Reference Manual

Five Star Hotel Systems Corporation

Point of Sale
Inventory
Purchase Orders

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Highlight Features of Point of Sale

- uses sophisticated touch screen technology, the fastest and easiest way to learn the point of sale platform.
- fully integrated with front desk, meaning that credit privileges are controlled, room charges are instant & accurate, daily sales reports for the general manager include front office, f & b and banquets, all on one report, every day, and output to the general ledger is fully automated.
- setup and modification of sales items and menus are quick & simple.
- excellent security and cash control for server and manager peace of mind, as well as system accuracy.
- flash reporting up to the second available from any station on your network, including the owner/manager's desk or anyone who has security clearance to view reports. Right from your desk you can monitor the activity of all your food & beverage locations.
- split bill, fast cash for bar situations and handles package plans for hotels.
- sends orders to kitchen, bar etc. saving time and steps.
- reduce employee theft by requiring food/drink preparers to prepare only orders printed on order printers. Thus all orders must be recorded. Servers cannot pocket cash from orders not entered.
- menu items can be uniquely colored or you can add photos of each food item for fastest recognition and use.
- handles employee and guest discounts.
- when prices change, you can record the new prices well in advance, so you don't have to stay up all night the night before the date of the change.
- integrated to inventory for excellent and automatic inventory and cost control.
- reports number of covers and records sales by seat.

Setting Up Point of Sale

Workstation Setup

Touch Screens

First a brief note on touch screens. Your hardware person should have set up your POS screen as a touch screen, meaning that you can touch the screen to make it respond, instead of using the mouse or keyboard. While setting up for the first time we suggest you have the mouse and keyboard attached, but once you get to the stage where you are using the system day to day, we suggest you disconnect both. If you leave the keyboard attached, users can press the Windows key to bring up the Windows Start menu, even while in Five Star POS, and then they can get out of Five Star to use other Windows programs. This is not necessary. Management may need to from time to time, but servers should not be able to. You can only stop this by removing the mouse and keyboard. There is a special password feature in the Five Star POS that stops servers from exiting Five Star POS, so you only ever see the POS program.

Your hardware person should also 'CALLIBRATE' the touch screen before you use it, and should show you haw to do it. Calibrating means making the place you touch on the screen exactly match the feature on the screen you want to select. Imagine clicking your mouse on a regular screen and Windows responds by selecting the next button over from where you clicked. That's a 'calibration' problem, and they are very annoying! You should calibrate a touch screen whenever it becomes hard to use.

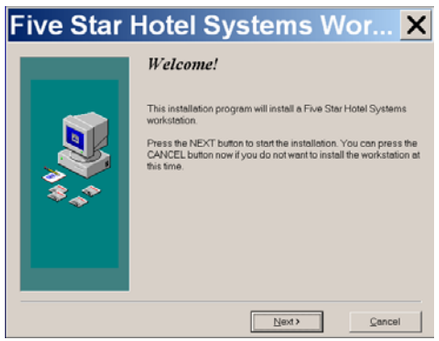
If you use the ELO Graphics brand touch screen drivers (the one we recommend) you find the calibration program on the Control Panel of your desktop, a very inconvenient place. We suggest you have your hardware person make a shortcut to this program and put it right on the desktop. This way, you can easily recalibrate when needed.

Put masking tape over the buttons on the screen that adjust the size and position of the image. Moving the image is the main reason touch screens need to be recalibrated. Also, make the image a little smaller than the total size of the screen, using the buttons (before you put the tape on!) We have found that touch screens are less accurate around the edges of the screen due to the curvature of the screen. You can reduce this problem by shrinking the image about ¼" around each edge.

WE STRONGLY ENCOURAGE YOU TO FOLLOW THESE RECOMMENDATIONS. THEY ARE THE DIFFERENCE BETWEEN HAPPY SERVERS AND GRUMPY SERVERS!

Windows Button Setup

You can start by setting up the buttons on the Windows Start menu. Your hardware person must have the workstation attached to your network, and he must have a drive letter mapped from each workstation to the server. Find out from him what that letter is. Then click Start, Run, Browse and then select the drive letter mapped to the server. Then select the GJCWIN folder then the WRKSETUP folder, then the Wrksetup file. Click Open then OK and the program will start to install the Start menu buttons.



At each stage just press Enter for the right answer to each question. When you get to the stage where it asks what type of station you are setting up, select POS workstation. This will set up four buttons on your start menu: the main POS Station button which staff normally works from, a Manager Mode button which management can work from for setting up new menus and viewing reports, and two similar buttons for the learning mode. This learning mode allows staff to practice and learn without affecting your real information.

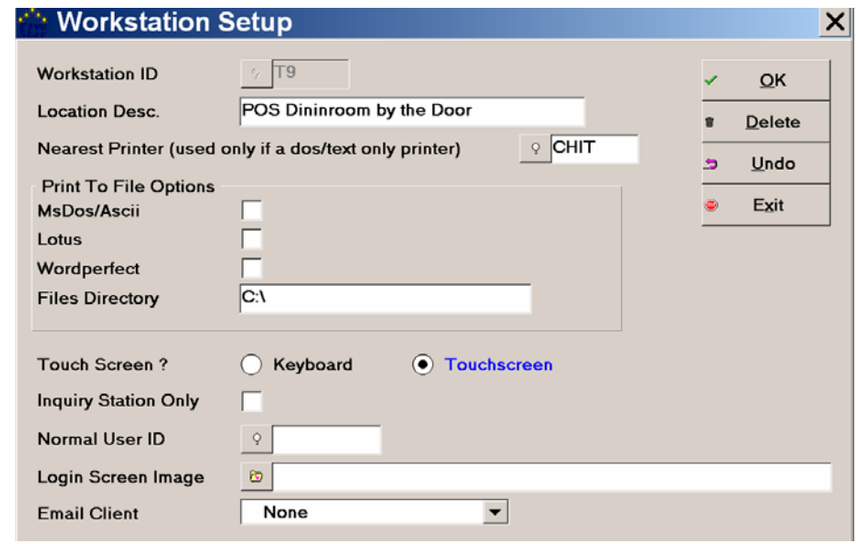
You will also be asked for a terminal ID for both the regular POS mode button and for the Manager Mode button. Follow the suggestions on the screen for selecting a Terminal Id. They must be 2 characters, the first must be the letter T and the second can be any letter or number 0 to 9 or A to Z. Each station must have a unique ID, and the manager mode ID must be different from the POS mode, e.g. you might set up T9 and T8.

Five Star Setup – Administration Menu

Once you have the buttons set up in Windows that start Five Star you can begin the work of setting up workstations within the program. Each of the Point of Sale Touch Screen Workstations must be set up in Workstation Setup program on the Administration menu before proceeding to the set up of the Point of Sale system.

Add a Workstation, giving a 'T' number to each station. Generally, the POS Terminals are assigned letters, for example TA, TB, TC, etc. (The office/accounting Terminals are assigned numbers, for example T1, T2, T3, etc.)

When you have set up the buttons in Windows, now you can get into Five Star. Do the rest of the setup in Manager Mode, ie by Touching the Manager Mode start button. Select the Administration menu and then Workstation Setup:



Enter a meaningful Terminal Location. Avoid using a persons name so that when the staff turns over, it is not necessary to change the Terminal Location.

Since you haven't set up printers yet, leave this field blank now, and come back to it when printers are set up in the next step. Select the printer that this Workstation will use for printing End of Shift reports, likely the CHIT printer.

Select Touch Screen for Point of Sale Terminals.

Leave the remaining video questions blank, as they are not applicable to Point of Sale.

Printers

For Point of Sale you will configure order printers and receipt printers. The order printer is used in the kitchen to notify the kitchen staff that a food order needs to be prepared or canceled. You might also use an order printer at a bar. Often at the bar you use the same printer for the bar orders and for guest receipts.

We recommend that your hardware people set up your printers for POS in a very specific way. If you have (or will have in the future) more than one POS station, the printer(s) in the kitchen must be set up on a print server, so they can be shared reliably. Do not connect the kitchen or bar order printers directly to the computer nearest the printer, this configuration is not reliable enough. That's why print servers were invented!

Have your hardware person create a windows printer for each printer on each POS station using the Windows Generic/Text Only printer driver, unless your specific brand and model of printer comes with its own driver. Since Five Star recommends Epson printers, and since they do not come with their own Windows drivers, he will likely have to do it this way. Then when he is done, if each POS station has its own receipt printer and there is a printer in the kitchen and in the bar, your hardware person should set up 3 printers on each station in the Windows Printer Setup screen. Use simple names like Chit, Kitchen, Bar for example, so when you link Five Star to them, you will know which is which.

For each shared printer, such as a kitchen printer or bar printer, make sure your hardware person names then identically on each POS workstation. This way you can set up just one printer in Five Star to work from all workstations. For example naming a printer Kitchen on one station and kitch on another and KITCHEN on another does not work. Make them all identical.

When setting up printers in Five Star we suggest you work at the POS station you are setting the printers up for, rather then working from your desk for example. This is because, you need to link Five Star to the Windows printer drivers your hardware person has set up for you. So as you do the setup you should go around to each POS station, set up the printers in Five Star and test print to each printer.

When the hardware and Windows drivers are set up Select DOS/Text Printer Setup from the administration menu:

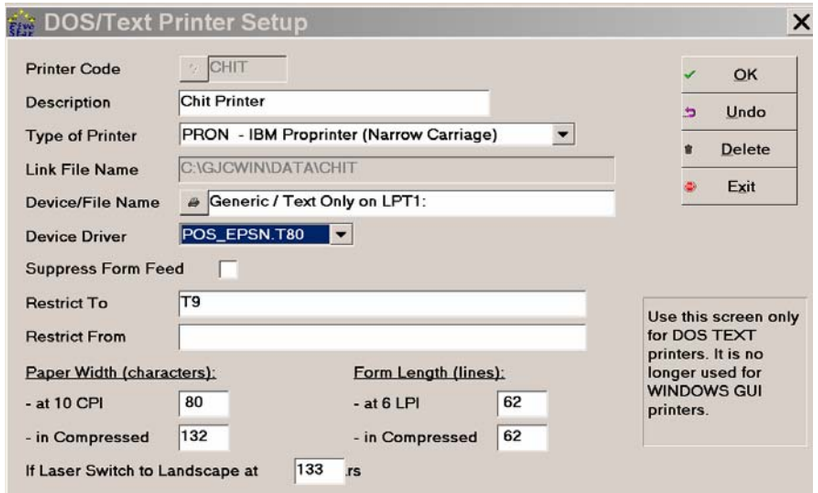


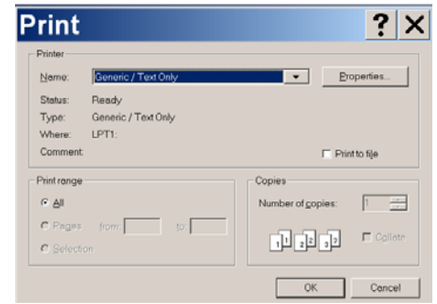
Figure: DOS/Text Printer Setup

Using the screen:

Choose add a new printer. Use a code like CHIT and description like CHIT PRINTER.

Type of Printer: Select IBM Proprinter Narrow Carriage.

Device/File Name: Click the icon to the left of the field and the following window will appear:



Since this is actually a Windows screen and not a Five Star screen, yours may be different depending on the version of Windows you use. Pull down the list of printers and select the one you want this Five Star printer to print to. If you do not see the right printer on the list, ask your hardware person for assistance. This list of printers comes from what he set up in the Windows Printer Setup screen.

When you have selected the right printer, click OK to return to the Five Star screen.

Device Driver: Scroll the list of printers to find the one that matches your printer and select it. For Epson thermal printers use the POS_EPSN.T80 driver. For Epson impact printers use the POS_EPSN.T3D driver, or experiment with the others on the list.

Suppress Form Feed: Leave this field blank. It is used only for laser printers.

Restrict to: Enter the terminal ID of the workstation you are at, for example T9. Each workstation has a unique terminal ID, found on the bottom right of the Five Star window. By entering a workstation ID in this field you tell Five Star to show this printer only to this POS station when a user is printing a report. If you want more than one station to share the same printer driver, you could enter them all like T7,T8,T9. That is, enter all the terminal ID's separated by a comma.

Be sure to fill in this field. At the end of a shift, servers must print an End of Shift report. You should only see one printer – the chit printer next to them, on the list of printers you could choose from. This is very important because one of the most common reasons we see POS stations freezing is because you leave servers with printers on their list that cannot actually be printed to. You can easily avoid this by ensuring that all printers in this setup screen have a

restriction on them, especially non-point of sale printers, and so POS servers cannot even see them to print to them.

You should probably show only the printer next to the POS station as well as one other, such as the bar or kitchen printer. This way, if the chit printer stops working, servers will have a second printer they can use to print their End of Shift reports from. By the way, the only thing you usually print on a chit printer is the End of Shift report. Don't worry about printing kitchen and bar orders at this stage; they will go to the right place regardless of the restrictions you enter here.

Restrict From: Usually this field is blank, since the restrictions were dealt with in the Restrict To field. You might use this field only in a very large installation with 10 or more computers, and you don't have enough space in the Restrict To field for all of them.

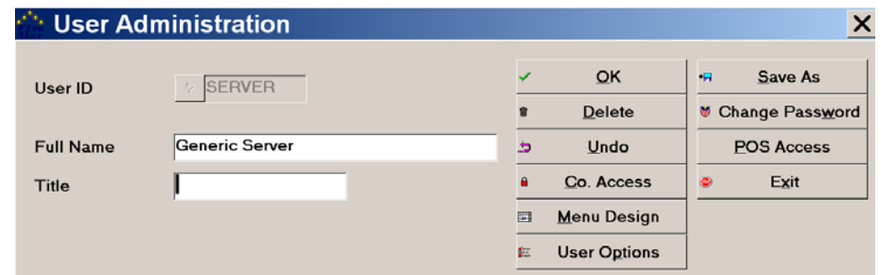
Paper Width: Enter 39 for both at 10 CPI and in Compressed.

Form Length: At 6 LPI and in Compressed enter 999 if the printer uses continuous paper. Otherwise, enter the number of lines there are on the chit form used.

Setting up User ID's and Security

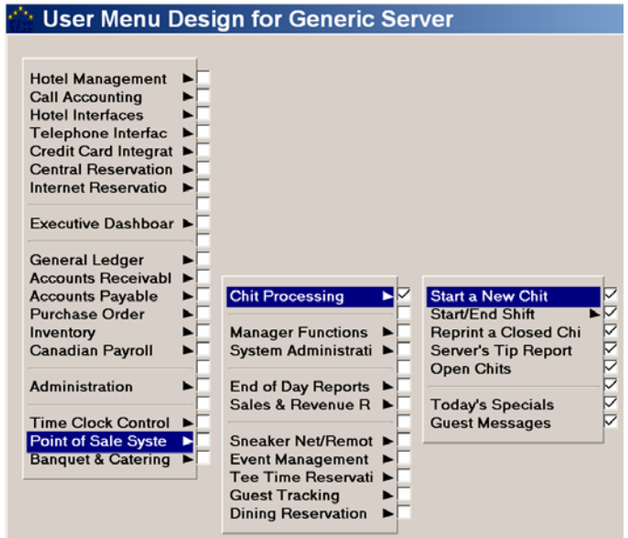
Only management with access to the User Logins and Administration on the Administration menu can do this step. Setting up servers correctly for point of sale is very important for easy use and good security. You should set each of your servers up on the User Id's and Administration program on the administration menu. If each has his own ID, each has responsibility for his own cash float. The POS system records every transaction by user name, so it can provide your staff with an end of shift report for each one. Use this report for balancing to the till at the end of each shift. By giving each of your staff his own ID each is responsible for his own cash.

Select the Administration menu and then User Logins and Administration. Start by creating a generic user like this:



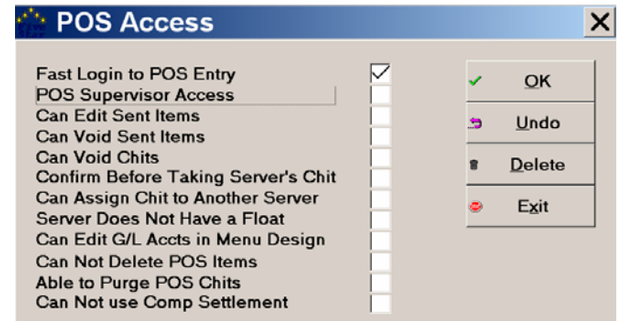
You will keep this user on file and when setting up new POS servers you can copy from this generic user using the Save As button. Before you are done with the generic user, go to each of the following screens.

First click the Menu Design button:

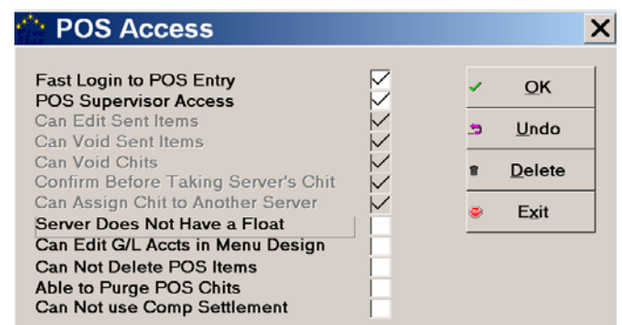


Set up each server's access menu to exclude everything but the point of sale menu by clicking on each check box to remove the check marks. Don't forget to remove the check marks on the lines too. Then add back the check mark on the Point of Sale menu. Then exclude everything on the point of sale menu except Chit Processing. Select the chit-processing menu and press enter. Limit this menu if there are features you don't want to use. When a server enters the system he will be taken directly to the open chits/start a new chit menu. Press F4 or click the X when you are done to return to the main screen.

Next click the POS Access button. For the Generic User fill in the screen like this:

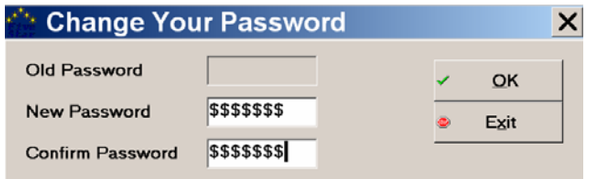


Here is a typical setup for your F&B manager or supervisor:



The POS supervisor check mark gives this person the ability to edit or void an item after it has been sent to the kitchen. All users should have the Fast Login box checked. Allowing a server to see all pos chits is useful if you want to manage other servers. When done click OK to return to the main screen.

Next click the Change Password button:



When done, save the generic user. Now you can set up each server from this user in much less time by using the Save As button. To do this, select the Generic POS User from the list of users. Click the Save As button. Enter the server's first and last initial e.g., Sally Jones would be SJ (in Capital letters). In the Full Name field type Sally Jones. In the Title field you can enter a name the way she wants to be known as on chits to her patrons, like "Sal your friendly server'. This will appear in the chits she presents to patrons. Next, change the password. If you make the user ID the same as the password, then the server needs only to enter his code once, instead of having to enter the user ID and the password. Be sure to enter the password in capital letters to make this work.

We suggest using a short user id and password, for speedy use.

System Parameters

All of the rest of the POS setup is done on the System Administration menu found on the Point of Sale menu.

Use the System Parameters screen to set general rules for the POS system, as well as tax rules. Select System Parameters from the System Administration menu:

Using the screen:

Property Type: should always be set to H-Hotel.

Selling Date: will automatically select the current date by pressing Enter. This is changed automatically each day based on rules you set in subsequent screens.

Chit Print Pgm: selects the chit print design program. POSC11P (S, C) are Five Star Standards.

Taxes: sets up the various tax and service charge rules and the general ledger integration.

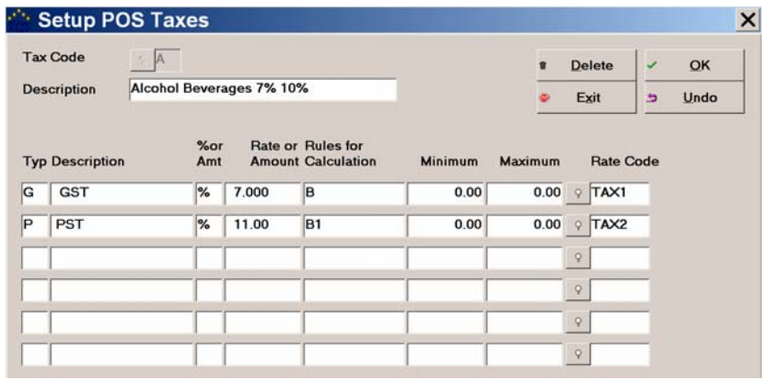
Options: asks you to define the “defaults” for the overall POS system. Many of these can be overridden at the terminal level.

Setup Areas: will setup the different physical locations or profit centers. The startup and settlement menus, inventory areas, area design, and area options are setup here.

Taxes

The POS tax program allows you to define the various tax arrangements that can be demanded of the property.

If Bar Sales were only taxed the State Sales Tax of 7% and nothing else, a separate Tax Code would be required.



Using the screen:

Tax Code: is limited to 1character. These tax codes are attached to different sales categories and areas where they are sold.

Description: holds more detailed information about what the taxes and services charges are for.

Type of tax: the system allows for 5 different tax types. Taxes of the same type are allowed.
S – Service Charge
R – Gratuity

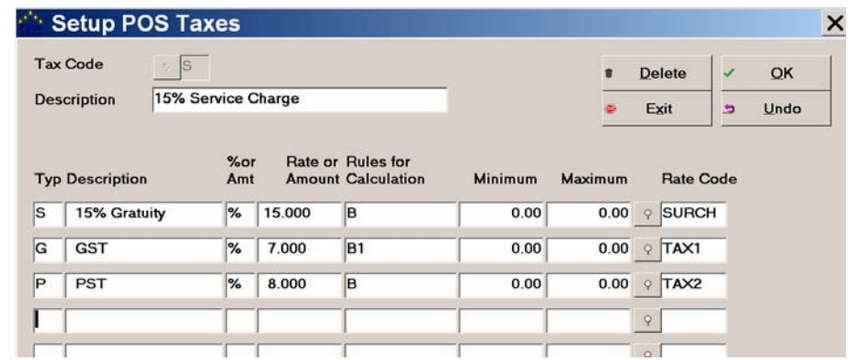
P – Provincial or States Sales Tax
G – Federal Sales Tax (GST for Canadians)
O – Other Sales Tax (Country or City)

Description: When setting up different tax codes with some of the same taxes, use the EXACT same wording in the description. For example, if Sales tax is entered in code 'A', and Sales Tax is entered in Code 'B', and two items with each of the sales rules are sold, the chit will display two separate tax lines for Sales Tax, even if it is the same percentage.

