Preparation

Extra

Accept Cancel

- Do the same with the "Extras Menu Category", and refer to Step 4 - "Extra Charges" - for more details

Code: XTR001

Description: Extras

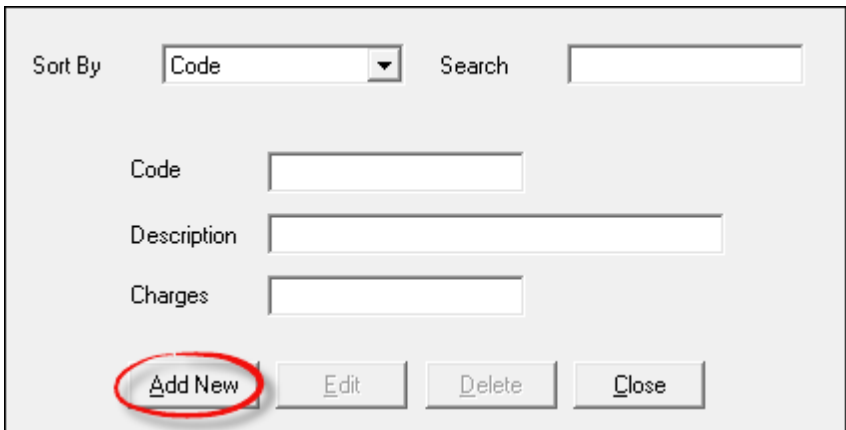
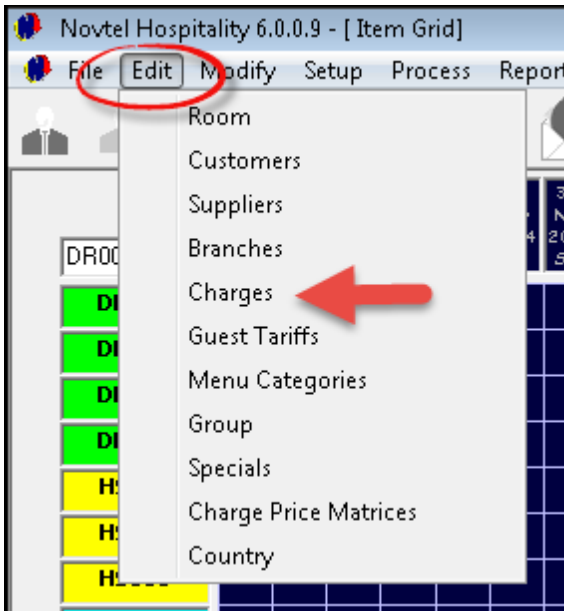
Extra

Accept Cancel

4 Step 4 - Creating Charges

There are different "Charges" to be created in the "Restaurant" business, such as:

- Gratuity Charges for every waitron (As mentioned in Step 2 when we created the "Restaurant System User")
- Every Food and Drink Item on the menu of the "Restaurant"
- In order to create these charges, click on "Edit - Charges", and then "Add New"



4.1 Gratuity Charges

"Gratuity Charges" are created as follow:

- Enter the "Code" for this charge - In this case: GRA002
- The "Description" is "Gratuity - Shawn"
- Tick the check-box if you want the charge to "Display on Invoice"
- In the "General" tab we do not allow tax on this charge, and there is no set amount for all transactions - "Gratuity Charges" vary from country to country, but the accepted rate in South-Africa is 10% of the entire bill

Code: GRA002

Description: Gratuity - Shawn

Barcode:

Display On Invoice

Service Charge Item

Blocked

General Properties

Allow Tax 0 - Tax Type 0 (0%)

Cost Price Excl: 0.00

Rate: 0.00

Markup %: 0.00

User Defined Field 1

User Defined Field 2

User Defined Field 3

User Defined Field 4

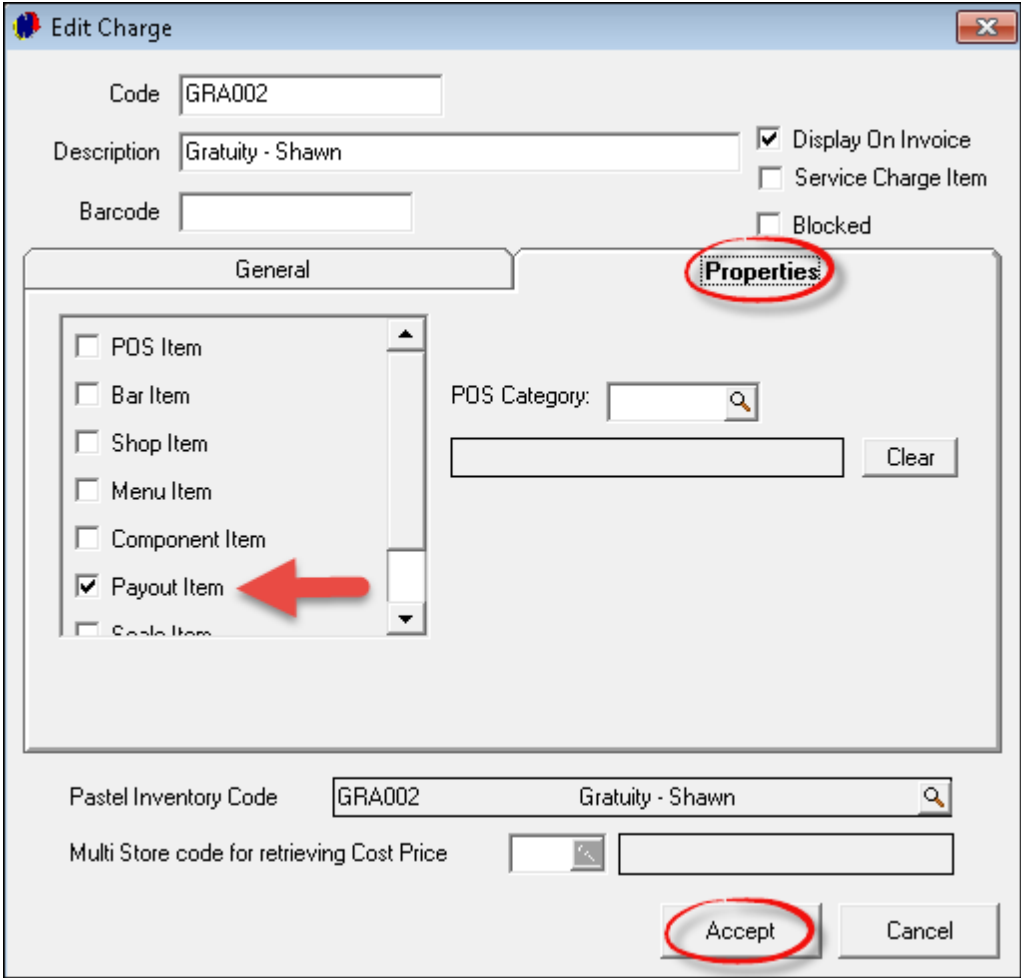
User Defined Field 5

Pastel Inventory Code: GRA002 Gratuity - Shawn

Multi Store code for retrieving Cost Price:

Accept Cancel

- Proceed to the "Properties" tab, and only select "Payout Item"



- Click "Accept" to save the charge. Now create all other "Restaurant System Users' Gratuity Charges" as explained

4.2 Menu Charges

We recommend that you plan all the "**Restaurant Charges**" well on paper before attempting to create them in Novtel. Some companies use abbreviations in order to code different items in the same "**Category**" - using consecutive numeric codes in conjunction with the abbreviation:

➤ "**BHD**" is short for "**Beverages Hot Drinks**"

- Code: BHD001 / Description: Filter Coffee
- BHD002 - Cappuccino
- BHD003 - Hot Chocolate
- BHD004 - Rooibos Tea
- BHD005 - Earl Grey Tea

➤ "**SDC**" is short for "**Soft Drink Cold**"

- SDC001 - Coke 350ml
- SDC002 - Sprite 350ml

➤ "**BRE**" is short for "**Breakfast**"

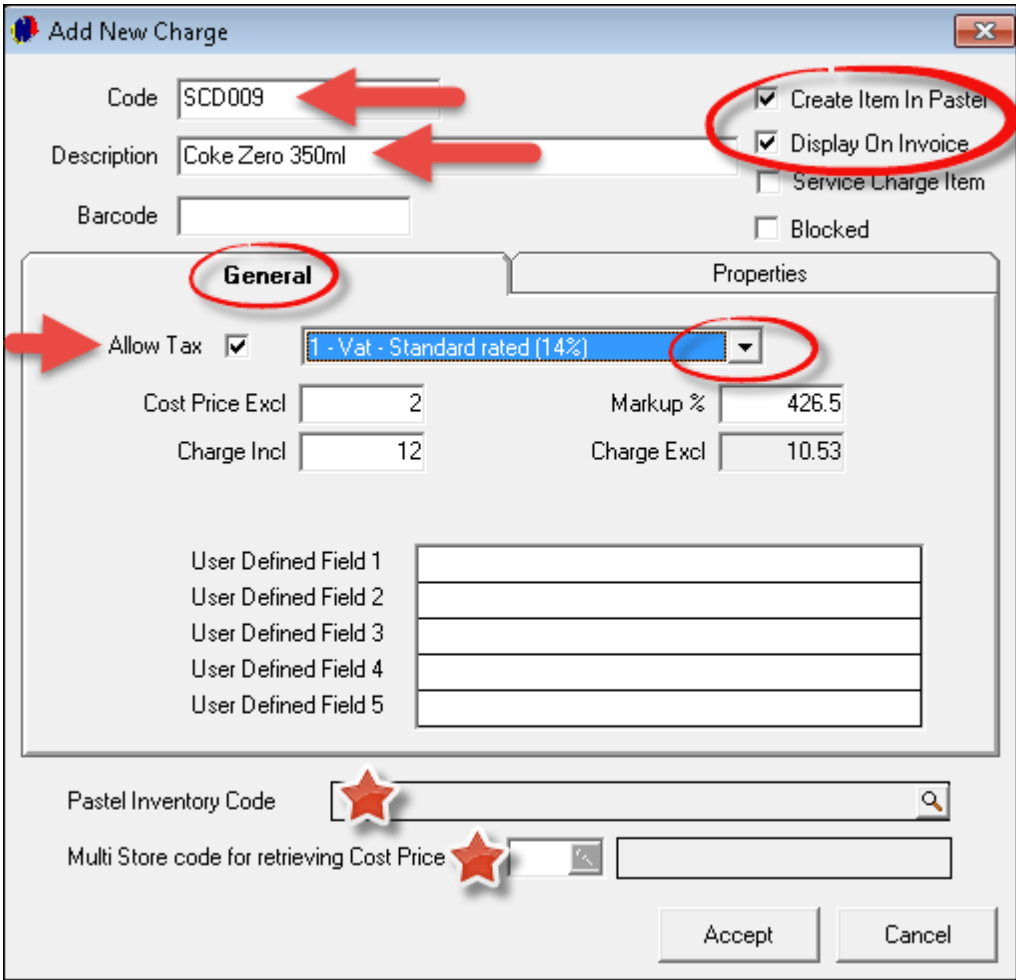
- BRE001 - Sunrise Breakfast
- BRE002 - Farmers Breakfast
- BRE003 - Mega Breakfast
- BRE004 - Plain Omelet and Toast

➤ "**BUR**" - short for "**Burgers**"

- BUR001 - Hamburger and Chips
- BUR002 - Chicken Burger and Chips
- BUR003 - Vegan Burger and Chips
- BUR004 - Pepper Steak Burger and Chips

Create all other "**Charges**" according to the "**Menu Categories**" created in Step 3 for a variety of "**Menu Items**"

- Click on "Edit - Charges - Add New"
- The item we are now creating, is the code for "Coke Zero". Tick the check-boxes to "Create Item in Pastel", and to "Display on Invoice"
- In the "General" tab, select the option to "Allow Tax", and then set the standard VAT percentage
- Enter the "Cost Price Excluding Tax", and below it, the "Cost Price Including Tax" - which is the selling price
- The "Mark-up Percentage", as well as the "Charge Excluding Tax" will automatically be inserted by the system
- The "Pastel Inventory Code" will be created as soon as the charge is imported to Pastel
- If the "Multi-Store Module" in Pastel has been installed on your computer, you can select the "Multi-Store" to which the item reports



➤ In the "**Properties**" tab, you can select the following check-boxes:

- POS Item
- Bar Item
- Shop Item
- Menu Item

The reason for selecting these four options, is because the item will be sold at the Front Desk; in the Bar and Restaurant, as well as in the Shop (At the same selling price for all "**Departments**")

However, if you have different selling prices for the same item in the different "**Departments**", you will need to create the codes as follow:

- SDC009 - Coke Zero 350ml Shop

The Selling Price is R12.00, and it is linked to the POS and Shop Items in the "**Properties**" tab

- SDC010 - Coke Zero 350ml Restaurant

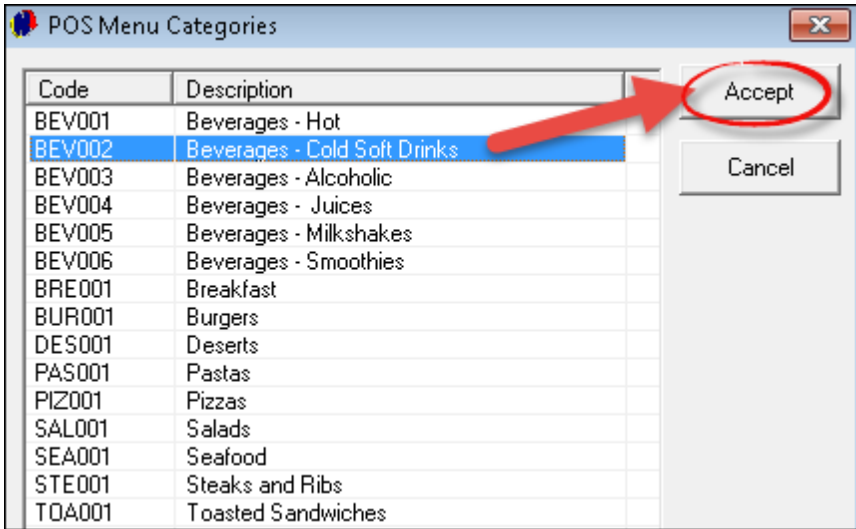
The Selling Price is R15.00, and is linked to the Bar and Restaurant Items in the "**Properties**" tab

The screenshot shows the "Add New Charge" window with the following details:

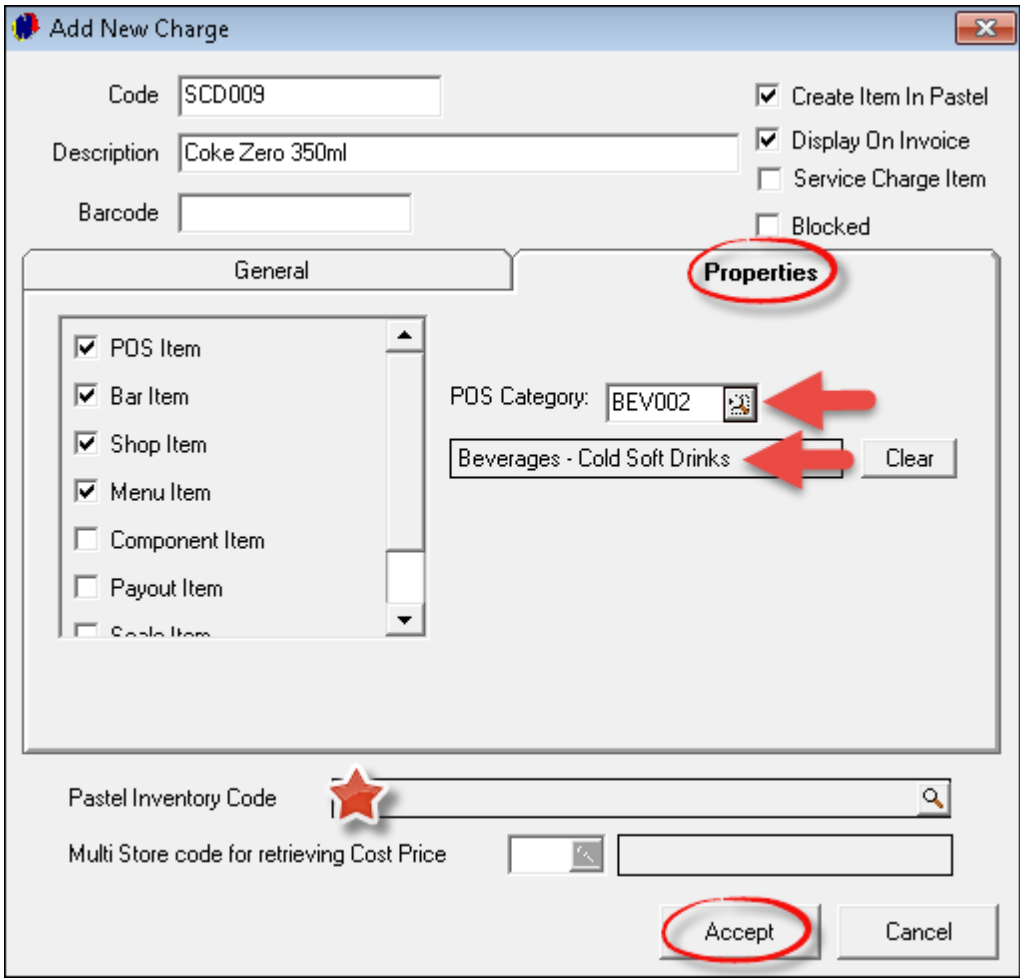
- Code:** SCD009
- Description:** Coke Zero 350ml
- Barcode:** (empty)
- Properties Tab:** Selected and circled in red.
- Item Selection:**
 - POS Item
 - Bar Item
 - Shop Item
 - Menu Item
 - Component Item
 - Payout Item
 - Scale Item
- POS Category:** (empty) with a magnifying glass icon circled in red.
- Clear:** Button next to the POS Category field.
- Pastel Inventory Code:** (empty)
- Multi Store code for retrieving Cost Price:** (empty)
- Buttons:** Accept, Cancel

- In order to link this item to the "**Menu Category**" for "**Soft Drinks**" created in Step 3, click on the magnifying glass next to "**POS Category**"

- The window containing all the "POS Menu Categories" that have been created will open, and the correct "Category" for this charge can be selected



- The "POS Category" now displays in the "Properties" tab



- We will show you shortly that the "Pastel Inventory Code" has been created
- Click "Accept"

- The "Import Inventory Item" window will open - Select "Inventory Goods" in the "Inventory Group" field
- Coke Zero is a "Physical Item"
- Click "Accept"

Import Inventory Item

Code: SCD009

Description: Coke Zero 350ml

Inventory Group: 002 - Inventory Goods

Excl Selling Price: 10.53

Physical Item
 Service Item

Accept Cancel

- Now when you open the "Charge" for "Coke Zero", the "Pastel Inventory Code" has been inserted because of the "Import" we have just done

Edit Charge

Code: SCD009

Description: Coke Zero 350ml

Barcode: [Empty]

Display On Invoice
 Service Charge Item
 Blocked

General Properties

Allow Tax: 1 - Vat - Standard rated (14%)

Cost Price Excl: 2.00 Markup %: 426.50

Charge Incl: 12.00 Charge Excl: 10.53

User Defined Field 1
User Defined Field 2
User Defined Field 3
User Defined Field 4
User Defined Field 5

Pastel Inventory Code: SCD009 Coke Zero 350ml

Multi Store code for retrieving Cost Price: [Empty]

Accept Cancel

- In order to demonstrate how the "Charge Code" for a meal in the Restaurant is created - in this case, "Hake and Greek Salad"

The screenshot shows the 'Edit Charge' window with the 'General' tab selected. The 'Code' field is 'SEA002' and the 'Description' is 'Hake and Greek Salad'. The 'Properties' section includes 'Allow Tax' (checked), '1 - Vat - Standard rated (14%)', 'Cost Price Excl' (20.00), 'Markup %' (158.75), 'Charge Incl' (59.00), and 'Charge Excl' (51.75). There are also five 'User Defined Field' boxes, a 'Pastel Inventory Code' field with 'SEA002', and a 'Multi Store code for retrieving Cost Price' field. 'Accept' and 'Cancel' buttons are at the bottom.

- It is a "Menu Item" ONLY, and it is linked to the "Seafood Category"

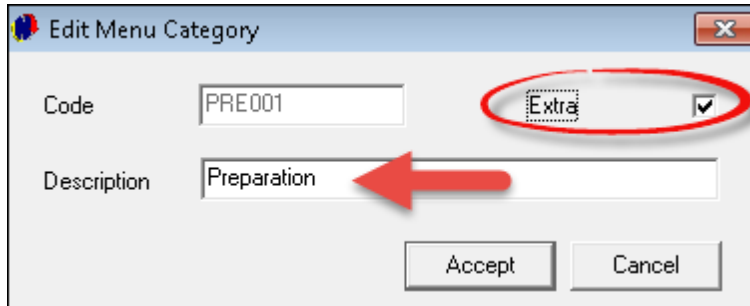
The screenshot shows the 'Edit Charge' window with the 'Properties' tab selected. The 'Code' is 'SEA002' and the 'Description' is 'Hake and Greek Salad'. The 'Properties' section includes a list of item types: 'POS Item', 'Bar Item', 'Shop Item', and 'Menu Item' (checked). The 'POS Category' is 'SEA001' and the selected category is 'Seafood'. There is a 'Clear' button next to the category field.

- Create all the items on the Restaurant's Menu, and link it to the appropriate "Menu Category"

4.3 Preparation Charges

The preparation methods used in a Restaurant are not a "Charge" as such, since the "Customer" will never pay according to the method used in preparing their food. However, this is how we link the "method" to the "Preparation Category" that has been set up. These preparation methods can then be selected for the specific meal ordered, and printed in the Kitchen for the Chef's attention.

Creating these "preparation methods" are done differently than "Ordinary Charges". In Step 3 we have created the "Preparation Menu Category" as an "Extra" item

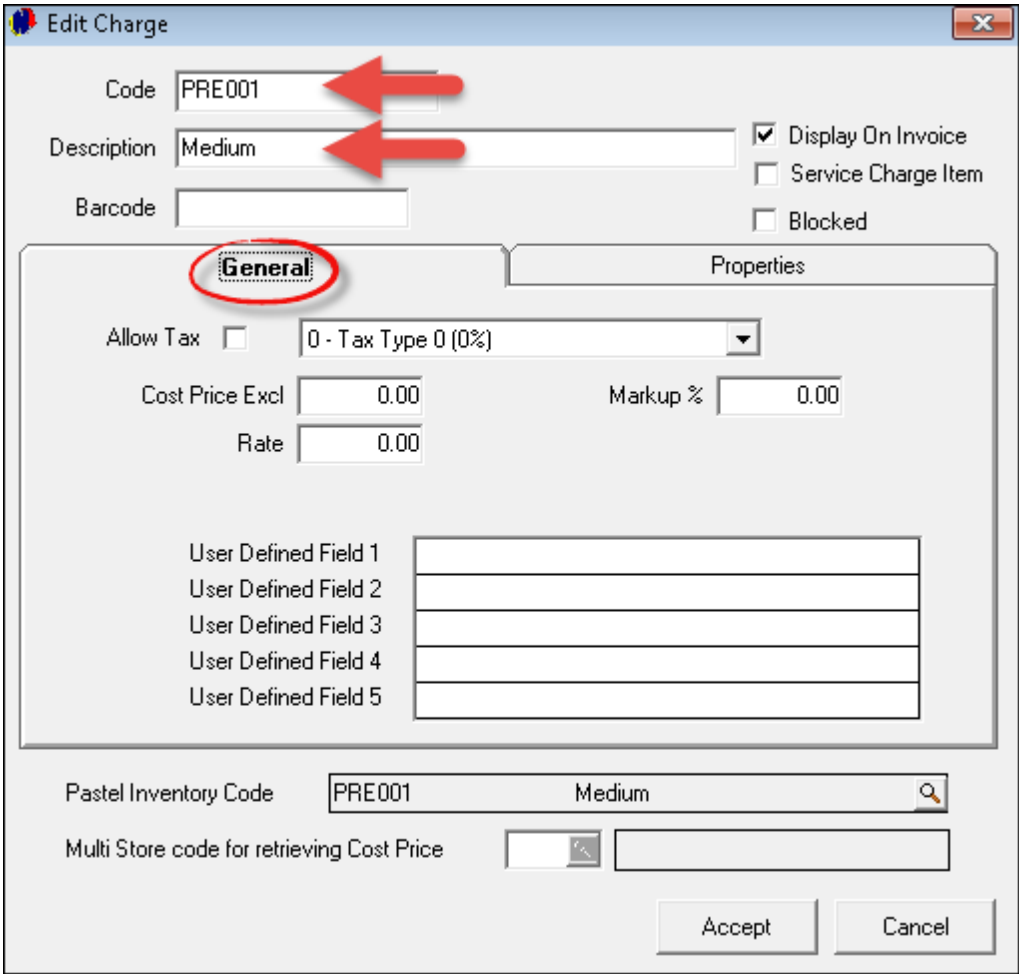


The reason being: in the POS Restaurant Screen, there is a specific icon to be clicked in order to open the "Categories" created as an "Extra" - it is not grouped together with the "Main Menu Categories"

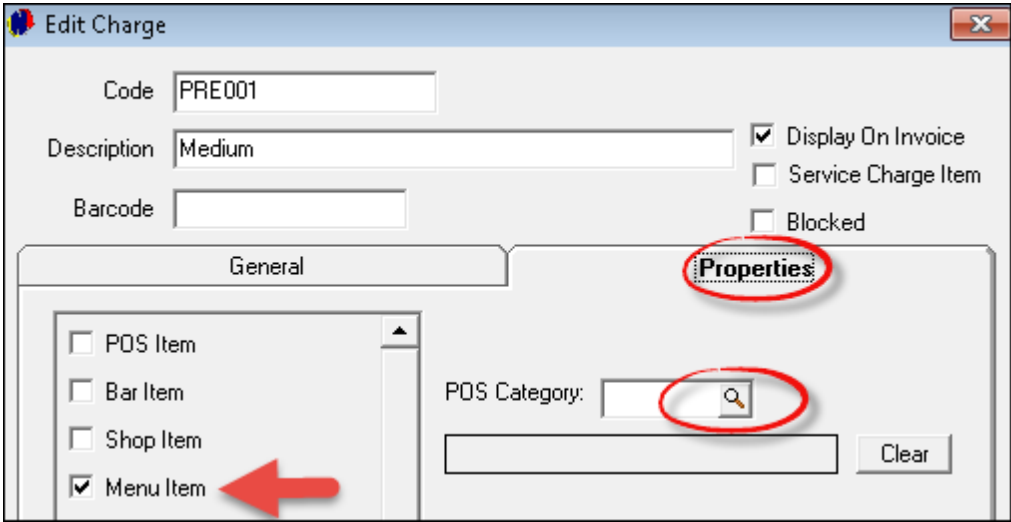
➤ Firstly we need to create the preparation method as a "Menu Item" - although it is not an actual item on the menu (This will make more sense when we demonstrate how it is used in the Hospitality Point of Sale Restaurant Module).

