



**talech**

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Software Guide  
*for Restaurants*

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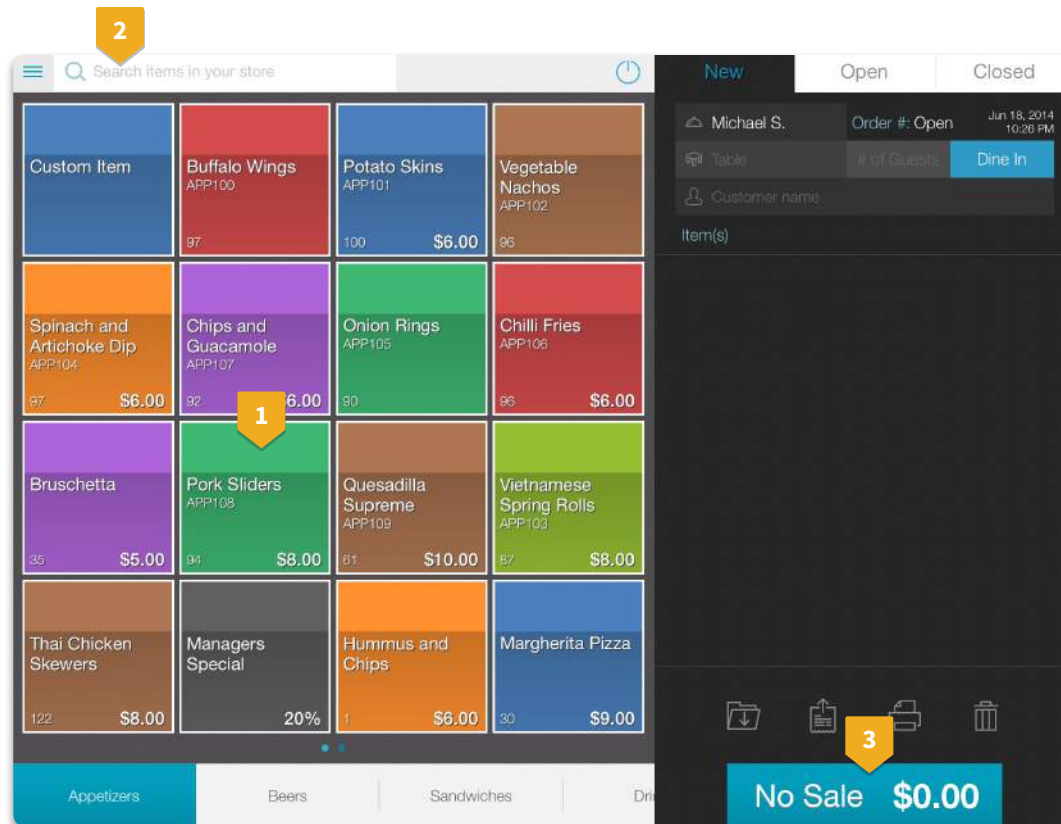
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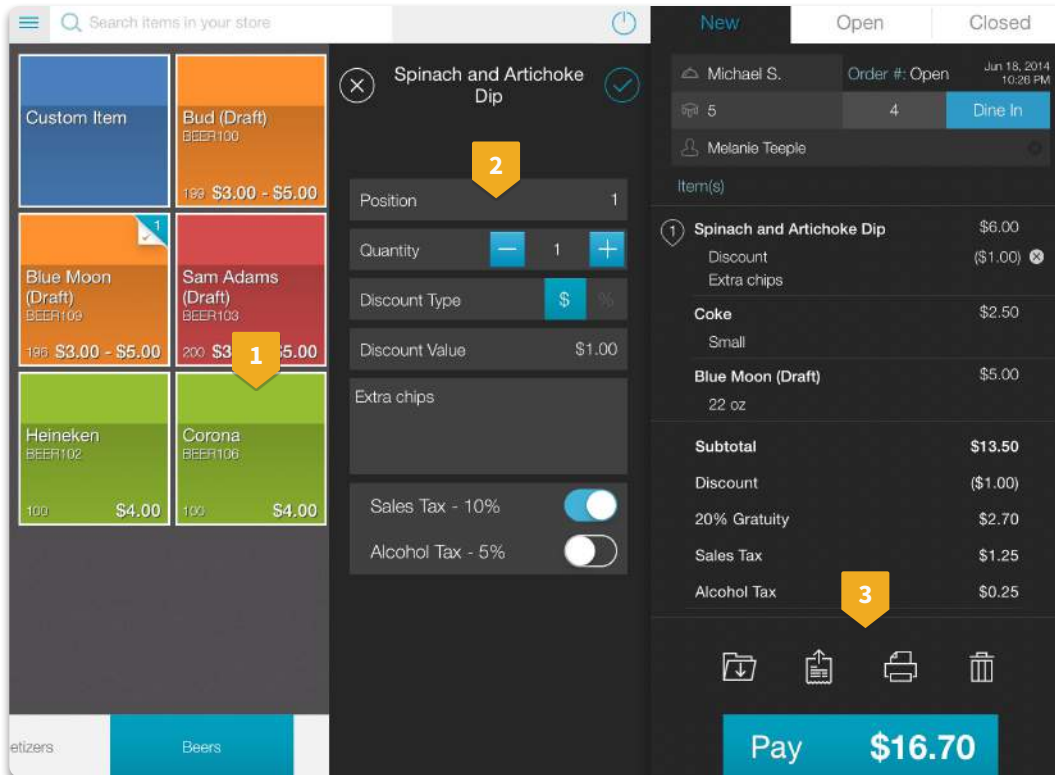
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# REGISTER: THE REGISTER SCREEN OVERVIEW