% or Amt: If the tax or service charge is a percentage of sales, enter '%', if it's a fixed dollar amount, enter 'A'.

Rate or Amount: Enter the fixed dollar amount if you entered A in the previous field or the percentage if you entered a % in the previous field.

Rules for Calculation: If the tax or charge is based on the base charge, enter a B in this field. If the tax or charge is based on the base charge PLUS one or more of the taxes or charges above it, enter B and the line(s) the tax or charge is based on. This implies that you should enter the taxes and charges in the right order. For example if you charge 15% gratuity and it applies to GST and the base charge, and you change PST and GST, you would enter them as follows:



Notice how the GST row has B1 in the Rules field. This means GST applies to the base charge as well as to the charge on line 1, namely the 15% gratuity.

Minimum: If a tax does not start until a certain sales dollar amount is reached, enter the amount of tax that would be calculated on this sales amount. If the tax starts at zero, just leave it blank. This can also be used for Service Charges and Gratuities.

Maximum: This is used when taxes or service charges have a ceiling or a limit. If the no limit is set, leave blank, or enter the maximum dollar amount of tax or service charge that can be calculated.

Billing Code: Press F2 and link the tax to a billing code in the front office.

Options

These are the global 'default' options for POS. Global means that these options will affect all Sales Areas within POS. Some of these options can be overridden by terminal in POS. To access them click the options button on the System Parameters screen:

Show Price in Chit Entry - If **Y**, the POS system will display the price of ONLY the last item entered by the server. This feature can be handy for helping new servers learn the prices of items.

Print Grat line on Chit - If you allow your guests to give voluntary gratuities to your servers then select this option. If **Y**, each chit printed will print a Gratuity line for the guest to fill in a gratuity for the server. If **E**, the Gratuity Line will Print 'Extra Gratuity Line' to suggest that a gratuity has already been added and only to add if service warrants it. This option can be overridden at the terminal level.

Show Grats before SubTot - If **Y**, the Gratuity line will print before the sub total. If **N,** it will print with the service charges and taxes.

Ask Table # for each Chit - If **Y**, the POS system will prompt the server each time you open a new chit to enter the table number. This option can be overridden as you set up individual terminals.

Ask # of Covers for Each Chit - If **Y**, the POS system will prompt you each time you open a new chit for the number of covers at the table. This option can be overridden as you set up individual terminals.

# of Copies of Chits to Print - Enter the number of chits required. If using an impact printer with double paper, set to 1. If using Thermal paper, set it to 2 if you want a copy of everything. This would allow one for the guest to take with them, and one for them to sign.

Prompt for Credit Card Info – Set this option to **Y** if you will be using the optional Credit Card Processing module from Five Star. If **Y**, it will prompt the server to swipe or enter the credit card information.

Sort Prep Request by Category? - Depending on how your property is setup, the kitchen or bar may receive requests for food and drinks. Pick the option best suited for your property.

N - will print grouped by Sales Category but in the order entered.
Y - will print grouped by Sales Category but in ascending order by Sales Category code.
U - will print to the kitchen simply in the order in which they were entered in the POS.

Print 'Last Name, First' on Chit - If **Y**, the chit will display guest name as Smith, Joseph. If **N**, it will print as Joseph Smith.

Print Table#/Covers on Two Lines - Default will show Table # and Covers # on one line. If **Y**, the table # will print on a separate line above the covers.

Display Guest Minimum – not used for hotels.

Include Taxes in General Status - The General Status report shows, by server, the number of covers, total sales, total number of chits, number of open chits, and average per chit. If **Y**, the total sales and average per chit will include all taxes, service charges, and gratuity. It is normal procedure not to flag this.

Walk Away After a Print & Close - If **Y**, the POS system will automatically sign off the server if you press PRINT & CLOSE. This is an advantage to reducing the occurrence of servers entering their orders under another server's sign in. It can be a disadvantage to some POS areas; Pro Shop & Bar usually do not require this.

Pass Cash Amount to Calculator - If **Y**, this will help speed up the server in processing a chit. When you press a settlement button the system will automatically bring over the total balance of the chit. All the server does is press one button '**T**' rather than having to enter the amount to be paid.

Archive Property Chits - not used for hotels.

Prep Printing Style - The prep requests that are printed either in the kitchen or at the bar can be printed in different styles. The prep order still follows the above option, but this allows for a property to have a custom style or to use a more specific style.

C All modifiers will print in red (if your printer allows for color printing)
J Multiple identical items will be summarized into one line
N No seat # information will print on request
O No seat # information will print on request (for color printers)
S Top of request summarizes items (without modifiers) and then bottom shows detail

Linefeeds at End of Chit/Prep - Enter 1 through 9 to add linefeeds to each printout if the printout is being cut too high on the chit and you are losing information.

Florida: Round Up Taxes - Only used if you are located in the state of Florida or Maryland. The system will round up the taxes to the next nearest cent, rather than down if less than 0.5 of a cent.

Inventory System Old/New – Set to O for now.

Force Even Split Settlement - An evenly split chit cannot have additional items added to it. If **Y**, this will force the server to close all chits created with the even split option. This avoids any 'orphan' chits being left open and outstanding. This will not allow you to leave one of the even splits open. If three guests sit down to eat and the server uses even split to create three chits and then two of the guests leave but one stays on to continue eating/drinking, this flag forces you to close all of them.

Auto Display Credit Book Info – Not used for hotels.

Don't Pass Discount to Calculator – This is similar to pass Cash amount to calculator. If discounts are used for partial payment do not use this. The danger with having this function on is that when you press a discount button, the full amount of the chit is brought over to the calculator and you could give 100% discount.

Limit Guest Settlement to Guest Charge - not used for hotels.

Change Selling Date Automatically - This should be turned on. The box following, for example, should be set to 300 or 400 for 3:00 or 4:00 am. The POS will automatically roll over to the new day, therefore users do not have to update each day in order for the new day to be used. Several days can be stored in POS until the office is ready to update those dates to the guest accounts.

Disallow Cash Chits - not used for hotels.

New Inv – Cash Sls Use Guest Price - not used for hotels.

Print Signature Line on Cash Chits - If **Y**, when printing a cash chit (no guest code) a signature line will print.

Gratuity Reporting Options - Within the Sales & Revenue Reports there is a Gratuity Report, which reports by server, in detail or summary of date range, which gratuities and service charges (usually automatically calculated by system) apply to which server.
N Not required should be used if you do not allow gratuities
O Records the gratuity to the server who originally opened the chit
C Records the gratuity to the server who finally closes the chit
S Records every server who touches (sharing) the chit in POS

Specials Jump to Area & Day - If **Y**, when the server touches the SPECIALS button on POS, it will automatically jump to that area's current day specials. If **N**, the server will be asked which Sales Area, then which day's specials do you wish to view.

Sort End of Shift Chit Summary by Chit # - If **Y**, the End of Shift Chit Summary will show all the chits opened, closed, voided by the server during their shift in the chit number order. If **N**, the chits will be displayed in the order they are closed. **Note - Chits always started with the Sales Area number.

Start Guest Lookup by Guest # - not used for hotels.

Get Reciprocal Information at Start of Chit - not used for hotels.

Check for Guest Photo in Bitmap Dir - not used for hotels.

Post to Hotel in Detail / Summary - This function will either post POS transactions in detail or in summary. Most properties choose Summary because guests don't want to see how much they drank on their company folio!

> **D** Detail – If a guest eats and drinks, the details are shown on the guest's folio, along with tax details. The billing codes in the taxes setup screen and the sales category screen will determine what is shown on the folio.
> **S** Summary – The charge to the folio is shown on one line only including the taxes. The billing code on the function button setup for room charges is shown on the folio. This is the more common way of posting to folios. Even though only one line is shown on the folio, the charges and g/l update report and the daily revenue report from the night audit will show the real details, just as if this parameter was set to detail.

Show Discount on Chit - If **Y**, the discount will be shown as a settlement method at the bottom of the chit. This only applies to certain chit designs. Currently the only Five Star Standards of POSC11P, POSC11PS, POSC11P.WID, and POSC11S have this ability.

Force Menus by Current Time - If **Y**, the system will read the system clock, rather than the time on the chit. If a server adds a lunch item to an open breakfast chit during the lunchtime shift, the lunch item will be considered a lunch sale. If **N**, the system will read the time the chit was opened and will add the lunch item to the breakfast sales.

Activate Tip Pooling - If your property has Tip Pooling, this must be set to **Y** to calculate the tip pooling. Do not use if your property does not have Tip Pooling.

Activate Tee Time Reservations - If your property has Tee Time Reservations, this must be set to **Y** to download the reservations into POS. Do not use this if your property does not have Tee Time Reservations.

Use ICVerify on Credit Cards - not used for hotels.

More POS Options

Only Record Chit Edits After Send - If **Y**, the End of Day report will print the chits, which had edits done after the item was sent. If **N**, all edits will print on the End of Day report. For example, if a server incorrectly selected a small salad and then edited to a large salad before sending the request to the kitchen, the chit will print as edited.

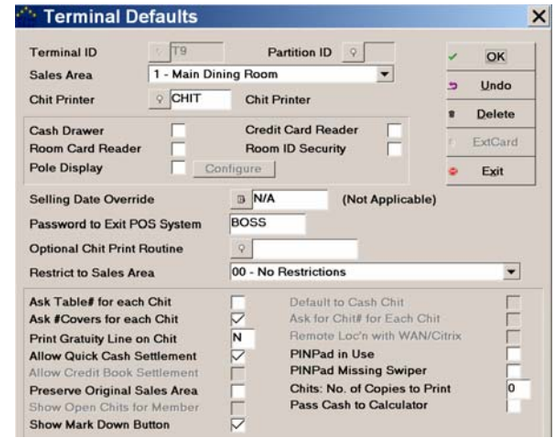
End of Shift – Inc. Tips in Cash Summary – Use **Y**, if servers are to deduct their tips from the cash they may have collected from sales. If your property does not allow cash sales or servers have all tips added to their paychecks do not select this option.

Property: Post Single Cash / Credit Card Payment if Possible – Select **Y** as default. Depending upon your setup, some purchases made by guests on their account and paid at the Point of Sale by either Cash or Credit Card can show up in the guest's account as a payment for each type of Item Group. This function will *try* to keep all payments as one record if multiple item groups are found. Some payments cannot be combined into one record if the POS chit has other methods of payments, discounts, split items, etc.

Check Chit Integrity at End of Shift – This program will rebuild chit files for the server when they end their shift. If a server had a corrupt chit during their shift and has disappeared from their report, this program will bring it back. It does take more time than a regular End of Shift.

Terminal Setups

A Terminal ID must be set up for each workstation that uses the POS system. Each workstation must be assigned to a Sales Area. The chit printers are set up in Administration, System Administration, and Printer Set Up and are assigned to Sales Area here. You may have a different type of chit printer in the Dining Room than you would in the Pro Shop. From the System Administration menu select Terminal Setups:



Using the screen:

Every terminal that requires access and use of POS must be setup in Terminal Setup. If Point of Sale is access by a non POS Workstation, you will be shown a message that the Terminal defaults must be setup first.

Terminal ID - When you created the start buttons for POS and manager mode in Windows at the beginning of this manual, you selected a terminal ID for each POS station, such as T9. Enter this same Workstation ID; this is displayed at the bottom of the Five Star screen beside the date.

Sales Area - From the pull down menu, select the default Sales Area that this Terminal would start in. This keeps the terminal from other Sales Areas, but in only the starting default area.

Chit Printer - Each POS Terminal must have a Chit printer. That is a printer to which chit can be printed. Usually a local printer but can be a network if using in a back office situation.

Cash Drawer, Guest Card Reader, Credit Card Reader, Guest ID Security, and Pole Display - These flags should only be on for those options that you have available. Please note that with the exception of the Cash Drawer, all of the other options here are not automatic and require custom interfaces from Five Star to be used.

Selling Date Override - For all POS workstations this should always be set to N/A. This tells the system that this workstation should be using the standard POS selling date that all other workstations are using.

This field is used most often by the back office workstation. You can set up your computer in the office to have a manager mode (how you regularly use Five Star) and you could set up a POS station so that from your desk you can use all of the touch screen programs that servers can use. Administrators for POS may want to access the chits from a previous selling date that have not been updated yet. By setting the selling date override on their particular workstations, you can view and edit the chits for that date, while all other POS workstations are working on the current date.

Password to Exit POS System - All POS workstations should have this field filled in. It is advisable to have the password for all POS workstations the same and changed often. This will prevent servers from getting out of Five Star POS into the Windows environment. They will be locked into Five Star from the moment they start the workstation.

Optional Chit Print Routine – not used by hotels.

Restrict to Sales Area - If this workstation needs to see chits from other areas, choose NO RESTRICTIONS. If this workstation should only see chits from its own area, simply choose the appropriate area. When you have a workstation restricted to its own area, it will only ever see its own chits. Workstations set to NO RESTRICTIONS will be able to access all chits from workstations that are also set to NO RESTRICTIONS, but will not be able to access chits from workstations that are restricted to their own sales area.

This reasoning also applies to reports, if a POS Manager wants to print reports for all Areas including restricted areas, then the Terminal they are using must be set to OVERRIDE ALL RESTRICTIONS.

A pro shop should clearly not see the dining room's chits, but the lounge probably should, if guests might move to or from the lounge and dining room.

If you set up a POS station in your office you should be set to OVERRIDE ALL RESTRICTIONS. This allows your workstation to access all chits regardless of restrictions.

The bottom of the Terminal Default Screen has options that can override global options setup in the Point of Sale System Parameters. Because not all POS outlets are identical, there is some room for changes. Set these options only when you have more than one workstation in the same sales area, and they each have different settings. If all stations in the same area have the same rules then just set them up in the setup sales areas program.

Ask Table # for each Chit / Ask # Covers for each Chit – This is often flagged as a global option because there are usually more food and beverage POS stations than retail. These options will override the global option at this terminal only if selected, or not selected. Do not ask for table number if you will be using the floor plan layout feature. We suggest you use the floor plan layout feature for your dining room and likely your lounge, but not for your shops or rental areas. The floor plan layout feature is a very intuitive way to organize chits as you work a busy shift.

Print Gratuity Line on Chit – If the property is using a Five Star Standard Chit program, if **Y** this will allow the chit program to print a line with the option for the guest to add a gratuity to the chit. If **N**, the line will not be printed. If **E**, the line will be Extra Gratuity. This is often used when a property has an automatic service charge but allows guests to add to it.

Allow Quick Cash Settlement – If **Y**, the POS user will have the ability to close a chit to cash with the push of one button. When you press the Quick Cash button it will post a settlement to the chit for cash, print the chit, and close the chit. This is a very useful feature in a busy bar. With just 2 touches of the screen you can sell a drink and record the sale. This is the ultimate in speed.

Allow Credit Book Settlement – not used by hotels.

Preserve Original Sales Area - This flag will force the system to keep track of the sales made from the different areas if the chit gets passed from one area to the next: for example, if a guest goes into the bar and opens a chit, then goes to the dining room. When a server opens a chit for the guest in the dining room, you will be shown that there is already a chit open in the bar for the guest. The chit can be picked up and continued in the dining room. This flag will track that a portion of the sales on that chit were from the bar.

Show All Open Chits for Guest - not used by hotels.

Show Markdown Button - The markdown button allows the server to markdown/discount a chit and/or item by a percentage, amount or new selling price.

Default to Cash Chit - not used by hotels.

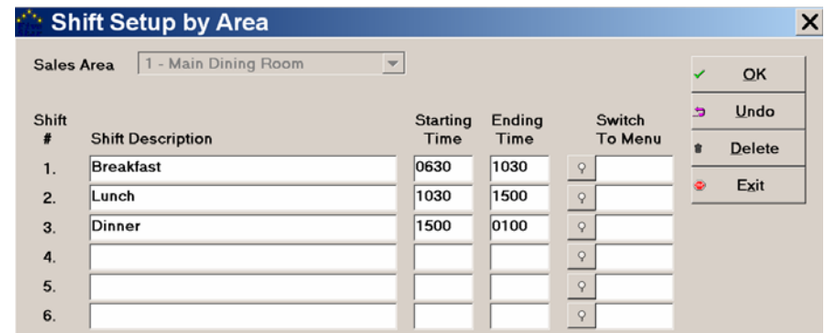
Ask for Chit# for Each Chit - This flag, (when on), will ask for the server to assign a chit number. It is a custom program for a specific property and should not be used without speaking with your Five Star representative.

Remote Locn with Wan/Citrix - not used by hotels.

ICVerify Terminal ID # - not used by hotels.

Shift Setup by Area

This function allows the property to track sales by time shifts, or switch menus from lunch to dinner at specific times. While this is a handy feature, it is dependent on your computer's clock being correct at all times. If you don't want to depend on this, set up one menu that has buttons for all the time. From the System Administration menu select the Shift Setup By Area option:



Select the Sales Area from the pull down menu. Enter a description of the time shift

Enter the Starting & Ending times. You must use military time and no punctuation.

If the menu changes with the shifts, enter the new menu code.

Reporting Groups

Sales Items are attached to Sales Categories, which are attached to Reporting Groups. You can produce detailed reports by sales item, or more condensed reports by sales category, or very summarized reports by report group. You might set up report groups similar to the following:

REPORTING GROUPS

Functions	Pop	Sundries	Food	Beer	Liquor	Miscellaneous
		|			|	
SALES		Appetizers			Cocktails	
CATEGORIES		Salads			Cognac	
		Sandwiches			Gin	
		Side Orders			Liqueurs	
		Soups			Rum	
		Entrees			Rye	
		Desserts			Scotch	
		Events			Vodka	
		Special Groups			Whiskey	

SALES ITEMS for SALADS Tossed, Julienne, Caesar, etc. (some of these Sales Categories may, or may not, be applicable for your Property)

Or you might set up a simple report group system like one group for food and one for liquor.

To set up report groups, select the Reporting Groups program from the system administration menu. Enter the desired codes and descriptions for your Reporting Groups.

Reporting Groups are an extra layer of definitions that helps in reporting from POS. Reporting Groups do not have to be set up. Reporting Groups are usually very generic in description. A typical setup could be FOOD, BEVERAGE, WINE, LIQUOR and BEER. As you continue to setup POS, it behaves like a tree or organizational chart, with each Reporting Group having several Sales Categories assigned to them, and several Sales Items attached to each Sales Category.

Sales Categories

The sales category program defines the middle level of summarization offered by the POS system. This program also defines the tax rules that will be applied to all sales items that are included in each category. For example you may have sales categories for liquor, which has liquor taxes, applied, and for food, which has a different set of rules applied.

You can specify the printer this category should be sent to for order preparation. For example, if you have a hot food preparation area in the kitchen, and a cold food area to the side of the kitchen, and a drink preparation area at the bar, you can locate an order printer in each area. The sales category program will define the printer that each sales category will be sent to. So you need at least one category (probably more than one) for each order printer.

Lastly, the sales category program links the sales items to your billing codes in the hotel program, or to your general ledger accounts if you use the property program.

Here is a list of typical sales categories:

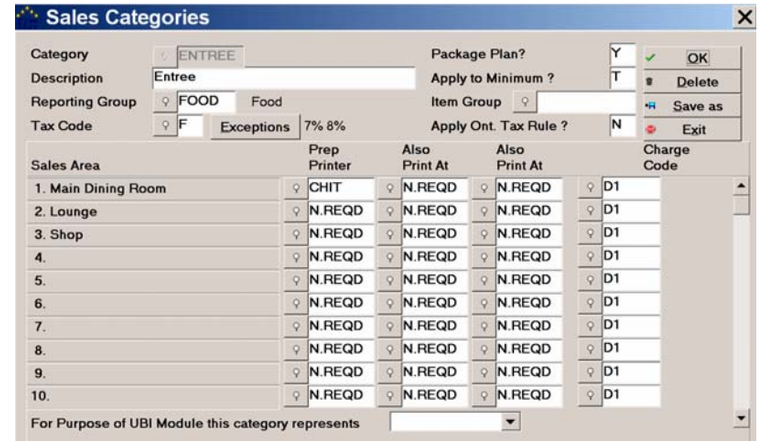
Breakfast
Breakfast buffet

Lunch or Dinner
Lunch Buffet or Dinner buffet or
Soup
Salad
Appetizer
Meat
Fish
Fowl
Pasta
Sandwiches
Deserts
Liquor or
Shots
Cocktails
Specialty coffees
Liqueurs
Wine

Beer, or
Domestic beer
Imported beer
Draft

You might use these categories or a simpler or more detailed system.

To set up sales categories, select Sales Categories from the POS administration menu:



Using the screen:

Category Code - Most clients like the prep printer to display the food orders in the following order; appetizers, soups and salads, entrees, then desserts. When an alpha code is used for categories, i.e.: 'APP' for appetizers, 'SOUP' for soups & salads, 'ENT' for entrees and 'DES' for desserts, the kitchen prep printers would received the orders and re-sort the categories alphabetically by the code. The orders would print in the following order; appetizers, then desserts, then entrees, then soups and salads.

Add a two-digit number to the beginning of the category code. I.e.: '10APP' for appetizers, '20SOUP' for soups and salads, '30ENT' for entrees and '40DES' for desserts. This way the prep printer will show them in the correct order. Depending on how many prep printers there are, you may require more detailed categories, such as '10APPH' for hot appetizers, and '10APPC' for cold appetizers.

For Pro Shop Categories use all alpha characters. There are no prep printers involved therefore order does not matter, and if food and beverage items begin with numbers, this will also keep the different types of categories separate.

Description - Enter a detailed description of the category.

Reporting Group - If Reporting Groups have been setup, enter the code for the group that corresponds to the category or press F2 / look up button to select from a list.

Tax Code - Enter the appropriate tax code for this Sales Category. Enter the code or press F2 / look up button to select from a list. This field is mandatory. If the tax rule changes depending upon where it is sold. For example, if food is non-taxable if sold for take out, use the exception button and enter the sales area and which tax rule is appropriate.

Package Plan - You must enter a **Y** or an **N**. If **Y**, when on the settlement screen for an area, you can setup a package plan button. When the server presses this button, all items linked to categories with this flag set to **Y** will be reduced to zero.

Apply to Minimum – not used by hotels.

Item Group - not used by hotels.

Apply Ont. Tax Rule - This flag only applies to our Ontario clients. This should be turned on if any of the items attached to this Sales Category will need to calculate the $4.00 GST rule. For example, non-alcoholic beverages, when sold separately, are fully taxable, but when sold with food it will follow the $4.00 rule. All other clients can set this to **N** or leave it blank.