Examples Include:

- Code: PRE001 / Description: Medium
 - PRE002 - Medium Rare
 - PRE003 - Well Done
 - PRE004 - Baked
 - PRE005 - Fried
 - PRE006 - Steamed
 - PRE007 - Eggs - Scrambled
 - PRE008 - Eggs - Easy Over
 - PRE009 - Eggs - Sunny Side Up
- Click on "Edit - Charges - Add New"



- In the "General" tab, no tax or rates are entered for preparation methods
- Select "Menu Item" in the "Properties" tab



- When you click on the magnifying glass next to "POS Category", you will notice that the "Preparation Category" is not present in this window - although it has been created as a "Menu Category"

Code	Description
BEV001	Beverages - Hot
BEV002	Beverages - Cold Soft Drinks
BEV003	Beverages - Alcoholic
BEV004	Beverages - Juices
BEV005	Beverages - Milkshakes
BEV006	Beverages - Smoothies
BRE001	Breakfast
BUR001	Burgers
DES001	Deserts
PAS001	Pastas
PIZ001	Pizzas
SAL001	Salads
SEA001	Seafood
STE001	Steaks and Ribs
TOA001	Toasted Sandwiches

- Click "**Cancel**" here, since no "**Category**" will be selected now
- Click "**Accept**" to save the "**Charge**", and "**Import the Inventory Item**" as a "**Service Item**"
- We now need to create another "**Charge**" for each of our preparation methods, which will link to the first "**Charge**" created as a "**Menu Item**", and also to the "**Preparation Category**"
- Enter a different "**Code**" and enter the "**Description**" for the preparation method. In the "**General**" tab, nothing else needs to be done, since there is no tax and rates for this "**Charge**"

Code: XTR011

Description: Medium.

Barcode:

Display On Invoice

Service Charge Item

Blocked

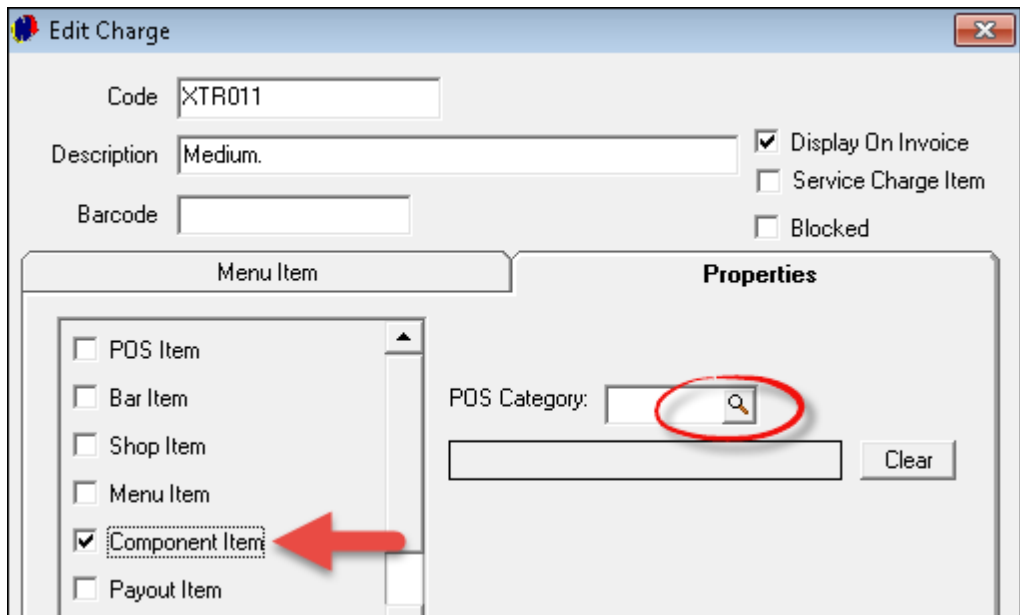
General Properties

Allow Tax: 0 - Tax Type 0 (0%)

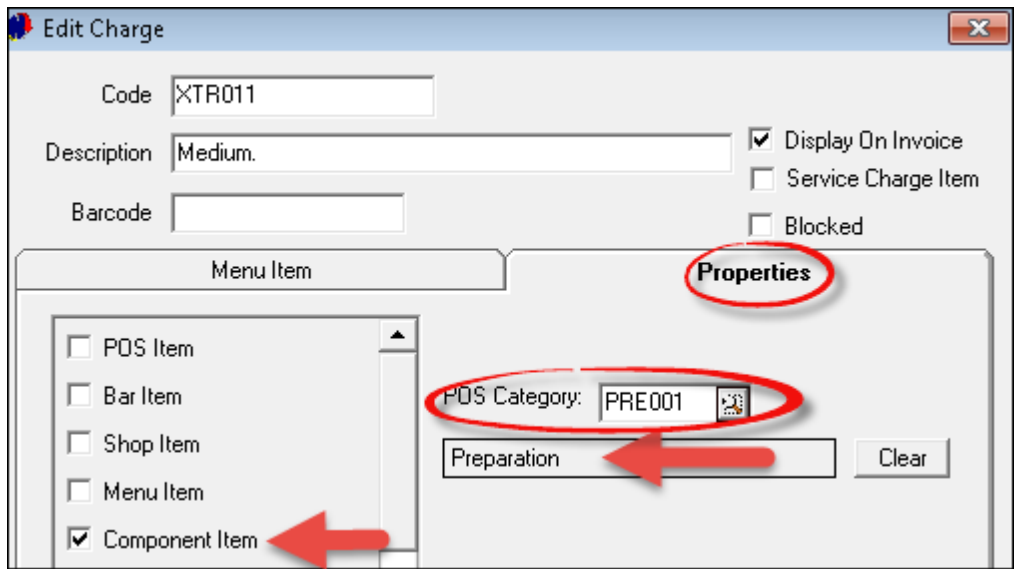
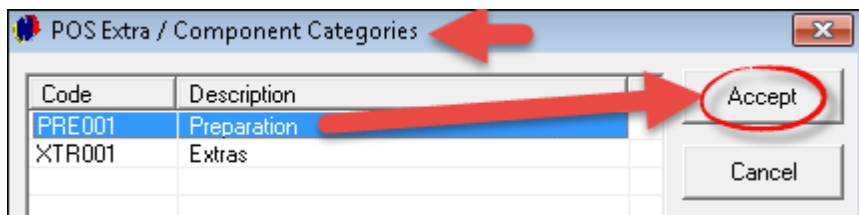
Cost Price Excl: 0.00 Markup %: 0.00

Rate: 0.00

- In the "Properties" tab, we will now select "Component Item"



- Click on the magnifying glass next to "POS Category". This is now where the "Preparation Category" displays, together with the "Extras Menu Category"



- Because we have selected "**Component Item**", this "**Charge**" needs to be linked to a "**Menu Item**". Notice that the "**General**" tab is now labeled "**Menu Item**"
- When you click on the tab, the "**Charge**" can be linked to the original "**PRE001**" Code, which means that the system will automatically notify the kitchen of the preparation method when it is selected in the POS Restaurant Module
- Click "**Accept**" to save, and then "**Import the Inventory Item**" as a "**Service Item**"

Edit Charge

Code: XTR011

Description: Medium. Display On Invoice
 Service Charge Item

Barcode: Blocked

Menu Item Properties

Menu Item: PRE001 - Medium Clear Menu Item

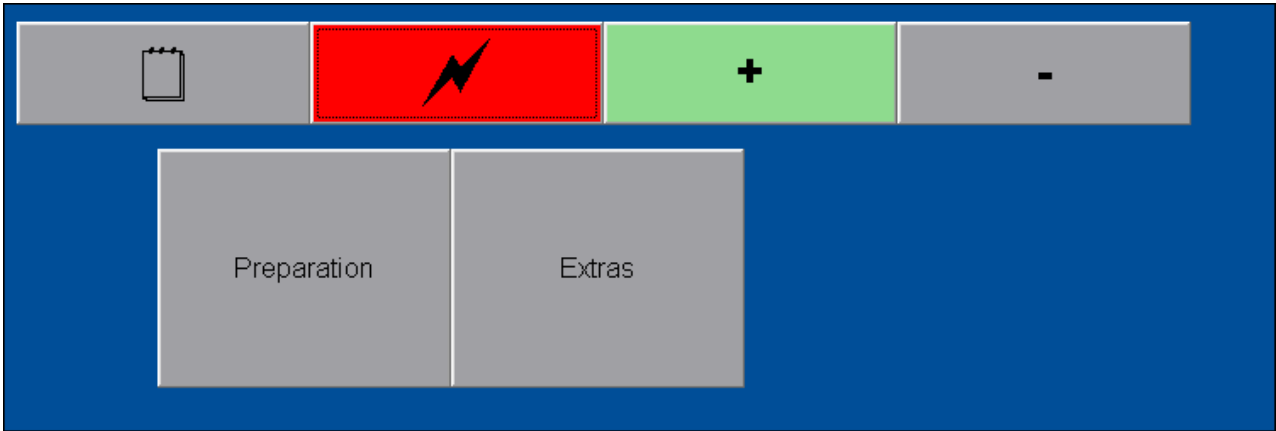
With Linked Menu Item:
Novtel will automatically inform the kitchen how to prepare the order and bill the customer simultaneously.

Without Linked Menu Item:
Novtel will only notify the kitchen how to prepare the order without billing the customer.

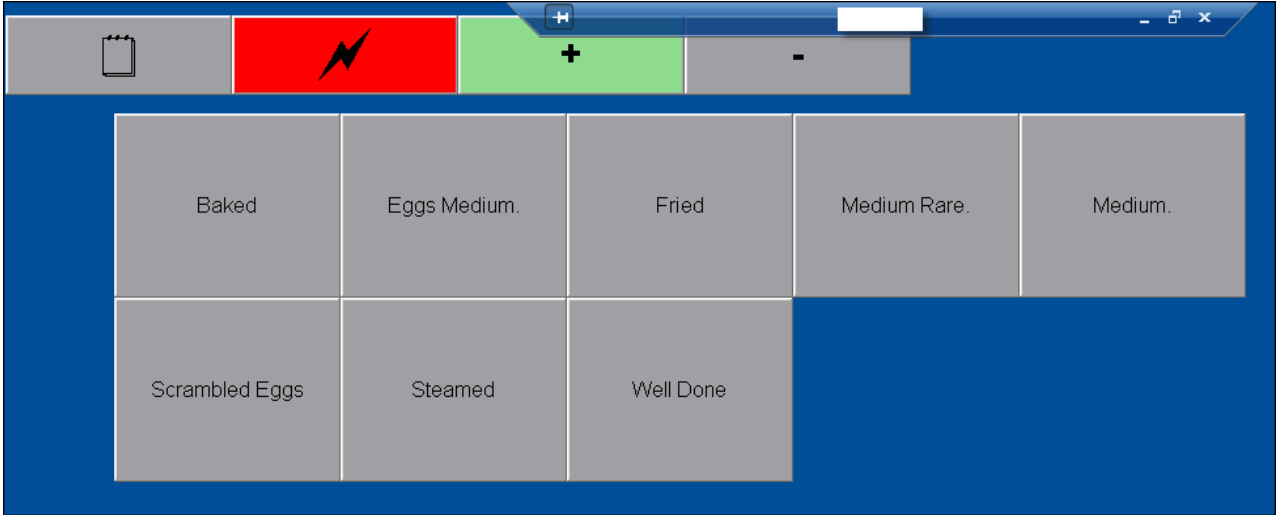
Pastel Inventory Code: XTR011 Medium.

Multi Store code for retrieving Cost Price:

- Logging into the "POS Restaurant System", this is how the "Categories" display for which we have selected the "Extra" check-box



When the "Preparation Menu" is clicked, all the "Methods" created are displayed

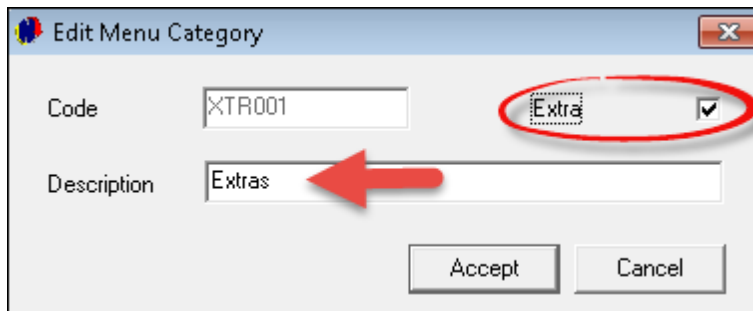


4.4 Extra Charges

On a daily basis in the Restaurant industry, "**Customers**" would ask to add items to their meal. For example:

- Add an egg and toast to their breakfast
- Add a portion of chips to a meal, etc.

When the "**Extras Menu Category**" was created, we have ticked the check-box for the "**Category**" to be classified as an "**Extra**". It sounds confusing, but the significance of this will become clear as soon as we demonstrate why it is done this way



The screenshot shows a dialog box titled "Edit Menu Category". It has two input fields: "Code" with the value "XTR001" and "Description" with the value "Extras". To the right of the "Code" field, there is a radio button labeled "Extra" which is selected, and a checked checkbox. A red oval highlights this "Extra" radio button and checkbox. A red arrow points to the "Description" field. At the bottom of the dialog box are "Accept" and "Cancel" buttons.

Creating the "Charges" are done in the same manner as the "Preparation Charges"

- Click on "Edit - Charges - Add New"
- Enter the Code and Description, and tick the check-boxes to "Create Item in Pastel" as well as "Display on Invoice"
- In the "General" tab, tick the check-box to "Allow Tax" and set the Tax Percentage
- Enter the "Cost Price Excluding" amount, and then the selling price in the "Charge Including" field. The system will automatically enter the "Markup %" as well as the "Charge Excluding" amount

The screenshot shows the 'Add New Charge' dialog box with the following details:

- Code:** ADD011
- Description:** Add Brown Toast Slice
- Barcode:** (empty)
- Checkboxes:** Create Item In Pastel, Display On Invoice, Service Charge Item, Blocked
- General Tab (circled in red):**
 - Allow Tax:** 1 - Vat - Standard rated (14%)
 - Cost Price Excl:** 1.00
 - Charge Incl:** 3.00
 - Markup %:** 163
 - Charge Excl:** 2.63
 - User Defined Fields:** Five empty text input fields labeled User Defined Field 1 through 5.
- Properties Tab:** (empty)
- Pastel Inventory Code:** (empty)
- Multi Store code for retrieving Cost Price:** (empty)
- Buttons:** Accept, Cancel

- In the "Properties" tab, select "Menu Item". Do not select a "POS Category" here

Code: ADD011

Description: Add Brown Toast Slice

Barcode: [Empty]

Create Item In Pastel
 Display On Invoice
 Service Charge Item
 Blocked

General

POS Item
 Bar Item
 Shop Item
 Menu Item

Properties

POS Category: [Empty] [X] [Search Icon]

Clear

- Click "Accept", and "Import the Inventory Item" as "Inventory Goods" and a "Physical Item"

Code: ADD011

Description: Add Brown Toast Slice

Inventory Group: 002 - Inventory Goods

Excl Selling Price: 2.63

Physical Item
 Service Item

Accept Cancel

- Now add another "Charge" for this item, and enter all information in the "General" tab
- Select "Component Item" in the "Properties" tab, and click on the magnifying glass next to "POS Category"

Code: XTR019

Description: Add Brown Toast Slice

Barcode: [Empty]

Create Item In Pastel
 Display On Invoice
 Service Charge Item
 Blocked

Menu Item

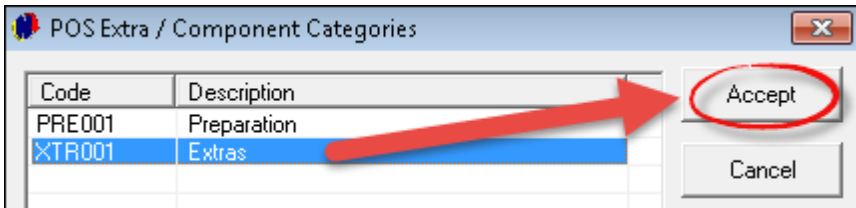
POS Item
 Bar Item
 Shop Item
 Menu Item
 Component Item

Properties

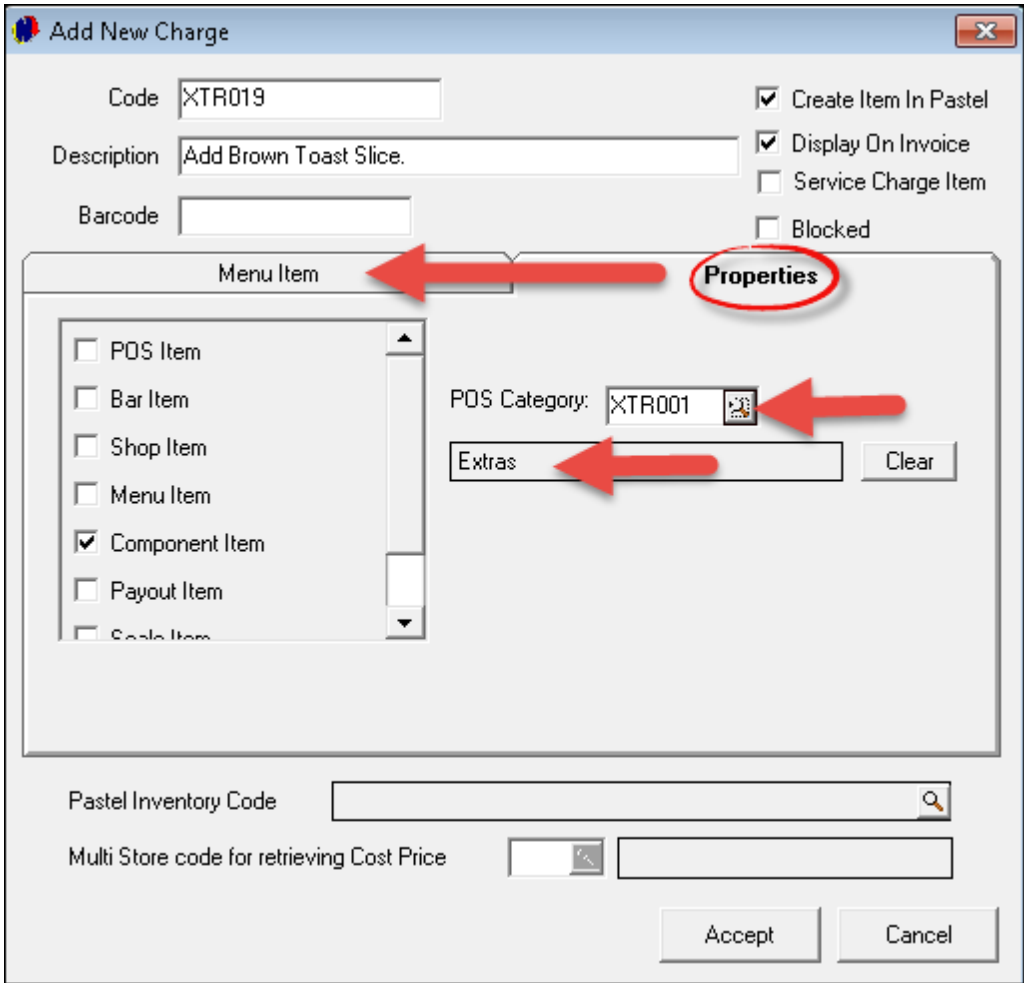
POS Category: [Empty] [Search Icon]

Clear

- Select the "Extras Category"

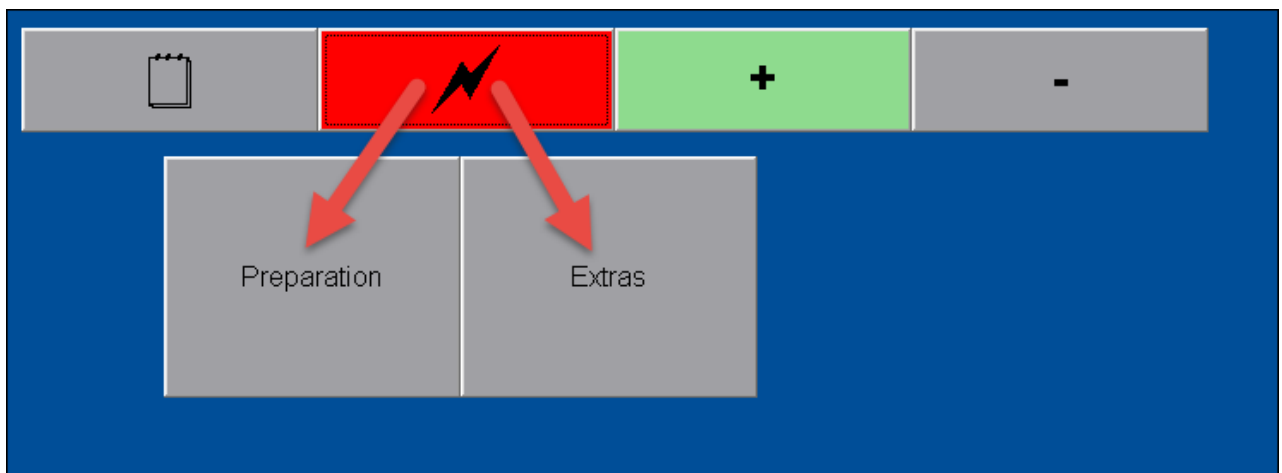


- The "Category" has been inserted. Notice that the "General" tab has changed to the "Menu Item" tab - Click on it

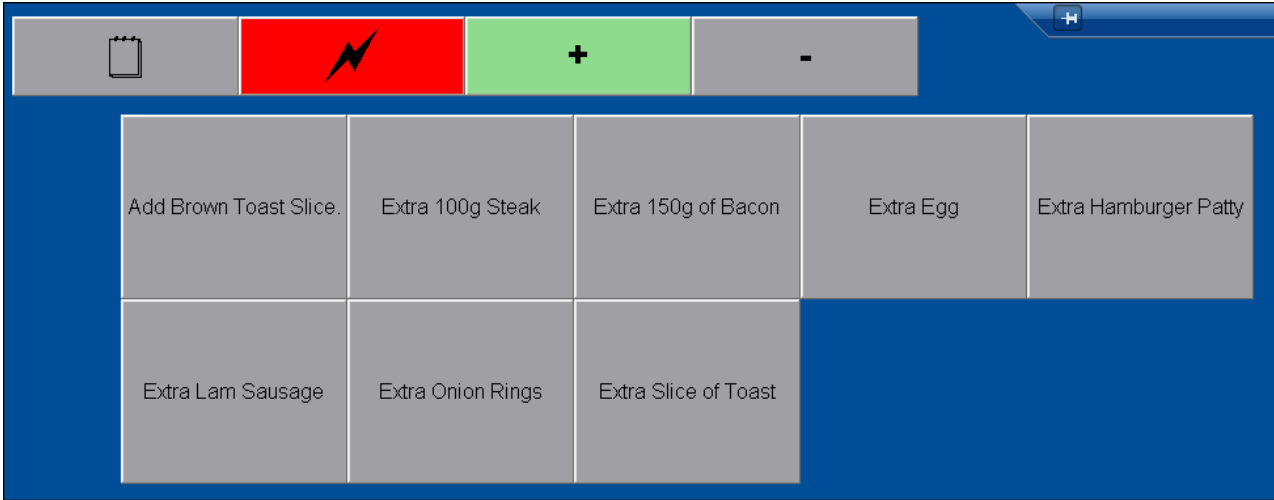


- Click on the magnifying glass next to **"Menu Item"**; browse for the original code created as a **"Menu Item"**, and select it. The charge is now linked to the **"Menu Item"** as well as the **"Extras Category"**. Whenever this charge is selected in the **"POS Restaurant Module"**, the kitchen staff will be informed of the extra item to be added to a specific meal, and it will automatically be billed
- Click on **"Accept"** to save the charge; **"Import the Inventory Item to Pastel"** as **"Inventory Goods"** and a **"Physical Item"**

- Logging into the **"POS Restaurant System"**, this is how the **"Categories"** display for which we have selected the **"Extra"** check-box



- When the "Extra Category" is selected, all "Charges" linked to the "Category" is displayed



- When an "Extra" is selected for an "Add-On" to a meal, it will display as follows on the slip that is printed in the kitchen:

A screenshot of a printed kitchen slip for Table 1. The slip lists items with their descriptions, quantities, and prices. Two rows are highlighted in green with red arrows pointing to them: the "Sunrise Breakfast" row and the "Omelette - Bacon and Tomato Fil" row. The "Sunrise Breakfast" row includes sub-items: "[+ 1 Extra Egg]" and "[+ 1 Extra Slice of Toast]". The "Omelette - Bacon and Tomato Fil" row includes a sub-item: "[+ 1 Extra 150g of Bacon]".