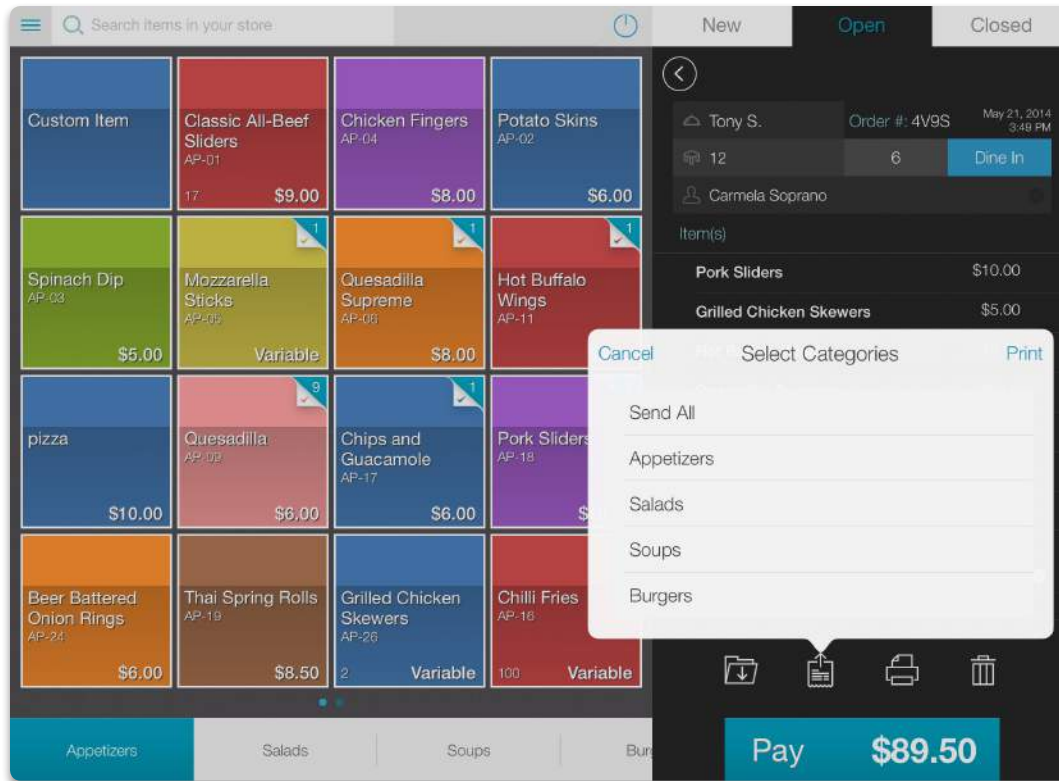
- 1 The item card contains the following information:
  - Item name
  - Item #
  - Quantity left in inventory
  - Price
- 2 Search for an item by item name, item # or barcode #
- 3 Tap on the “No Sale” button to open the cash drawer.