Prep Printer, Also Print at, - Enter the prep printer code for the printer at which the requisition will be sent, or press F2 / look up to select from a list. If not required, select Print Not Required.

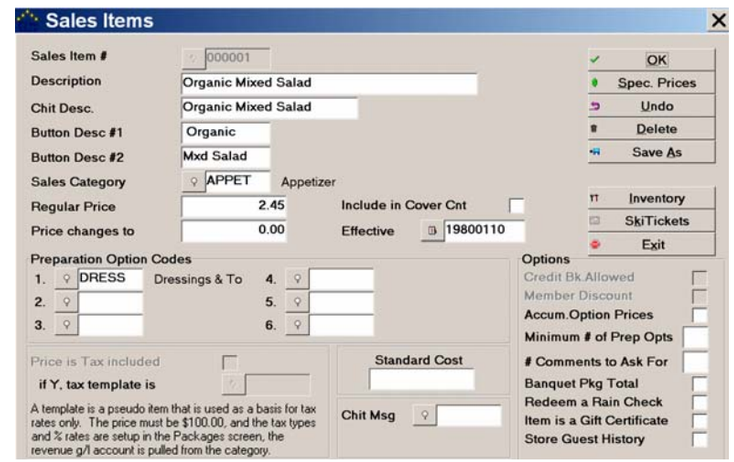
Charge Code - Enter the billing code for each Sales Area (if required) that will be updated with the Sales Revenue amount.

UBI (Unrelated Business Income) – not used by hotels.

Sales Items

A Sales Item is set up for each menu item. This is the screen you do the big job of entering all your foods and beverages. If you have a single food item like property sandwich that you sell for a different price at lunch and at dinner you set the item up twice, once for each price. You also use this screen to link sales items to the inventory system. We suggest that you link all your alcoholic beverages to the inventory system if you plan to electronically monitor your inventory. You can also link your expensive meat portions or pre-packaged items, but you may not be able to successfully track lesser important items, like vegetables, prep items, or deserts.

To set up sales items, select the Sales Items program form the POS administration menu:



Using the screen:

Sales Item # - (Similar to Sales categories) Give some thought to the coding you will be using for your items. We suggest that you incorporate the first three letters of the sales category into the code. This works well for food and beverage items. For example, 'APP010' for shrimp cocktail and numbers for Pro Shop items.

We advise you to fill in the item code with leading zeros. If you enter 'AP20' the system will not 'pad' this out to 'AP0020' but accept it as 'AP20'. When the system sorts these items you will see AP20 out of sequence. Take the extra step and fill in the leading zeros. Also request to leave some space when numbering the item. Do not setup 'AP0010', 'AP0011', 'AP0012', etc or you may not leave any room to add the items at a future date.

All inventory items should be setup in the Inventory module first (if purchased) and linked to POS Sales Items.

Description - This description will appear on reports.

Chit Desc. - This description will appear on the guest's chit and what the kitchen prep printers will show.

Button Desc. #1 & #2 - The description placed on these buttons will be displayed on the menu screen for the servers.

Other Types of Sales Items

Countdown Items - Items can be set up to count down as servers order them. This can be handy for daily specials. To achieve this you need to add to the Button Desc #2 field '**CD##**'. Do not use the quotes and replace ## with the number of that item available. As soon as a server sees this item on the menu it will show the item description, followed in brackets by the number (of specials) still available for sale. As each server enters this item, it will automatically show the next server how many items are left.

Zero Value Items - Items can be set up which do not ask for a price if the price entered is zero dollars. Enter an "*" before the description and when the POS user selects the item it will not prompt for an amount.

Daily Specials - The best way to handle daily specials is to setup generic items for the daily specials. For example: 'SPL001' for Daily Special Lunch, 'SPD001' for Daily Special Dinner, etc. Each day, change the button descriptions and price. When you exit the item setup, the Five Star system will prompt, if you want to update the menu button description.

Sales Category - Enter the Sales Category or press F2 / look up to select from a list.

Regular Price - Enter the selling price for this item. If you enter '0.00' as the price, when the server selects this item during chit processing, the server will be prompted for the price.

Include In Cover Count - A lot of property clients are not as concerned with 'true' covers as they are with the number of actual persons. If **Y**, the system will calculate cover counts based on which items are sold. Servers can also enter the number of covers during chit processing.

Price Changes To & Effective - These two fields work together. If you know that the price for an item is going to change on a specific date you can set the new price and the date that it will come into effect. When the POS automatically rolls over to that effective date, it will automatically start using the new price.

Preparation Option Codes - The prep options setup is covered in the next section. They are the automatic modifiers for an item. Each item can have up to six prep option screens setup. When the server touches this item, each one of the prep option screens pops up automatically for the server to enter or choose the info required. As each prep option screen is closed the next is automatically opened.

Credit Bk Allowed – not used by hotels.

Guest Discount - not used by hotels.

Accum. Option Pricing - This refers back to the Preparation Options. If this flag is on, then the guest sees on their chit the item price, including any cost for a prep option. When the flag is off, then the guest's chit will show the item price, the prep option beneath it, and the extra cost for that item.

Minimum # of Prep Options - When a number is entered in this field, such as two, then each prep option screen assigned to this item will require you to choose at least that number (two) of options for each prep screen before you can continue.

 # Of Comments to ask For – This option gives the POS user the ability to print a comment onto a chit (if the chit design your property uses supports it). The comment is not stored in history. This is also used with the Guest History module; a number of 2 comment lines are required prior to selecting Store Guest History option. If you do not have the Guest History option, see your Five Star Representative for Sales Information.

Banquet Pkg Total – not used by hotels.

Redeem a Rain Check – not used by hotels.

Store Guest History – If **Y**, this will ask the POS user to enter guest information when this item is selected.

Spec. Prices - Use the Special Pricing Screen if items are sold in different Sales Areas for different prices. Enter the new price next to the appropriate area. If the field is left blank or set to 0.00 then the regular price on the item setup screen will be used.

Daily Specials – The best way to handle daily specials is to setup generic items for the daily specials. For example: 'SPL001' for Daily Special Lunch, 'SPD001' for Daily Special Dinner, etc. Each day, change the button description and price. As you exit the item setup, the Five Star system will prompt you if you want it to update the menu button description.

Save As – The ability to copy a Sales Item has been added for ease in creating new items. Press the Save As button and you will be prompted to enter in another code and the same information from the first item will be copied to the second item.

Package Rev. - Use this option to create a sales item that represents a package item, then break out the components to the different general ledger accounts. For example, tournament package for $100.00 that includes 25.00 for cart rental, 50.00 for green fees and 25.00 for tournament revenue, or a spa package for $100.00 that includes 50.00 for a massage, 25.00 for a sauna, and 25.00 for one pool use.

Inventory - This only is used if you are using the Five Star Property Inventory module. Use the Property Inventory module to setup the integration between POS and Property Inventory. This screen should be used for information purposes only.

If the Sales Item is to deplete an inventory SKU item, the SKU # will be shown in the SKU to Update Column with its description.

You can either use the POS or the Property Inventory to link items. Shows all Point of Sale Sales Areas and their description and which Inventory Area has been attached to the Area. This is in the System Parameters function.

Preparation Options

Prep Options are used for items such as a steak or a salad to let the kitchen know how you would like this item prepared. They are also used for items such as mixed drinks or cocktails to let the bar know how you would like a drink prepared. You have the option of charging for a prep option for example, for extra cheese you may want to charge 50 cents. If the wait staff is preparing or picking up the items, it is not necessary to have them on the Prep Options screen.

Some examples of preparation options tables might be:

Salads (Would include various dressings, no croutons, no bacon bits, extra croutons, extra bacon bits, no onions, etc.)
Burgers (Would include the usual pickles, tomato, cheese etc.)
Meats (Would include blue, rare, medium rare, medium, well, black, onions, mushrooms, etc.)
Sandwiches
Pizza (the usual)
Cocktails
Shots (ice, no ice, shaken, stirred, no olive)

It is a good idea to set up the Prep Options before setting up the Sales Items so save time linking the Prep Options to the Sales Items when setting up the Sales Items.

Set up a few buttons to be used for special instructions to the kitchen, for example **EXTRA**, **HOLD** or **SEE SERVER**. It is a good idea to keep the Prep Option Menus uniform throughout the system. You may have several Prep Option menus or you may have only a few, depending on how extensive your menu is. To create preparation options select the Preparation Options program from the POS system administration menu:

Using the screen:

Prep Option Code - Enter a code to represent this prep option screen.

Description - Enter a more detailed description for this prep option screen.

Max. # Of Selections - Enter the maximum number of options a server can enter from this menu. As soon as the server reaches the maximum number of selections it automatically shuts and the next prep option table, if any, opens. If you set this field to **0** then you can continue to make choices from it and when finished, press 'DONE' to close it.

When designing your prep options, try to keep them generic so that one prep option screen can be used for several different items.

Enter the modifier description that will attach to a Sales Item.

If a modifier or option increases the price of the item, enter the additional cost here.

In the little field to the right of the description field you can enter a dollar amount if the prep option changes the price. For example the cheese you add to the burger might add a dollar to the price, so put a 1.00 in the field to make the price go up.

Note: Price changes that arise from prep options provide less information in sales reports than adding a new sales item. For example you could have a sales item for hamburger with a prep option for cheese at a dollar, or you could have two sales items, one for a hamburger and one for a cheeseburger. If you use the second technique you see on your sales reports how many cheeseburgers you sold versus how many hamburgers you sold.

Maintain Bar Book

A standard bar book of over 200 drinks is shipped with the POS system. This bar book lists each drink, ingredients, and directions for making it. You can add or edit this bar book and it is available to servers in POS.

General Modifier Table

The general modifier table program is used to create general modifiers for food or beverage items that are not related to any specific item, but could apply to any item. For example, TO GO, HOLD, DO NOT MAKE, or RUSH.

When the server is chit processing, by pressing the general modifier button, you can add a general modifier to any item. Or you can type in anything you wish to be attached to that item. If you want to type any message at all when ordering something (if you have a really unusual request) you can, even if there is no keyboard attached to the computer. Five Star displays a keyboard on the screen you can type with. These modifiers and the prep options will all print on the prep printers but not necessarily on the guest chit.

Reason Table

Use this simple screen to define reasons for discounts. You might set up reasons like 'meal bad' or 'poor service'. When you set up buttons for discounts you can check a box in the setup screen that will require the user to record a reason for the discounts. The reasons you enter here will be displayed as choices. Set up a generic one too.

Menu Design

This screen is used to design your menus for designated areas. It is a good idea to thoroughly plan your menu designs on paper before attempting to design them in the system. Try to keep the modifiers or special instructions uniform throughout all of the menus, for example keeping them down the right hand side of the menu. The Menu buttons always appear in CAPS.

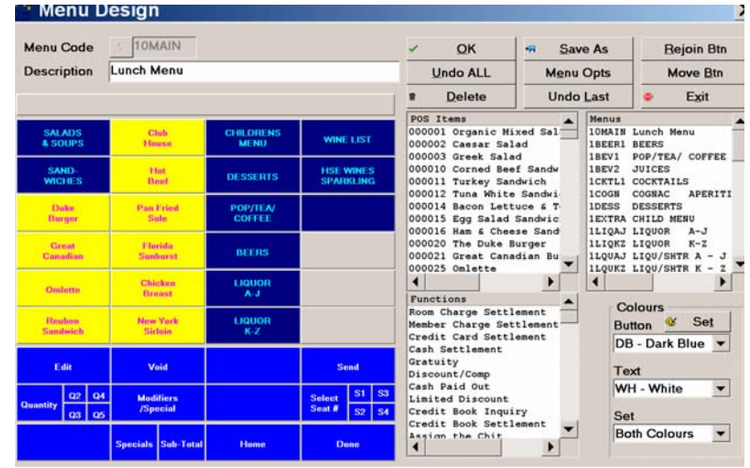
Menus have the following entry types:

(I) Items from the sales item program, such as Tossed Salad, Soup of the Day, Miller Light, etc. These items are recorded in your daily sales reports.

(L) Lookup allows you to scroll through sales items and select as required. If you have an extremely long list of items i.e. wines or mixed drinks, you may wish to divide your list and set up several Lookup buttons.

(M) Menu allows you to have one menu lead to another sub menu. For example, you may have a Main Menu that has an Appetizer menu, a Beverage menu, an Entree menu, a Beer & Wine menu, etc. You will probably want to set up your secondary menus first so that you are already there when designing your main menu. Otherwise, you will have to go back to your main menu to link to the secondary menu buttons.

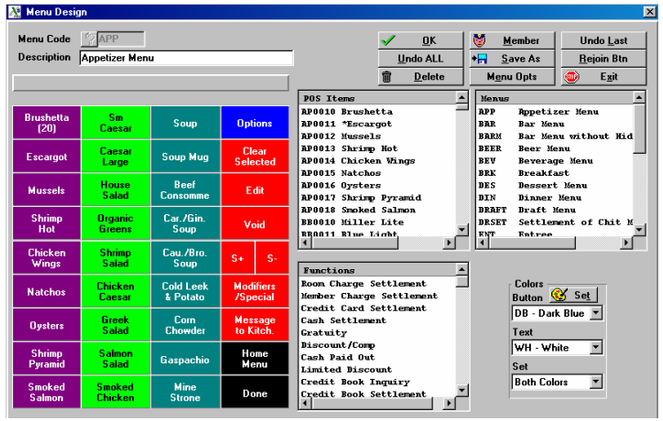
To set up menus, select Menu Design from the administration menu of the POS program:



Designing menus is fun and we have seen some very creative designs. Above all, the design must be functional and follow the use of the system. Since Five Star POS works equally well for a dining room, lounge, gift shop, pro shop, rental shop etc. menus should be designed to fit the environment.

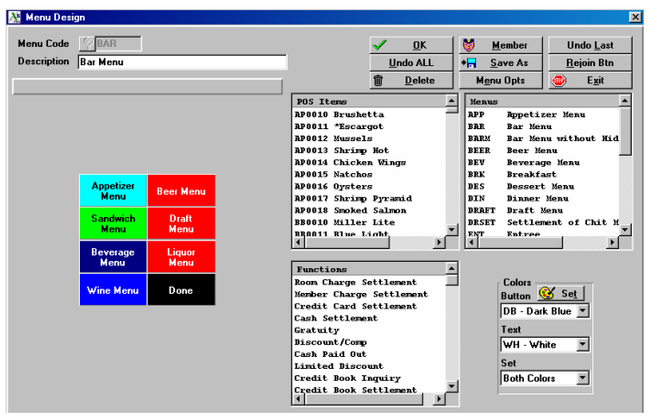
The example you see above is the classic Five Star menu design, with the menu on the top six rows, and some actions on the next 3 rows.

Some people like a big screen full of menu items and a separate screen for actions like this one:



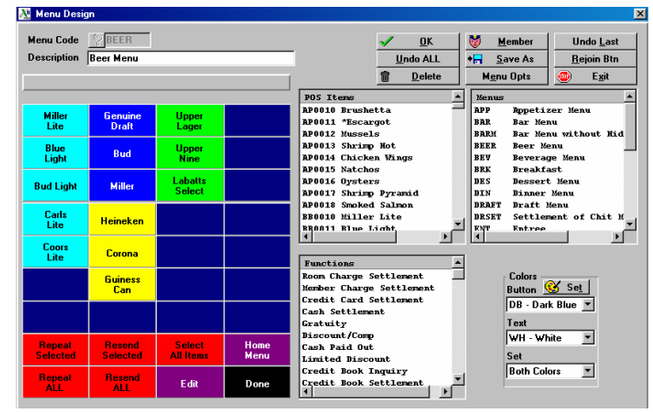
You see lots of food items. Notice the Options button on the top right. It gets you to the actions like send to the kitchen, quick cash, close, print, void, edit etc. We think this is the most functional and easiest to learn.

Here is another example:



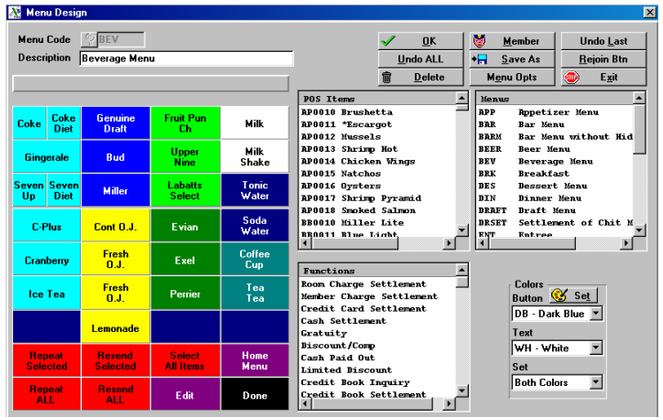
The unique thing about this menu is that you don't see anything but what you want. You might design a sub menu for, say, sandwiches, and you only offer 7 sandwiches. The designer of this menu used the 'Hidden' function. That is, the Functions list was scrolled to find a function called Hidden. Then you click on the buttons around the menu that you don't want to use, and they hide just like you see on the example above.

How about this one:

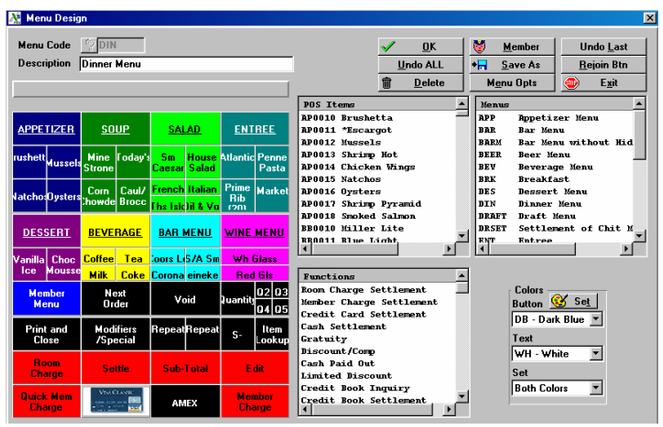


Notice the red buttons at the bottom. They are very useful for a bar menu. See the instructions below for complete usage information. The repeat and resend buttons are great for ordering another round for the whole table or even for parts of the table. They really speed up that kind of operation.

But wait, there's more:

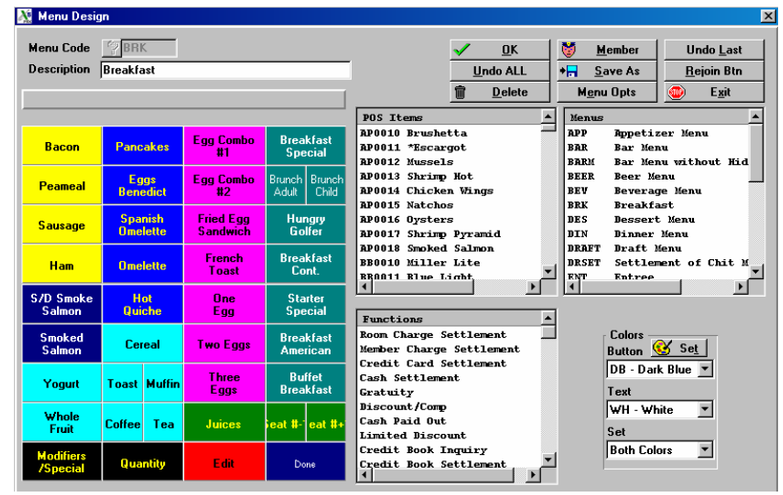


Here you see an interesting example of splitting buttons. The sweet and diet versions of each drink are shown on the same button. Again, follow the instructions below for details on splitting buttons. You have many possible split alternatives. Here is a very highly designed split button screen:

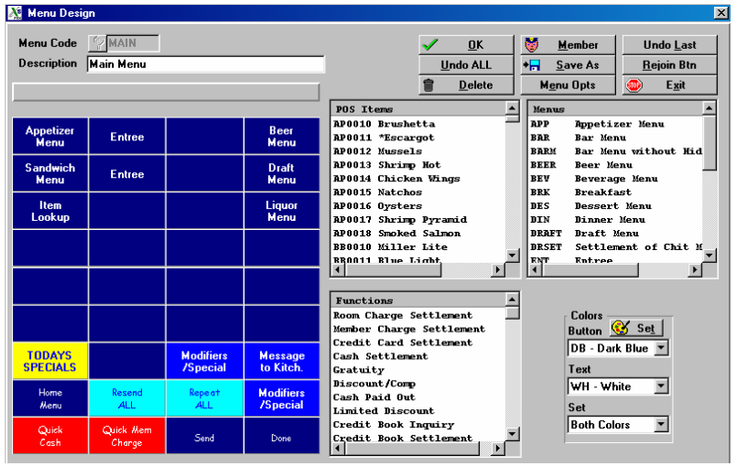


The idea behind this one is the colours are used to distinguish categories. But more important, the split button feature is used to put the most popular items for each category on the main menu so they can be quickly accessed with just one touch. There is a word of caution necessary for this style however. Since the buttons are much smaller, you need to keep the calibration on your touch screens exact at all times, or the screens become hard to use. You touch one button and you get another item. People with long fingernails have trouble. Sometimes very tall or very short people have difficulty too. If you like a design like this, set it up and then ask your servers how it works. Teach them all how a touch screen is best used, and show them how to calibrate.

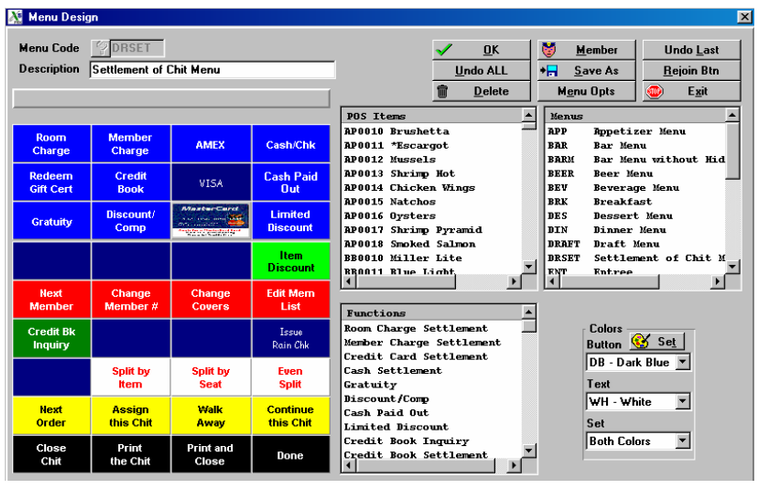
Here is a nice tidy breakfast menu that makes great use of colour to separate areas of the menu:



Or if you want to just go simple you can too. Notice on this menu the use of differing fonts to distinguish buttons with differing functions. You might use one font consistently for sales items, a second font for buttons that lead to other menus, and a third font for function buttons. Don't get too wild and have too many fonts. The human eye gets tired more easily with too many fonts.