DESCRIPTION	QTY	PRICE
- Sunrise Breakfast	1	45.00
Sunrise Breakfast	1	45.00
[+ 1 Extra Egg]		
[+ 1 Extra Slice of Toast]		
+ Add Egg	1	7.50
+ Add Slice of Toast	1	3.00
Filter Coffee	2	24.00
- Omelette - Bacon and Tomato Filling	1	73.00
Omelette - Bacon and Tomato Fil	1	55.00
[+ 1 Extra 150g of Bacon]		
Add 150g of Bacon	1	18.00

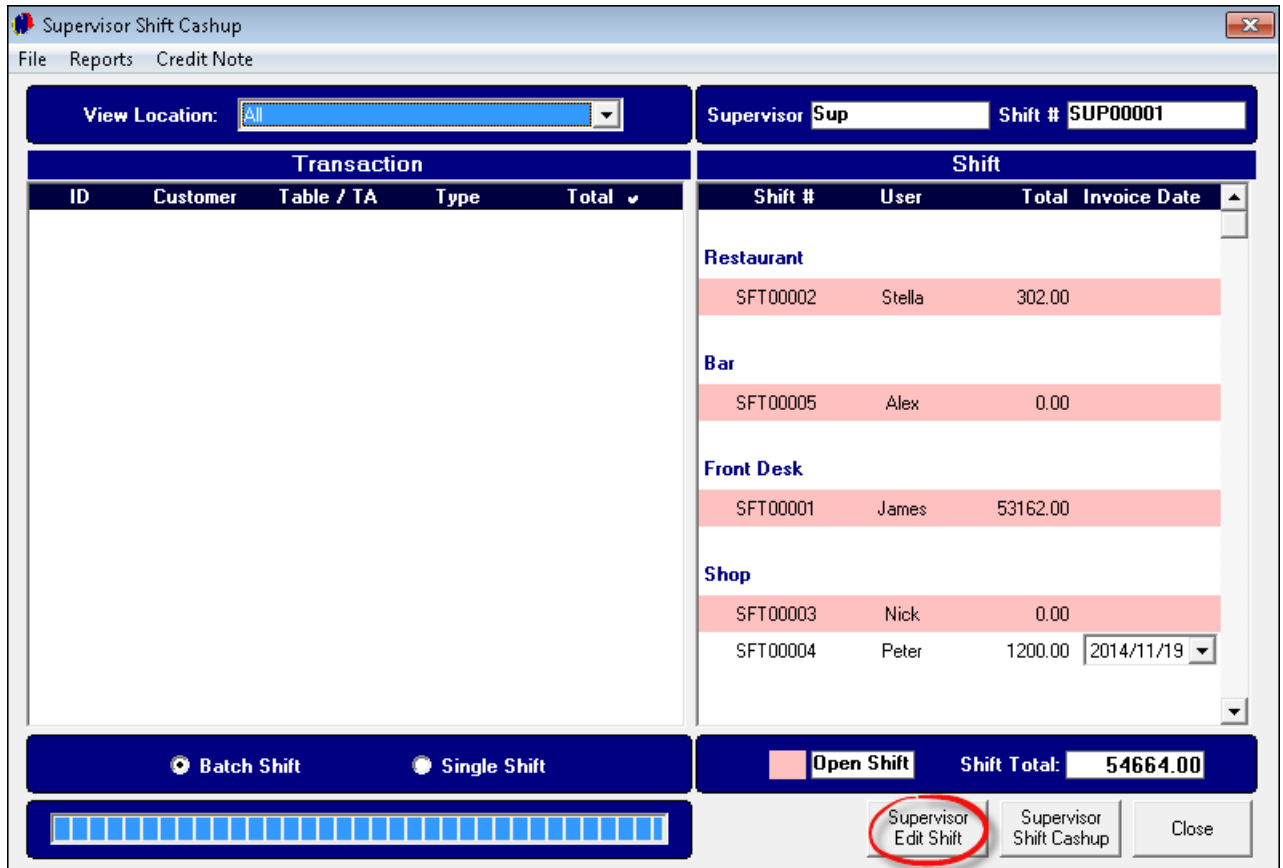
- When the "Customer" receives the bill, this is what he or she will see on the slip:

Novtel Hospitality			
Diaz Office Park			
Block 1 Unit 30			
0861 66 88 35			
0865 1171 65			
Invoice :	IN00063		
VAT Number :	123456789		
<hr/>			
Table: 1			
Sunrise Breakfast	1	5.53	45.00
Add Egg	1	0.92	7.50
Add Slice of Toast	1	0.37	3.00
Filter Coffee	2	2.94	24.00
Omelette - Bacon and Tomato Filling	1	6.75	55.00
+ Add 150g of Bacon	1	2.21	18.00
Service Charge	1	0.00	0.00
		Total Excl :	133.78
		Tax :	18.72
		Total :	<u>152.50</u>
		Discount Included :	<u>0.00</u>
Gratuity:			
Waitron :	Stella		

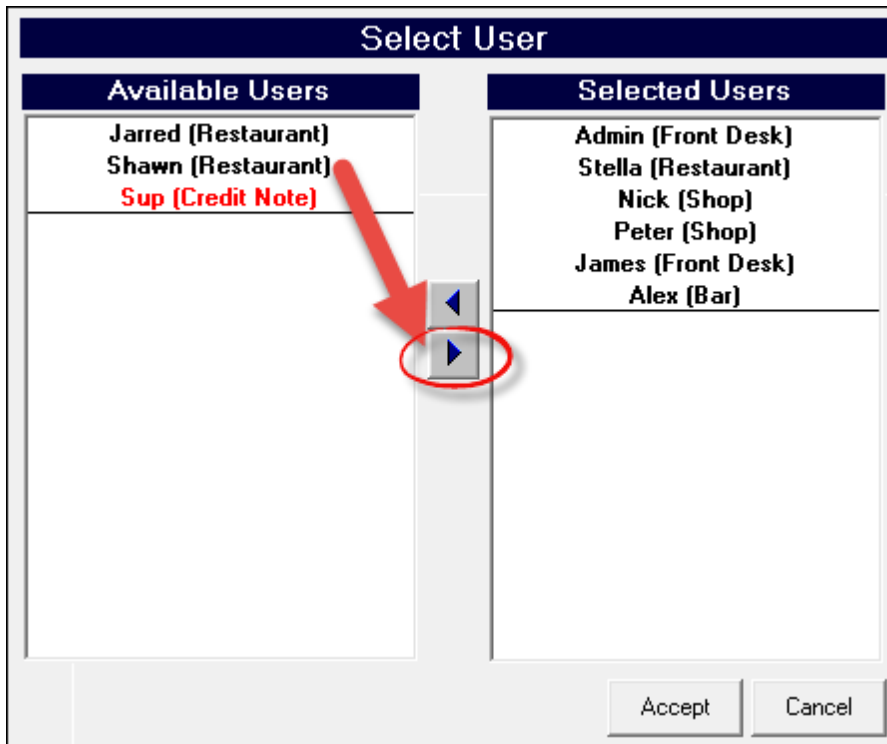
5 Step 5 - Opening a Shift

Only a Supervisor can open a shift - without an open shift, no transactions can be done. The "User" must log out of the system in order for the Supervisor to log in

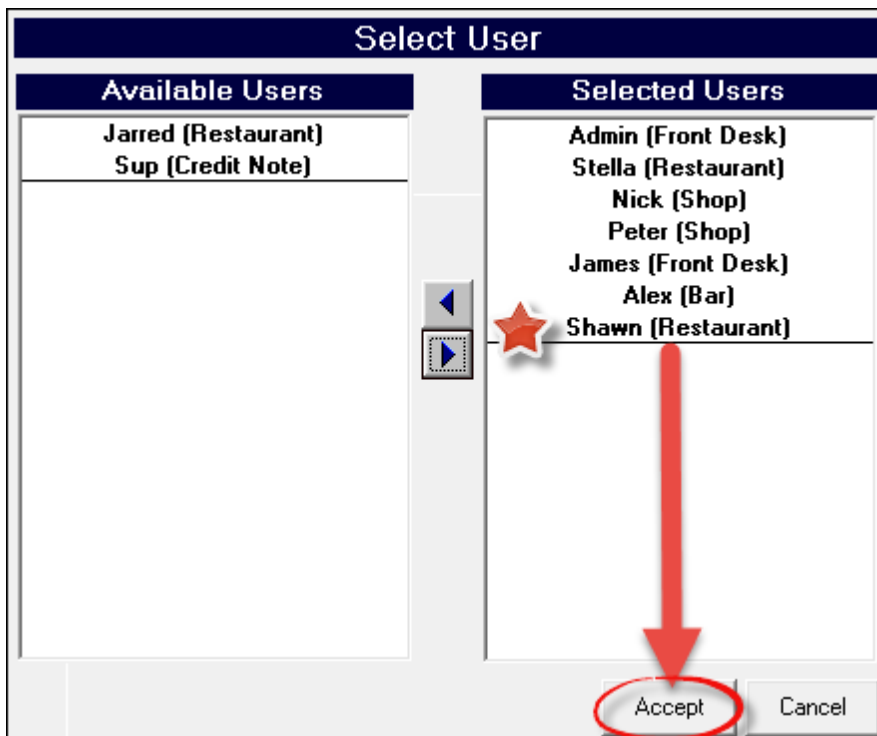
- Click on "Supervisor Open Shift", or when other shifts are open as in this case, click on "Supervisor Edit Shift"



- Click on the "User" whose shift is to be opened, and click on the arrow pointing to the right



- The "User" will now display in the right hand block of the window. When all applicable "Users" have been selected, click "Accept"

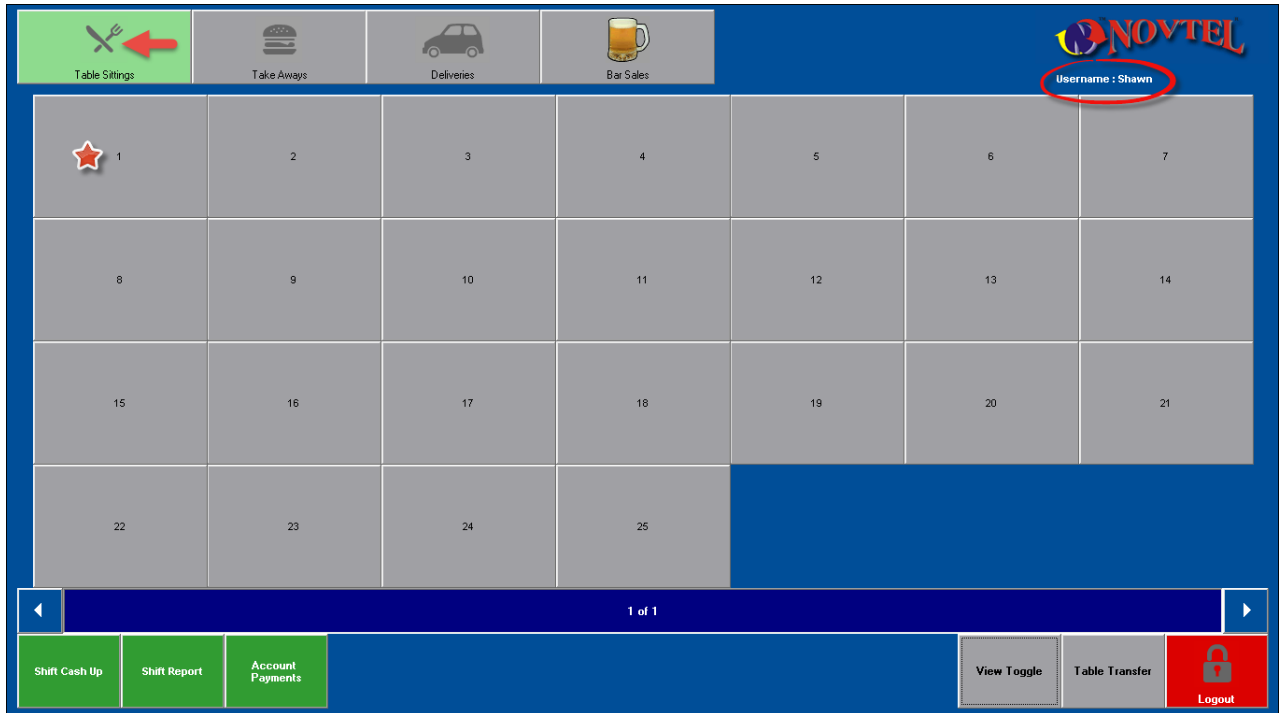


- Click "Close" in order for the Supervisor to log out. The "User" can now log in for his / her shift

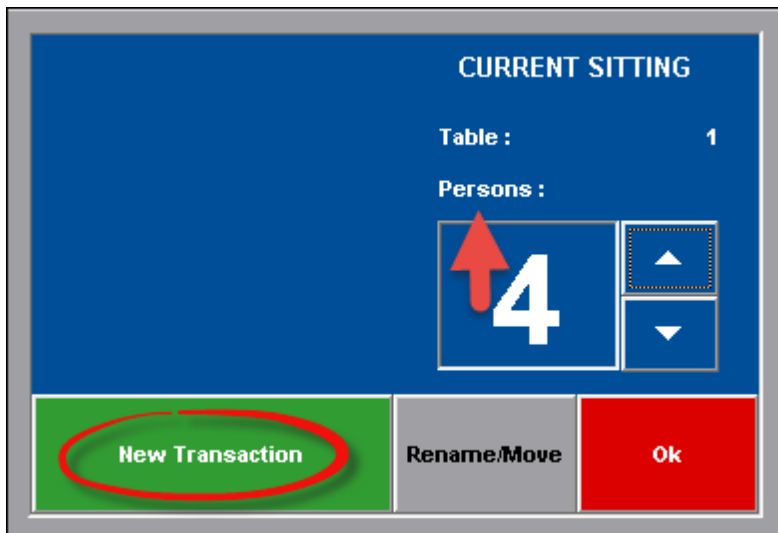
6 Step 6 - Table Settings and Transactions

When Shawn logs in with his password, the "Table Settings" screen opens in the POS Restaurant Module. The number of blocks represents the number of tables in the Restaurant - as set up in Step 1

- In order to be able to start a transaction, a table must be selected. We will use Table 1



- Select the number of people seated at the table, and click on "New Transaction"



- A keyboard will open, and you can enter any transaction description for this table. We have simply entered "1" because it is the first transaction for the day

Enter transaction description :

#1 1

0	1	2	3	4	5	6	7	8	9	a	b	c
d	e	f	g	h	i	j	k	l	m	n	o	p
q	r	s	t	u	v	w	x	y	z	_	←	Cancel

Accept

Upon clicking "Accept", the "Menu Categories" screen open

Table 1


Beverages - Hot	Beverages - Cold Soft Drinks	Beverages - Alcoholic	Beverages - Juices	Beverages - Milkshakes
Beverages - Smoothies	Breakfast	Burgers	Deserts	Pastas
Pizzas	Salads	Seafood	Steaks and Ribs	Toasted Sandwiches

DESCRIPTION	QTY	PRICE

NC ALL NC ▲ ▼ ✕

1 of 1

0.00

Sale Cash Up Print Bill Print Group  Print Kitchen Discount TENDER - CASH Drawer Accept

The "**Customers**" have ordered drinks upon being seated:

- Two Filter Coffees (Click on "**Beverages - Hot**" and click Filter Coffee twice - the quantity will increase to 2). In order to return to the "**Categories**" screen, click the "**Notepad**" icon
- One Chocolate Milkshake
- One Mixed Fruit Juice

The screenshot shows the POS interface with the 'Beverages - Hot' category selected. The 'Filter Coffee' item is highlighted with a red star. The order list on the right shows 'Filter Coffee' with a quantity of 2 and a price of 24.00. The total amount is 24.00.

DESCRIPTION	QTY	PRICE
Filter Coffee	2	24.00

NC ALL NC ▲ ▼ ✕

24.00

1 of 1

Sale Cash Up Print Bill Print Group Print Kitchen Discount TENDER - CASH Drawer Accept

- The "**Drinks**" have been entered. For now, click "**Accept**" in order to switch between transactions, and to enter orders for other tables. You can return to the table transaction when the "**Food Order**" is entered

The screenshot shows the POS interface with the 'Beverages - Hot' category selected. The order list on the right shows 'Filter Coffee' (2, 24.00), 'Milkshake Chocolate 500ml' (1, 22.00), and 'Mixed Fruit Juice 500ml' (1, 12.00). The total amount is 58.00. The 'Accept' button is highlighted with a red arrow.

DESCRIPTION	QTY	PRICE
Filter Coffee	2	24.00
Milkshake Chocolate 500ml	1	22.00
Mixed Fruit Juice 500ml	1	12.00

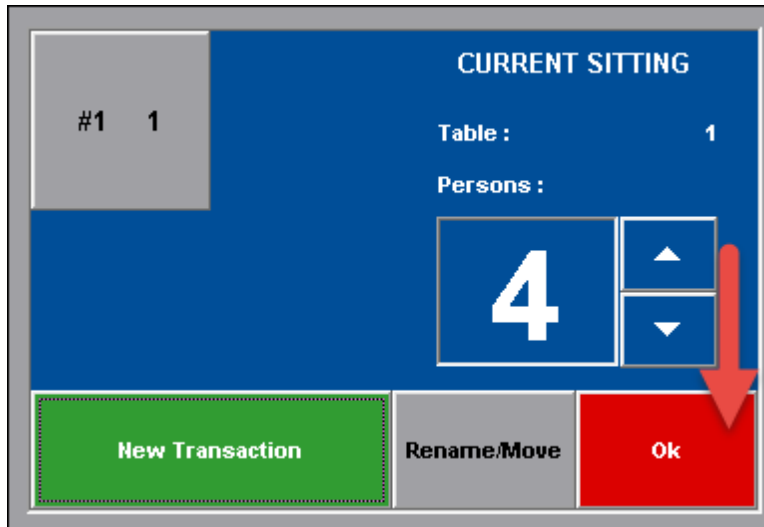
NC ALL NC ▲ ▼ ✕

58.00

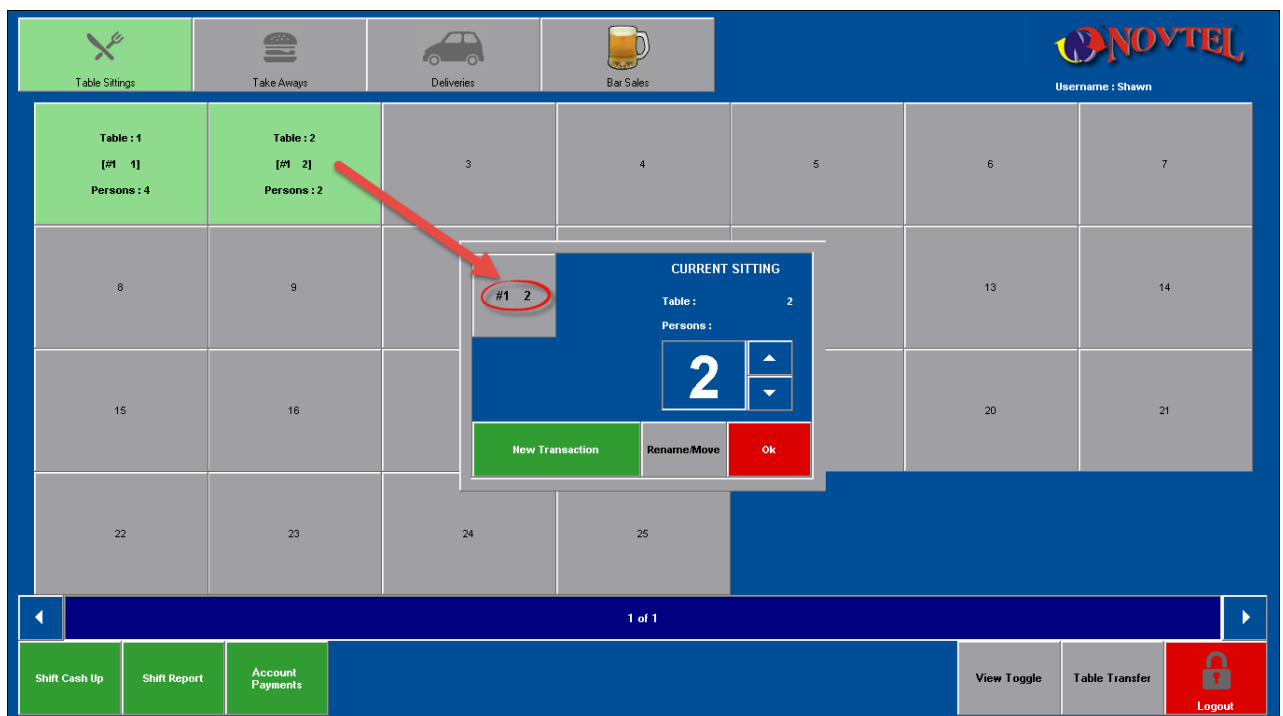
1 of 1

Sale Cash Up Print Bill Print Group Print Kitchen Discount TENDER - CASH Drawer Accept

- Click "OK" to exit table 1



- Meanwhile, Table 2 have received their "Smoothies", and are ready to order breakfast. Click on Table 2 and then on the "Transaction"



- Click on the appropriate "Category" - in this case it is the "Breakfast Category" - in order to open the "Breakfast Menu"

The screenshot shows a POS interface with a grid of categories. The 'Breakfast' category is selected, indicated by a red star icon. The right-hand panel displays a list of items:

DESCRIPTION	QTY	PRICE
Smoothie - Mixed Fruit with Ice Cream	1	25.00
Smoothie - Mixed Fruit with Yogurt	1	20.00

The total amount shown is 45.00. The interface also includes a top navigation bar with icons for home, power, add, and subtract, and a bottom bar with buttons for 'Sale Cash Up', 'Print Bill', 'Print Receipt', 'Print Kitchen', 'Discount', 'TENDER - CASH', 'Drawer', and 'Accept'.