Last, we show an excellent example of a settlement screen:



Have a close look at this one; it does the whole job very well.

Using the screen:

Option Buttons Top Right of the Design Screen

First here is a description of some of the option buttons on the top right:

OK – This saves your menu changes.

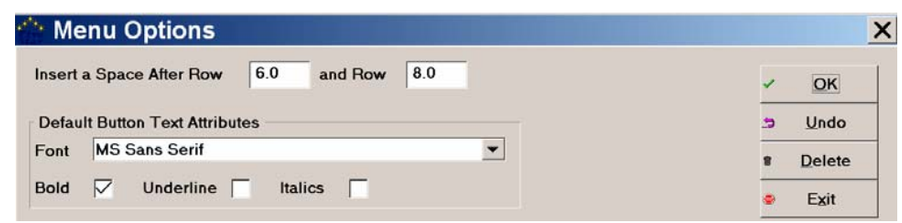
Undo ALL – This will remove any changes done to the Menu prior to pressing OK, or if OK had not be selected, any changes since entering the Menu itself.

Undo Last – This will remove the Last Entry made on the Menu.

Rejoin Button – Five Star has the ability to create smaller buttons, called split buttons. Some of the examples show above use split buttons. The Rejoin button will bring a split menu button back to the default size and only keep the function of the button selected. See below for details on splitting buttons into more than one button.

Menu Opts - The Menu Options Screen gives you the ability to default to a specific Font and Font Characteristics, and allows you to set spaces above or below a row of buttons. There are many fonts to choose from. Five Star uses only true type fonts. Many fonts can be too fancy and may be hard to read if used. Five Star suggests using fonts with clean, straight lines. For example, Arial or Tahoma. Use **BOLD**, UNDERLINE, or *ITALIC* characteristics as needed. Do not use for regular items. Use the color-coded the buttons to suggest differences.

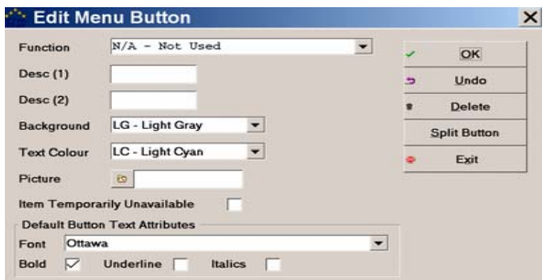
When you click the Menu options button the following screen appears:



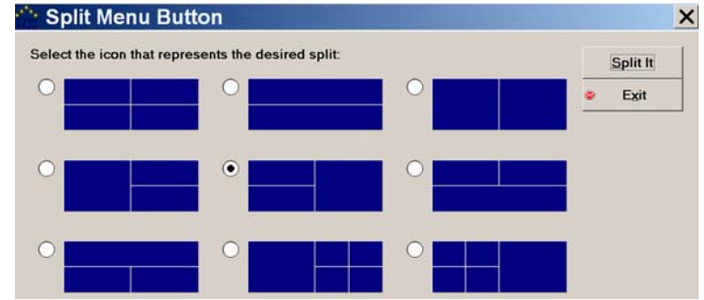
Select a Font from the Pull Down Menu and its characteristics.

Enter the row number that is the last row before a space is displayed on the menu. The space is a display feature that separates different parts of the menu. This section from the menu design takes a look at the functions for using the spacing between rows. The spacing does not take away from the amount of buttons allowed, but does create a defined separation between buttons. This is useful as in some of the examples above for separating food and submenu items from action buttons down at the bottom three rows.

Splitting and Rejoining Buttons - to split the size of a menu button, first select the button to split and the following screen will be displayed.



Select the Split Button button. The following screen appears with lots of possible split designs shown. Click your mouse on the radio button to the left of the design you want to choose.



Once selected, the menu button is now split into multiple menu buttons.
You can use the button space for more than one button now.

To rejoin the button, select one of the buttons that is part of the original whole button, and the one that is to be the remaining button. Press 'Rejoin Button' and the button will go back to the default size with the selected button's function.

Menu Button Setup Screen

Now that we have covered the options available on this program, we get to the main use, the setting up of menu buttons. Most menus (i.e. screens of buttons) consist of sales items or sub menus, and action buttons. A button that has a sales item on it immediately adds that sales item to a chit. A button that has a sub menu on it takes the server to that menu, where usually sales items are found.

When designing Menus and Point of Sale Layout there are a few rules of thumb to follow.

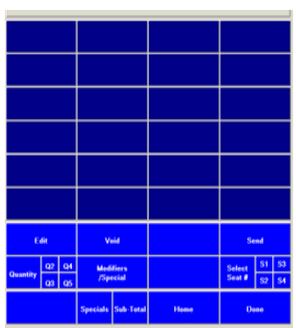
• The POS user should never have to go more than 4 screens deep to select an item, and 2 screens is a good maximum. Since you can actually get 9 x 4 = 36 buttons on a screen, if every button on the first screen is a menu, and every button on each of the 36 menus is a sales item, the maximum number of sales items you can have in a 2 level system is 36 x 36 or 1296. Most operations might have 200 to 500 sales items, so you see why two levels is adequate.
• Keep common or items together, using colour and or fonts to distinguish them from unlike items. For example on the breakfast menu put the egg dishes in a column with one background colour and put the fruit dishes in the next column with another colour.

There are others ways to select items, such as using a scanner, or using a lookup list.

Setting up New Menus

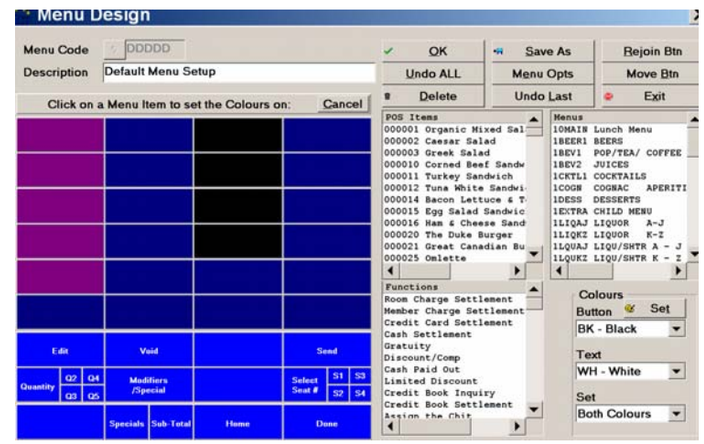
When you create a new menu you start with a blank palette. From the pull down list of existing menus, select the first row ** Set up Another Menu Design Code **. In the design code field type a code for the menu like Beers or Breakfast or Lunch or Main. You will be asked if you want to start with a default menu like this:

If you want to create a menu that starts like the one below with three rows at the bottom for actions then just press enter and you get:



On the other hand if you want a menu that uses all nine rows for sales items like this

Then you should blank the field and press enter. Then you start with a completely blank palette. Next we suggest you decide where you want things to go and set up colours. Do this by selecting the colours in the Colours pane of the screen in the bottom right of the screen. Then click the Set button in that pane:



Here we clicked the button colour black and the text white. Then we clicked the Set button and then we clicked the 4 buttons one after the other in the third column and turned all black. We plan to distinguish this column from the others as a set of 4 different chicken entrees (cordon bleu, barbeque etc.)

POS Sales Items & Menus

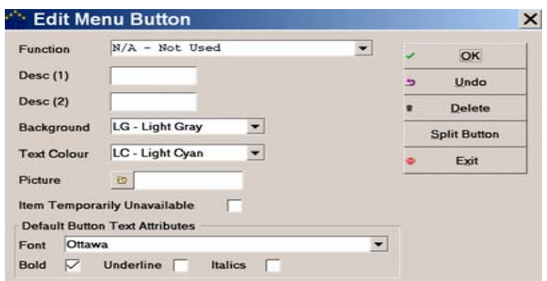
Next you put the sales items on the buttons. This is easy. Scroll the POS Items list until you see the item you want. Click it, then click the button you want the item on and viola! You have a button.

If you want to make a button be a menu rather than a sales item, do the same thing, except scroll the Menus list, and click the menu you want then the button you want it on.

To set up action buttons scroll the Functions list and click the action you want.

Fine Tuning your Buttons

You can fine tune each button as you go by clicking it again after you assign it a sales item, menu or action. You can also start setting up any button by clicking on it first before you click on the sales item list, the menu list or the functions list. If you do this you will have to select the type of button etc in this window:



If you are fine tuning a button you already assigned a sales item or menu to, you see this screen already set up for you, and you may have to fine tune a few things on it, like colour, picture or Front Office Billing Code linkage if it is a function button.

Desc (1) and (2) - You might want to improve the words that will appear on the button.

Background, Text Colour - Use color to differentiate between items and functions.

Picture - The use of pictures (bitmaps) can be great in settlements. Five Star has various credit card and cash bitmaps for use. Pictures of brands of beer and shots can be a very visual way to quickly select items.

Item Temporarily Unavailable - When a regular item runs out of stock and will be replenished, it helps both the POS user and the Manager to flag the item unavailable. It is a great communication function.

Use the font and text attributes to show differences between items.

The following pages will describe each type of function and what is required for the function to work and how it will appear in the POS Chit Processing screen.

A Function must be selected from the pull down menu. If the button is blank, use N/A – Not in Use. Or you might choose to use the 'Hidden Function' for a cleaner looking menu. A button that has N/A selected shows on the screen but is blank. A button that uses the 'Hidden' function does not show on the screen at all.

Depending upon the function, a selection of a Sales Item or Menu may be required.

Settlement Types

Most settlement types will require a Front Office Billing Code. Thus when a chit is settled it will flow to the default folio in the front desk properly, and during the night audit, will get to your general ledger properly too. If a billing code is required, you cannot leave the Menu Button Setup screen without entering the account.

If a Limited Discount or Gratuity Button, to have the system calculate the amount based on a percentage, enter the percentage here.

Room Charge Settlement – If the Hotel Module is setup, you can settle a chit to an occupied room number. This will prompt you for a room number or you can look up a reservation using the F2 or Find Button.

Credit Card Settlement – This function may activate other programs and functions depending upon the property's setup. Basically, this function separates credit card payments from cash payments in the End of Day Reporting. If this option is selected, you can be asked for the credit card number, expiry date, and card name. This information is only printed on the chit for information purposes only. It is not retained anywhere. If the property has the ICVerify module, the setup will require an ICVerify Processor Code as well. All credit card transactions, when settled under a guest code, will appear with the amount of the chit and payment in the guest's inquiry. Depending upon the property's statement, it may also appear on the statement.

Cash Settlement – The cash settlement function activates the ability to do POS transactions without a guest number. If a cash settlement is done when a guest number has been selected, the chit amount and the amount of the cash payment will appear on the guest's

Inquiry. Depending upon the property's statement, it may also appear on the statement.

Cash settlements cannot be **EDITED** or **VOIDED**. This is a security feature for cash. If a POS user made an error in the CASH amount, you must enter in a correcting Cash settlement as well. This security feature is to stop users from settling to cash and then editing the settlement type to the guest's account and taking the cash.

Quick Cash Settlement - This is the same as Cash Settlement but will settle the amount of the chit to cash, then close the chit in one step. The POS user is then brought back to the POS processing menu to select the next guest or chit to process. To use the Quick Cash Settlement, the option flag must be checked in the Terminal Defaults in POS Administration. This button is great in a busy bar. You can actually process a beer and payment in 2 touches and be ready for the next order.

Discount / Comp - This function will discount an item by whatever dollar amount is entered or by 100%. If setup, the system will default to the general ledger account entered into the Menu Button setup or will be overridden by the Discount Revenue G/L account in the category.

Package Plan – This important feature is used by properties that offer package plans for guests such as $400 for the golf and meals package. This sample package includes room charges, green fees and meals. When a guest on the plan eats, he does not pay for food, but likely pays for liquor, wine & beer. Sales items that fall under sales categories that have the Package field set yes will be backed out of the guest's total. So he or she sees the complete bill of what he/she ate and drank, but only sees the total for the items not covered by the package plan.

Note: Some properties have a different kind of package, the kind where you get a fixed credit towards a meal, like $25 or something. The package button described here is not for this type of plan, it is for the type where the guest eats any entrée regardless of value and it is covered by the package plan. If your property package is like the kind that offers a $25 voucher, use a Discount Button.

Cash Paid Out - This function adds a Cash dollar amount to a chit. This can be used for paying guests or staff for receipts for items that maybe purchased on the property's behalf. These amounts are recorded in the Cash column as a negative.

Gratuity – Use this function to add a dollar or percentage gratuity onto a chit. If the percentage field is left blank you will be prompted to enter an amount. If a percentage is entered, the system will calculate the amount.

Split By Item / Split by Seat / Even Split – These functions allow the POS user to split the chit into multiple chits for payment. Depending upon the split type, you will be prompted for the other guests to bill and who is paying for what.

Other Buttons

Chits can be assigned to POS users, if a POS user needs to start a chit on behalf of another server, you can transfer the chit to the other server when ready. This can be handy when a server wishes to end their shift but has an open chit that does not belong to them.

Assign the Chit – This function is used to give or assign the currently opened chit to another server (user with open shift).

Continue the Chit – This function button is often put on the settlement menu and allows users to go back into the same chit without reselecting it from their open chits. It will take the POS user back to the Home Menu with the current chit open.

Print the Chit – This function will print the currently displayed chit.

Close the Chit – This function will close the currently displayed chit if the balance is zero, and will prompt you for another guest to start another chit.

Print and Close the Chit – This function button combines the above two functions in one step. The currently displayed chit (if balance is zero), will print the chit, close the chit, and then take user to log on screen.

Walk Away – This function takes the POS user to you Login screen.

Next Order – The function of this button will take the POS user to the Guest selection screen to start a new chit. If the POS user has chits open, it will take them to the Open Chit screen.

Home Menu – The function of this button will take the POS user back to the original Menu Screen. The default menu is setup in the Sales Areas in System Parameters. If the POS user is 3 screens deep, this button will always bring them back to the beginning.

Done – The function of this button will take the POS user to the last menu screen used, or to the settlement screen if you is on the Home Menu Screen. **THIS FUNCTION MUST BE ON EVERY MENU.**

Item Lookup – This function button allows the POS user to select a Sales Item from the list of Sales Item. The system will start from any Sales Item. You enter or select the code where the lookup list is to start. Once in the list you can go to any item.

Modifiers / Specials – This button is used when an irregular modifier or special order is required. The POS user selects an item, then selects the Modifier / Specials button. You are then asked to select either from a list of modifiers or enter the modifier instructions using the window keyboard.

Price Lookup - This button's function is used for information purposes only. You can look up any item in a list and it will display the price. The POS user cannot select the item to put on the chit from the list.

Select All Items – This function highlights all items on the chit for further processing, such as resending, repeating, clearing, or voiding.

Clear Selected Items – This function will remove any selected items from a chit; as long as the POS user has not sent the items to the preparation print or has left the processing area and has entered the settlement area by pressing "Done."

Repeat ALL / Repeat Selected – This function will re-enter the items, selected or all, already on the chit. This is great for repeating rounds of drinks.

Resend All /Resend Selected – This function will re-send sales items that have already been sent to preparation printers. These buttons should only be setup if necessary. Duplicate orders could be prepared.

Send Order – This function will send any items not already sent to the preparation printer.

Send / Print / Walk Away – This function will send any items not already sent to the preparation printers, print the chit, and log the POS user out of Five Star so another POS user can log in.

Edit – This button is used to move or change a Sales Item or its preparation option before or after sending it to a preparation printer, or after pressing 'Done.'

Void – This button will remove Sales Items from chits, if the items have been sent to preparation printers. A Void Request will be sent to the preparation printer as well. Voids must also be used if the POS user has left the processing screens or has pressed, 'Done'.

Some of the functions do not require any input from you in the setup. Only button description, font, and attributes can be edited.

The Five Star POS system allows one guest to open a chit, but the server can assign other guests to the seat numbers of the table (the number of covers controls the number of seats).

Change # of Covers – This function allows the server to change the number of covers. The server will be prompted to enter in a number in the following screen.

Change Table # - This function allows the server to change the table number. The server will be prompted to enter in a number in the following screen.

Change Guest # - This function is used when the original guest selected or if cash was selected, has to be changed.
The following options are used with the seats function. When a chit has seats and guests assigned to the seats, these will help in the editing and attaching of guests to the seats.

Edit Guest List –When using 'Seat' numbers, the server can use this function to assign Guests to seats. If you needs to split by seat, the guest is already assigned.

Next Guest – The function button is used in conjunction with seat assignments of guests. After entering a guest for the first seat, press this button to go to next seat # and select Guest.

Message to Kitchen – This function is used by properties that servers tell the kitchen when to start preparing a course. The server selects the chit, and then presses the Message button (which can say anything), and the kitchen will receive a request with the table, cover, server, and guest information, along with the message. It does not resend the order; it is assumed the order has already been placed.

Specials – This function is for display purposes only. When selected, any specials that have been setup will be displayed.

Summarize – This function will combine all of the same items into one line on the chit. For example, if a server has entered multiple rounds of drinks, the system can add all the same drinks into one line.

Sub-Total – This is a display function. When selected the server will be shown a virtual chit for the current order. The virtual chit is standard; it does not follow any custom layouts.

Hidden – This function is for menu setup. It will remove the menu button from the screen.

Options – This is the same as the options Toolbar function. You can have a button on the menu instead of the Toolbar.

Not Used – This function is for menu setup. It will make the menu button blank and non-active.

Chit History – This function shows the guests' past chit history. It can be placed on a menu as a button or can be in the Toolbar in Options.

The Quantity functions are used to assist you in the selection of quantities of an item. The Seat functions are to assist the server in selection of the proper seat number before selecting an item.

Quantity – This function will display the calculator and prompt you to enter the quantity of POS item selected.

Quantity 1 through 6 - These function buttons will automatically change the quantity of the last item selected to the quantity number.

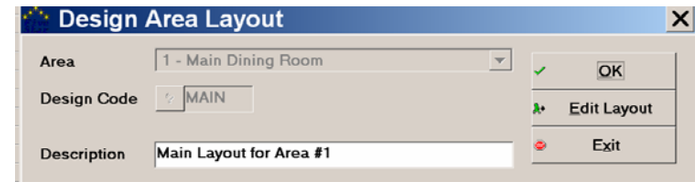
Current Seat # -1 – This function button will change the seat number to the seat number before the current seat number.

Current Seat # +1 – This function button will change the seat number to the seat number after the current seat number.

Seat # 1 through #6 – This function button changes current seat selection to the selected seat number.

Design Area Layout

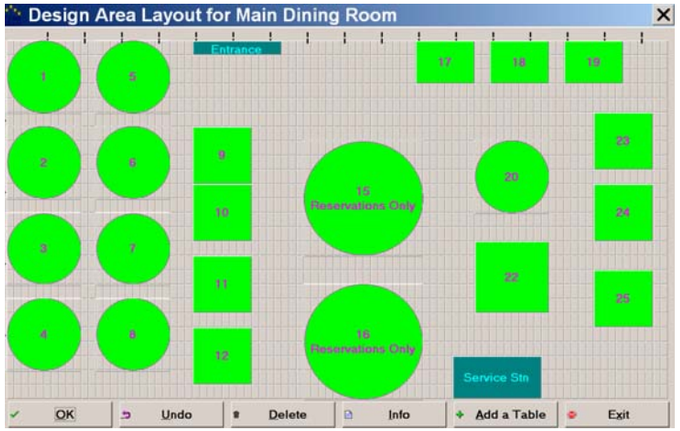
The Area Layout is a great visual tool used to assist servers of the location where guests and the tables assigned to them are. These layouts can be assigned to the Sales Area in the System Parameters. If the property's dining layout changes from Lunch to Dinner, the layout can change too. Servers can also use the Chng Floor Plan button on the Toolbar to select an alternate floor plan or simply move tables around. To design or edit a floor plan select the Design Area Layout program from the System Administration menu:



After selecting Design Area Layout, the system will be prompt you to create a Layout Code and its description.

To edit an existing layout, select the Area Layout Code from the list.

To enter the Layout Design, press the Edit Layout button. The following screen appears:



The example shown above already has tables set up on it. Of course if you are starting a new floor plan you just see the empty grid palette.

Using the screen:

OK will accept all changes made to the layout.

Undo will cancel the last change made in the program.

Delete will delete the COMPLETE layout, not just a table. Be careful!

Exit will leave the layout program. If changes have been made, the system will prompt you to save the changes: **Yes** or **No**.

To add a new table or feature of the room such as the entrance, or plans etc, click the **Add a Table** button. To edit an existing table or feature of the room, simply click the table or feature. The following screen will appear:

Using the screen:

Object Function - Select the function of the object. Table, Display, or Start a New Chit. Use the pull down menu. A table is where you seat your guests, and where open chits are accesses. A display simply creates a picture for visual orientation of a room. You might add a wall, or alcove, or entrance, or server station, or fish tank, or plant etc. Don't put too many of these on the layout or you will crowd out the tables, the real reason for setting up the layout. But a few help servers quickly pick the right table.

Object Shape - Select the basic shape of the object: rectangle or circle. By changing the size you can create squares, rectangles, round tables and oval tables. Use the pull down menu.

Table Number - All Tables MUST have a number. This will always be shown when unoccupied

 # Of Seats – This is an option, but we suggest you fill it in. The number will default at the beginning of each chit to save you entering the number of guests every time. Of course you can over ride the default when you seat a different number of guests.

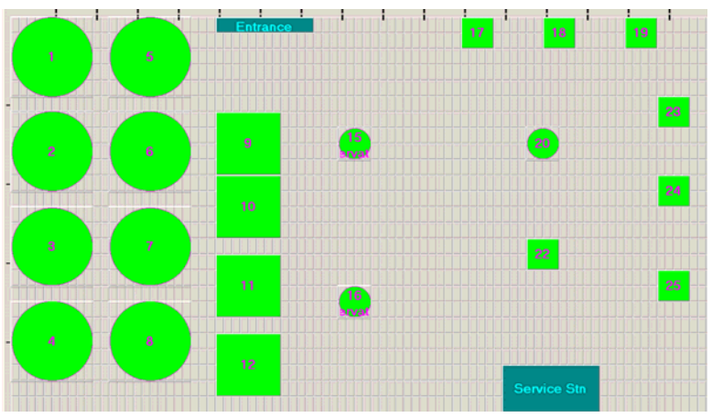
Text to Display – If you want to show some words on the table when it is unoccupied type them here. You might say something like 'Reservations Only' on your big tables. Enter Non-Smoking, Smoking, if the table is reserved or out of order. The Chit Info overrides the Text once the table is selected.

Colours - The background is always gray, but the tables can be other colors. We default to a Cyan (Teal) color and Dark Gray when unoccupied and occupied.

Choose colors to represent sections by servers or by smoking or non-smoking and of course, when a table is unoccupied versus when it is occupied.

Location & Size – When adding the initial object, the system will allow a Drag and Drop of the object. Once OK is selected the layout will show a cursor prompting you to select a spot to put the object. Leave the column and row fields empty and the program will ask you to click on the table location when you save it.

We suggest that you make the buttons for tables as big as you have room for, and leave less space between tables, i.e. use up the palette with table space. Make the display items (other features of the room) smaller to leave more space. The idea is big buttons are easier to touch then small ones. The example shown below has big easy tables on the left and small hard to touch ones on the right. In reality the tables might all be the same size – just the way they are designed on the screen is different. The example is a bit exaggerated but you see the idea:



If the object is to be moved from it's present position, you can blank out the column and row at which the top left hand corner is to be located and when it is resaved you can click on its new location.

The size of the object defaults to 12 columns in width and 4 rows in height. A perfect square and circle are always twice the number of columns than rows.

Chit Info to Display on Table – Once a server has selected a table the information displayed can be other than table number and text.

Depending upon the size of the tables, not all information can be displayed.

Setup Rounds of Golf

This function is used by the Pro Shop to report on the number of Rounds of Golf sold by the property. You can define types of rounds, like men's18 holes, ladies 9 holes, evenings, weekends, days etc. You can link sales items (up to ten items per type of round) to each type of round. Then when you sell one of those sales items the rounds of golf tracking features will remember the sale. Then on the Manager's menu or the Sales Reports menu you can print a Rounds of Golf report for today or any other date range for statistical purposes.

Each type of Round of Golf can be reported on daily, weekly, monthly, annually, and compared to the previous year's attendance. To set up the rounds of golf rules select the Setup Rounds of Golf program from the System Administration menu:

Using the screen:

Enter a code for the type of Round of Golf. For example, 18 Holes.

Enter the description that best describes the Rounds of Golf, which are attached to this code.

Attach the Sales Items for the Rounds of Golf by entering the item code or using the F2 Lookup button to select from the list.

Using Point of Sale

Wait Staff Procedures

This section of the manual is written so that you can copy it and give it to your servers to learn the system on their own. It is written in the sequence that service staff uses the system, namely, how to log on, how to start a shift, how to start a chit, how to send orders to the kitchen, how to add to a chit, how to print a bill, how to settle the chit, how to close it, how to end a chit, and how to exit the system. It also covers splitting chits, editing and voiding, and other issues.

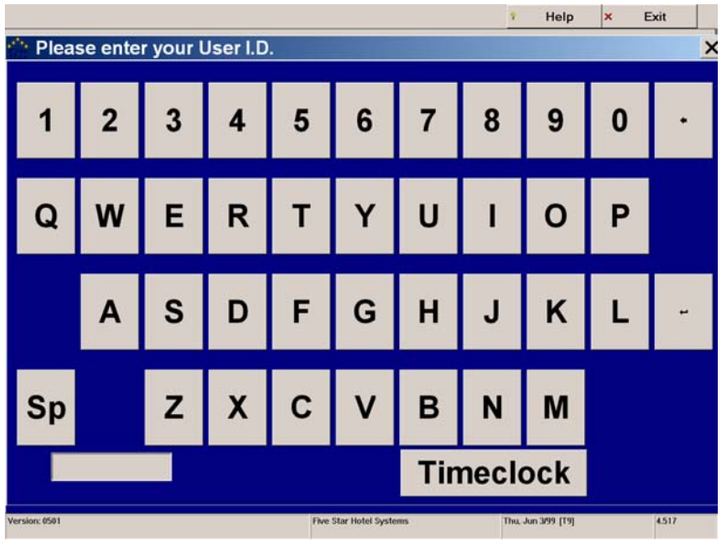
The Five Star system utilizes the very high-speed touch screen system. For best use of the screen, touch it with your finger, not your fingernail or a pencil etc. The screen actually responds when you remove your finger from the screen, rather than the instant you touch it. This makes it easier to select from lists etc. Try it - put your finger on the screen and then move it around all over the screen. See how the highlight responds to the movement, without actually selecting anything. When you remove your finger from the screen, it makes the selection that you last touched.

Some people mistake the ‘untouch’ characteristic and think that the screen is not sensitive enough and so you start pressing harder, and pounding the screen with the finger. This is unnecessary, and can wear the screen out faster, and put it out of alignment. The screen responds as soon as you let go of the screen.

If you notice that the screen is out of alignment, speak to your supervisor. It can be realigned in seconds.

Signing On

The POS system always starts from the following sign on screen:



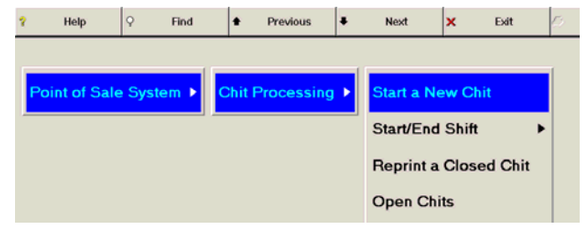
By touching the letters of your user ID you can log in. You must request your user ID and password, and you shouldn't tell anyone what it is. Only your supervisor should know it. If you believe someone has learned your user ID or password, have your supervisor change it. You can change it as often as you want. If someone else knows your password, he can record cash transactions on your code, which you may be held responsible for. By maintaining secrecy, you have control over your own cash.

If your user ID and password are the same, you only have to enter your user ID. By keeping it short, like two or three characters, you can log in FAST!

The ← button on the top right hand corner is similar to a BACKSPACE key on a keyboard and when used will backspace and erase the last button touched. The ← button in the center on the right hand side is the ENTER button. There is a SPACE button on the bottom left hand corner of the screen. Enter your ID and touch the ENTER button. Enter your password and touch the ENTER button.

Watch the top line of the keyboard screen before you touch it. It will either ask for your user ID, your password, or a password to exit the POS system. Only the system supervisor knows the password to exit POS, for manager setup and other functions. If the system is prompting you for a Password to Exit Five Star, just touch the ENTER button, or the F4 button to resume.

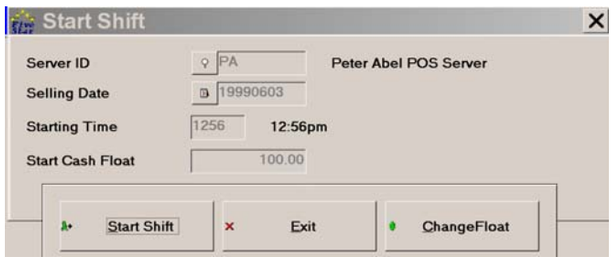
When your user ID and password are accepted, you will be taken to the chit-processing menu:



This menu does not appear once you have started your shift. Also, if your manager has set up to the Fast Login option, you won't see this menu, instead you will be taken directly to the screen where you start your shift, or if you have already started it, you go straight to the screen where you enter guest orders.

Beginning Your Shift

The first step in your day is to start your shift. Starting your shift creates a file of transactions that stays open for the day and which you will use to balance you cash etc. at the end of the shift. If you try to start a chit or open an existing one (if you are taking chits over from a previous server) before you start a shift you will automatically be taken to the start a shift menu:



Using the screen:

Touch Start/End Shift.

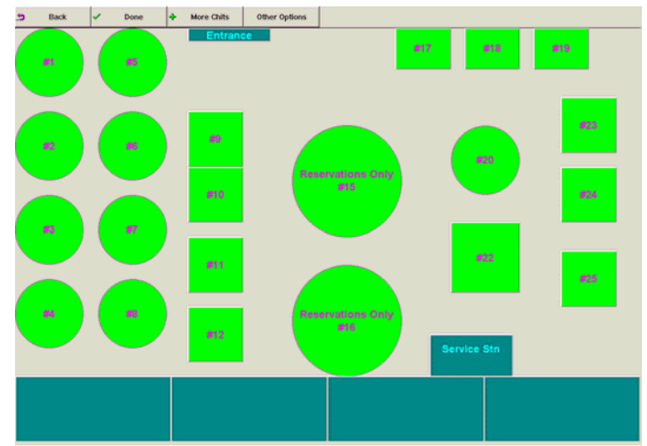
Touch Start Shift.

If you are using a float, enter the amount in the calculator and touch OK to accept. If you are not using a float, touch OK to accept.

If the float amount is correct, touch Start Shift to open you shift. If the float amount is not correct touch Change Float and repeat these steps.

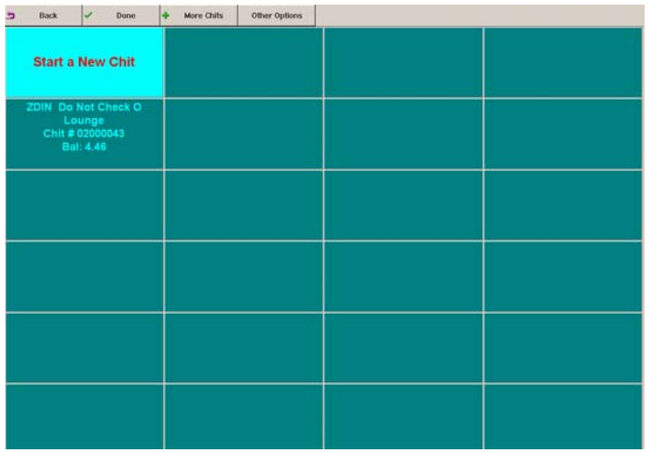
Starting a Chit

When you take a customer's order, you should return to the POS station to enter it. The station will automatically send the order to the kitchen. (For true control, the kitchen staff may prepare only orders that come to the kitchen from the order printer in the kitchen. That way all orders are recorded.) Start by logging in (see above). If you are in a dining room or lounge with tables you will see a floor plan layout like this:



To start a new chit simply touch the table the guests are seated at.

If you work in a bar with guests who are not seated, or if you work in a shop with no seats, you see this screen instead:



Simply touch an empty square to start a new chit.

If you use the hotel program, many of your chits will be for guests who are not staying at the hotel, that is, who simply come in form the street and pay with cash, visa etc. The POS system starts off by default linking all chits with a room number ZZZZ, a special folio number that collects all non-guest sales and receipts. Most properties leave the room number at ZZZZ until the bill is settled. Only if the guest requests that the bill be charged to his room do you need to reassign the bill to a room number. Touch the special options button on the bottom of the screen (F7) and then select change room number. You can do this any time during the processing of the order, but you must do it before you close the chit.

The order-processing screen appears. Of course yours will reflect your menus and sales items. As the features of this screen are described below, if you don't see a particular feature you would like to use on your screen, ask your manager, she/he may need to add more features to your menu:

Using the screen:

Chit Window: The left side of the screen shows the items in the current chit. If there are too many items to fit in the chit display window, you may Scroll Forward or Back to review any items entered. Notice in particular the seat number. If you have been instructed to record chits by seat number, you should change the seat number between each bill.

Menu Order Buttons: The four rows of five buttons (if all buttons are in use) on the upper right hand side are the menu order buttons. They consist of item buttons, look up buttons and menu buttons. Each menu is custom designed by your Property to make it fast and easy to use. Select the items the guest has ordered, or if the menu items are found on a submenu, select the button that you will find the menu item on.

Special Order: Use this option to give specific instructions to the kitchen for an order. Touch Special Order; Special Order for an Item, touch the item that requires special attention, enter the special instructions and ENTER. You can also use this option to send specific instructions to a different Prep Request area for a special order. Touch Special Order; touch the desired printer; enter the special instructions and ENTER. When you SEND the order to the kitchen, the special instructions will be sent to the selected printer.

If you have 2 or more people at one table you can start a chit for each person or you can start one chit and record the sales combined. If you later decide that you want separate chits you may easily split by seat #. The system defaults to Seat #1 and this is displayed next to the selected item on the left side of the screen. Select the desired items for person #1. Touch Seat # and the system defaults to the next number. Touch OK to accept or enter the desired seat # and OK to accept. Select the desired items for person #2. Continue this procedure for all of the people charged to this chit.

If you have selected an item that has Options, touch the desired options and touch F4 DONE or F8 DONE to return to the previous menu.

Once all of the desired menu items have been entered, touch the SEND button. This will send all food & beverage items to the appropriate order preparation printers. At this point you can touch the Walk Away button to allow other servers to access to the workstation or you can begin the Next Order if you have more than one chit to process. You can pick up orders that are ready or go serve your next guest. Don't close the chit yet. You may have more items to add to the bill. Just leave it open for now.

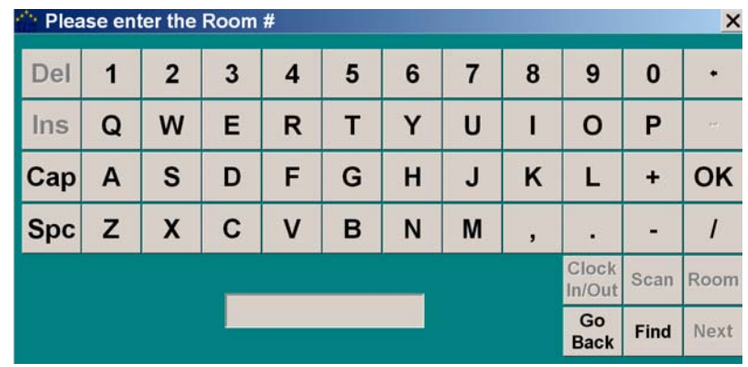
Opening an Existing Chit

When you have a guest that adds more food or drinks to the bill you need to return to the POS station, log in, and use the open existing chits function, instead of the start a new chit function. To open a chit, touch the Open Chits button.

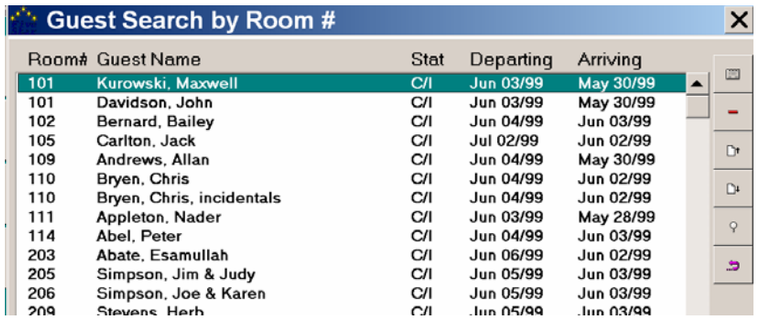
If you are set up with the fast login option, you don't see these choices, instead you immediately see the table floor plan or the grid of open chits. Touch the table that is already open, or touch the grid button with the chit you want to work on.

Assigning a Chit to Room Guest to Room Charge it

When you know the guest/room number open the chit you wish to assign. This usually happens after the guest signs the final bill to his room. Touch the Room Charge or Change Room Number button. The following screen appears:



You can type the room number but we highly recommend that you touch the Find button first. This will list all the guests in the property:



Guest Search by Room #

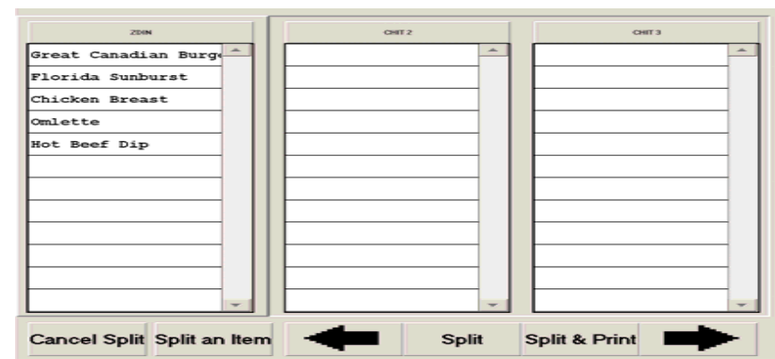
Room#	Guest Name	Stat	Departing	Arriving
101	Kurowski, Maxwell	C/I	Jun 03/99	May 30/99
101	Davidson, John	C/I	Jun 03/99	May 30/99
102	Bernard, Bailey	C/I	Jun 04/99	Jun 03/99
105	Carlton, Jack	C/I	Jul 02/99	Jun 02/99
109	Andrews, Allan	C/I	Jun 04/99	May 30/99
110	Bryen, Chris	C/I	Jun 04/99	Jun 02/99
110	Bryen, Chris, incidentals	C/I	Jun 04/99	Jun 02/99
111	Appleton, Nader	C/I	Jun 03/99	May 28/99
114	Abel, Peter	C/I	Jun 04/99	Jun 03/99
203	Abate, Esamullah	C/I	Jun 06/99	Jun 02/99
205	Simpson, Jim & Judy	C/I	Jun 05/99	Jun 03/99
206	Simpson, Joe & Karen	C/I	Jun 05/99	Jun 03/99
209	Stevens, Herb	C/I	Jun 05/99	Jun 03/99

You can touch Page Down until you find the Guest that you are looking for or you can touch use the search icon. Once you have found the desired Guest, run your finger down the screen until the desired Guest is highlighted and then remove your finger from the screen. Your touch screen actually responds to your touch when you release your finger rather than when you first touch it. This makes it easier to select from lists like the list of open chits. Continue processing the chit as required. Touch F4 or F8 when done and select the walk away button.

Splitting a Chit amongst Guests

There are three ways to split a chit:

1) The Even Split will divide the chit evenly between the selected guests when you have completed the transaction. Touch Even Split at the chit settlement screen. Select the number of chits to split the chit into. You must complete the processing of each chit so don't start the even split unless you are ready to settle and close the chit right away.
2) The Split by Seat button will divide the chit between the seat numbers you recorded the order by. This is one good reason to always order by seat number. Touch Split by Seat # at the chit settlement screen. Then touch Split and Print to get an immediate printout of each of the resulting chits.
3) The split by item program is very fast and can control up to 99 chits at once at a single table! To split a chit by item touch Split by Item. The following screen appears:



Simply touch the item in the left hand chit, and then touch any blank spot in any of the other chits. The item is instantly transferred to the new chit. If you need to split to more than two chits, touch the big arrows at the bottom to see up to 99 chits. When you are done moving the items to the right chits, touch the split & print button for copies of each bill instantly.

Discounts

There are two types of discounts:

Limited Discounts are set up to deduct a predetermined percentage for all Sales Items in certain Sales Categories. A Discount/Comp can be a predetermined percentage or an amount can be entered. This can be done after entering a Sales Item or when settling the chit. If discounted before settling the chit, it reduces the taxable amount. If discounted when settling the chit, it ignores taxes and reduces the chit total.

These discounts are determined and labeled by your supervisor. Check with your Supervisor to determine which Discount method you are to use.

Closing a Chit

When the meal or drinks are done, and it is time for the guest to pay and leave, you can settle and close the chit. You can print a chit as often as you wish. Normally you print a copy of the chit and present it to the guest. He may sign it to his room, or pay it with cash, credit card etc. To print a chit before it is settled, use the open chits button to put the bill on the screen. Then touch the print chit button to create the copy you will present to the guest. The guest will indicate his preferred settlement.

A chit can be settled to any of the following Settlement Methods (method of payment):

Cash & Cash Paid Out. There are two ways to settle a chit to cash. If you have configured your system to default to the amount of the chit, touch Cash and OK to accept. This method requires the Server to calculate the change to be paid out. Your system may be configured to calculate the change. If this is the case, touch Cash and enter the amount received and OK to accept. When the system indicates the change, touch the Change or Cash Paid Out button and OK to accept.

Credit Card: Touch the appropriate Credit Card button and OK to accept the amount. If you have your system configured to prompt for Credit Card information, enter the Credit Card number, Expiry Date, and Cardholders Name.

Room Charge: Touch the Room Charge button and OK to accept the amount.

If the order has been completed and you are presenting the chit you will want to Print the Chit.

If the Guest has paid the chit by cash or charge, you have the option to Print and Close if you require a copy or just Close the Chit if you do not require another copy.

How to edit or void items on a chit.

Depending on the policy at your property the server may or may not have full ability to edit / void items on a chit.

All items that have not been requested or SENT can be edited.

Press the **Edit/Void** button. You will be prompted to select the item to be edited or voided. If the item is to be voided completely, press **Done Editing** and the item will be removed. If only the Seat number is to be changed, press **Only Change Seat #** and the seat number will change to the seat number currently selected.

If you wish to void or edit an item after SEND has been used you will need a supervisor's password for the system to allow you to edit. Any items that get edited or voided that have already been sent will automatically have a cancellation order sent to the prep printer that the original item was sent to.

If you want to edit/void just a modifier or prep option on an item follow the same procedures as above. Except, when prompted to touch the item to be edited, do NOT touch the item, only the prep option/modifier you want to change.

General Modifiers

While the chit is open, press the MODIFIERS/SPECIAL button. Touch the item you wish the modifier attached to, on the virtual chit. Type in the modifier or select one from the FIND list and press DONE.
Either select from the predefined list or type in a user-defined modifier/message.

After pressing the **Modifiers /Special** button, select the item to attach the modifier to.

Pick up a Chit from Another Server

When you sign in and you have open chits, you will see a grid showing all your open chits. A button will say **PICKUP ANOTHER SERVERS CHIT OR START A NEW CHIT**, press this button and you will see the other server's chits. If your system is setup to preserve the original Sales Area, you may not see all chits from other Sales Areas.

Simply touch the one you wish to pickup and you will see the details of that chit. After selecting the chit, it will be re-assigned to you. The other Server will have to pick it up from you to take it back.

Close All Chits

If, at the end of your shift, there are any Guest Charge chits remaining, you can close each of them with this option. If you need a copy of the chit, select Print & Close. If you do not need a copy of the chit, select Close. If you do not wish to close the displayed chit, select Skip. When finished, select Exit.

Reprinting a Closed Chit

Touch Reprint a Closed Chit. If the desired chit is not on the screen you have 3 options. You can touch Page Down until you find the chit that you are looking for or you can touch use the search icon or press F2 again to perform a speed search or you can touch use the search icon or press F2 again to perform a word search. Once you have found the desired chit, run your finger down the screen until it is highlighted.

Touch Reprint if you wish to reprint this chit, otherwise touch Exit.