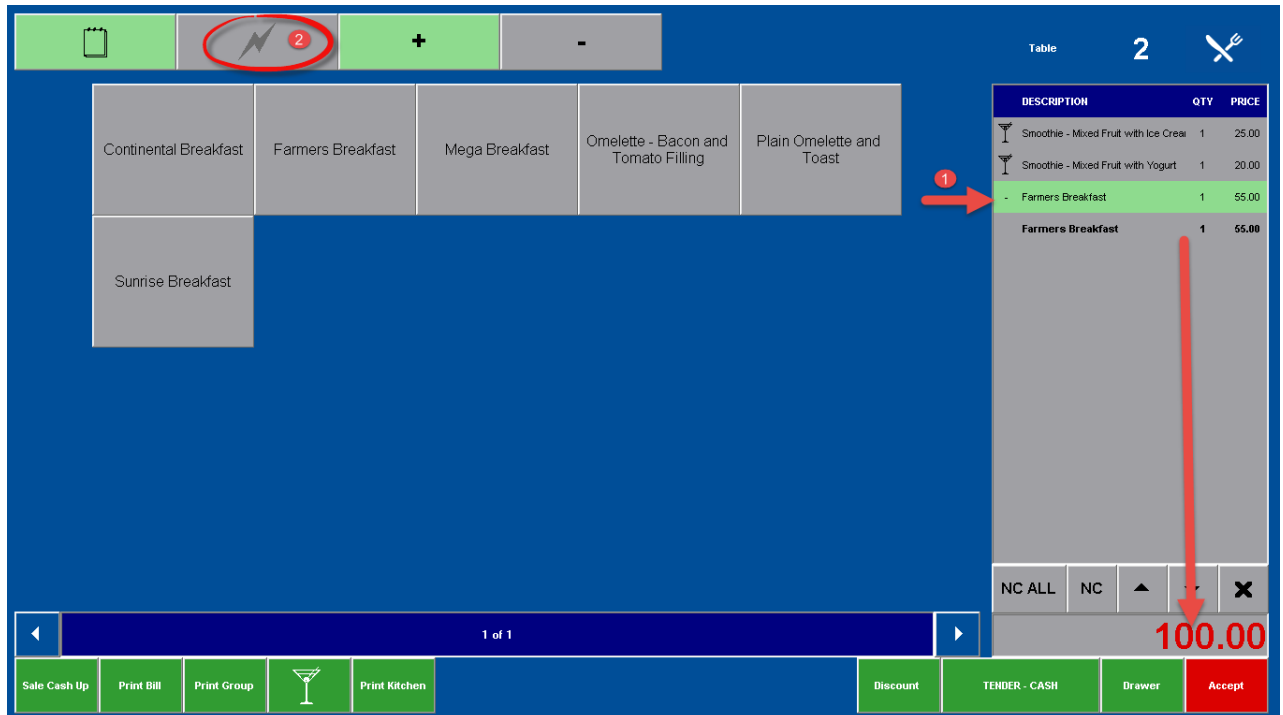
- The first person orders a "Farmers Breakfast", and requires an extra egg as well as 2 slices of brown toast. Click on the "Farmers Breakfast"

The screenshot shows the POS interface with the 'Farmers Breakfast' item selected, indicated by a red star icon. The right-hand panel displays the same list of items as in the previous screenshot:

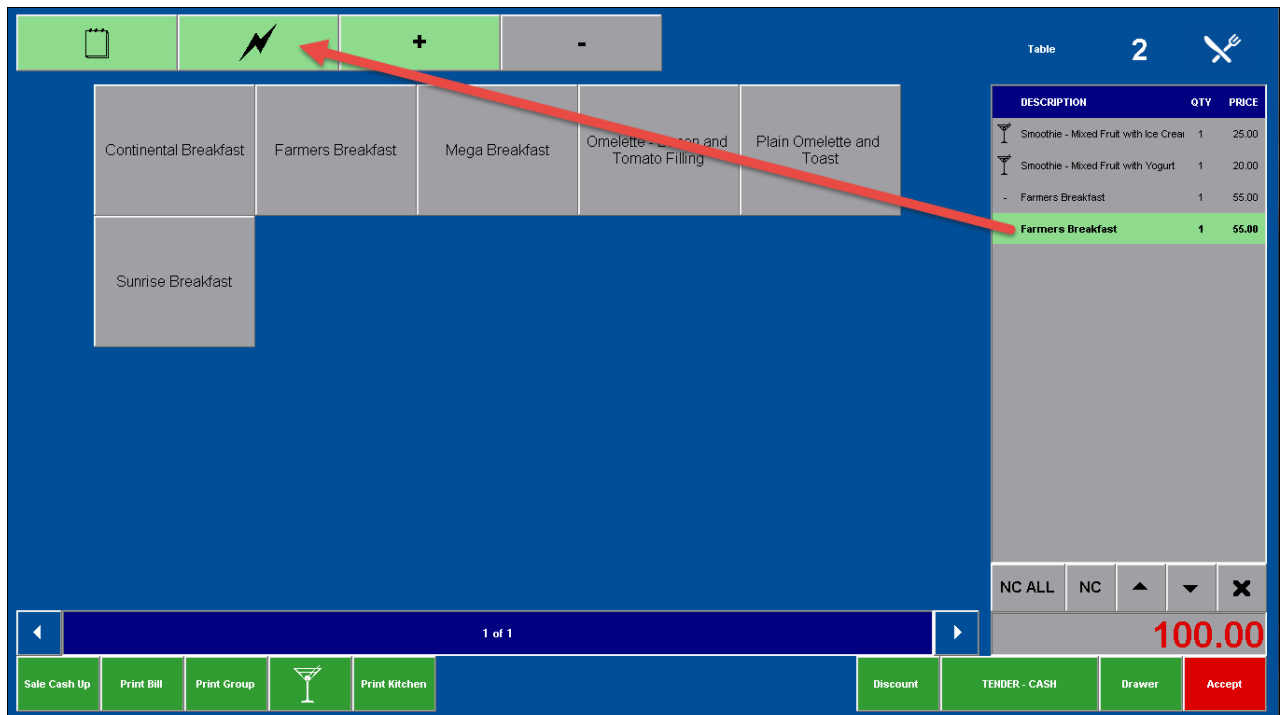
DESCRIPTION	QTY	PRICE
Smoothie - Mixed Fruit with Ice Cream	1	25.00
Smoothie - Mixed Fruit with Yogurt	1	20.00

The interface also includes a top navigation bar with icons for home, power, add, and subtract, and a bottom bar with buttons for 'Sale Cash Up', 'Print Bill', 'Print Receipt', 'Print Kitchen', 'Discount', 'TENDER - CASH', 'Drawer', and 'Accept'.

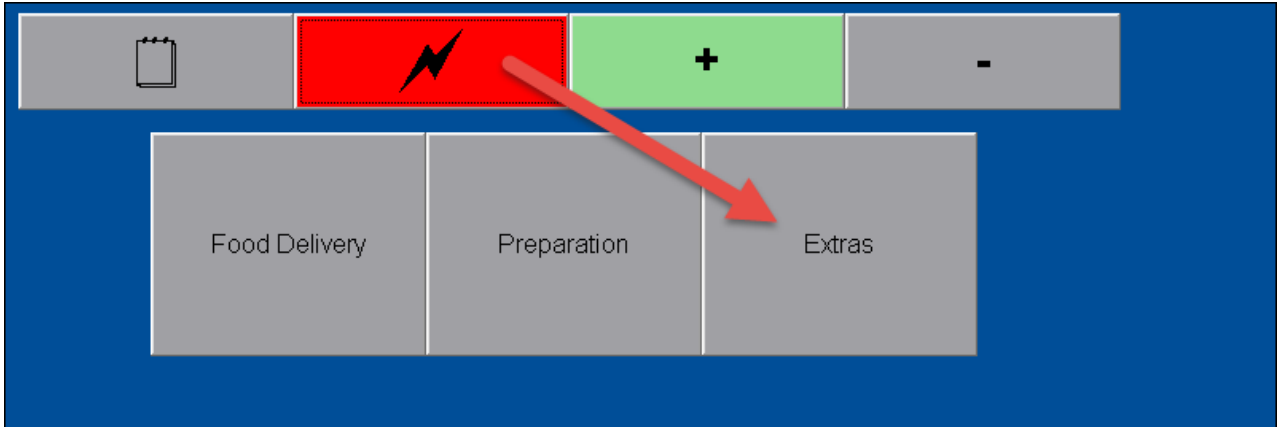
- When you click on the "**Farmers Breakfast**" in the right-hand side of the screen, you will notice that it is duplicated in bold letters beneath the first "**Farmers Breakfast**" - but the total at the bottom of the screen stays the same - the charge itself is not added twice to the total
- Secondly: Notice that the "**Lightning Bolt**" icon is deactivated at present



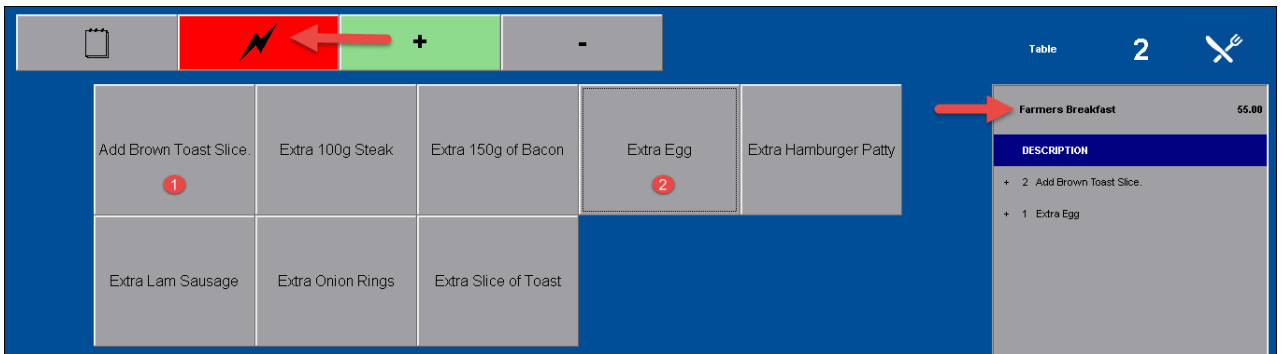
- As soon as the duplicated "**Farmers Breakfast**" is selected, the "**Lightning Bolt**" icon becomes accessible, and turns green



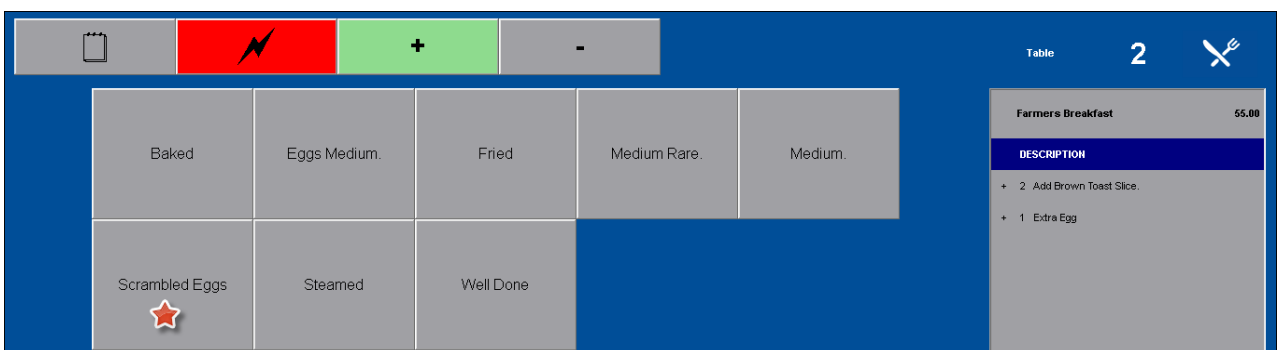
- This is now the part we have set up so meticulously in Step 3 and 4, where the "Extras Category" and "Extra Charges" were created. It leads us to the "Lightning Bolt" function
- When you click on it, the "Preparation; Extras and Delivery Categories" are displayed - Notice that the icon has turned red. Click on the "Extras Category"



- Now click on "Add Brown Toast Slice" twice, and then once on "Extra Egg"



- The "Customer" ordered "Scrambled Eggs", and in order to return to the "Preparation Category", you need to click on the "Lightning Bolt" icon again
- Click on the "Preparation Category", and then on "Scrambled Eggs"



To return to the "Menu Category" screen, click on the "Notepad" icon at the top left-hand side of the window

1. When you click on "Farmers Breakfast" on the right, the "Extras" and the "Preparation Method" has been entered. The "Extra Charges" has been entered automatically, and added to the total
2. Enter the second person's order
3. Click on "Print Kitchen" for the order to be sent to the Kitchen for preparation
4. Click "Accept" to save the order and to attend to other tables

The screenshot displays a POS interface with a menu on the left and an order summary on the right. The menu includes categories like Continental Breakfast, Farmers Breakfast, Mega Breakfast, Omelette - Bacon and Tomato Filling, Plain Omelette and Toast, and Sunrise Breakfast. The order summary on the right shows a total of 168.50. Red arrows and numbers 1, 2, 3, and 4 highlight specific actions: 1 points to the Farmers Breakfast item, 2 points to the Omelette - Bacon and Tomato Filling item, 3 points to the Print Kitchen button, and 4 points to the Accept button.

DESCRIPTION	QTY	PRICE
Smoothie - Mixed Fruit with Ice Cream	1	25.00
Smoothie - Mixed Fruit with Yogurt	1	20.00
- Farmers Breakfast	1	68.50
Farmers Breakfast	1	55.00
[+ 2 Add Brown Toast Slice.]		
[+ 1 Extra Egg]		
[+ 1 Scrambled Eggs]		
Add Brown Toast Slice	2	6.00
Add Egg	1	7.50
Scrambled Eggs.	1	0.00
+ Omelette - Bacon and Tomato Filling	1	55.00
		168.50

- Remember to "Log out" of the system when you walk away from the workstation

7 Step 7 - No Charge Items

The system will only allow you to utilize this option if it has been set up as explained in Step 1. When using the **"No Charge"** option, the item will still appear on the bill - since it must be accounted for in stock control - but it will not be charged

➤ Reasons why a **"Customer"** is not charged for a particular menu item, may include:

- The restaurant is running a special on the **"Sunrise Breakfast"** at full price, but one cup of filter coffee is complimentary with each meal ordered
- The restaurant has sponsored a meal for a family of four people, as a prize in a competition

➤ The **"Customers"** at table 3 have ordered the breakfast special, and we now need to **"No Charge"** the 2 Filter Coffees

- Click on the Coffees, and then on the **"NC"** button

The screenshot shows a POS system interface. At the top, there are icons for a notepad, a lightning bolt, a plus sign, and a minus sign. On the right, a red circle highlights 'Table 3'. Below this is a menu grid with items: Cuppuchino, Earl Grey Tea, Filter Coffee, Green Tea, Hot Chocolate, Peach Flavoured Tea, and Rooibos Tea. A red arrow points from the 'Filter Coffee' item in the grid to the 'NC' button in the bill summary. The bill summary shows a table with columns: DESCRIPTION, QTY, PRICE. It lists '+ Sunrise Breakfast' (2, 90.00) and 'Filter Coffee' (2, 24.00). The total amount is 114.00. The 'NC' button is circled in red. At the bottom, there are buttons for 'Sale Cash Up', 'Print Bill', 'Print Group', 'Print Kitchen', 'Discount', 'TENDER - CASH', 'Drawer', and 'Accept'.

DESCRIPTION	QTY	PRICE
+ Sunrise Breakfast	2	90.00
Filter Coffee	2	24.00
		114.00

- The Supervisor must enter his or her password to authorize the action

The screenshot shows the Novtel Hospitality POS interface. At the top, there are navigation buttons: a calendar icon, a lightning bolt icon, a green '+' button, and a grey '-' button. Below these are buttons for 'Cappuchino', 'Earl Grey Tea', 'Filter Coffee', 'Green Tea', and 'Hot Chocolate'. Further down are 'Peach Flavoured Tea' and 'Rooibos Tea'. A central dialog box titled 'Novtel Hospitality' is open, with the text 'Enter Password' and a red arrow pointing to the input field. To the right of the dialog are buttons for 'Log In', 'Cancel', and 'Unlock'. On the right side of the screen, there is a table with the following data:

DESCRIPTION	QTY	PRICE
+ Sunrise Breakfast	2	90.00
▲ Filter Coffee	2	24.00
Filter Coffee	1	12.00
Filter Coffee	1	12.00

Below the table are buttons for 'NC ALL', 'NC', and a set of navigation arrows. At the bottom right, the total amount '114.00' is displayed in red. At the bottom of the screen, there are buttons for 'Sale Cash Up', 'Print Bill', 'Print Group', 'Print Kitchen', 'Discount', 'TENDER - CASH', 'Drawer', and 'Accept'.

- Click "Yes" to confirm

The screenshot shows the Novtel Hospitality POS interface with a confirmation dialog box. The dialog box is titled 'Novtel Hospitality' and contains the text 'Are you sure you want to change this item to No Charge?'. There are two buttons: 'Yes' (circled in red) and 'No'. The background interface is the same as in the previous screenshot, showing the menu items, the table with the same data, and the total amount '114.00'.

- The Coffee charge amount has been set as zero, and the "Bill Total" has changed from R1140.00 to R90.00

The screenshot displays a POS interface with a menu grid on the left and a bill summary on the right. The menu grid includes items like Cuppuchino, Earl Grey Tea, Filter Coffee, Green Tea, Hot Chocolate, Peach Flavoured Tea, and Rooibos Tea. The bill summary table is as follows:

DESCRIPTION	QTY	PRICE
+ Sunrise Breakfast	2	90.00
Filter Coffee	2	0.00

At the bottom right of the bill summary, the total amount is displayed as **90.00**. The interface also includes a top bar with a table number '3' and a bottom bar with various action buttons like 'Sale Cash Up', 'Print Bill', 'Print Group', 'Print Kitchen', 'Discount', 'TENDER - CASH', 'Drawer', and 'Accept'.

"No Charge" for the Entire Bill

- The "Customers" at Table 4 have won the "Sponsored Prize" of a complimentary meal for four people. Again, we need to add the items to the table transaction, since the staff is accountable for the stock
- Click on the "NC ALL" button

The screenshot shows the Novtel Hospitality POS interface. At the top, there are navigation buttons: a calendar icon, a lightning bolt icon, a green '+' button, and a grey '-' button. On the right, 'Table 4' is displayed with a fork and knife icon. Below this is a grid of menu items: Banana Boat and Ice Cream, Chocolate Brownie and Cream, Choc-Nut Sundae, Fruit Salad and Ice Cream, Malva Pudding, Strawberry Cheesecake, and Waffle and Ice Cream. On the right side, there is a list of items with their descriptions, quantities, and prices. At the bottom right, the 'NC ALL' button is circled in red, with a red arrow pointing to it. Below the 'NC ALL' button are other buttons: 'NC', up and down arrows, and a close button (X). At the bottom of the screen, there is a status bar showing '1 of 1' and a total amount of '572.00'. Below the status bar are several buttons: 'Sale Cash Up', 'Print Bill', 'Print Group', 'Print Kitchen', 'Discount', 'TENDER - CASH', 'Drawer', and 'Accept'.

DESCRIPTION	QTY	PRICE
Milkshake Choc-Mint 500ml	1	22.00
Milkshake Lime 500ml	1	22.00
Dry Red Wine per Glass	1	25.00
Castle Lager 375ml	1	20.00
+ Mixed Grill	1	120.00
+ Mussel and Calamari Platter	1	59.00
+ Bacon and Pineapple Pizza	1	69.00
+ Pepper Steak Burger	1	75.00
+ Chocolate Brownie and Cream	2	90.00
+ Choc-Nut Sundae	1	25.00
+ Waffle and Ice Cream	1	45.00

- The Supervisor's password will authorize the action

The screenshot shows the Novtel Hospitality POS interface, similar to the previous one, but with a 'Novtel Hospitality' dialog box open in the center. The dialog box has a title bar, a text input field labeled 'Enter Password', and buttons for 'Log In', 'Cancel', and 'Unlock'. A red arrow points to the 'Enter Password' field. The background interface is the same as in the previous screenshot, showing the menu grid, item list, and bottom status bar with the total amount of '572.00'.

- Click "Yes" to confirm

Novtel Hospitality

Are you sure you want to change All the items to No Charge ?

Yes No

DESCRIPTION	QTY	PRICE
Milkshake Choc-Mint 500ml	1	22.00
Milkshake Lime 500ml	1	22.00
Dry Red Wine per Glass	1	25.00
Castle Lager 375ml	1	20.00
+ Mixed Grill	1	120.00
+ Mussel and Calamari Platter	1	59.00
+ Bacon and Pineapple Pizza	1	69.00
+ Pepper Steak Burger	1	75.00
+ Chocolate Brownie and Cream	2	90.00
+ Choc-Nut Sundae	1	25.00
+ Waffle and Ice Cream	1	45.00

572.00

- The entire bill is now a zero total amount

DESCRIPTION	QTY	PRICE
Milkshake Choc-Mint 500ml	1	0.00
Milkshake Lime 500ml	1	0.00
Dry Red Wine per Glass	1	0.00
Castle Lager 375ml	1	0.00
+ Mixed Grill	1	0.00
+ Mussel and Calamari Platter	1	0.00
+ Bacon and Pineapple Pizza	1	0.00
+ Pepper Steak Burger	1	0.00
+ Chocolate Brownie and Cream	2	0.00
+ Choc-Nut Sundae	1	0.00
+ Waffle and Ice Cream	1	0.00

0.00

8 Step 8 - Removing Items

When an item has been selected that was not meant for the specific Table, click on the item - in this case it is the "Plain Omelette and Toast" - and then click on the "X"

The screenshot shows the Novtel Hospitality POS interface. The main menu is a grid of categories: Beverages - Hot, Beverages - Cold Soft Drinks, Beverages - Alcoholic, Beverages - Juices, Beverages - Milkshakes, Beverages - Smoothies, Breakfast, Burgers, Deserts, Pastas, Pizzas, Salads, Seafood, Steaks and Ribs, and Toasted Sandwiches. On the right, the order list for Table 1 is displayed. The order list contains the following items:

DESCRIPTION	QTY	PRICE
Filter Coffee	2	24.00
Milkshake Chocolate 500ml	1	22.00
Mixed Fruit Juice 500ml	1	12.00
+ Mega Breakfast	2	150.00
+ Continental Breakfast	1	49.00
+ Omelette - Bacon and Tomato Filling	1	55.00
+ Plain Omelette and Toast	1	39.00

The total amount is 351.00. The 'X' icon in the bottom right corner of the order list is circled in red, indicating the action to remove the selected item.

- Click "Yes" to confirm the item's removal from this Table

The screenshot shows the Novtel Hospitality POS interface with a confirmation dialog box open. The dialog box asks "Are you sure you want to delete this item?" and has two buttons: "Yes" and "No". The "Yes" button is circled in red, indicating the action to confirm the removal of the item.

- The item has been removed, and deducted from the total amount of the bill

The screenshot displays a POS system interface with a menu grid on the left and a bill summary on the right. The menu grid includes categories like Beverages, Breakfast, Burgers, Deserts, Pastas, Pizzas, Salads, Seafood, Steaks and Ribs, and Toasted Sandwiches. The bill summary lists items such as Filter Coffee, Milkshake Chocolate 500ml, Mixed Fruit Juice 500ml, Mega Breakfast, Continental Breakfast, and Omelette - Bacon and Tomato Filling. A red arrow points from the 'Omelette - Bacon and Tomato Filling' item in the bill to the 'Accept' button at the bottom right. The total amount shown is 312.00.

DESCRIPTION	QTY	PRICE
Filter Coffee	2	24.00
Milkshake Chocolate 500ml	1	22.00
Mixed Fruit Juice 500ml	1	12.00
+ Mega Breakfast	2	150.00
+ Continental Breakfast	1	48.00
+ Omelette - Bacon and Tomato Filling	1	55.00

1 of 1

312.00

Accept

9 Step 9 - Table Cash-Up

- The "Customer" has asked for the bill, and it has been printed

The screenshot displays a restaurant POS interface. At the top, there are navigation icons: a clipboard, a lightning bolt, a plus sign, and a minus sign. In the top right corner, a red circle highlights the text "Table 1" next to a fork and knife icon. The main area is a grid of menu categories:

Beverages - Hot	Beverages - Cold Soft Drinks	Beverages - Alcoholic	Beverages - Juices	Beverages - Milkshakes
Beverages - Smoothies	Breakfast	Burgers	Deserts	Pastas
Pizzas	Salads	Seafood	Steaks and Ribs	Toasted Sandwiches

On the right side, a table list shows the following items:

DESCRIPTION	QTY	PRICE
Filter Coffee	2	24.00
Milkshake Chocolate 500ml	1	22.00
Mixed Fruit Juice 500ml	1	12.00
+ Mega Breakfast	2	150.00
+ Continental Breakfast	1	49.00
+ Omelette - Bacon and Tomato Filling	1	55.00

At the bottom right, the total amount is displayed as "312.00". Below the menu grid, a toolbar contains several buttons: "Sale Cash Up", "Print Bill" (circled in red with a red arrow pointing to it), "Print Group", "Print Kitchen", "Discount", "TENDER - CASH", "Drawer", and "Accept".