Combine Open Chits

This function combines multiple open chits into one chit. Large parties often have more than one server. Instead of sharing one chit back and forth, each of the servers can open a chit and the chits can be combined prior to presenting it to the guest. If a guest wishes to pick up another guest's chit, it can be combined with the original guest's chit. Or if a guest starts in the bar and then moves to a dining table, sometimes a second chit is opened for the guest. This feature puts the two back to one.

The list of open chits displays the chit number and guest number. If no guest number is displayed, it is a Five Star cash chit.

First, select the chit that all other chits will be combined with. This is called the master chit. The chits that are combined will not be accessible after combining.

Press Done when finished selecting chits.

You now have the option to combine the chits and print the new combined chit, or just combine it. **Press Done** to exit without combining the chits.

Using the Toolbar

There is space for tools on the top line of the screen, the area known as the toolbar:

Here is a description of how each button works:

Move Tables – This button allows users to instantly move a table to change the floor plan layout. Click it to see the floor plan for your area. Then click the table you want to move. Then click the grid square where you want the top left corner of the table to be positioned. Your table will be moved. This is handy if you tend to move your tables around during the meal hours. On the other hand, you might have more than one standard layout, like the regular layout and the murder mystery theatre layout. Rather than always moving tables around using the toolbar button, you can use the Design Area Layout program on the System Administration menu to pre-set more than one layout for each sales area. Then you can use this toolbar button to select the alternate layout in one quick step.

Done – This takes the server to the next level of processing, either to the settlement screen, log in screen, or previous menu.

Mail – Five Star Mail is an internal mail system for Five Star users. This can be used to inform users of changes or company memos. This cannot be hooked into an email system. This is the same email system shared by all employees of the property.

Options – The options screen has the following functions: Change Room #, Change Table #, Change # of Covers, Lookup Prices and Bar Book (Recipes for Bartenders).

Print Chit – This will print the currently displayed chit.

Send – This will send any Sales Items not previously sent to the preparation printers and take you to the settlement screen.

Ending Your Shift

Touch Start/End Shift. Touch End a Shift. If you would just like to review your Shift Summary and Cash Balance, touch Don't End the Shift and you will be returned to the previous menu. When you end your shift, a report of your Shift Summary, Cash Summary and Settlement Summary is printed. If you would just like to print the report, touch Print a Report, otherwise touch End the Shift and select your local chit printer. If you would just like to have a summary of all chits processed, touch Chit Summary. You can view it or touch Print a Report if you would like a hard copy. Touch Exit when complete.

Exiting the System

Touch F4 until you reach the Five Star Sign-on screen. If a password is required to exit Five Star, you can leave the system on and turn off the monitor.

Supervisory Procedures

Voiding a Chit

You have the option of voiding an open or a closed chit. If it is a closed chit, touch the desired chit or touch Page Down to display more chits. If it is an open chit, touch Void an Open Chit and touch the desired chit. Touch Void the Chit or Print and Void as required. You cannot void a chit from a previous day, nor can you void one that was room charged for a guest that has checked out.

Reopen Closed Chit

Select Reopen Closed Chit. Touch Page Up or Page Down to view more chits. Touch the desired chit. Touch Reopen. You cannot reopen a chit from a previous day, nor can you reopen one that was room charged for a guest that has checked out.

End of Shift and Report

You may end a server's shift and/or print an End of Shift Summary Report for any or all of the wait staff provided that there are no open chits. This report will summarize all sales items, number of covers, number of chits, average sale per chit, cash sales, and other settlement methods. Touch the desired Servers Name or All Servers for a complete summary. Select Print a Report or End the Shift as required.

Printer Redirection

This option redirects printing from a specific printer to another. For example, if a property has two bars and one closes down before the other. Those Sales Areas bar requisitions can be redirected to the open bar. If a printer breaks down, the system can redirect the print jobs until the problem is solved.

Select Printer to Redirect - Choose the printer that you need to redirect from the list.

Where Should Reports Go - Choose the new printer that will receive the information.

Redirect When - Use if you want to immediately redirect printing, or permanently have it redirected until the problem is resolved. Use Specific Time only if you want the printing to be rerouted at a specific time. When the POS rolls to the next date this redirection is cancelled until that same time next day. Enter the time for the redirection in military ordinance: IE: 4:00pm is 1600.

Setup Today's Specials

You can set up different daily specials in each of the Sales Areas for every day of the week. This can later be printed on the chit printer or displayed to the screen as required.

Use the cursor to select the Sales Area and the day of the week. Enter the items and special prices that you wish to be displayed. This is intended for display only and is not linked to Sales Items or Menus. Press F4 and Accept when completed or Clear to remove.

Setup Suggestions / Reminders

This function is used by managers to prompt or remind servers to do specific things prior to closing the chit. For example, "Did the server request to charge for coffee?" or "Did the server tell the guest about the Family BBQ on Sunday, June 4th?"
Then, when closing the chit, the following window will appear.

Messages to Put On Chits

These messages can be defined by sales area. There are 99 lines for each message. They can be used to remind guests of upcoming events.

Reporting

There are a number of available reports that can be run any time to check on the status of the current days sales. If your workstation has restrictions set up in Terminal Setup, you will only be able to report on the Sales Area that you are restricted to and no one else will be able to report on the restricted Sales Area.

Servers Sales by Report Group: This report will display the value of sales, quantity of sales, average sale per sales category for each Sales Category, for each Report Group, for each Server.

Today's Sales by Item: This report will display the value of sales, quantity of sales, average sales price per sales item for each Sales Area.

Today's Sales by Category: This report will display the value of sales, quantity of sales, average sales price per sales item for each Sales Category, for each Sales Area.

Today's Sales by Report Group: This report will display the value of sales, quantity of sales, and average sales price per sales item for each Sales Category, for each Report Group in each Sales Area.

Today's Cash Summary: This report will summarize the amount posted to each Settlement Method for each Server in each Sales Area. It also totals summarizes each Settlement Method for all Sales Areas.

Today's General Status: This report will display the total number of covers, total sales, total number of chits, number of open chits and average sales value per chit for each Server in each Sales Area. It also reports on the total sales value, total quantity of sales, and average price per sales item for each Sales Category.

Month End Reporting

There are a number of available reports that can be run any time to check on the status of the month's sales. If your workstation has restrictions set up in Terminal Setup, you will only be able to report on the Sales Area that you are restricted to and no one else will be able to report on the restricted Sales Area.

Sales by Item: This report will display the value of sales, quantity of sales, average sales price per sales item for each Sales Area.

Sales by Category: This report will display the value of sales, quantity of sales, average sales price per sales item for each Sales Category, for each Sales Area.

Sales by Report Group: This report will display the value of sales, quantity of sales, and average sales price per sales item for each Sales Category, for each Report Group in each Sales Area.

Report Group Sales Summary: This report will summarize the amount posted to each Settlement Method for each Server in each Sales Area. It also totals each Settlement Method for all Sales Areas.

POINT OF SALE EVENT MANAGEMENT

The Point of Sale Event Management is a quick and efficient way to manage events that occur through the Point of Sale. Events may be set up prior to their actual dates and guests can be put on the event list that will be created on the actual date. The system will create a chit for each guest signed up for the event, which can be edited and added to. For example, you could use event management to setup a women's Bridge party for next Thursday, for 30 guests, each of whom will also have afternoon tea.

POS Sales Items

The first step to setting up an event is to setup a Point of Sale Item that represents the event.

Area - Select the Point of Sale Sales Area in which the event is to be reported or where it will occur.

Date of Event - Enter the date the event is scheduled.

Time of Event – Enter the time the event is scheduled for. (Use 24-hour time).

Name of Event – Enter a name for the event. For example, Ladies Bridge Tournament. The name will appear in the guest's inquiry and on the statement, depending upon the statement program being used.

Description – Enter a description of the event. This description is a free form field that can contain whatever information is needed for the event. In the Guest field, enter the number of the guest to bill and sign up for the tournament. Press F2 Lookup to select from list. The guest name will be inserted into the Name field.

Enter the quantity or number of people the guest will be paying. In the Sales Item field, enter the sales item number for the tournament or press F2 Lookup to select from list. There is only one sales item per line. However, a guest can be billed more than one sales item.

The price field picks up the price from the Sales Item, but this can be overridden in this field. The total field is an extension field, which multiplies the quantity field by the price field.

Open an Event

To open the event on the scheduled day, go to the 'Open an Event' program in the 'Event Management' Menu.

Select the Area and then select the event to be opened. The system will create open chits for all guests signed up for the event.

Enter the date to appear on the chit and assign the chits to a user in the POS area.

You can automatically pre-print a copy of each opened chit, or erase an event after opening it.

These are options can be checked.

Once the event is open and the chits created, you should follow regular POS procedures to close the chits.

Also, when the event is open, the system updates the event with the date and time the event was opened, and who opened the event. An event cannot be re-opened or edited after it has been opened.

Setup / Edit Events – Print Report

Reporting for Event Management is the F9 Master Report in the Setup / Edit Events.

The system will print all events within a date range for a specific area.

The report displays the Name of the Event, any description entered, the date opened, the POS date, and to whom the chits were assigned.

The Five Star POS Dining reservation system is a fast and easy way to create, track and seat a reservation.

A walk-in facility lists “unreserved tables” for faster seating. “Quick Check” lets you quickly find an open time slot for the requested number of people.

Setup dining areas with descriptions, closed dates and seating times.

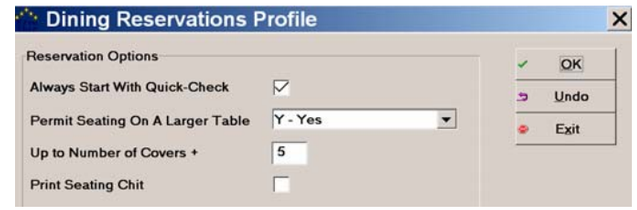
Host or Hostess can provide better service with reminder memos and reservation lists printed in advance.

DINING RESERVATION SYSTEM

The Dining Reservation System takes reservations for each POS sales area.

System Profile

Select System Profile to set the global settings within the Dining Reservation system.
The Dining Reservation Profile has four different settings. They include the following:



Using the screen:

Always Start With Quick-Check - When checked, you enter the reservation requirements. The system will display the Quick Check Screen so you can quickly see what is available for that date. You can view which tables are available, at what time, table size, and if it's smoking or non-smoking.

Permit Seating On A Larger Table - This section has three options: yes, no, ask.
If Yes, the guest can be seated at a larger table.
If No, then the guest is limited to that particular table size.
If Ask, it will ask you if it's okay for guests to sit at that specific table.

Up to Number of Covers * - Additional number of people that can be added after the reservation has been set.

Print Seating Chit - A chit will be printed and placed on the table when the party is seated.

Setup Dining Areas

POS Sales Area – Select from the pull down list using the arrow.

Description - Enter the description for the sales area. For example, the "Cachet Dining Room."

Short Description – Fill in the abbreviated name of the Sales Area. From the example above the "Cachet Dining Room" has a short description of "Cachet Room."

Closed Days - Choose the days of the week that the POS Sales Area is closed. For example if the dining area is closed on Monday then click the Monday box. You can check off more than one box. There are no restrictions. Select the POS Sales Area. Enter the Descriptions for the sales area.

Select which days of the week that area is closed.

Other Closed Days - Select the days that you want the "Dining Area Closed." For example, if the dining area is closed on Christmas or Boxing Day (December 25 & 26) fill in the dates under the Other Closed Days (or any days of the year that the POS Sales Area is closed).

Shutdown Between - If there are any extended dates of the year that the dining area should be closed, then fill the dates where applicable. For example, if the dining area is closed between a certain range, then fill in the dates. To illustrate: Dec. 23, 01 to Dec. 27, 01 or if the property is closed during the off-season.

Select different dates that area is closed

Earliest Seating / Last Seating - Indicate the hours of operation for the dining area. The hours are on a 24-hour clock. For example, use 13:00 for 1:00 pm.

Booking Block - Pick the reservation-booking block in hours and minutes. This box indicates the length of time between each reservation.
Select the Tables button to setup the tables.
Choose the Reservation booking block.

Choose available times to take reservations.

Setup Dining Area Tables

Dining area tables must be setup to allow reservations. Select if it is a smoking or a non-smoking table. After completing, press the **OK** button. If you select **Exit** then all your work will be lost. The **Undo** button deletes the last feature performed.

Select the **# Tables** with the **# Seats** that can be seated at that table. For example, in the first row, there are 2 tables that can seat 2 individuals.

Choose if it's an **N - Non-smoking** or an **S - Smoking** table.

Click **OK**, when finished with this screen. The Dining Areas screen will reappear.

Click **OK**, to get out of the Dining Area screen. Now, you can setup reservations.

In the Dining Area Table screen, when you want to exit, do not press **Exit**. The items chosen will not be saved. If the delete button is pressed a window will appear to confirm this choice. If **yes**, is pressed then the work will be erased. If **no**, then the Dining Areas screen will re-appear and no work will be lost.
Select N – Non Smoking or S - Smoking

Dining Reservations

Once the Dining Areas and System Profile have been completed, the Five Star system is ready to take reservations.

Setup another Reservation

1. **Dining Area** - Select the Dining Area that the reservation needs to be placed.

2. **Reservation** - Press Enter on the Reservation field. The next dinner reservation number will be entered automatically.

3. If “Quick Check” was checked in System Profile, the Reservation Quick Check screen will open. If yes, go to step five, otherwise go to step four.

4. Continuing, type in the date, time, # in party and if its smoking or non-smoking table. Continue to step eight.

Fill in this box with comments.

Example: Someone’s birthday.

5. Plug in date, time, number in party and if it’s a smoking or non-smoking table.

6. Highlight the time when the guest wants to come to the Dining Area. Next to the time are the table size, table number and if it’s smoking or non-smoking.

7. Click on Proceed. This will bring you back to the Dining Reservations screen.

8. Select a guest for the reservation. The guest’s number, name and telephone number will appear. The guest’s name and telephone number can be substituted.

9. Fill in the box on the Dining Reservations screen with any comments that might pertain to the reservation.

10. Click “off” the Hostess Memo if you want the Host to know anything pertaining to the reservation.

11. Click OK. A message box will appear with a reservation number. Then Press OK.

Pick a free table in the box to the left.

Hostess Reminder Memos

Hostess Reminder Memos are useful since it gives the host / hostess a message about a day. It gives you a reminder such as an anniversary, birthday, or any other message that the host / hostess needs to know.

Dining Area. – Select the appropriate area. Press Enter.

For Date - Press enter on the box and the current date appears. If another date is needed, type in the date in numeric format.

Memo Number – Select the memo number. This will view the memo in the memo field provided. You can change the memo in the Memo box. If an additional memo is needed, click

Add New Memo.

Type in the Memo in the Memo box provided.
Click **OK**.
Type in new Memo

Print Reservation List

You can print the reservation list for one day or a period of consecutive days. The days could be printed on one page or separate pages.

Dining - Select the Dining reservation list that needs to be printed.

From Date To Date - Choose the dates that need to be printed. After entering the date press enter. If enter is not pressed then the data will not appear on the printout.

Separate page per day - Click the "Separate page per day" when reservations are to appear on different page if the date is more than one day.
Click "**OK**" and choose from the Print Options.

Hostess Seating Screen
On the "Hostess Seating Screen" there are a number of areas.

The top right hand corner has the **Dining area**, **today's date** and **time**. You cannot change this box.

The top left hand side has all the **Hostess Notes**. You can only view the notes in this screen. Choose a guest.

Seat Guests

To seat a Guest (Guest), click on the name of the guest and the following screen will appear.

You have **three** choices:

Go Back – Returns to the Hostess seating screen.

Edit Reservation – Allows you to edit the reservation by changing the number in the party, time, host memo, name and telephone number.

Seat the Guests – Permits you to assign the guest to their respected table. Click on "Seat the Guests" and the following screen will appear.

After selecting the table, you can now assign the chit to a server.

After assigning the chit to the respected server the Hostess seating screen will reappear.

Select Server

Choose a table

Options on the Hostess screen

The Hostess screen allows you to **Quick Check** if there is a table available or set up a new dining reservation using the **Walk-In box**.

Click **Walk-In** box and the Dining Reservation Screen will appear. Follow the steps for making a **Dining Reservation**. Quick Check is not available through this method. Once completed, the screen will change to the **Seat the Guests** screen.

Follow the instructions above when seating the guest. Once you have finished using the Hostess screen, press the **Exit** button.

Guest History Tracking & Loyalty Programs

The Guest Tracking program allows a property to follow a guest usage in the property, or which guests are bringing which guest.

This can be used in two ways. First, if a guest is coming to the property with various guests, the system can tell the property how many times that guest has used the facilities in total. Also, if a guest is only allowed so many guest privileges, this program can report how many guests the guest has had during a specified period.

The program is used through the Point-of-Sale system, and attaches the guest information to specific sales items: for example, Guest Fees or Rounds of Golf.

The Sales Items that will be used to track Guest History must be setup first. Go to Point-of-Sale, System Setup, Sales Items. Select the item to track. The Flag for Guest History must be flagged before the # Comments field. Press **OK** to accept.

First, # Comments To Ask For must be 2.

Second, the Store Guest History box must be flagged.

Setup / Edit Guest History

After selecting the Sales Items to track, you can optionally enter the Historical Guest Visits by going to the Setup / Edit Guest History program. You will be asked to enter the Guest's name, Date of Visit, Number of Visit (start at one), the Guest, and the Item associated with the visit. This function is only used for historical information. The Point-of-Sale system will take care of future visits.

Enter the Last Name of the Guest. Press Enter. Another field will appear and ask for the First Name of the Guest.

Enter the date of the visit.

This box is a counter, for the number of visits. The system will calculate future visit counts on the historical numbers, if any.

Now, for the details of the visit. Which Property and Guest did the guest visit? Which item is associated with this visit? Entering the chit number if known.

There are two memo fields for comments in the Report, required when entering history. These fields will print on the Guest History

Point-of-Sale Chit Processing

During Chit Processing in Point-of-Sale, you will be required to enter Guest Information if an Item that has Guest Tracking flagged is selected.

The system will display a window that shows any 'Guest Names' that have already been entered or you may select **Enter New Guest**, and will be asked for the Guest Last and First Names.

The window also displays the last time the guest was at the property and how many visits in total the guest has made. The 'Total Visits' does not show how many items but how many visits (dates.)

Guest History Report

The Guest History Report always shows the originating guest. The option for reporting is 'All' or 'Selected Guests,' with 'All' or 'Selected Guests.'

You can sort the report by Guest, then All Guests associated to the guest, or by Guest, and All Guests who had that Guest for a visit.

Which Property is to be reported on?

Enter the Date Range to report the Guest's Visits.

Select to either print for All Guests or Selected Guests. If selected, enter the guest codes or pressF2 Lookup to select from list.

Select to either print for All Guests or Selected Guests. If selected, enter the last name of the guest or Press F2 Lookup to select from list.

Choose the Sort by option; print the Guest and all guests who brought them for a visit, or by Guest and all the guests they brought.

Sample Report

Clear Old Guest History

Depending upon your need for the Guest History Data, you can delete guest history information. The system will delete the visits based on the dates of the visits and by the Guest Name. Selected Guest History or a Range of Guests' History can be deleted. This does not necessarily clear the guest name. If all information is cleared then the guest will be deleted as well. If any history is left, then the guest name will be retained.

If a range of guests' historical information is to be deleted, enter the Last Name of the first Guest in the range or Press F2 to select from list, and enter the Last Name of the last Guest in the range or Press F2 to select from list.

If selected, enter the Last Name of the Guest or Press F2 Lookup to select from list.

Enter the guest option, All, Selected, or Range. If All, the cursor will go the OK button.

To be deleted. Enter the date up to which all historical guest information is t

Select the property, if applicable, if only one property, press enter.

Inventory

This unique inventory and sales reporting module is designed for Food and Beverage. This system is also fully integrated to the complete Five Star suite of modules.

For Food and Beverage Outlets, this module can be used as a detailed, non-perpetual, inventory system, taking into consideration specific portion controlled items, such as lobster tails and alcoholic beverages. Some properties will set up an inventory code for the sales item primarily for reporting capabilities. The property will then have the option of creating a report on the members who purchased the lobster special at a dining function.

INVENTORY - FOOD & BEVERAGE SETUP

General Parameters

A/P S/L to Use - Enter the appropriate Accounts Payable sub-ledger that you wish the inventory to be linked to. You can choose the code from a lookup window by clicking on the lookup (the 'magnifying glass') or by pressing F2.
For Food and Beverage, this normally will be linked to your standard (trade) Accounts Payable sub-ledger.

Bitmap Location - If you are going to take advantage of the picture (bitmap) function with your inventory items, enter the drive letter and path that the images will be stored. Five Star recommends that the directory be J:\GJCWIN\IMAGES (substitute J: for whatever your server's drive letter is on the network).

Inventory Areas

Setup the different inventory areas you want within the property. At the very least, you will require one area for each type of costing method you want to use. If you want the dining room and bar to be at standard costing, but the lounge to be at average, you will need to setup two inventory areas.
Normally, for food and beverage, there will be one inventory area.

Area Code - Use meaningful codes when setting up your areas: for instance, F&B for food and beverage. The maximum is five characters.

Description - Enter a more detailed description for the area you are setting up.

Short Form - Enter a short form code to represent this area. This is the heading that will appear on reports where they do not have room to put the full description. Again, remember to keep the code simple but meaningful.

Costing Method

Determine which costing method to use for each area you setup. Your options are:

FIFO - First In, First Out - if you purchased 10 lobsters on March 03, at $ 8.40 per lobster, another 5 lobsters on March 12, at $ 7.90 per lobster, then the first ten lobsters sold would be at the cost of $ 8.40 per lobster.

AVERAGE- Weighted Average - if you purchased 5 cans of peas on January 10, at $7.95 per can, another 2 cans on February 05, at $8.95 per can, then the cost per can would be worked out as follows;

5 X $7.95 = $39.75

2 X $8.95 = $17.90

7 $57.65

$57.65 / 7 = $ 8.236 per can

LATEST- the last cost paid - if you purchased 12 cartons of milk on February 01, at $1.95 per carton and another 4 cartons on May 15, at $2.25 per carton, then all the cartons sold from that point would be $2.25 per carton

STANDARD - set cost - if you purchased 4 boxes of chicken breasts on June 15, at $21.95 per box and declared $21.95 as standard cost, then another box on July 01, at $19.95 per box, the boxes sold at any point on would be at a cost of $21.95 per box.

When Receiving Inventory, do Journal Entry - When selected, the system will debit the Inventory account and credit the accrual account as specified under Categories.