Novtel Hospitality

Diaz Office Park

Block 1 Unit 30

0861 66 88 35

0865 1171 65

Invoice : IN00067

VAT Number : 123456789

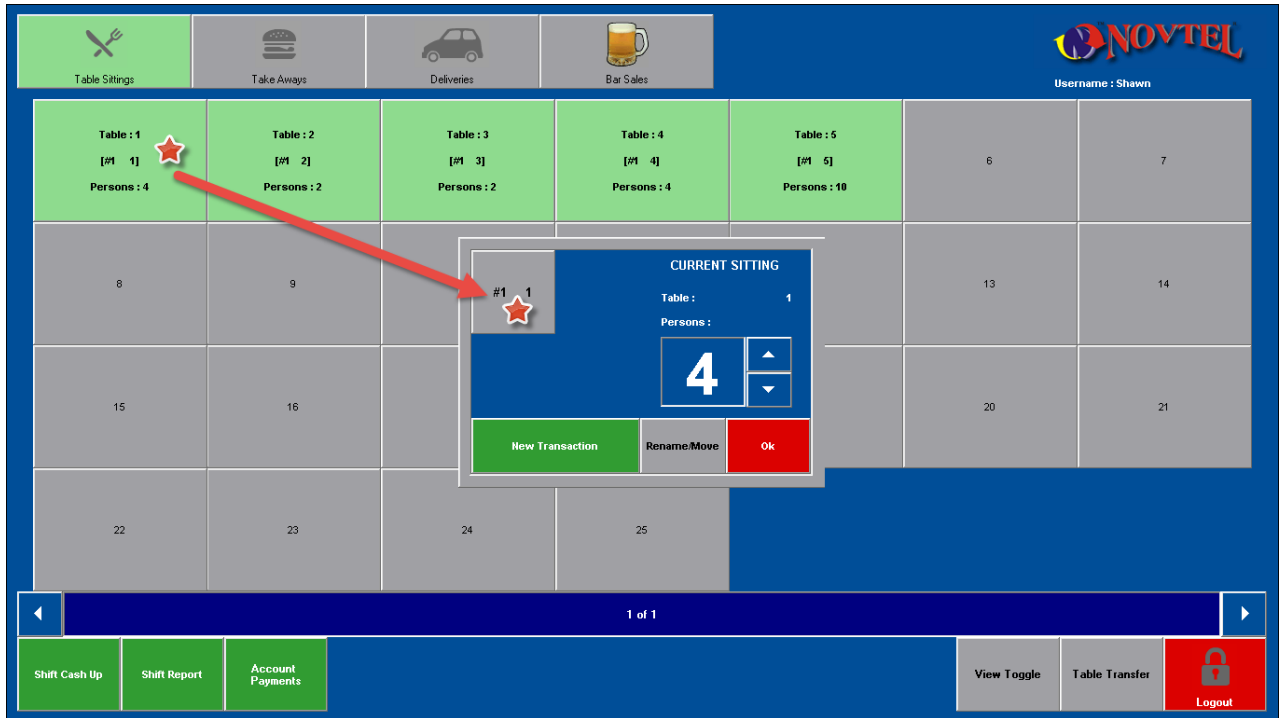
Table: 1

Filter Coffee	2	2.94	24.00
Milkshake Chocolate 500ml	1	2.70	22.00
Mixed Fruit Juice 500ml	1	1.47	12.00
Mega Breakfast	2	18.4	150.00
Continental Breakfast	1	6.02	49.00
Omelette - Bacon and Tomato Filling	1	6.75	55.00
Service Charge	1	0.00	0.00
		Total Excl :	273.70
		Tax :	38.30
		Total :	<u>312.00</u>
		Discount Included :	<u>0.00</u>

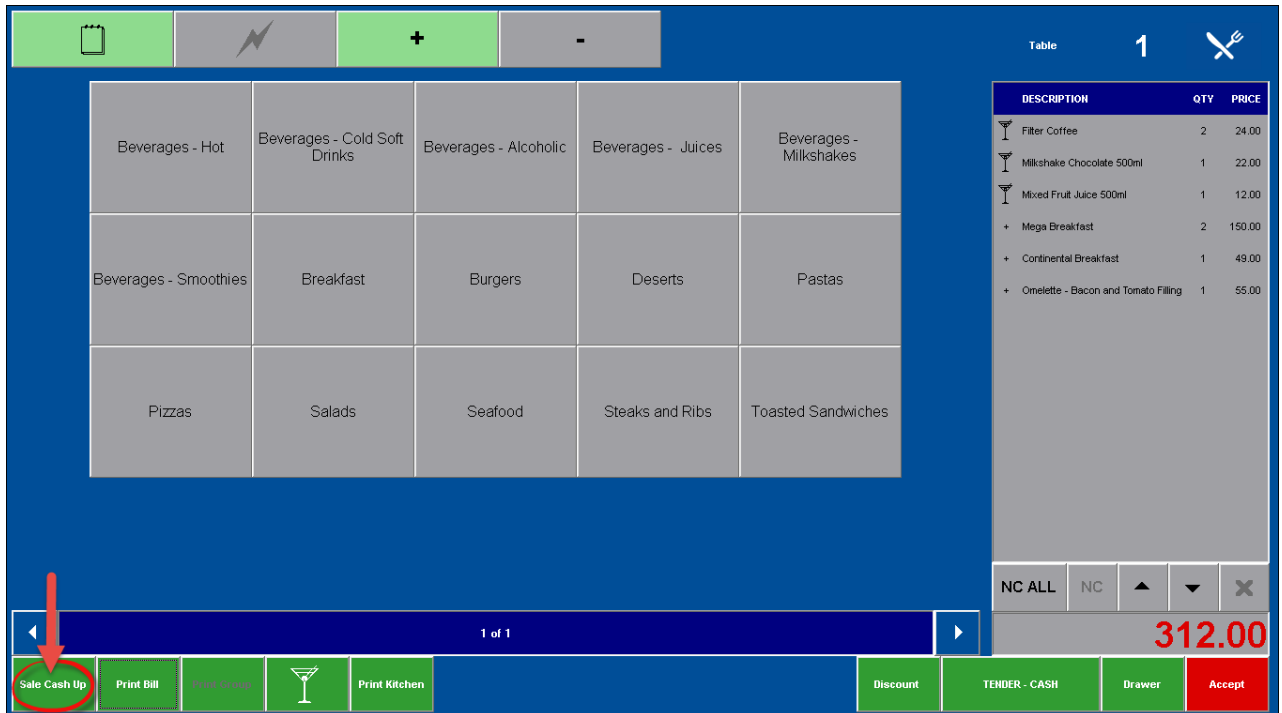
Gratuity:

Waitron : Shawn

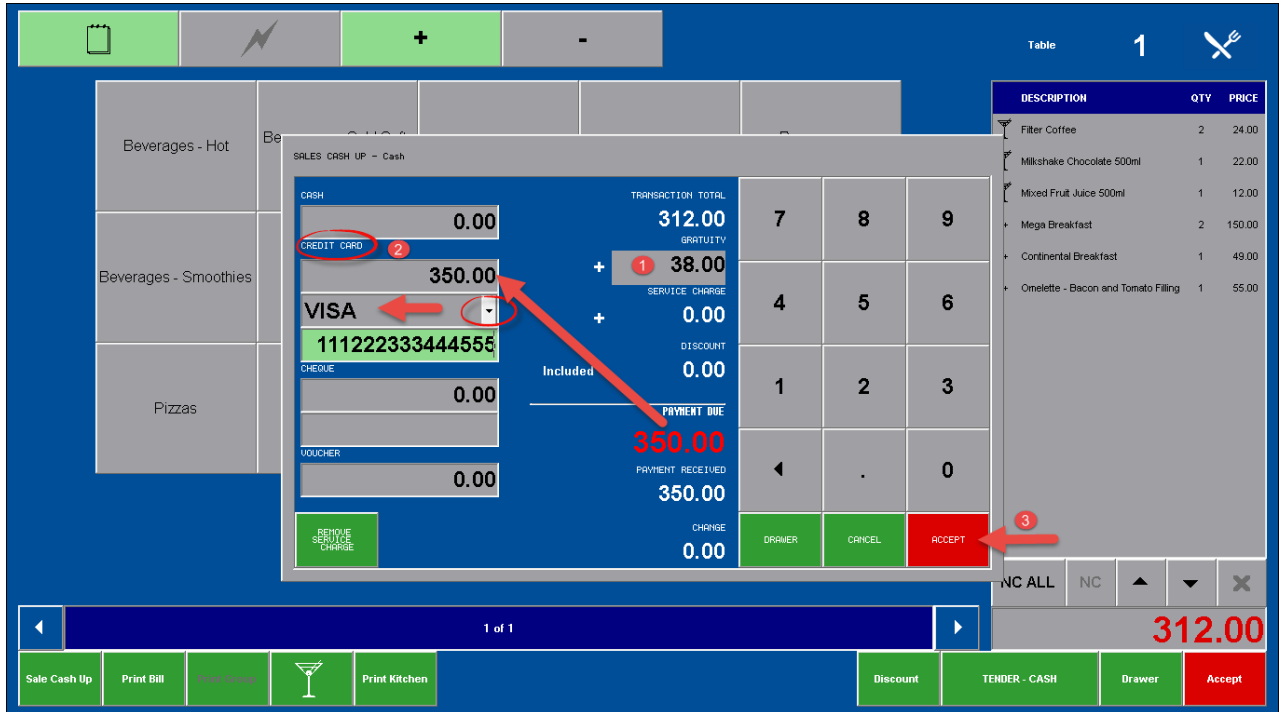
- The "Customer" has entered the "Gratuity" amount, and is ready to settle the bill
- Click on the Table to be "Cashed-Up", and then on the "Transaction" - Notice that the "Transaction" is Grey-colored at present



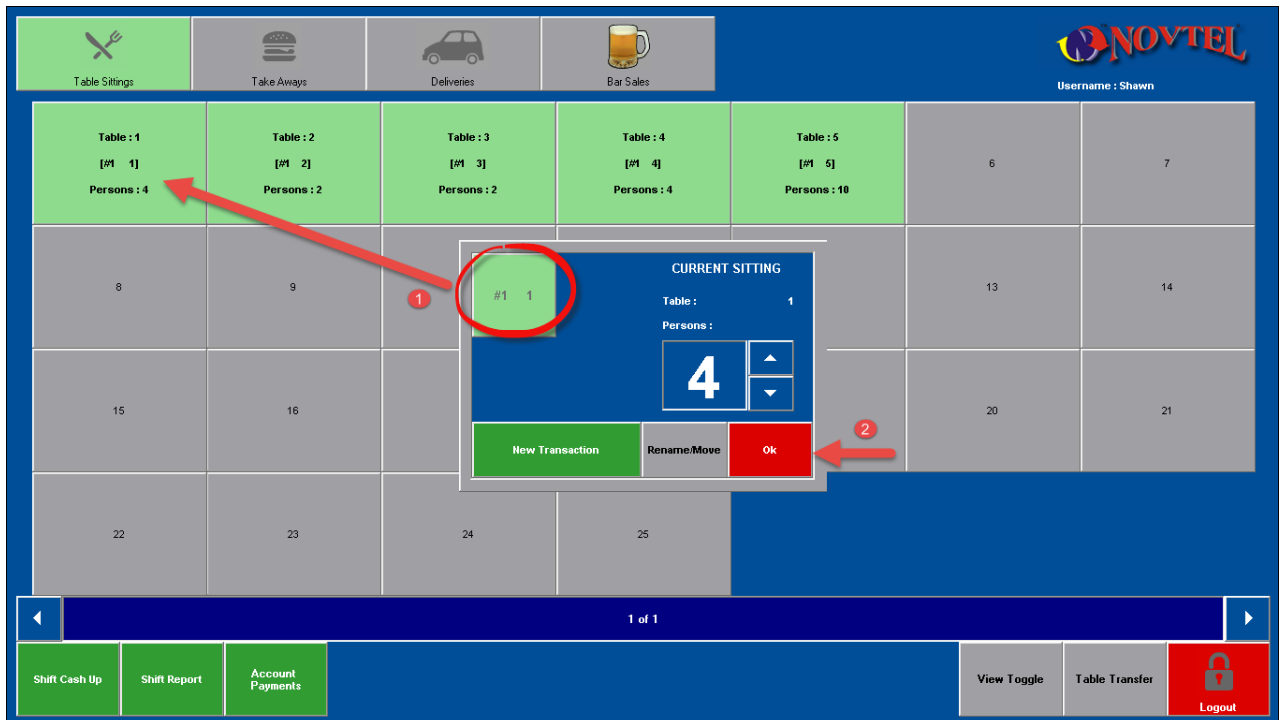
- For cash and credit card payments, click on "Tender Cash" and then on "Cash". Now click "Sale Cash Up"



1. Enter the **"Gratuity"** amount
2. Enter the **"Payment"** amount beneath either **"Cash"** or **"Credit Card"**. If the **"Payment"** is made by means of a credit card, enter the card type and the card number
3. Click **"Accept"** to finalize the transaction



- Notice how the **"Transaction"** color has turned green on the **"Current Sitting"** for Table 1
- Click **"OK"** in order to **"Free"** the table on the Grid



- Table 1 is now available for the next "Customer" to be seated

The screenshot displays the Novtel Hospitality Restaurant Point of Sale interface. At the top, there are four main menu categories: Table Sitings (with a fork and knife icon), Take Aways (with a burger icon), Deliveries (with a car icon), and Bar Sales (with a beer glass icon). The Novtel logo is in the top right corner, along with the username "Shawn".

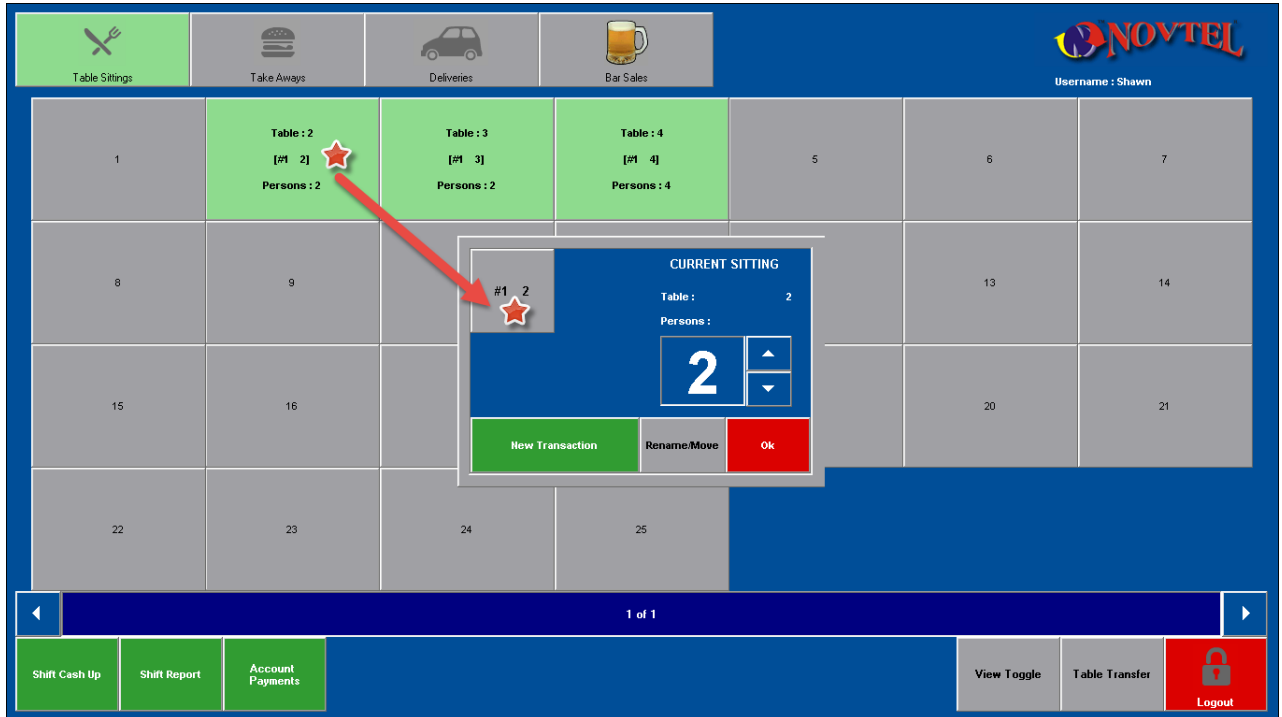
The main area is a grid of 26 tables, numbered 1 through 25. Table 1 is highlighted with a red star icon. Tables 2, 3, 4, and 5 are highlighted in green. Table 2 is labeled "Table : 2 [M 2] Persons : 2". Table 3 is labeled "Table : 3 [M 3] Persons : 2". Table 4 is labeled "Table : 4 [M 4] Persons : 4". Table 5 is labeled "Table : 5 [M 5] Persons : 10".

At the bottom, there is a navigation bar with the text "1 of 1". Below this are several buttons: "Shift Cash Up", "Shift Report", "Account Payments", "View Toggle", "Table Transfer", and "Logout" (with a red lock icon).

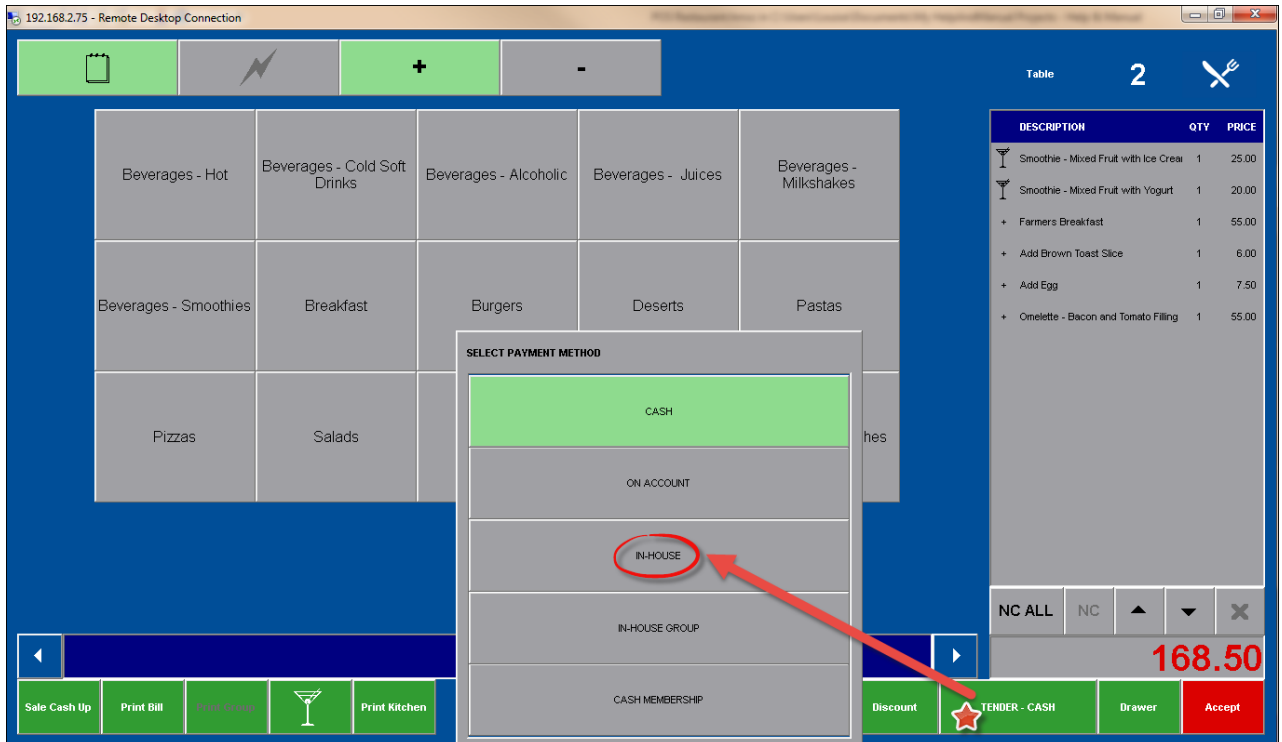
9.1 In-House Charge

Whenever a guest in the Hotel enjoys a meal in the Restaurant, the meal can be charged to his Reservation, and the entire bill can be settled on the day of departure. Recording such Restaurant or Bar charges are done as follow:

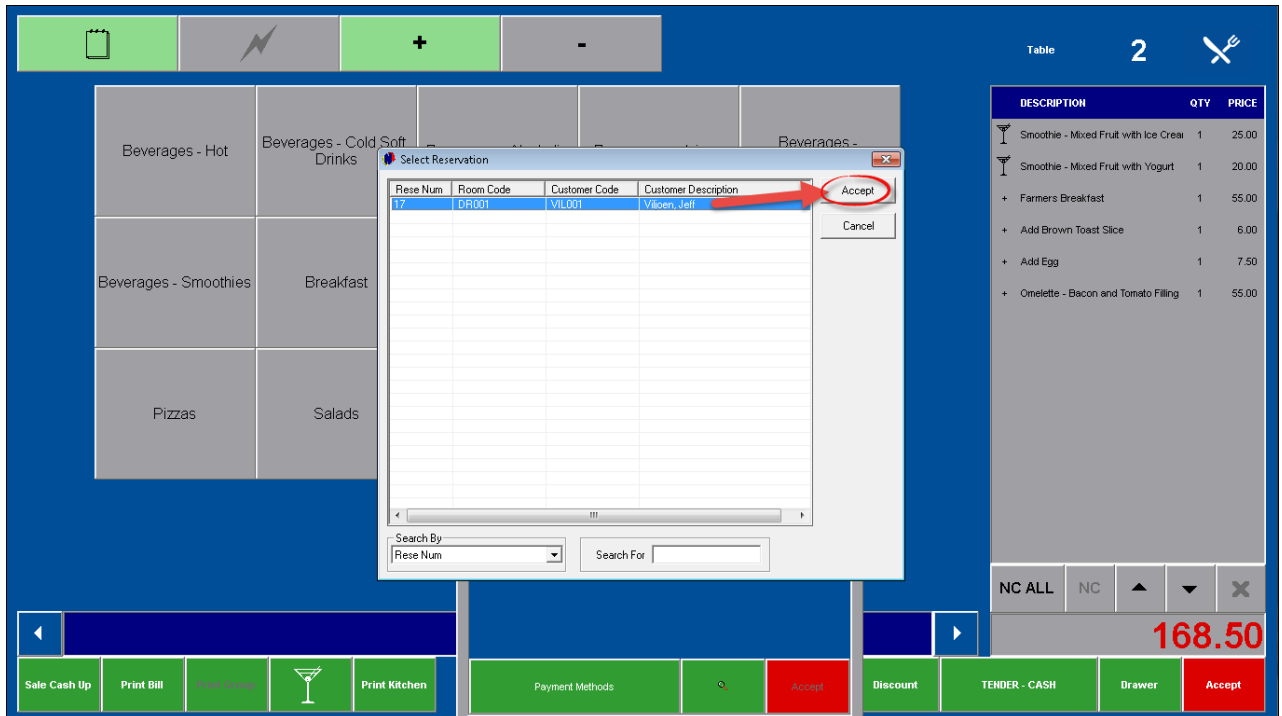
- Click on the particular Table on the Grid, and then on the "Transaction" - which is grey-colored at present



- Click on "Tender Cash", and then select "In-House"



- Browse for the specific "**Customer**" and select the Reservation



- Check the details, and click "**Accept**" in order to save the charge to Mr Viljoen's Reservation
- Click on "**Print Bill**"
- Mr Viljoen needs to sign the bill in acknowledgment that the charge is to be added to his Reservation - with the understanding that it is to be paid upon departure
- In order to finalize the transaction and to make the table "available" on the Grid, click on "**Sale Cash Up**"



- Do not enter anything - simply click "Accept"

SALES CASH UP - In House Customer Number: VIL001 Viljoen, Jeff Bookings: 17

DESCRIPTION	QTY	PRICE
Smoothie - Mixed Fruit with Ice Cream	1	25.00
Smoothie - Mixed Fruit with Yogurt	1	20.00
Farmers Breakfast	1	55.00
Add Brown Toast Slice	1	6.00
Add Egg	1	7.50
Omelette - Bacon and Tomato Filling	1	55.00

TRANSACTION TOTAL: 168.50
 GRATUITY: 0.00
 SERVICE CHARGE: 0.00
 DISCOUNT: 0.00
 PAYMENT DUE: 168.50
 PAYMENT RECEIVED: 0.00
 CHANGE: 0.00

Buttons: REMOVE SERVICE CHARGE, DRAWER, CANCEL, ACCEPT

- As soon as you click "OK", table 2 becomes available on the Grid

NOVTEL
Username: Shawn

1	2	Table : 3 [#] 3] Persons : 2	Table : 4 [#] 4] Persons : 4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25			

Buttons: Shift Cash Up, Shift Report, Account Payments, View Toggle, Table Transfer, Logout

- Shawn only has permission to access the POS Restaurant Module, but for demonstration purposes we will show you how the charge displays on Mr Viljoen's **"Reservation Details - In-House"** tab

The screenshot shows the Novtel Hospitality 6.0.0.9 interface. The main window displays reservation details for Mr. Viljoen, Jeff, with reservation number 17. The 'In-House' tab is selected, showing a table of transactions. A red arrow points to the 'In-House' tab, and another red arrow points to the 'Display' button at the bottom of the window. The table contains one transaction with a value of 168.50.

Transaction #	Date	Document #	Invoice #	Shift #	Department	Inclusive
58	2014/11/26	GIN00012	CI000023	SFT00006	Restaurant/Bar	168.50

Buttons: Display, Refresh, View Audit Log, Accept, Cancel

Created: 2014/11/27 09:18:00

Legend:

- Cancelled
- Provisional
- Confirmed
- In House
- Departed
- Fully Paid
- Non Rev

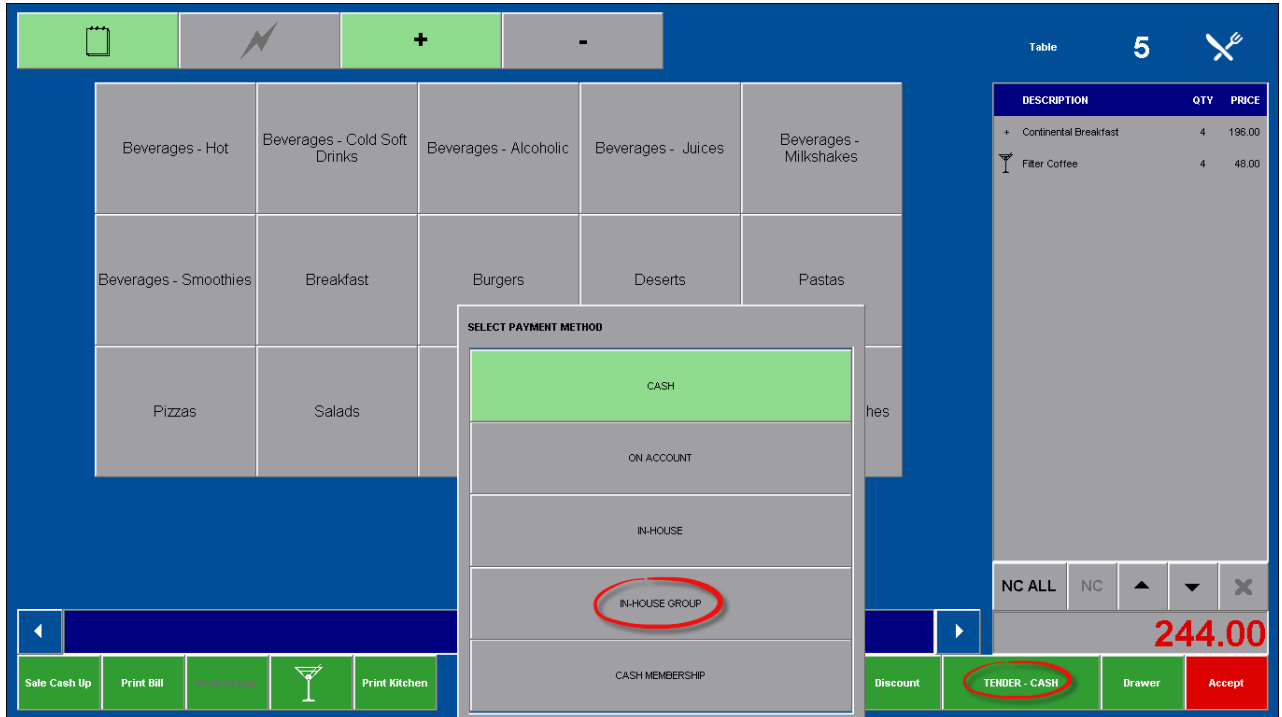
- In order to see what the "Charge" entails, click on it and then "Display"

Novtel Hospitality			
Diaz Office Park			
Block 1 Unit 30			
Beach Boulevard West			
Diaz Beach, Mossel Bay			
Tel : 0861 66 88 35			
Fax : 0865 1171 65			
Tax : 123456789			
GOODS ISSUE NOTE			
1	Smoothie - Mixed Fruit with Ice Cream	3.07	25.00
1	Smoothie - Mixed Fruit with Yogurt	2.46	20.00
1	Farmers Breakfast	6.75	55.00
2	Add Brown Toast Slice	0.74	6.00
1	Add Egg	0.92	7.50
1	Scrambled Eggs.	0.00	0.00
1	Omelette - Bacon and Tomato Filling	6.75	55.00
Description :		Table - 2	
Customer :		VIL001 - Viljoen, Jeff	
Room :		DR001 - Double Room Nr 3	
Payment Type :		In-House: Res # 17	
Payment Due :		168.50	
Tax/VAT Total :		20.69	
Payment Received :		0.00	

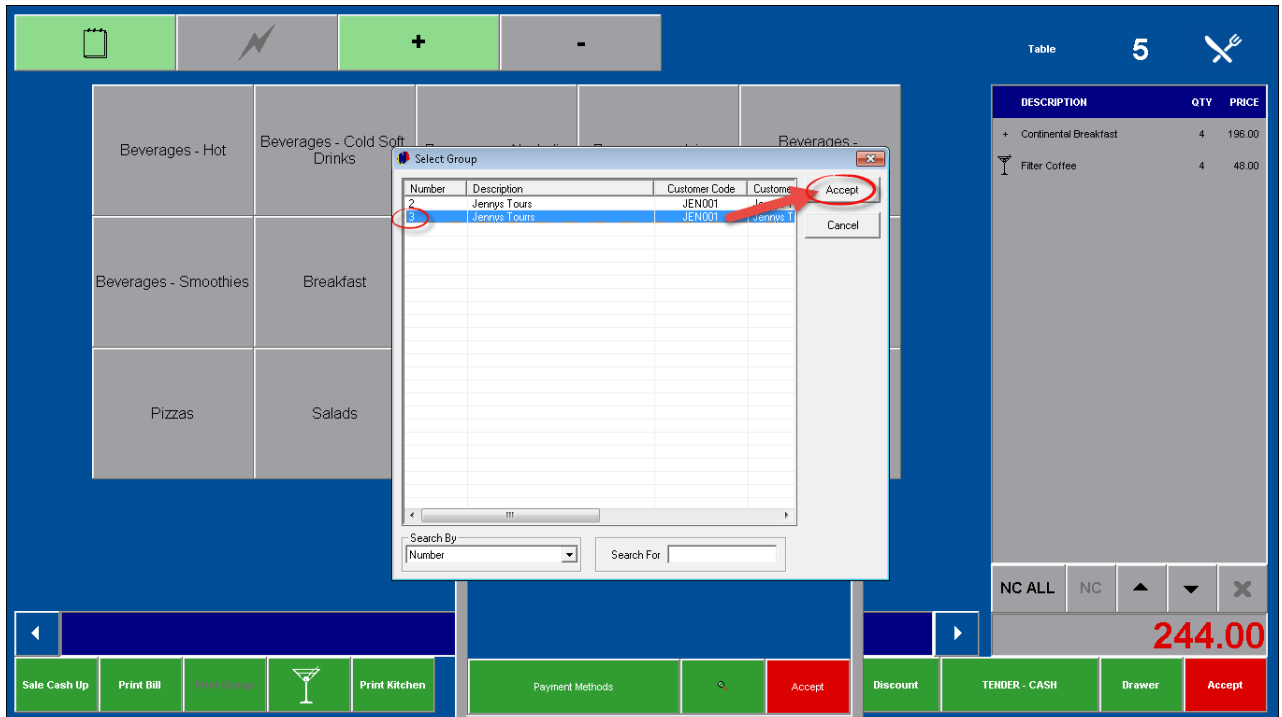
9.2 In-House Group Charge

Normally when a **"Group Booking"** for accommodation in the Hotel is made, the price includes breakfast. But for demonstration purposes we will show you how to allocate a restaurant charge for a specific person in the **"Group"**, to the account of the **"Group / Tour Operator"** with the **"In-House Status"**

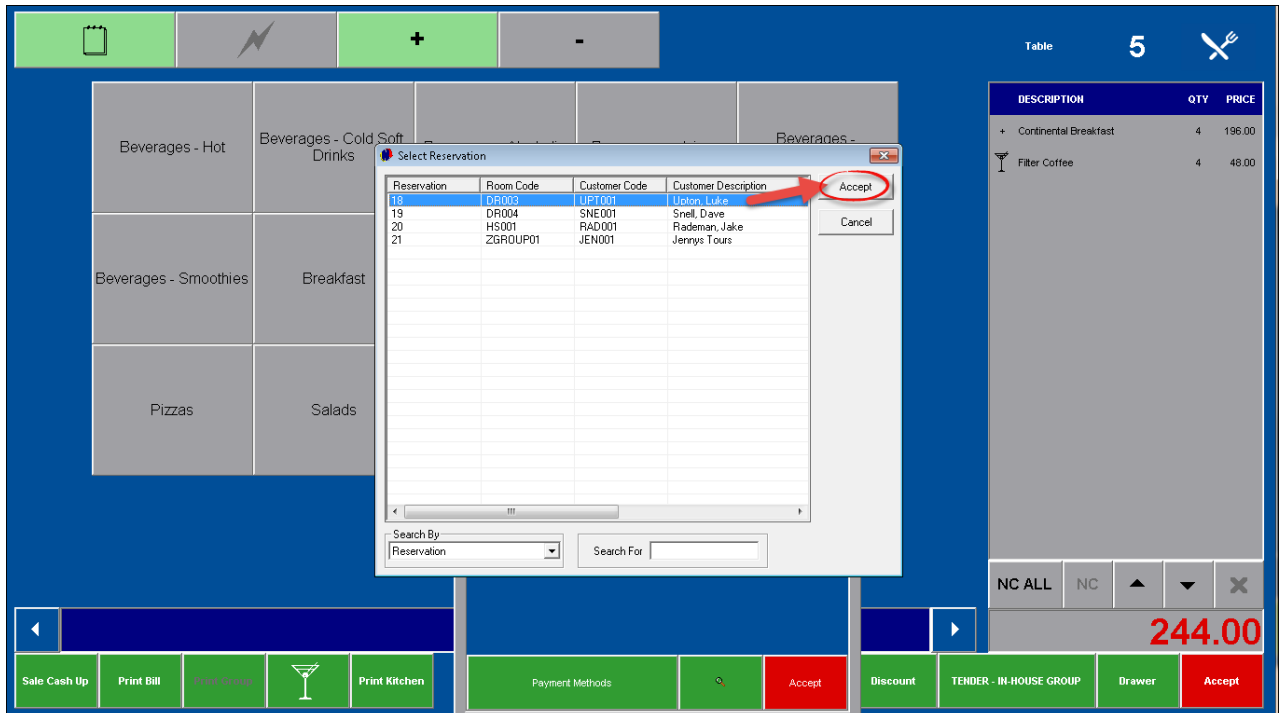
- Click on **"Tender Cash"**, and then select **"In-House Group"**



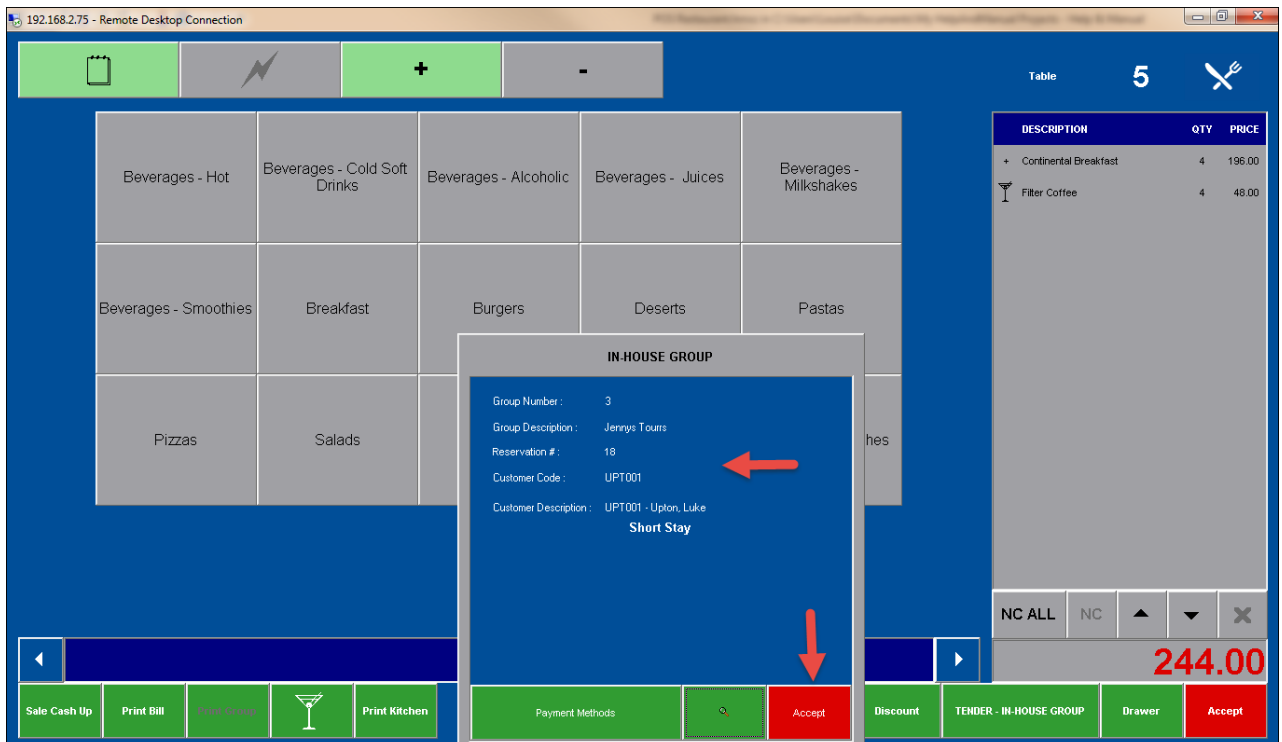
- There are currently 2 **"Groups"** for **"Jenny's Tours"** in the Hotel. Make sure that the correct **"Group Number"** is selected



- Now we need to select the person within the "Group" who is charging this bill to "Jenny's Tours"



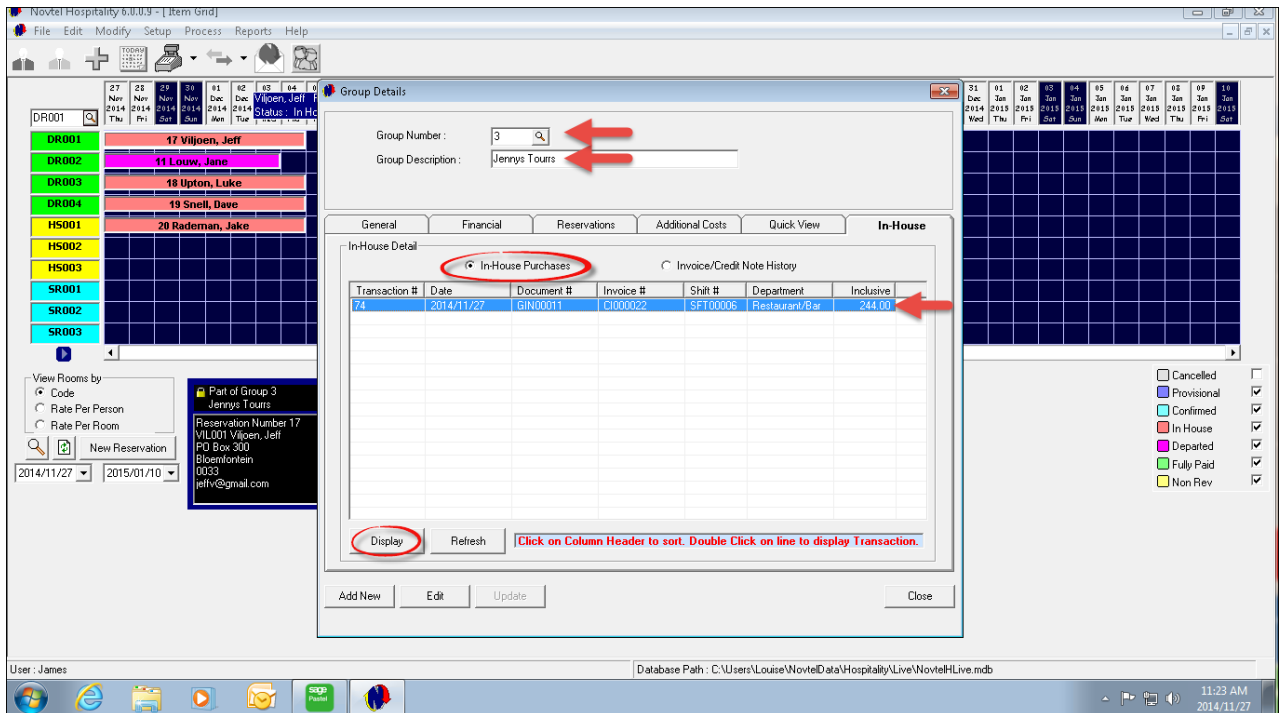
- When you are sure that the information is correct, click "Accept"



- Print the bill while the "Customer" is present in the restaurant, and be sure to get the slip signed by him in acknowledgment that he is charging the meal to "Jenny's Tours"
- In order to finalize the transaction and to free the table on the Grid, click on "Sale Cash Up". Do not enter anything - just click "Accept"




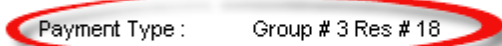
- Shawn does not have access to the "Main Reservations" screen, but for demonstration purposes we have logged in and opened Jenny's Tours' reservation details. In the "In-House" tab, the transaction we have just done displays here. In order to see the details of the charge itself, click on it and then on "Display"




Beach Boulevard West
Diaz Beach, Mossel Bay
Tel : 0861 66 88 35
Fax : 0865 1171 65
Tax : 123456789

GOODS ISSUE NOTE

4	Continental Breakfast	24.08	196.00
4	Filter Coffee	5.88	48.00

Description : Table - 5
Customer : UPT001 - Upton, Luke 
Room : DR003 - Double Room Nr 5
Payment Type : Group # 3 Res # 18 

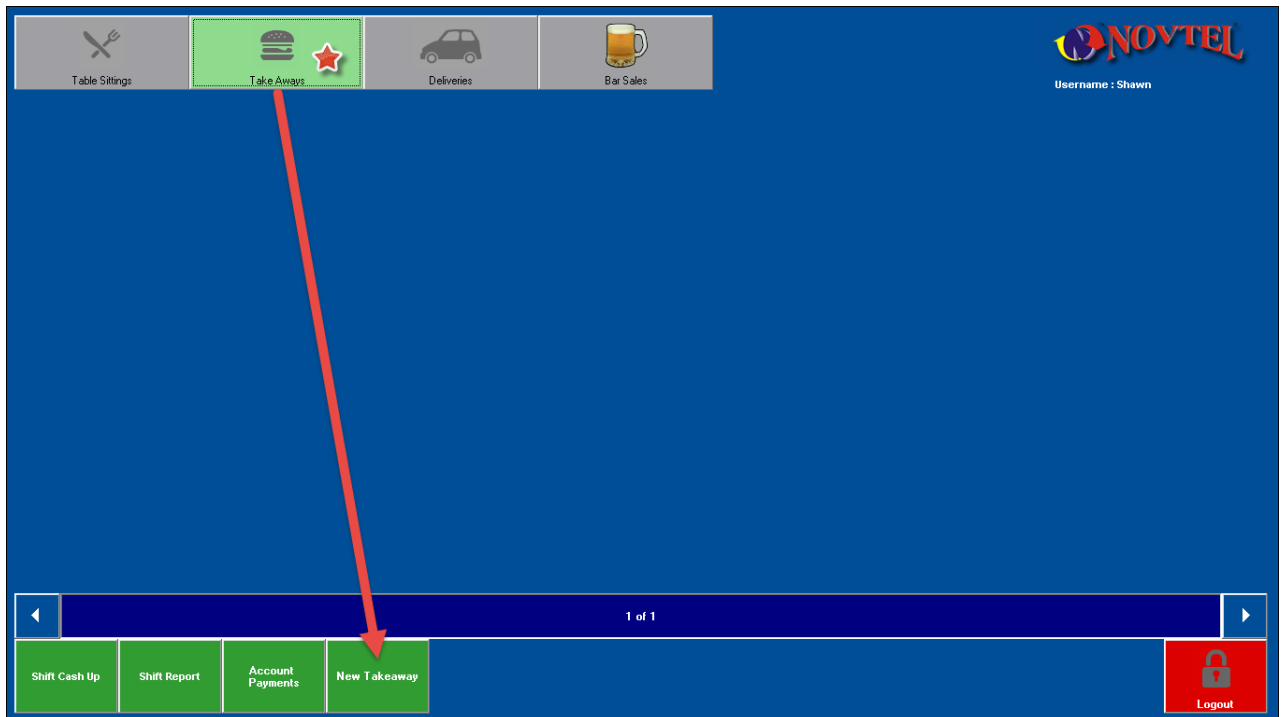
 Payment Due : 244.00
Tax/VAT Total : 29.96
Payment Received : 0.00
Change : 0.00
Discount(0%) : 0.00

Staff member : Shawn
Payment Date : 2014/11/27
Print Date : 2014/11/27
Time : 09:22:43
Shift Number : SFT00006
Invoice : CI000022

Thank You.

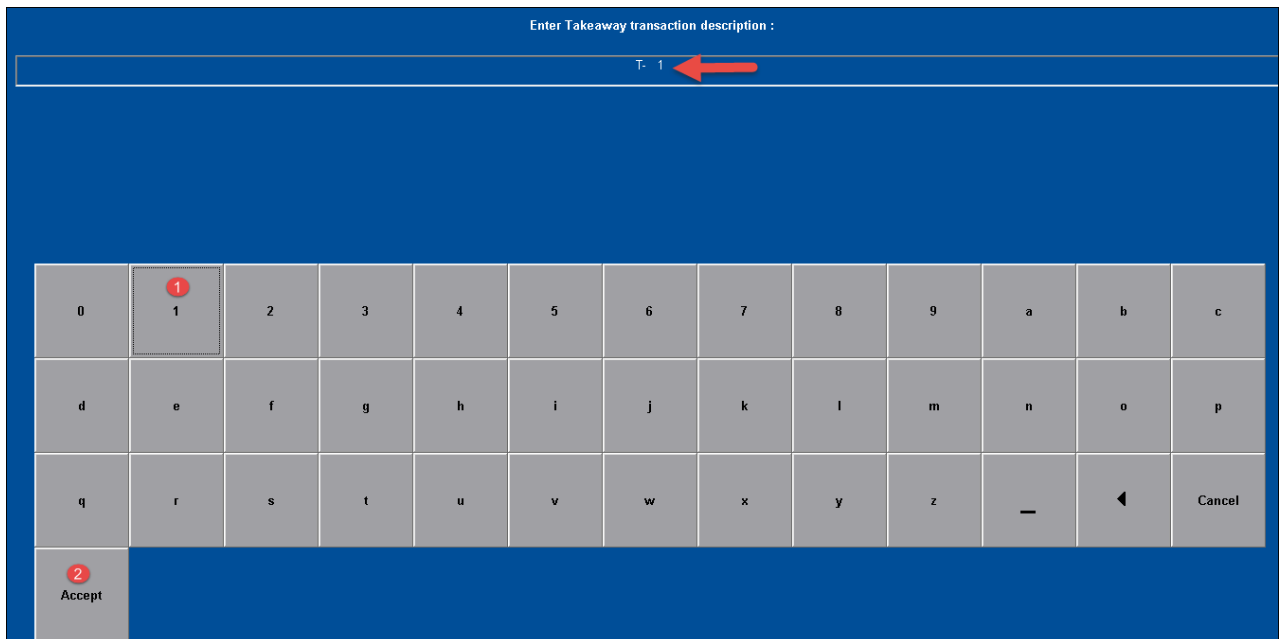
10 Step 10 - Take Aways

- Click on the "Take Away" icon and then on "New Take Away"

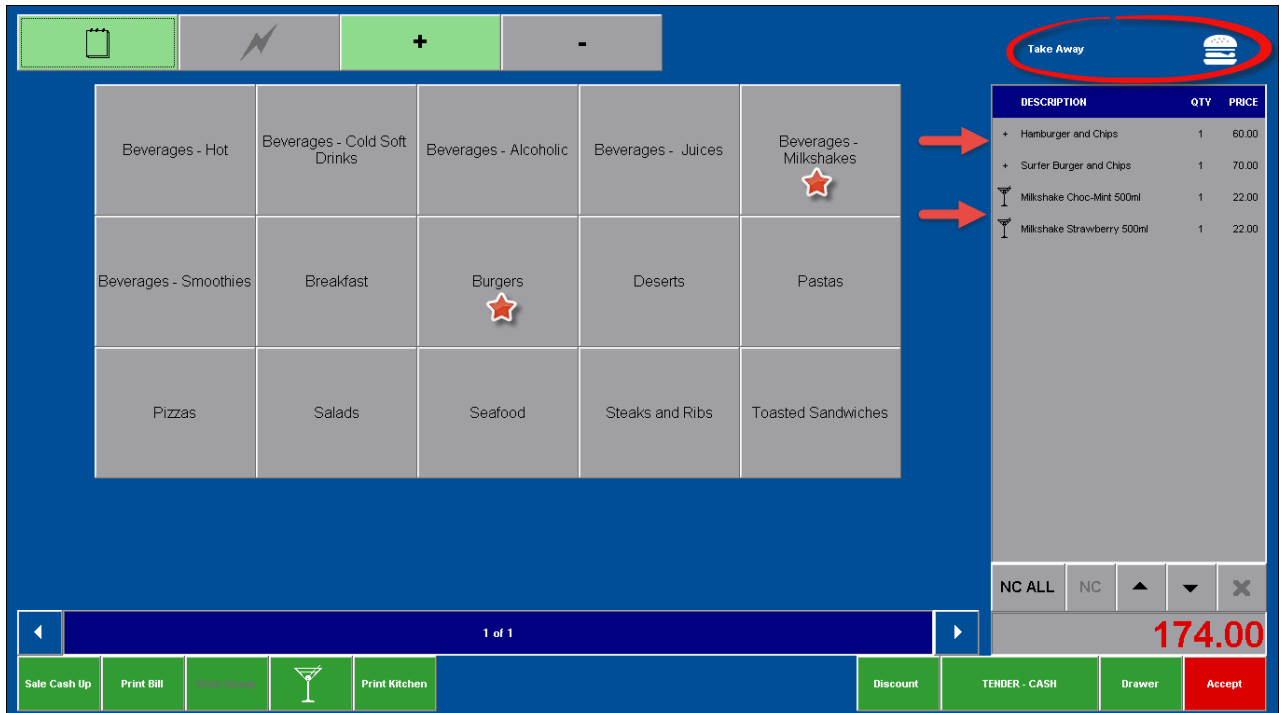


The on-screen keyboard will open, and you can enter a transaction name. You will notice that a "T" is entered as the default, since it indicates that it is a "Take Away"