When Running POS Updates, do NOT Update Qty on Hand – Normally, as you sell items via Five Star Point-of-Sale and run End-of-Day Updates, the inventory module adjusts quantity on hand for the sales and returns for that day. Activating this flag stops this from happening. No change is made to inventory for quantity on hand when End-of-Day Update is run from Point-of-Sale.

When Entering SKU's, Do Not Validate UPC Code - If this flag is active you must print your barcode labels from Five Star for the Five Star POS to understand the codes being scanned. If you do NOT flag this item, then you can enter the UPC code that came on the item into Five Star and when scanned in Five Star POS it will understand the code. **NOTE**: This is only workable if the supplier UPC code does **NOT** use a check digit in their UPC codes. To determine if they do simply start up NOTEPAD in *Windows* and using your scanner, scan the supplier code, the code number will appear in NOTEPAD. If the number displayed exactly matches the one listed under the UPC code, they are **NOT** using check digits.

A/P Integration: Company & A/P Sub-ledger - This is normally set to the same company and Accounts Payable sub-ledger as you set in the General Parameters. This is used when a certain inventory area needs to link to a different company or Accounts Payable sub-ledger. In that case, you would link this specific area to the appropriate company and Accounts Payable sub-ledger.

Last Inventory # - If you enter the next available inventory (SKU) number here then when setting up items the system will automatically assign an inventory number to the SKU's being entered.
When in the **Setup SKU**, press F5 for the auto assign function.

Stock Locations

Stock locations are created to allow the tracking of stock movements of a particular location. For example, each bar in the food and beverage inventory area can be created as individual locations under that area. Names of SKUs in an area automatically get copied under all locations. Transaction logs, snap shots, valuation reports etc., can be printed for individual locations. This means that price or cost changes only need to be made to one SKU and will impact on all stock locations in that area.

Area Code - Enter the appropriate inventory area code. To lookup from a list, click on the lookup button ('magnifying glass') or press F2.

Location Code - Setup a unique code to represent this location within this particular inventory area. Remember to keep the codes simple.

Description - Enter a more detailed description for this stock location.

Categories

Decide on how you want to categorize your inventory items. Then, using meaningful groups, create those categories in this screen.
This is also where you can establish the link between the inventory system and General Ledger.

Note: It is at the category level that the inventory system gets linked with the General Ledger.

Area Code - Enter the appropriate inventory area code, use the lookup ('magnifying glass') or F2 to pick from a list of available area codes.

Category Code - Enter a meaningful code to represent each category. Some examples for Food and Beverage are: meat, vegetables, etc.

Description - Enter a more detailed description for this category.
Short Form - Enter a shorter description for this category that will appear on reports.

Inventory Account - Enter the General Ledger account to debit when items are purchased.

Cost of Sales - Enter the General Ledger account to debit when items are sold.

Inventory Accrual - Enter the General Ledger account to credit when items are purchased.

COS by Area - This is only used if your inventory has different General Ledger Cost of Sales accounts related to a category, but differing by area. For instance, you may have a category called WINE, with General Ledger accounts for cost-of-sales for Food and Beverage, and another General Ledger account for Banquet / Property events.

Style Codes / Color Codes / Size Codes - These items are normally **NOT** used for Food and Beverage inventory.

Setup SKU #'s

The inventory SKU's (Stock Keeping Unit) link to specific Point-of-Sale items to track inventory. If you have not yet setup the items in Point-of-Sale, you do have the ability to set them up from this screen.

SKU # - Enter a unique SKU code / number. This number can be any combination of letters and numbers, up to 15 characters. You can get quite elaborate with the code consisting of the six character Point-of-Sale item number, a portion of the code to represent the supplier and a portion of the code to represent the brand, etc. However, Five Star does recommend that for simplicity it should be the same as the six-character Point-of-Sale item number. Remember that if you want to take advantage of the auto numbering for inventory items simply press F5 in this field and the system will assign the next available item number to this SKU.

Description - Enter a more detailed description for the item.

UPC Code - This field only gets filled if items will be sold or stocked using a barcode reader. The UPC code **MUST** begin with "4." The best method is to simply take the SKU number and add "4" to the beginning of it and pad the end of the number with "0" to make up 12 characters. For instance, an item with an SKU of 511828 would be setup with a UPC code of 451182800000. When you press ENTER you will see the following message:
Simply click on **OK** and the system will automatically setup the check digit at the end of the UPC code.

Picture - If you wish, Five Star allows you display bitmap images of the items. Remember that if you are going to use this, you need to have setup the Bitmap Location in General Parameters. Simply click on the yellow file folder, browse to where you have the images stored, and click on the image for this item.

Category - Enter the appropriate category for this item, click on the lookup ('magnifying glass') or press F2, to choose from a list.

Style Code - Not used for food and beverage inventory.

Color Code - Not used for food and beverage inventory.

Size Code - Not used for food and beverage inventory.

Sex Code - Not used for food and beverage inventory.

Bin Number - Enter a unique bin number or click on the little grey button to the right to setup based on Stock Locations setup earlier.

Qty Minimum - Enter a number here, if you wish to have the Reorder Report advise you when items need to be reordered. If you do not wish to use the computer's reorder capability, skip this field.

Qty Maximum - If you wish to have the Reorder Report advise you when items need to be reordered, enter the quantity to be ordered. If you do not wish to use the computer's reorder capability, skip this field.

Purchase UOM - Enter the "Unit of Measure" for this item. For instance, if this item is chicken breast are they purchased by the breast or by the box? Quite often properties do not use this field.

Sell UOM - Enter the "Unit of Measure" for this item. If it is purchased by the box but sold by the item, you could enter EA here to represent each. Properties rarely use this.
Both of the UOM fields really have no affect on the inventory but can be an aid in reporting.

Qty On Hand, Value on Hand & Qty on Order - These fields are updated automatically by the system whenever you receive or adjust goods, do an inventory count, or run an End-of-Day Update from Point-of-Sale.

Loc'n - Clicking on this button will display the inventory on hand, broken down by stock location/bin number.

Cost Price - When initially setting up your SKU items, you can enter the cost price for each here. This field will be changed by the system depending on the costing method you have set in the categories.

Selling Price – Retail/Member - Enter the selling price for this item when sold at retail and when sold to a member. This distinction is based on Point-of-Sale. If a server opens a ticket to CASH or non-member then the price under RETAIL is what will be charged. If the server opens a ticket to a member number, then the price under MEMBER is the charge for the item. If you do not have different pricing for retail vs. member, make sure you enter the same price in both fields. **Do NOT leave one of the fields blank**.

Changes To – Retail/Member - This function is similar to Selling Price. If you know that the price for this item will be changing on August 01, you can setup the new price here and the date it will take effect. When the system date rolls over to August 01, the item will automatically be sold at the new pricing.
If price is $0.00 Pop-up Calculator - When checked, any inventory item with a zero balance that is sold from Point-of-Sale will automatically bring up a calculator for the server to enter a selling price.

POS Item Code - If the inventory item you are setting up already exists in Point-of-Sale, simply enter the Point-of-Sale item code here, press F2, or click on lookup ('magnifying glass') to choose from a list.
If the inventory item has not yet been setup in Point-of-Sale, simply enter the six character code for the Point-of-Sale item and press ENTER. If that item code does NOT already exist, you will see this screen appear:

Chit Description - This is the description that will appear on the member's ticket.

Button Desc #1 / #2 - These two lines are the description that the server will see on the touch screen to represent this item.

Sale Category - Enter the Point-of-Sale Sales Category that this item belongs to or use the lookup ('magnifying glass') or F2 to choose from a list.

Include in Cover Count - Flag this if you will be tracking true cover counts. For more detail on cover counts please refer to Point-of-Sale application brief, Setting up Sales Items.

Preparation Option Codes - Use the lookup ('magnifying glass') or F2 to choose any preparation options that need to be attached to this item. For more details on preparation options please refer to Point-of-Sale application brief, Preparation Option Setup.

Credit Bk Allowed - If you flag this, the item can be settled by the member's credit book balance, if any. For more information on Credit Books, please refer to the appropriate Application Brief.

Member Discount - Flag this if this item qualifies for the member discount. Refer to the Application Brief for Property Membership for more information.

Accum. Option Pricing - When flagged, any extra charges for the preparation options will NOT be priced separately on the member's ticket, but will be rolled into the base price for the item. If unchecked, then these, extra charge prep options will show as separately priced items on the member's ticket.

Minimum # of Prep Options - Please refer to Point-of-Sale application brief.
When done, click on OK to accept the setup and continue with the inventory item setup. When the item is created in Point-of-Sale, it will assume it to be linked/setup in the same Point-of-Sale area as the inventory area. If you are setting this inventory item in the Pro Shop area, it will be created in Point-of-Sale and be linked to the inventory item for Pro Shop area only.

If you want to have more than one Point-of-Sale item that shares the same inventory item, you must go to the Point-of-Sale System, System Setup, Sales Items, Inventory, and link the appropriate Point-of-Sale items to the appropriate inventory item by entering its SKU number or using the lookup function.

Edit - Use this to make changes to an item that is already setup in Point-of-Sale.

Unit Tracking - When flagged, the system will track the units of this stock item on a perpetual basis.
In addition to the system updating the value based on the receipts and sales (consumption cost) of the item, the choice made at this level updates the quantity of the item based on receipts and sales (consumption units).

Allow Cr Book / Member Discount - These flags will be filled based on the Point-of-Sale item flags of the same.

Commissionable - Activate this flag if the sale of this item entitles the seller to commission.

 # Comments to Ask For – Allows the user to enter a customized description for the Sales Item when that Sales Item is chosen.

Banquet Pkg Total – This will accumulate the Banquet Package Sales Item's Prices to one amount.

Redeem a Rain Check – This will allow the Sales Item to be used with the Gift Certificate / Rain Check module.

Store Guest History – This allows the Sales Item to be used with the Guest Tracking Module.

Purchase History

This button gives you access to view the previous purchases of this item. You can sort the listing by any of the headings by simply clicking on the appropriate heading. For instance, to sort the list by Supplier rather than by date of purchase, click on the heading "SUPPLIER." Clicking a second time on the SUPPLIER heading will re-sort in descending order by supplier.

Markdowns

Allows you to set date sensitive markdowns by percentage or amount.

Sales History

This will show details as to the sales of this item. You can view from any date for 30 days backward per screen. The lower half of the screen will give the details of which members purchased the item. Again, this information can be sorted by any of the headings by simply clicking on them.

If you double-click on a member purchase in the lower half, you will see more details on that specific purchase.

Look for Chit - Will allow you to view a copy of the original ticket from Point-of-Sale. This functionality is only available when chit archiving is activated and the sale was processed through Point-of-Sale.

Supplier Pricing

This will give you records of the previous purchases by supplier and the cost pricing.

Pkg BOM - This allows the user to setup an inventory item that really represents several different inventory items. Five Star does not generally recommend using Bill of Materials / Packages for food and beverage.

Inventory - Pro Shop

For the Pro Shop, this system becomes an extensive retail system. It has the ability to store important product information such as style, size, color, retail and member pricing with the flexibility of having options like: markdowns and dated price changes.
This module accommodates items on trial and credit book allowance. The system can be used if the Pro Shop is owned by the property, a third party, or a third party with payables processed through the property.

SETUP - General Parameters

A/P S/L to Use - Enter the appropriate Accounts Payable sub-ledger that you wish the inventory to be linked to. You can choose the code from a lookup window by clicking on the lookup (the 'magnifying glass') or by pressing F2.
With Pro Shops there are normally three variations for this setup:

Pro Shop owned by the property. The Property will integrate this inventory with their regular Accounts Payable sub-ledger and suppliers.

Pro Shop owned by an outside party. The Pro Shop maintains a full set of books apart from the Property with integration to its own separate Accounts Payable sub-ledger, suppliers and inventory stock.

Pro Shop owned by an outside party but payables processed through the property. The goods are paid by the property on behalf of the Pro Shop. Linkages are setup via an "Owing to Pro" account in liabilities section of the General Ledger or through inter-company linkages.

Bitmap Location - If you are going to take advantage of the picture (bitmap) function with your inventory items, enter the drive letter and path where the images will be stored. Five Star recommends that the directory be J:\GJCWIN\IMAGES (substitute J: for whatever your server's drive letter is on the network).

Inventory Areas

Setup the different inventory areas you want within the property. At the very least you will require one area for each type of costing method you want to use.
Normally there will be one inventory area.

Area Code - Use meaningful codes when setting up your areas, for instance, PRO for Pro Shop. The maximum is five characters.

Description - Enter a more detailed description for the area you are setting up.

Short Form - Enter a short form code to represent this area. This is the heading that will appear on reports where they do not have room to put the full description. Again, remember to keep the code simple but meaningful.

Costing Method
Determine which costing method to use for each area you setup. Your options are:

FIFO - **First In, First Out** - If you purchased 10 sleeves of balls on March 03, at $8.40 per sleeve then another 5 sleeves on March 12, at $7.90 per sleeve then the first ten sleeves sold would be at the cost of $8.40 per sleeve.

AVERAGE - **weighted average** - If you purchased 5 pair of gloves on January 10, at $7.95 per pair then another 2 pairs on February 05, at $8.95 per pair then the cost per pair would be worked out as follows;

5 X $7.95 = $39.75

2 X $8.95 = $17.90

7 $57.65

$57.65 / 7 = $ 8.236 per pair

LATEST - the last cost paid - if you purchased 12 hats on February 01, at $11.95 per hat, then another 4 hats on May 15, at $12.25 per hat, then all the hats sold from that point would be $12.25 per hat.

STANDARD - set cost if you purchased 4 shirts on June 15, at $21.95 per shirt and declared the standard cost to be $21.95, then another 2 shirts on July 01, at $19.95 per shirt then the shirts sold at any point on would be at a cost of $21.95 per shirt.

When Receiving Inventory, do Journal Entry - When selected, the system will debit the Inventory account and credit the accrual account as specified under Categories.

When Running POS Updates, do NOT Update Qty on Hand – Normally, as you sell items via Five Star Point-of-Sale and run End-of-Day Updates, the inventory module adjusts quantity on hand for the sales and returns for that day. Activating this flag stops this from happening. No change is made to inventory for quantity on hand when End-of-Day Update is run from Point-of-Sale.

When Entering SKU's, Do Not Validate UPC Code - When checked, the Property Inventory will not create a 'check digit' when you setup a UPC code on a SKU. This means that you can input the actual UPC code already on the items that are delivered with this particular SKU. Be careful using any UPC codes included with clothing as some suppliers will have a different UPC code for each size as well as style, color, etc. In this case you will want to create a single unique UPC code for Five Star so you do not have to setup each size, color, etc.

A/P Integration: Company & A/P Sub-ledger - This is normally set to the same company and Accounts Payable sub-ledger as you set in the General Parameters. This is used when a certain inventory area needs to link to a different company or Accounts Payable Sub-ledger. In that case you would link this specific area to the appropriate company and Accounts Payable sub-ledger.

Stock Locations

Stock locations are created to allow the tracking of stock movements of a particular location. Names of SKUs in an area automatically get copied under all locations. Transaction logs, snap shots, valuation reports etc., can be printed for individual locations. This means that price or cost changes only need to be made to one SKU and will impact all stock locations in that area.

Area Code - Enter the appropriate inventory area code. To lookup from a list, click on the lookup button ('magnifying glass') or press F2.

Location Code - Setup a unique code to represent this location within this particular inventory area. Remember to keep the codes simple.

Description - Enter a more detailed description for this stock location.

Categories

Decide on how you want to categorize your inventory items. Then, using meaningful groups, create those categories in this screen.

Some examples would be; bags, lessons, hard goods, soft goods, etc.

This is also where you can establish the link between the inventory system and General Ledger.
Please note that it is at the category level that the inventory system gets linked with the General Ledger.

Area Code - Enter the appropriate inventory area code, use the lookup ('magnifying glass') or F2 to pick from a list of available area codes.

Category Code - Enter a meaningful code to represent each category. Some examples for Pro Shop would be: bags, properties, etc.

Description - Enter a more detailed description for this category.

Short Form - Enter a shorter description for this category that will appear on reports.

Inventory Account - Enter the General Ledger account to debit when items are purchased.

Cost of Sales - Enter the General Ledger account to debit when items are sold.

Inventory Accrual - Enter the General Ledger account to credit when items are purchased.

COS by Area - This is only used if your inventory has different General Ledger cost of sales accounts related to a category, but differing by area.

Style Codes / Color Codes / Size Codes - To help organize and facilitate more detailed reporting, the Pro Shop can setup appropriate style codes for each style of shirt, pant, glove, property, etc. They can setup different color codes to represent the different colors available for items and a series of size codes.

Setup SKU #'s

The inventory SKU's (Stock Keeping Unit) link to specific Point-of-Sale items to track inventory. If you have not yet setup the items in Point-of-Sale, you do have the ability to set them up from this screen.

SKU # - Enter a unique SKU code/number. This number can be any combination of letters and numbers up to 15 characters. You can get quite elaborate with the code consisting of the six characters Point-of-Sale item number, a portion of the code to represent the supplier, a portion of the code to represent the brand, etc. However, Five Star does recommend that, for simplicity, it should be the same as the six-character Point-of-Sale item number.

Description - Enter a more detailed description for the item.

UPC Code - This field only gets filled in if items will be sold or stocked using a barcode reader. The best method is to simply take the SKU number and pad the end of the number with '0' to make up 12 characters. For instance, an item with an SKU of 511828 would be setup with a UPC code of 511828000000. You may also use the actual UPC code of an item and pad the beginning with "0" to make up 12 characters. When you press ENTER you will see the following message:

Simply click on OK and the system will automatically setup the check digit at the end of the UPC code.

Picture - If you wish, Five Star allows you to display bitmap images of the items. Remember that if you are going to use this, you need to have setup the Bitmap Location in General Parameters.

Simply click on the yellow file folder, and browse to where you have the images stored, and click on the image for this item.

Category - Enter the appropriate category for this item or click on the lookup ('magnifying glass') or press F2, to choose from a list.

Style Code - Enter the style code, use the lookup ('magnifying glass') or press F2 to choose the code.

Color Code - Enter the color code, use the lookup ('magnifying glass') or press F2 to choose the code.

Size Code - Enter the size code, use the lookup ('magnifying glass') or press F2 to choose the code.

Sex Code - Click the down arrow to the right of this field to choose from the list of codes.

Bin Number - Enter a unique bin number or click on the little gray button to the right to setup based on Stock Locations setup earlier.

Qty Minimum - Enter a number here, if you wish to have the Reorder Report advise you when items need to be reordered. If you do not wish to use the computer's reorder capability, skip this field.

Qty Maximum - If you wish to have the Reorder Report advise you when items need to be reordered, enter the quantity to be ordered. If you do not wish to use the computer's reorder capability skip this field.

Purchase UOM - Enter the 'Unit of Measure' for this item. For instance, if this item is golf balls and are purchased by the sleeve. Properties usually do not use this field.

Sell UOM - Enter the 'Unit of Measure' for this item. If it is purchased by the box but sold by the item, you could enter EA here to represent each. Properties rarely use this.
Both of the UOM fields really have no affect on the inventory but can be an aid in reporting.

Qty On Hand, Value on Hand & Qty on Order - These fields are updated automatically by the system whenever you receive or adjust goods, do an inventory count or run an End-of-Day Update from Point-of-Sale.

Loc'n - Clicking on this button will display the inventory on hand, broken down by stock location/bin number.

Cost Price - When initially setting up your SKU items you can enter the cost price for each here. This field will be changed by the system depending on the costing method you have set in the categories.

Selling Price – Retail/Member - Enter the selling price for this item when sold at retail and when sold to a member. This distinction is based on Point-of-Sale. If a server opens a ticket to CASH or non-member, the price under RETAIL is what will be charged. If the server opens a ticket to a member number, the price under MEMBER will be charged for the item. If you do not have different pricing for retail vs. member then make sure you enter the same price in both fields. Do **NOT** leave one of the fields blank.

Changes To – Retail/Member - This function is similar to Selling Price. If you know that the price for this item will be changing on August 01, you can setup the new price here and the date it will take effect. When the system date rolls over to August 01, the item will automatically be sold at the new pricing.

If price is $0.00 Pop-up Calculator - When checked, any inventory item with a zero balance that is sold from Point-of-Sale will automatically bring up a calculator for the server to enter a selling price.

POS Item Code - If the inventory item you are setting up already exists in Point-of-Sale, simply enter the Point-of-Sale item code here, press F2, or click on lookup ('magnifying glass') to choose from a list. If you have more than one POS area attached to your inventory area, you may need to click on the Edit button beside the POS item code in order to attach it to the SKU. If the inventory item has not yet been setup in Point-of-Sale, simply enter the six-character code for the Point-of-Sale item and press ENTER. If that item code does NOT already exist, you will see this screen appear.

Chit Description - This is the description that will appear on the member's ticket.

Button Desc #1 / #2 - These two lines are the description that the server will see on the touch screen to represent this item.

Sale Category - Enter the Point-of-Sale Sales Category that this item belongs to, use the lookup ('magnifying glass') or F2 to choose from a list.

Include in Cover Count and **Preparation Codes -** These 2 fields are seldom used in Pro Shop.

Credit Bk Allowed - If you flag this, the item can be settled by the member's credit book balance, if any. For more information on credit books, please refer to the appropriate application brief.

Member Discount - Flag this if this item qualifies for the member discount. Refer to the application brief for Property Membership for more information.

Accum. Option Pricing – seldom used in Pro Shop.

Minimum # of Prep Options - seldom used in Pro Shop.
When done, click OK to accept the setup and continue with the inventory item setup.

Edit - Use this to make changes to an item that is already setup in Point-of-Sale.

Unit Tracking - When flagged, the system will track the units of this stock item on a perpetual basis.
In addition to the system updating the value based on the receipts and sales (consumption cost) of the item, the choice made at this level updates the quantity of the item based on receipts and sales (consumption units),

Allow Cr Book / Member Discount - These flags will be filled in based on the Point-of-Sale item flags of the same.

Commissionable - Activate this flag if the sale of this item entitles the seller to commission.

Purchase History

This button gives you access to view the previous purchases of this item. You can sort the listing by any of the headings by simply clicking on the appropriate heading. For instance, to sort the list by Supplier rather than by date of purchase, click on the heading 'SUPPLIER.' Clicking a second time on the SUPPLIER heading will resort in descending order by supplier.

Markdown

Allows you to set date sensitive markdowns by percentage or amount.

Sales History

This will show details as to the sales of this item. You can view from any date for 30 days backward per screen. The lower half of the screen will give the details of which members purchased the item. Again, this information can be sorted by any of the headings by simply clicking on them.