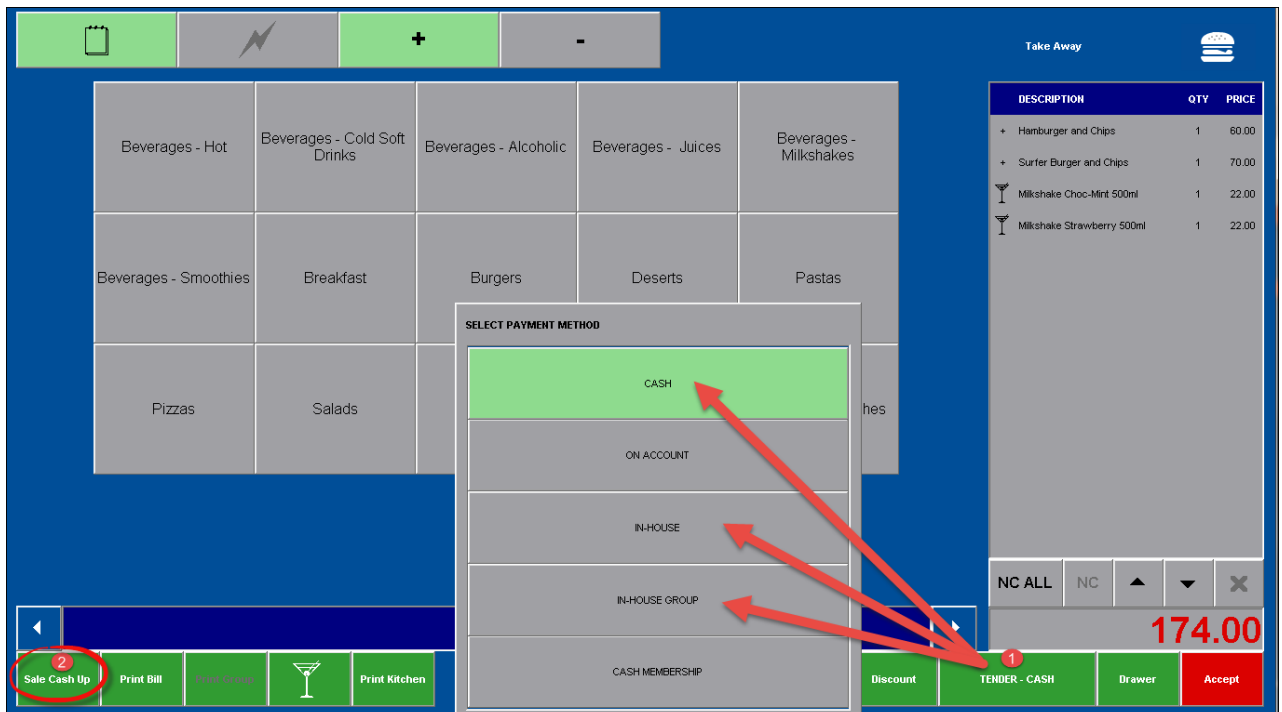
- We have simply entered the number "1" - being the first "Take Away" transaction for the day
- Click "Accept" to save the description



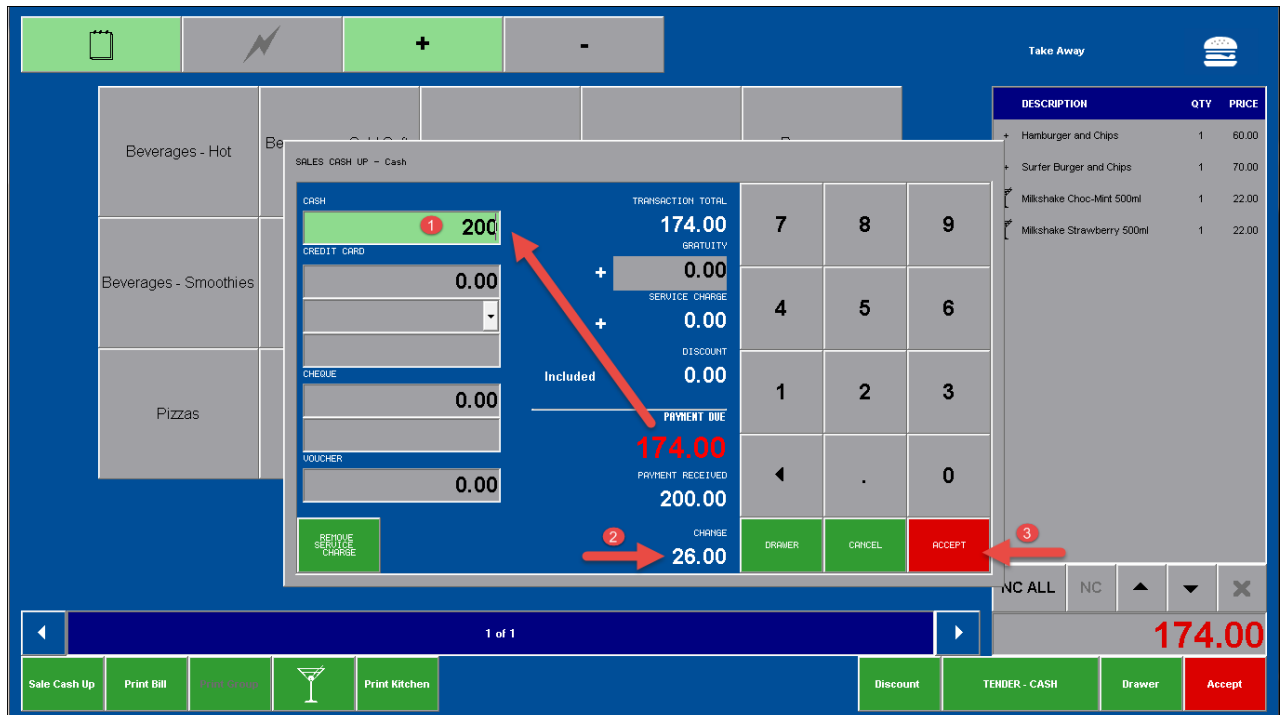
- The "Menu Categories" screen opens, and the "Customer" has ordered the following:



- When you click on "Tender Cash", the appropriate payment option can be chosen as explained in Step 9. Print the bill, and in the case of an "In-House" or "In-House Group" charge, have the "Customer" sign the slip. We have selected the "Cash" option, and clicked on "Sale Cash-Up"



- The "Customer" hands Shawn R200. When the amount is entered, the system automatically calculates the "Change". Click "Accept"



- Either start a new "Take Away" transaction, or click on "Table Settings" to return to the Restaurant

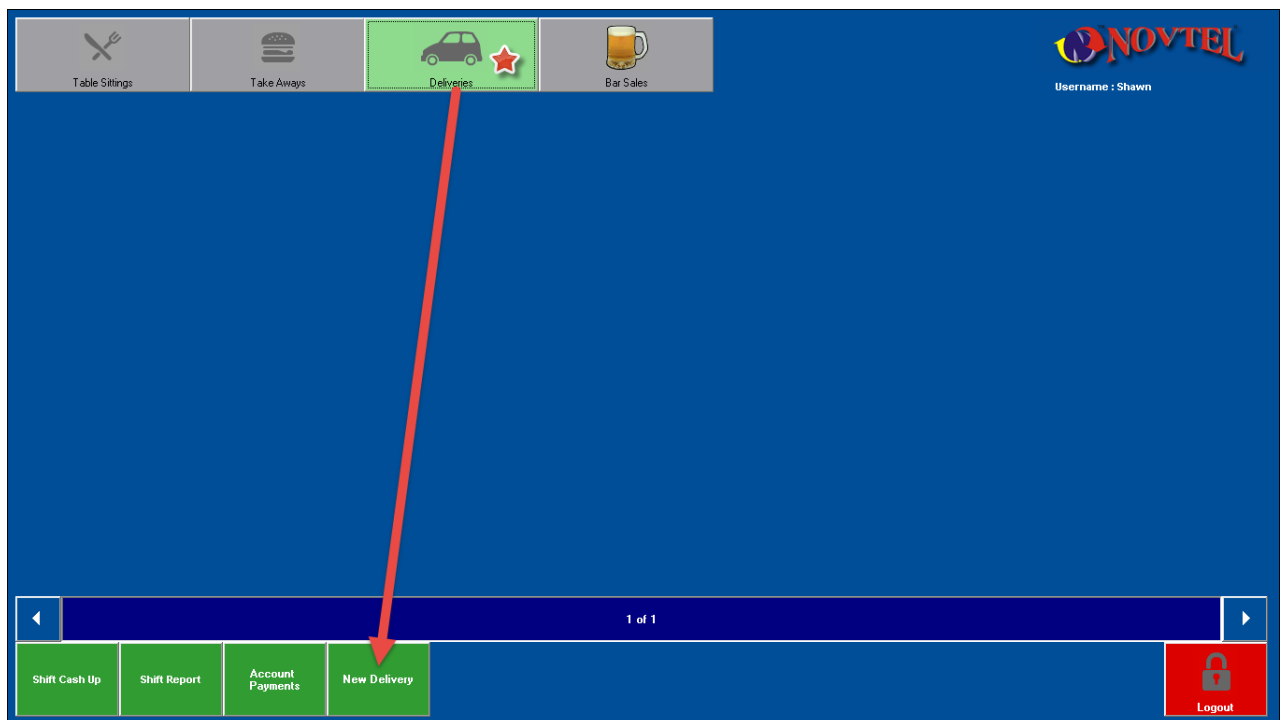
11 Step 11 - Deliveries

We have created a **"Menu Category"** for **"Deliveries"** to be displayed as an **"Extra"** when the **"Lightning Bolt"** is clicked. We also created a **"Delivery to Room Charge"** that is linked to the **"Category"**. This means that every time we do a delivery to a room in the Hotel, the **"Delivery Charge"** will be added to the bill.

Keep in mind that this option will not only be used within the **"Facility"**. You may have a wide range of delivery charges for **"Off-Site"** deliveries as well - and you can create it according to different areas in town, or according to distance from the Restaurant. For example:

- 0 - 15km R30.00
- 16 - 30km R60.00 etc.

For demonstration purposes, we will do a **"Delivery"** to a guest in the Hotel, and charge the amount to the Reservation. Click on **"New Delivery"**



- Enter the "Delivery Transaction Description" when the on-screen keyboard appears. Notice that the "D" for "Deliveries" are entered by default. We have entered the Room Code for the delivery - DR001

Enter Delivery transaction description :

D- room dr001

0	1	2	3	4	5	6	7	8	9	a	b	c
d	e	f	g	h	i	j	k	l	m	n	o	p
q	r	s	t	u	v	w	x	y	z	-	←	Cancel

Accept

- Mr Viljoen ordered from the "Desert Category" one Choc-Nut Sundae, and a slice of Strawberry Cheesecake

Delivery

DESCRIPTION	QTY	PRICE
+ Choc-Nut Sundae	1	25.00
+ Strawberry Cheesecake	1	40.00

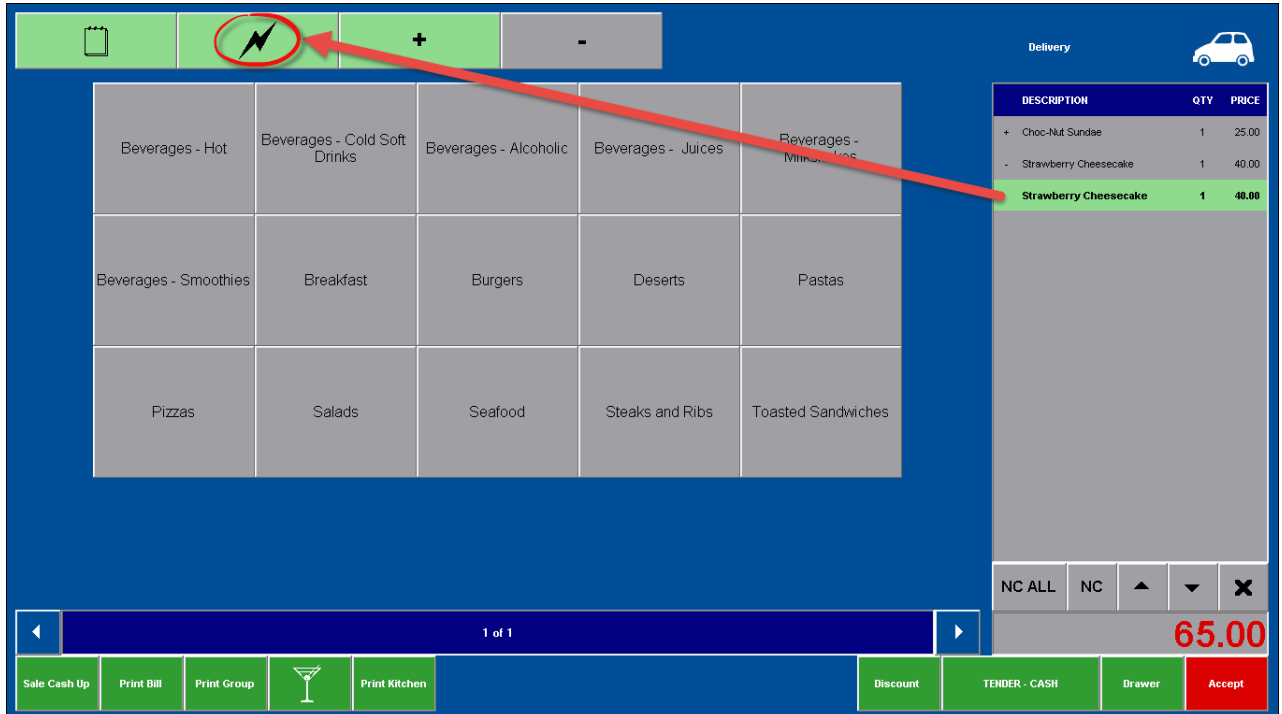
65.00

1 of 1

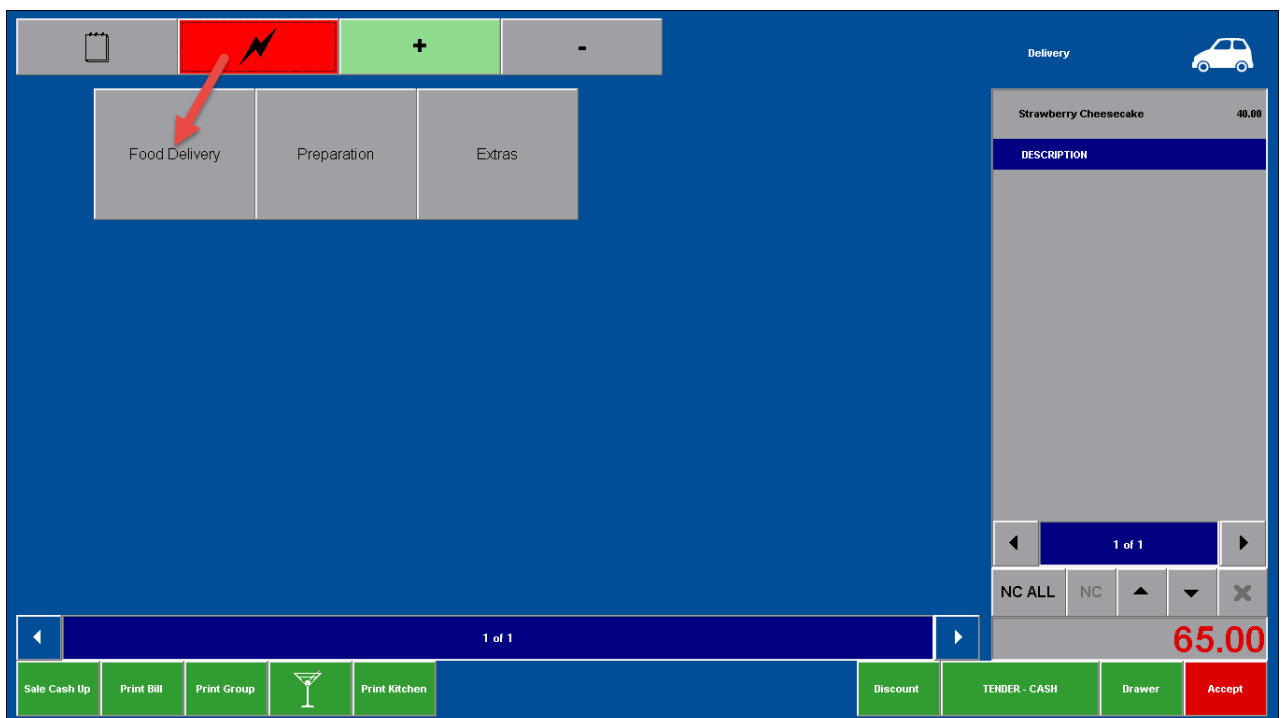
Sale Cash Up Print Bill Print Groups Print Kitchen Discount TENDER - CASH Drawer Accept

In order to activate the "Lightning Bolt" function to access the "Food Delivery Category", and to add the "Delivery Charge":

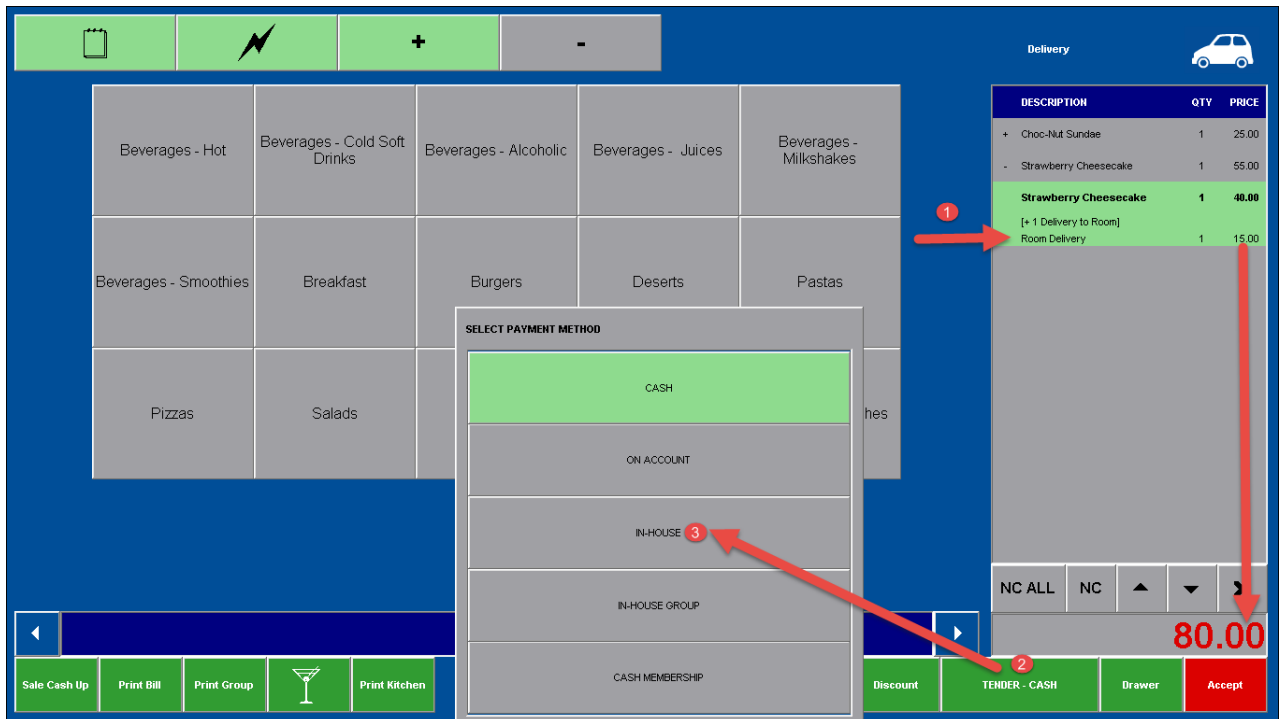
- Click on the last charge listed (Strawberry Cheesecake) and click on the duplicated charge
- The "Lightning Bolt's" color is now green, and it can be utilized



- Click on the "Food Delivery Category", and select the appropriate charge rate - In this case it is a R15.00 Room Delivery Charge



1. The "Delivery Charge" has now been added to the total
2. Click on "Tender Cash"
3. Select "In-House"



- Select the correct "In-House" guest from the list; check that all information is correct, and click "Accept"
- Select "Print Kitchen" to send the order to be prepared
- Click on "Print Bill" - which must be signed by the guest upon receiving the order, and kept at the Front Desk with all other purchases by this guest - in order for him to settle all outstanding amounts upon departure
- To finalize the transaction, click on "Sale Cash Up"



Novtel Hospitality

Diaz Office Park

Block 1 Unit 30

0861 66 88 35

0865 1171 65

Invoice : IN00076

VAT Number : 123456789

Delivery: 4

Choc-Nut Sundae	1	3.07	25.00
Strawberry Cheesecake	1	4.91	40.00
+ Room Delivery	1	1.84	15.00
Service Charge	1	0.00	0.00
		Total Excl :	70.18
		Tax :	9.82
		Total :	<u>80.00</u>
		Discount Included :	<u>0.00</u>

Gratuity:

Waitron : Shawn

2014/11/27

03:25:31 PM

SFT00006

Thank You.

- Notice how the system has entered the information of the "In-House Customer" when the "Sale Cash Up" is being finalized
- Do not enter anything - simply click "Accept" for the charge to be sent to the guest's Reservation

The screenshot displays a POS interface with a central dialog box titled "SALES CASH UP - In House Customer Number: VIL001 Viljoen, Jeff Booking: 17". The dialog box contains the following elements:

- Payment method selection: CASH (0.00), CREDIT CARD (0.00), CHECK (0.00), and VOUCHER (0.00). Each has a red 'X' over it.
- Transaction summary: TRANSACTION TOTAL (80.00), GRATUITY (0.00), SERVICE CHARGE (0.00), DISCOUNT (0.00), PAYMENT DUE (80.00), PAYMENT RECEIVED (0.00), and CHANGE (0.00).
- A numeric keypad with digits 0-9 and function keys: DRAWER, CANCEL, and ACCEPT.
- Customer information: "In House Customer Number: VIL001 Viljoen, Jeff Booking: 17" (indicated by red arrow 1).
- Buttons: "BEHOLD SERVICE CHARGE" (green), "DRAWER" (green), "CANCEL" (green), and "ACCEPT" (red, indicated by red arrow 3).

The background interface shows a menu with categories: Beverages - Hot, Beverages - Smoothies, and Pizzas. A list of items is visible on the right, including Choc-Nut Sundae (1 @ 25.00), Strawberry Cheesecake (1 @ 55.00), Strawberry Cheesecake (1 @ 40.00), and Room Delivery (+1 Delivery to Room) (1 @ 15.00). The total amount due is 80.00.

For an "Off-Site" delivery, the "Customer" will have to pay cash upon delivery, and the "Sale Cash Up" is done when the person who delivered the order, returns with the money

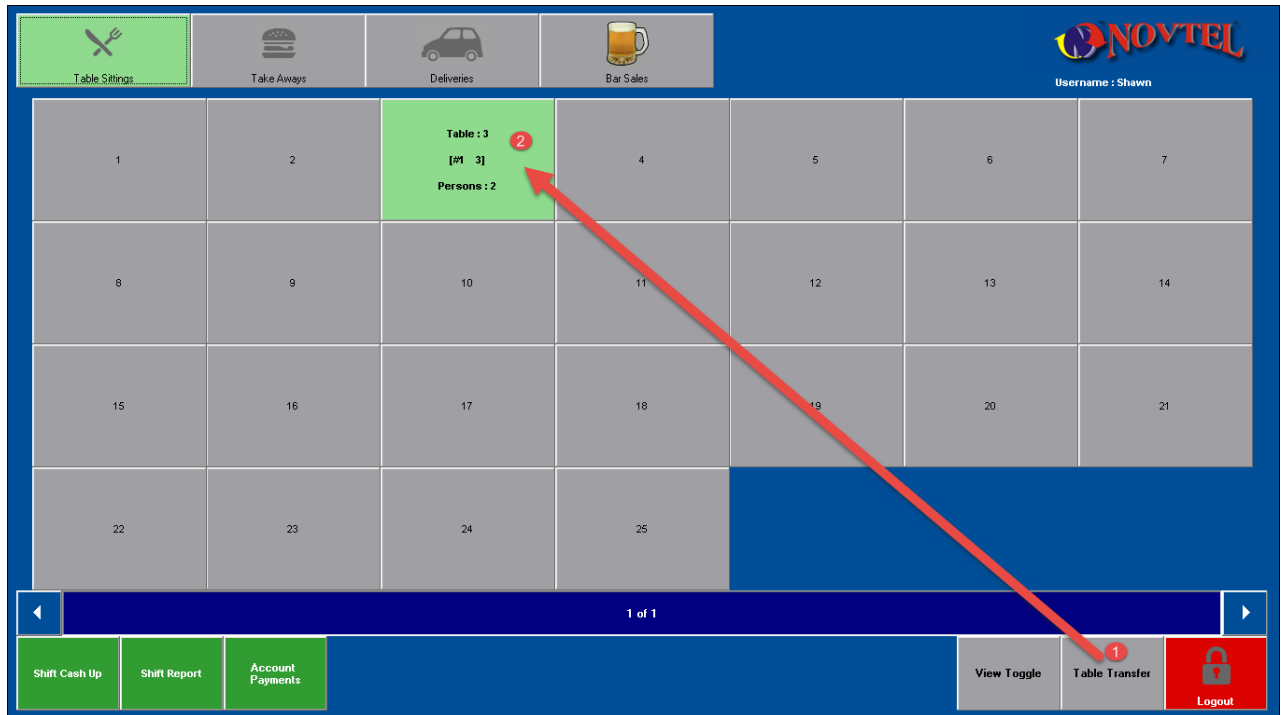
This will be done in the same manner as when the "Waitron" enters the drinks order and clicks "Accept" - in order to save the order to the "Table Sitting". He or she will then later return to the "Table Sitting" to enter the food order, etc.

Simply return to the "Delivery"; select "Sale Cash Up" and enter the payment amount

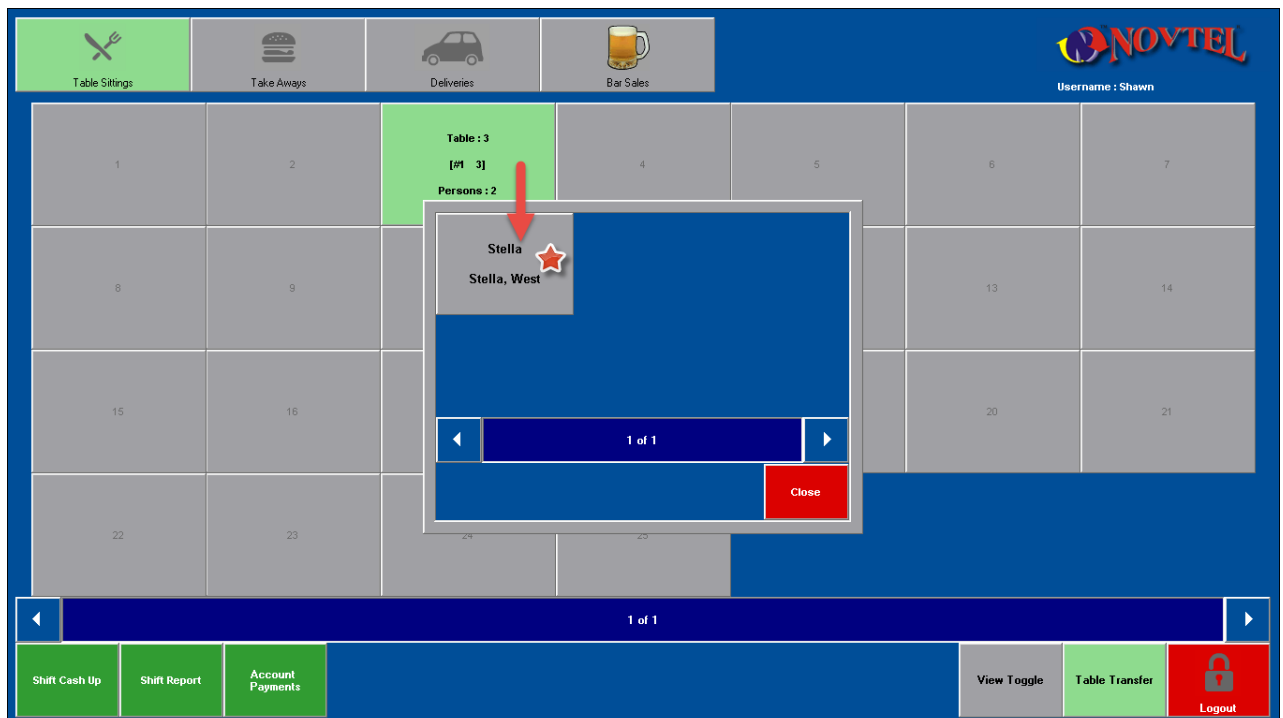
12 Step 12 - Transferring a Table upon Shift-End

In order to transfer a Table from one "Waitron" to another when a shift comes to an end, the other "Waitron's" shift must have been opened first by the Supervisor

- Click on "**Table Transfer**", and then on the table to be transferred



- A window will open, containing all available "Waitrons". Select the "Waitron" to whom this specific table is transferred - in this case, click on "Stella"



If there is a few active "Table Sittings" and different "Waitrons", the tables can be allocated as follow:

Tables 1, 2 and 3 are transferred to Stella

Tables 4, 5 and 6 are transferred to Jarred

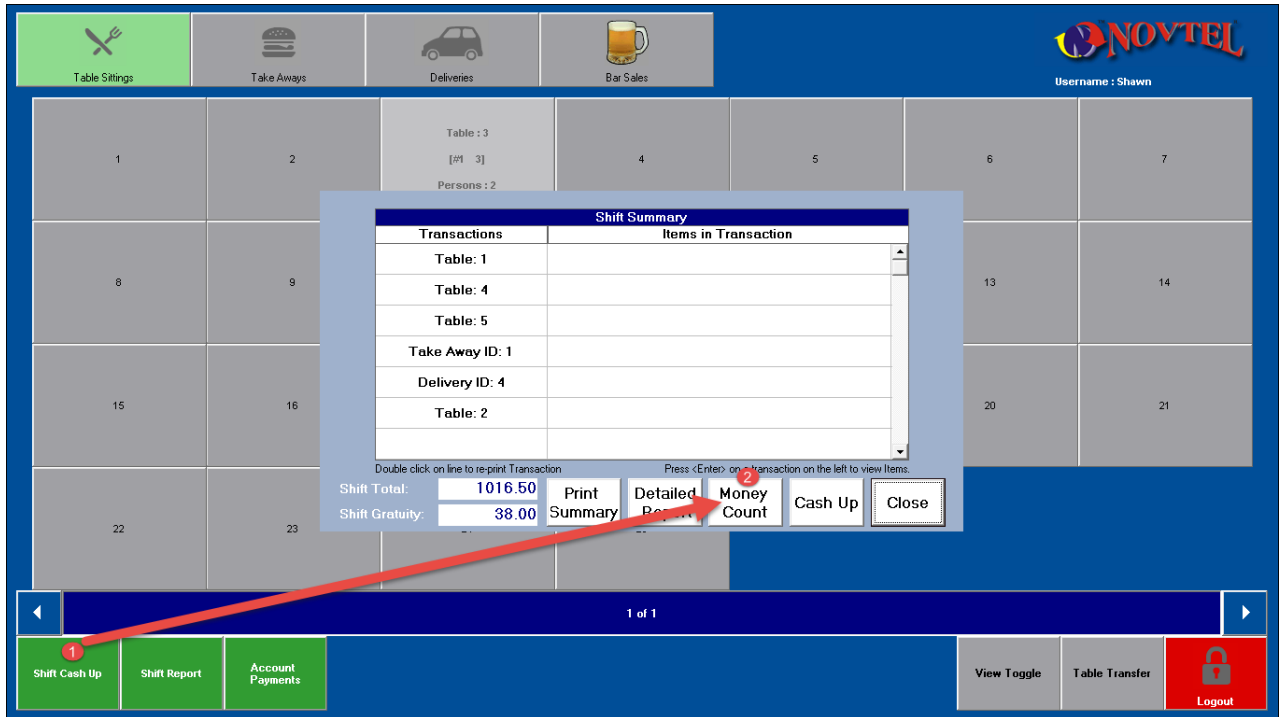
- Table 3 is now inaccessible to Shawn, but when Stella logs in with her password, the table and all it's transactions will be reflected on her shift

The screenshot displays the Novtel POS interface. At the top, there are four main menu categories: "Table Sittings" (green), "Take Aways" (burger icon), "Deliveries" (car icon), and "Bar Sales" (beer icon). The "NOVTEL" logo is in the top right corner, with the "Username: Shawn" field circled in red. Below the menu is a grid of 25 numbered table slots (1-25). Table 3 is highlighted in grey and contains the text "Stella" and "West, Stella" with a red star icon. The bottom of the screen features a navigation bar with buttons for "Shift Cash Up", "Shift Report", "Account Payments", "View Toggle", "Table Transfer", and "Logout".

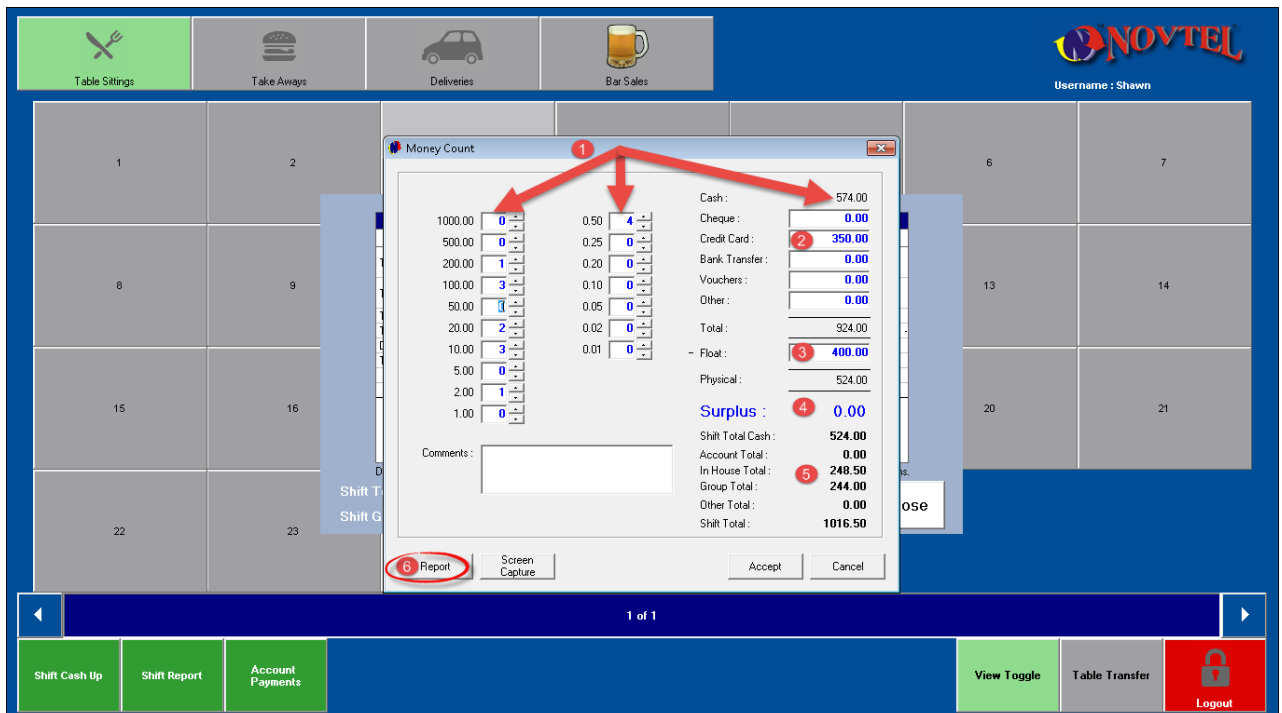
- All that needs to happen now, is that Shawn must do a "Shift Cash Up"

13 Step 13 - Shift Cash-Up


- Click on "Shift Cash Up", and then on "Money Count"



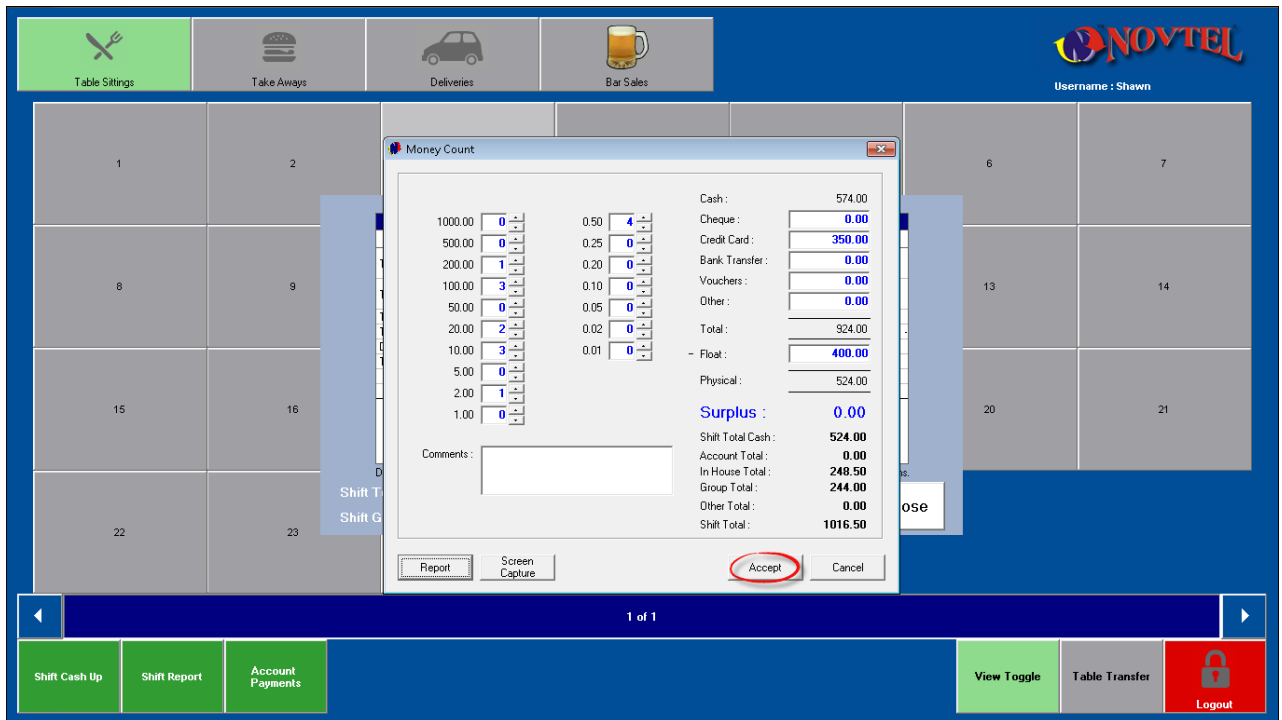
1. Enter the number of notes and coins - the system will automatically calculate the total cash amount
2. Calculate the amount of "Credit Card" payments, and enter the "Total" in the field provided - as well as any other form of payment such as cheques and bank transfers
3. Enter the "Float" amount - which will be deducted by the system
4. Should there be a surplus or shortage, the amount will be printed in red
5. All "In-House" and "Group In-House" transaction totals are listed and added to the "Shift Total"



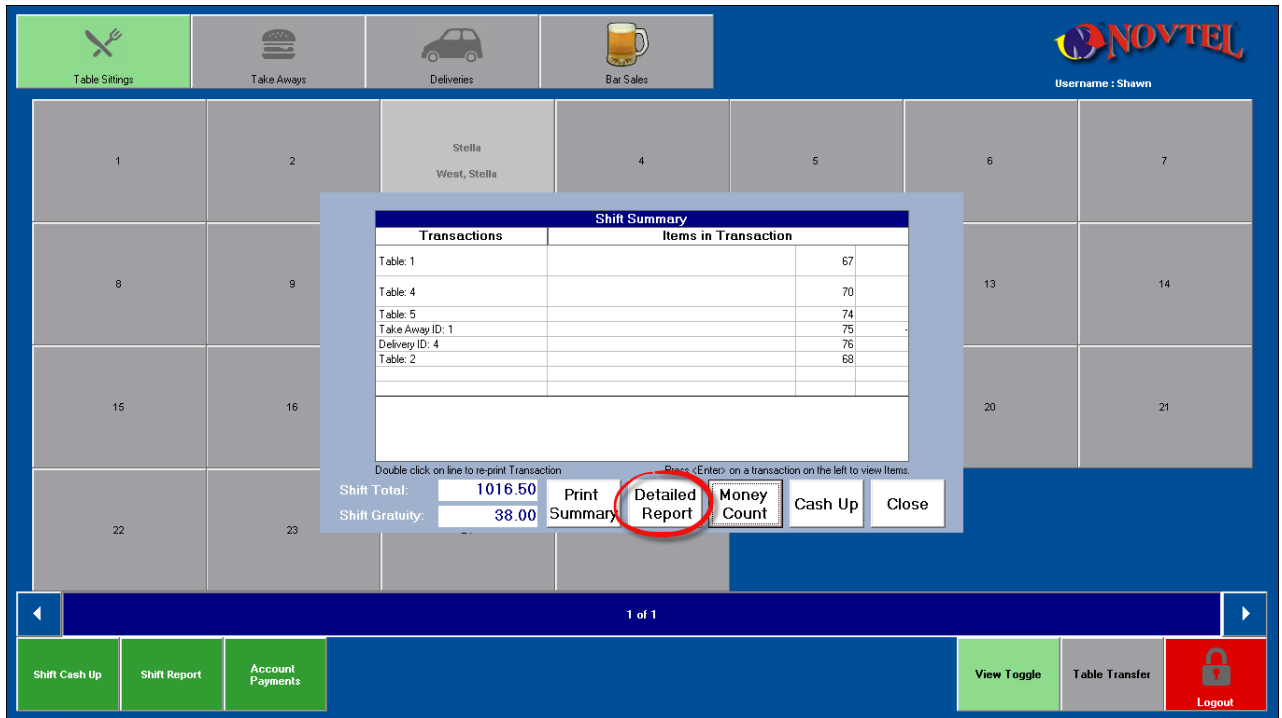
6. Click on "Report" in order to display the "Operator Cash Up Report". It can be printed and signed by the "Operator"

	Date :	2014/11/28
	Operator :	Stam
	Shift Number :	SFT00005
	Shift start: 2014/11/28 12:32:27	Shift End: OPEN
Operator Cash Up 		
CLOSING TOTAL :		1016.50
		<hr/>
Cash		574.00
- Float		400.00
		<hr/>
		174.00
Cheque		<hr/>
		0.00
Credit Card		350.00
Bank Transfer		0.00
Other		0.00
		<hr/>
		524.00
Vouchers		
	<hr/>	
	<hr/>	
	<hr/>	
	<hr/>	
	<hr/>	
	<hr/>	0.00
	<hr/>	524.00
Short / Over		0.00
BALANCING TOTAL :		<hr/>
		524.00
On Account		0.00
In House		248.50
Group		244.00
Other		0.00
SHIFT TOTAL :		<hr/>
		1016.50
Comments		

- Close the "Report" and click on "Accept"



- Click on "Detailed Report"



- This is the first part of the report - reflecting all the Cash and Credit Card transactions, as well as all items that was set at "No Charge"

TRANS #	CODE	DESCRIPTION	QTY	RATE
Detailed Shift Summary - Supervisor: ←				
Cashier: Shawn - Shift #:SFT00006				
Shift Start 2014/11/26 12:32:27 PM - Shift End 2014/11/28				
Time and date report was printed: 2014/11/28 09:25:05 AM				
Cash Invoices and Credit Notes ←				
67 (REC00025)				
Table #1	BHD001	Filter Coffee	2	24.00
Table #1	BRE003	Mega Breakfast	2	150.00
Table #1	BRE005	Omelette - Bacon and Tomato Filling	1	55.00
Table #1	BRE006	Continental Breakfast	1	49.00
Table #1	GRA002	Granuity - Shawn	1	58.00
Table #1	JUI004	Mixed Fruit Juice 500ml	1	12.00
Table #1	MSE001	Milksake Chocolate 500ml	1	22.00
VOID	MSE001	Milksake Chocolate 500ml		22.00
VOID	BRE004	Plain Omelette and Toast		59.00
TRANSACTION TOTAL:			9	350.00
70 (REC00027)				
Table #4	ALC004	Castle Lager 375ml	1	0.00
Table #4	ALC005	Dry Red Wine per Glass	1	0.00
Table #4	BUR004	Pepper Steak Burger	1	0.00
Table #4	DES001	Choc-Nut Sundae	1	0.00
Table #4	DES002	Chocolate Brownie and Cream	2	0.00
Table #4	DES004	Waffle and Ice Cream	1	0.00
Table #4	MSE002	Milksake Lime 500ml	1	0.00
Table #4	MSE006	Milksake Choc-Mint 500ml	1	0.00
Table #4	PIZ005	Bacon and Pineapple Pizza	1	0.00
Table #4	PRE002	Medium Rare	1	0.00
Table #4	SEA005	Mussel and Calamari Platter	1	0.00
Table #4	STE004	Mixed Grill	1	0.00
TRANSACTION TOTAL:			13	0.00
75 (REC00026)				
Take Away #1	BUR001	Hamburger and Chips	1	60.00
Take Away #1	BUR005	Surfer Burger and Chips	1	70.00
Take Away #1	MSE003	Milksake Strawberry 500ml	1	22.00
Take Away #1	MSE006	Milksake Choc-Mint 500ml	1	22.00
TRANSACTION TOTAL:			4	174.00

This is the "NC ALL" transaction demonstrated in Step 7 - zero totals, but the "Stock" is accounted for

- The second part of the report reflects the transactions that was billed to the "In-House" and "Group In-House" reservations

In-House Sales ←

TRANS #	DOC NO	ROOM	CUSTOMER	AMOUNT
68	GIN00012	DR001	VIL001 - Viljoen, Jeff	168.50
76	GIN00013	DR001	VIL001 - Viljoen, Jeff	80.00
				248.50

In-House Sales Group ←

TRANS #	DOC NO	GROUP	CUSTOMER	AMOUNT
74	GIN00011	3	JEN001 - Jeany's Tours	244.00
				244.00

- Close the "Detailed Report", and click on "Cash Up"

The screenshot shows the Novtel Hospitality software interface. At the top, there are icons for Table Settings, Take Aways, Deliveries, and Bar Sales. The main area is a grid of tables. A "Shift Summary" dialog box is open in the center, displaying a table of transactions and items. Below the dialog box, there are buttons for "Print Summary", "Detailed Report", "Money Count", "Cash Up" (circled in red), and "Close". The "Cash Up" button is highlighted with a red circle. At the bottom of the interface, there are buttons for "Shift Cash Up", "Shift Report", "Account Payments", "View Toggle", "Table Transfer", and "Logout".

The screenshot shows a confirmation dialog box titled "Novtel Hospitality". The text inside the dialog box asks "Are you sure you want to cash up your shift?". Below the text are two buttons: "Yes" and "No". The "Yes" button is circled in red.

- Shawn will now automatically be logged out of the system, and the Supervisor must log in to complete the "Cash Up" procedure
- Click on Shawn's name, and see how the transactions done during his shift, are display in the left-hand side of the window. Select "Supervisor Shift Cash Up"

Supervisor Shift Cashup

File Reports Credit Note

View Location: All

Supervisor Sup Shift # SUP00001

Transaction (SFT00006)					Shift			
ID	Customer	Table / TA	Type	Total	Shift #	User	Total	Invoice Date
67		Table 1	Sales	350.00				
68	VIL001	Table 2	Sales	168.50				
70		Table 4	Sales	0.00				
74	UPT001	Table 5	Sales	244.00				
75		TA 1	Sales	174.00				
76	VIL001	Delivery 4	Sales	80.00				

Restaurant

SFT00002	Stella	302.00	
SFT00006	Shawn	1016.50	2014/11/28

Bar

SFT00005	Alex	0.00	
----------	------	------	--

Front Desk

SFT00001	James	76408.00	
----------	-------	----------	--

Shop

SFT00003	Nick	0.00	
SFT00004	Pe	1200.00	2014/11/19

Batch Shift Single Shift

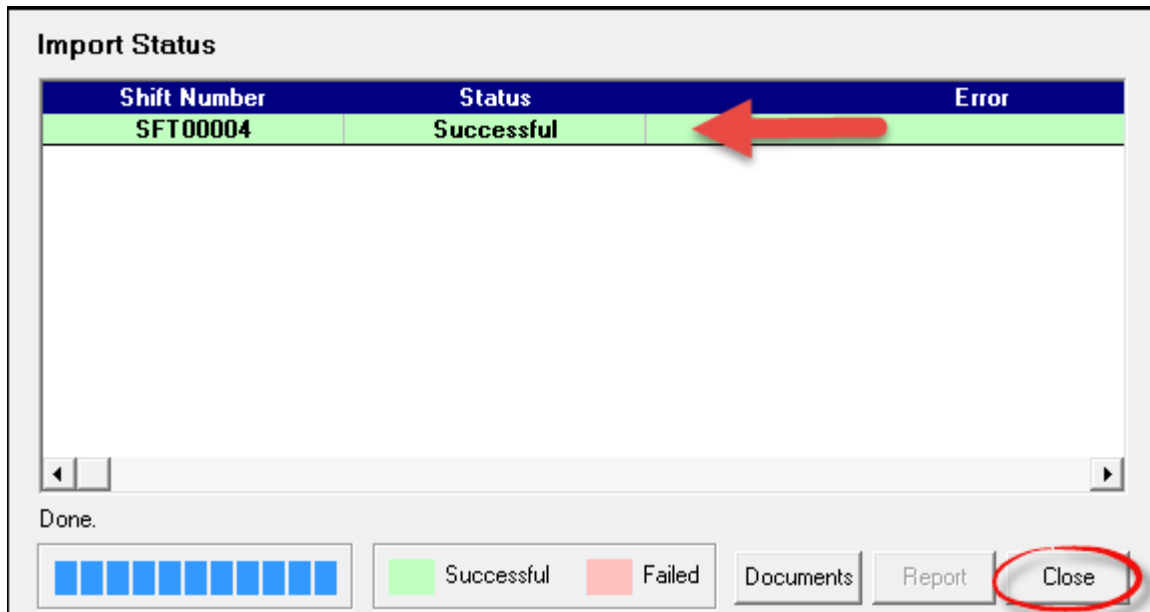
Open Shift Shift Total: 78926.50

Supervisor Edit Shift Supervisor Shift Cashup Close

Novtel Hospitality

Continue Cashup?

Yes No



- The data is sent to Pastel

This concludes the Hospitality Restaurant and Bar POS Tutorial. For more information, please register on Novtel's Forum: <http://www.novtel.com/forum/index.php>



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Our Pastel integrating software include products for:

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- Self-Storage
- Equipment Hire*
- Relations Management*
- Hospitality*
- Contract Management
- Toilet Hire*
- Service Business Rental
- Point of Sale: Retail*
- Point of Sale: Restaurant*
- Workshop Management*
- Gate / Facility Access Control*
- Standard Operating Procedure (SOP) Management*

* Can also be used as stand-alone applications

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