If you double-click on a member purchase in the lower half, you will see more details on that specific purchase.

Look for Chit - Will allow you to view a copy of the original ticket from Point-of-Sale. This functionality is only available when chit archiving is activated and the sale was processed through Point-of-Sale.

Supplier Pricing

This will give you records of the previous purchases by supplier and the cost pricing.

Pkg BOM

This allows the user to setup an inventory item that really represents several different inventory items. For instance, you offer a Father's Day Special for $225.00. For that price they get: two green fees, one cart rental, and a sleeve of balls. You could setup an item called Father's Day Special with a selling price of $225.00, but then use Bill of Materials to setup that $150.00 revenue goes to green fees, $63.00 goes to cart rental, and $12.00 goes to balls.

Use the lookup ('magnifying glass'), F2 to choose the SKU or item number. For the QTY, enter the number that should be deducted from inventory when this item is sold.

Make sure that you go to the EDIT button, next to POS ITEM CODE, and setup Package Revenue to distribute the revenue to the different General Ledger accounts. For instance, as in our example above: $150.00 is being directed to green fees, $63.00 to carts and $12.00 to ball revenue.

Inventory Procedures

Receiving and selling inventory items are day-to-day occurrences that we often take for granted. Controlling inventory stock, identifying markdowns and changing prices are as much a part of a functioning inventory system as the day-to-day operations.
Receiving SKUs into inventory is enhanced with the ability to print SKU labels immediately after the receipt.

Adjusting previously received inventories or moving items between different inventory locations provides the inventory manager with tighter control of the stock of goods.

Selling price changes, whether for retail or member or both may be altered immediately or at a future date. Markdowns are also date specific with the markdown value being set as a percentage or value.
Another 'tracking' feature to further enhance the module is the 'Items Out on Trial' program.

Use of these procedures will provide the Property with an up-to-date picture of the inventory.

Markdown by Categories

This feature allows the user to set markdowns, by percent or amount, for specific date ranges, for a specific category.

Receive SKU's into Inventory

This is where you will enter the items being restocked and their cost prices.

Area - Enter the area, use the lookup ('magnifying glass') or press F2 to choose from a list.

Supplier - This is the link to the accounts payable suppliers. Enter the supplier code or use the lookup.

Date of Rec't - Enter the date you wish to record these goods were received on.

Reference - Enter a reference note. This could be the date, invoice number, etc.
At this point you will be asked if you wish to print labels for the items you are about to enter into inventory. If you answer **YES**, then after updating the batch, you will be asked where to print the labels.

SKU # - Enter the item number or use the lookup function to choose from a list.

Stock Locat'n - Enter the appropriate stock location code or use the lookup function.

On Hand - This field will be filled in automatically to show you the current stock level for this item in this stock location and area.

Qty Recvd - Enter the number of items you have received. Be careful with this. If you receive balls, for instance, as boxes of six sleeves, but you sell the items by sleeve, you need to convert it to the number of sleeves. So if this item is sold as a sleeve, and you have just received 4 boxes of 6 sleeves each, you would enter 24, not 4.

Unit Cost - Enter the cost for the item you are entering.
As you enter items, they will be displayed in the lower window. If you make a mistake and want to remove an item you have just entered, simply double-click on the item in the lower window, and you will be asked if you wish to remove it from this batch.

Preview - This will print a report showing what you have entered for the batch.

Update - Clicking this will update the inventory with the items and costing you have just entered.

Inventory Adjustments

This program allows you to adjust items, by receipt invoice. You can edit the cost price and the quantity through here: it keeps track of it against the original receipt invoice that was created when you received the goods into inventory.

Area - Enter the inventory area.

Date of Adj't - Enter the date you want the adjustments to be recorded.

Reference - Enter a reference such as the original invoice number, date, etc.
SKU # - Enter the appropriate SKU number for the item or use the lookup function.

Receipt / Select

After you enter the SKU number, this list will pop-up automatically. It will list all invoices that were created when goods were received.

Simply click on the invoice you want. If you pick the wrong invoice simply go back and click on SELECT to choose another one.

Unit Cost - This will be filled in automatically based on the original entry when the goods were received. The user can now change the cost price for this item.

Current Qty - This quantity refers to the amount received on the invoice, **NOT** the current quantity on hand. It is filled in automatically, based on the original invoice.

Adjust By - Enter the amount to adjust the quantity by. For instance, if the original amount received was five, but it should have been **3**, you would enter **–2** in this field. If you wanted to increase it, you would enter **2**.
As in Receive Goods Into Inventory, you can remove mistaken items you have adjusted by double-clicking on the item in the lower window.

Preview - This will print a report showing your entry for the batch.

Update - Clicking this will update the inventory with the edited items and costing you have just entered.

Move SKU's Between Areas

This program will allow you to move items between different inventory areas or stock locations.

From Area - Enter the inventory area code or use the lookup function to choose the inventory area you will be moving items from.

From Location - Enter the stock location code or use the lookup function to choose which stock location you will be moving items from.

To Area - Enter the inventory area code or use the lookup function to pick the area you wish to move the items to.

To Location - Enter the stock location code or use the lookup function to choose which location to move the items to.

Ref # - Enter a reference for this move. This can be the date, N/A, etc.

Date of Xfer - Enter the date you want the transfer to be recorded as.

SKU Number - Enter the item number or press F2 to choose from a list of items.

Description and Category - These fields will be filled in automatically based on the item you choose.

Qty to Move - Enter how many of this item you want to move. If you enter an amount that is greater than the quantity on hand, you will be warned that you have exceeded the quantity on hand, and will be shown the amount available to be moved.

When finished moving the inventory, you simply click on OK.

Cost Changes

This allows you to change the cost price for inventory items by category, bin number or category and bin number. Please note that you can only use this program if the area has been set up with Standard or Latest costing methods.

Area - Enter the inventory area code or use the lookup function to choose from a list.

Select by - Choose if you want to select the items by category, bin number, or category and bin number. These options affect how the lookup screen for SKU Numbers will appear.

SKU Number - Enter the SKU number or press F2 to choose from a list.
Description and Current Cost - These fields are filled in automatically from the system, based on which item you choose.

New Cost - Enter the new cost for this item.

When finished, click on UPDATE to send the changes to the inventory.

Price Changes

This will allow you to change the pricing for items, categories or area by a percentage of cost, or a flat amount.

Area - Enter the inventory area or use the lookup function.

As of - Enter the date that these price changes will take effect.

Which Price - You can choose to change both the Retail and Member price, or just the Retail, or just the Member.

Method - Enter the method of the markup. You can choose **Markup Sell Price By** or **Recalc Sell Price** as a **Percent of Cost**. **Markup Sell Price By** allows you to increase the price by a set amount. **Recalc Sell Price** as a **Percent of Cost** allows you to increase the price by a set percentage of whatever the cost is.

Percent - Enter the amount or percentage that you want the price changed by.

Option - You can change the prices for All Categories in this area, for Selected Categories, or by individual inventory items (Selected Parts.)
As before, if you have chosen Option Selected Categories or Selected Parts and have chosen the wrong category or item, simply double-click on the category or item in the lower window, and you will be asked if you wish to remove it from the price change.

Preview - Use this to print a report showing the changes you have entered without actually updating the changes.

Update - Click this to complete your work and have the changes updated to the inventory.

Items Out on Trial

This program allows the user to track items that are out on a trial basis with members.

Area - Enter the appropriate inventory area code or use the lookup function.

Member - Enter the member number who is taking the item out on trial.

Date Out - Enter the date that the item is lent out.

SKU # - Enter the item number that has been sent out on trial with the member.

Qty Taken - The quantity on hand will be displayed to the right of this box.
Simply enter the number of this item that this member is taking out on trial.

Callback Date - Enter the date that the item is to be returned.

Comments - This field can be used for any reference notes when the item is loaned or when it is returned.

Date Returned - Enter the date when the item was actually returned.

Report - You can generate a report that will show you all items that have been sent on trial (FULL), or just the items that need to be called back in (MEMBERS NEEDING CALLBACK.) These reports can be run for specific members, all members, or a range of members.

INVENTORY - COUNT

The following programs are used for preparing, conducting and updating an inventory count.

It allows you to print the inventory count sheets. After taking the inventory, it allows you to enter the count and update the system, as well as enter cost price changes.

For the inventory count there are certain steps that must be completed before moving on to the next. The normal sequence of events would be:

1. Snapshot Inventory
2. Print Count Sheets
3. Enter Item Counts
4. Enter Cost Changes
5. Valuation Report and Update

Inventory Snapshot

This is where the system will take a 'snapshot' or picture in time of the current inventory items, and what their current stock levels are at the point you run this program. This is what your counts will be based on, and what your count sheets will have for information.

Area - Enter the inventory area you wish to do the inventory count for.

Stock Location - Here you have the option of doing an inventory snapshot of just one specific stock location, or one for this particular area with all stock locations.

Start Counts at Zero - This should only be checked if you are going to be using a scanner to count your inventory.

Print Count Sheets

You may bypass this step if you are using your own standardized inventory count sheets.

When you print these count sheets they will display the SKU number, stock location/bin number, description of item, unit of measure (if any), quantity on hand, and a blank field to fill in actual count.

Area - Select the inventory area that you wish to print inventory count sheets for.

Sorted By - You can choose to have the items on the sheet printed in order of category, bin number/stock location, category & bin number/stock location, bin number/stock location with no subheadings.

Show Computer Qty on Hand - You have the option of not including on the count sheets a column for current quantity on hand. This is sometimes used to insure that those doing the inventory count do not just 'assume' the quantity on hand rather than doing an actual count.

Print Options - You can print count sheets for all categories or for specific categories.

The second Print Option allows you to choose if you will print items from all stock locations or specific stock locations for the selected categories.
The third Print Option gives you the ability to print all items from an area, items with quantity on hand for a location, or items that have had activity in the stock location.

Double Space Report - Click if you want a blank line after each item listed to allow for notes, changes, etc. to be added to the report.

Print Bar Codes - Do you wish to have the bar codes printed on the count sheets to aid in doing the inventory counts? This should only be used for those clients that are set up to run inventory counts with a barcode scanner.

Enter Item Counts

Now that your people have completed the manual inventory counts and filled in the inventory count sheets, you can enter the new counts into the system.

Area - Enter the inventory area or use the lookup function.

Select by - Choose the method you wish to use to enter the new counts for the inventory item: by category, bin number/stock location, category & bin number/stock location.

Location - Choose which stock location you will enter the count for.

Use Scanner - If you are set up to take the inventory count with a barcode scanner, you need to activate it here by clicking on the red **X**. The scanner will now be active and you can enter your inventory count using the scanner.

Set count to 1 if scanned - When flagged, each time you scan an item the system will reset the count to one.

Get all SKU's - This flag is used by the 'Next SKU' feature. When this flag is turned off (system default) the 'Next SKU' function will retrieve the next SKU in the current stock location with a quantity on hand. However, if this flag is turned on, the 'Next SKU' function will retrieve the **next** SKU in the inventory area regardless of the quantity on hand.

SKU Number - Enter the SKU number, press F2 to choose from a list of items or press RETURN to automatically retrieve the next SKU on file.

Description, Bin # & Snapshot - These are filled in automatically by the system. Remember that the Snapshot represents the quantity on hand according to the system at the point you took the Inventory Snapshot.

Count - Enter the new count. **Do NOT** enter the net change but rather, enter the actual count that resulted from your manual inventory count. If the snapshot is correct you can press ENTER.

Because the counts will need to be entered by area and stock location, it would be a good idea to organize your count sheets into areas and stock locations before starting the entry process.

Enter Cost Changes

Costs assigned to SKUs in this screen will be applied for all subsequent valuations. Please note that the pricing method should be either Standard or Latest Cost for cost changes to be effective.
The screen here is similar to the Enter Inventory Counts and the same procedures apply. Enter the SKU number and the new cost for the item.

Valuation Report & Update

This will update the inventory with the new counts and cost (if applicable) that you have entered. If you would like to adjust your General Ledger accounts for any inventory adjustments created here, a separate manual journal entry is required.
Once you have run this update, the changes will be final and cannot be reversed.

Inventory Reports and Inquiries

The Property Inventory Reports provide the ability to print labels with UPC codes as well as twelve pre-designed standard reports.

The Property Inventory Inquiry into an item is provided to the level of detail you desire. For example, you have the ability to select the following:

- What items were sold by day?
- Whom was it sold to?
- What else did that member purchase?
- Trace when the item was purchased on down to the chit detail.

Print Labels

Area - Enter the inventory area or use the lookup function.

Put Price on Label - Some properties use bar-coded labels for pricing so they may not want the prices actually displayed on the label. This is especially sensitive if you are charging a different price for Retail and Member.
If you do activate this flag, you have to decide which prices will be printed on the label. Do you just want Retail, just Member, or both?

How Many Labels - You can choose to print an exact number of labels which you specify, print labels for exactly the quantity you have on hand according to inventory, or print quantity on hand up to a set number of labels.

Label Format - Choose which label format you will be using. There are several different sizes listed to choose from. If the size you want does not appear in the list, please contact Five Star Support. Five Star may be able to tell you which one most closely matches the one you want or you may need to get a custom label designed.
There are a few options that allow for UPC code labels. If you have originally been setup to print UPC labels, you cannot just choose this option and have it print UPC labels. UPC labels require special printers: it is best to check with Five Star Support to see if you are equipped to produce UPC labels.

Option - Choose whether you wish to print all the items in this area (ALL SKU's), selected items (SELECTED SKU's) or all items in a category (SELECTED CATEGORIES).

Code on Label - Do you want to show the SKU number on the label or the Point-of-Sale item number?

Other Reports

Inventory Transaction Log- - This report will show all transactions summarized on one line for each SKU. The report will be based on selected periods of; time, day, week, or month. You can also have this report print in detailed format showing each transaction per SKU.

Valuation Report - This report lists items with description, quantity on hand, cost price, and value on hand.

Receipts of Goods Report - This report is similar to the Valuation Report, but only displays goods received.

Stockouts/Re-Orders Report - The Stockout Report lists items with zero balance quantity on hand. The Re-Orders Report lists items that are below the minimum quantity amount setup on the SKU.

Commission Report - This report lists commissionable sales under each waiter/sales person to help compute their commission.

Supplier Analysis - This report provides a detailed analysis of suppliers with purchase details, sales details, profit margin details, stock turnover ratio, etc. based on annual or 'to-date' sales. The user has the option of reporting on selected or all inventory categories.

Daily Sales Report - This report shows daily sales by category with the option of details by item. The detail is listed by selected date, month-to-date, and year-to-date. The detail shown is total amount, units sold, and average sale price per unit.

Comparative Annual $$ Report - This reports summarizes all sales by item or category in dollars, or item by quantity for each month of the last twelve months, and the % of sales each category or item.

Fast/Slow Sellers - This reports your best and worst items by units sold, dollar value, gross margin, and date range.

Detailed Sales Report - This report shows sales details by item or category for current and last week, current and last month, current and last quarter, and current and last year. Details include quantity, selling price, cost, gross profit, markdowns, and net profit.

Detailed Margin Analysis Report - This report shows a detailed analysis, by item, of sales, cost and profitability. It also computes the averages for these headings.

Reports, Credit Book Report - This report will print credit book transactions based on a date range and selected credit book. Date, Member, Reference #, Description, Amount, and subtotal for day is reported.

Member Purchases Report - This report shows details of all member purchases with items and values. Reports can be produced to give all SKUs purchased by a particular member. In addition, reports can also be produced to show all members who purchased a particular SKU.

SKU Look Up

This lookup allows you to view the details for a specific inventory item. You **cannot** edit any information in this screen; it is used strictly for lookup purposes.

Purchase History

This will show you a listing of property purchases of this item for inventory. You can sort by any of the headings by simply clicking on the heading.

Markdown - Will display any markdowns that were set for this item.

Sales History

View a breakdown by day of quantity and value of sales for thirty days. You can also view individual sales of the item. The sales by member information can be sorted by any of the headings by simply clicking on the heading.

Clicking on an individual sale will bring up more details for that sale. From here you can view the original ticket, provided your system has been set to archive tickets, and other items purchased by this member.

Supp Pricing - Will show you the cost pricing from your suppliers for this item.

Supp (Qty on Hand) - Clicking here will display the same information as Purchase History.

Loc'n - This will display the quantity on hand by stock location.

Purchase Orders

The P.O. System module provides the control for your important buying and receiving functions. As well, with the interface to Accounts Payable, it eliminates manual matching for payment authorization.

This system provides the ability to process inventory or non-inventory items and comes with a standard Five Star Report Generator.

Setting Up the Purchase Order System

P.O. System Profile

A/P S/L - Enter the Accounts Payable sub-ledger to use for processing purchase orders.

Tax Exemption Number - Enter the tax exemption number for your property, if applicable.

Message to Put on PO 1, 2 & 3 - Enter a message: that you want to automatically appear on all purchase orders printed by the system.

G/L Accrued Expense Acct / CHANGE - Enter the accrual expense General Ledger account that you wish to post to for purchase orders.

Name of 'Print PO' Program - This field should be set to GJYM20A. If you wish, Five Star can develop a 'custom' purchase order based on your specifications. Please contact Five Star Support for more information.

Default: Std. Terms - Indicate the standard terms for purchase orders. This will be printed on all purchase orders.

Ordered By - Enter the name of the authorized purchaser for the property. This will appear on the purchase orders when printed.

Reprint Edited PO - If flagged, whenever you edit a purchase order the system will re-print it.

Print PO's - If you want the system to always print purchase orders when processing, click this box. Normally this feature should be activated.

Date Req'd by Line - If activated, you will have to fill in date required for purchase orders when entering them.

Tax Usually Exempt - Flag this if most of your purchase orders will be tax exempt.

Most P.O.'s Are From: Property & Area - If you know that you mainly produce purchase orders for one inventory area, enter the company and area here. Otherwise, you may leave the area field blank.

Address - Enter the property address information here that will appear on the purchase order.

Standard Clauses & Phrases

This program lets you create a list of short form codes that can instantly call up a lengthy phrase that is often repeated on P.O.'s.

P.O. Ship-to-Addresses

This allows you to set up numerous Ship-to addresses. This is useful when you have items on your purchase orders being shipped to various locations.

Using the Purchase Order Program

Setup/Edit Purchase Orders

A/P S/L - Enter the appropriate Accounts Payable sub-ledger.

P.O. No. - Enter the purchase order number, or just press ENTER. The next available purchase order number will be assigned.

Supplier - Enter the supplier code or use the lookup function.

P.O. Date - Enter the date the purchase order is being issued/created.

Date Required - Enter the date by which you need the items delivered.

Ship-To Address - You only need to enter this if the ship-to address is NOT the same as your property address.

Terms - This will be filled in based on your set up in the P.O. System Profile. If you wish, you can change the terms at this point for this particular purchase order.

Ordered By - The field will be filled in automatically, but you can change it here.

Sale Tax Exempt - Choose whether this purchase order is tax exempt or taxable.

State - If you choose taxable from the previous field, you will need to enter the state code.

Tax 2 Applicable - Click if there is a second tax set up to be charged.

Print P.O. - Click if you want the system to automatically print the purchase order when you finish creating it.

This P.O. is For - Enter the company and inventory area for this purchase order.

Details Screen

Here you will set up the items you are ordering from inventory on this purchase order. There are three types of items that you can set up here.

C – Comment
Enter a comment line. This is used for text messages that you want included in the purchase order.

Item Number - This dictates where the comment or item will appear on the purchase order. For instance, an item or comment with an item number of 20 will appear before any item/comment with a higher item number.

Comment - Enter the comment text or use the lookup button ('magnifying glass') to choose from the Standard Clauses & Phrases.

I – Inventory Item
Enter the item number from inventory that you want to order.

Item Number - This dictates where the comment or item will appear on the purchase order. For instance, an item or comment with an item number of 20 will appear before any item/comment with a higher item number.

Quantity - Enter the quantity that you are ordering.

Part Number - Enter the item number from inventory or use the lookup to choose from a list.

Unit Price - The unit cost price will be filled in based on the inventory item set up. You can override the cost price here.

Measure - Enter the unit of measure for the item or leave it blank.

Taxes - Click on Sales Tax to activate tax (green checkmark), click again to deactivate (red sign).

L – Line Item

This is used to enter items that are not part of your inventory. This will **NOT** set up a new item in inventory. It is used to set up an item you wish to order, but you do not necessarily want to include with your regular inventory.

Item Number - This dictates where the comment or item will appear on the purchase order. For instance, an item or comment with an item number of 20 will appear before any item/comment with a higher item number.

Quantity - Enter the quantity you wish to order.

Description - Enter the description for the item. Use the lookup button ('magnifying glass') to pull from Standard Clauses & Phrases.

Unit Price - Enter the price for the item you are ordering.

Measure - Enter the unit of measure.

Taxes - Click on taxes to activate the tax fields (green checkmark), again to deactivate taxes (red mark).

Date Req'd - Enter the date you want this item delivered by.

Revision - Use this option to make changes to a purchase order that has already been set up.

When done click on OK, then DONE. Click on OK to finish the purchase order. You will be prompted with the purchase order number and asked if you wish to print the purchase order.

Print Purchase Orders

You can choose to print: all unprinted P.O.'s, selected P.O.'s or all unprinted P.O.'s.

Receive Parts against P.O.

Subledger - Enter the Accounts Payable sub-ledger.

P.O. # - Choose the purchase order from the lookup. The system will automatically bring up all the inventory and line items for the purchase order. You will not see the comment lines.

You can change the stock location (Loc'n), date received (Date Rec'd) and the quantity received (Qty Rec'd) for each item.

Click OK to exit and print the audit trail.

Declare P.O.'s as Complete

Sub-Ledger - Enter the Accounts Payable sub-ledger.

P.O. Number - Enter the purchase order number or press F2 to view from a list. Enter the completion date.

Click OK to finish.

Delete Completed P.O.'s

Sub-Ledger - Enter the Accounts Payable sub-ledger.

Option – You can delete specific purchase orders or all completed purchase orders.

As of Date - Enter the date of the completed purchase orders that you wish to delete.

Select P.O. - If you have chosen to delete specific purchase orders, this is where you choose the purchase orders that you wish to delete.
Click OK to continue.

Inquiries

Sub-Ledger - Enter the Accounts Payable sub-ledger.

Type - You may choose to do a standard P.O. Inquiry or SKU inquiry.

P.O. # - Enter the specific purchase order number or press ENTER to choose all purchase orders.

Supplier - Enter the supplier code or press ENTER to choose all suppliers.