# REGISTER: CREATING AND MANAGING NEW ORDERS



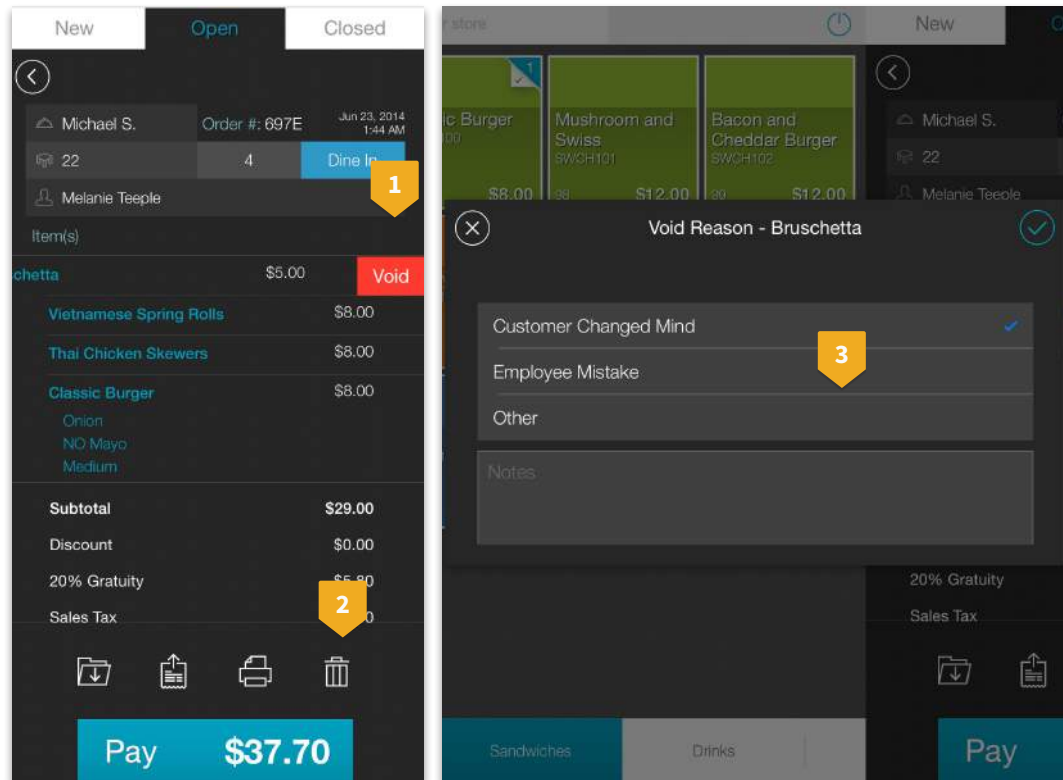
- 1 Tap on an item to create an order
- 2 Edit item options by tapping on the item in the order screen. You can edit the following options:
  - Table Position
  - Item Quantity
  - Discount
  - Adds-ons and Exclusions
  - Taxes
  - Item Notes
- 3 Use the row of order options to to:
  - Save an order
  - Send order tickets to the kitchen
  - Print receipts
  - Delete the order

## REGISTER: SENDING ORDER TICKETS



If you want to control the timing of sending order tickets, turn on the following setting: “Send Order Tickets By Category” located under Settings > Printers > Advanced

## REGISTER: ISSUING VOIDS



Once an item has been sent to the kitchen, you cannot delete the item. It can only be voided.

- 1 To issue a void, swipe an item to the left.
- 2 To void all items in the order, tap on the delete order button.
- 3 You will be prompted to select a void reason and add an optional note. All voids require admin approval.

# REGISTER: FINDING OPEN & CLOSED ORDERS

1

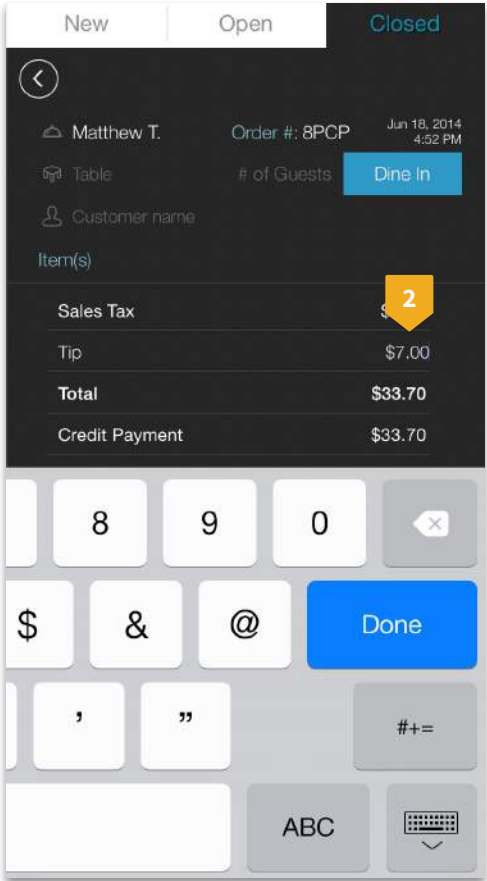
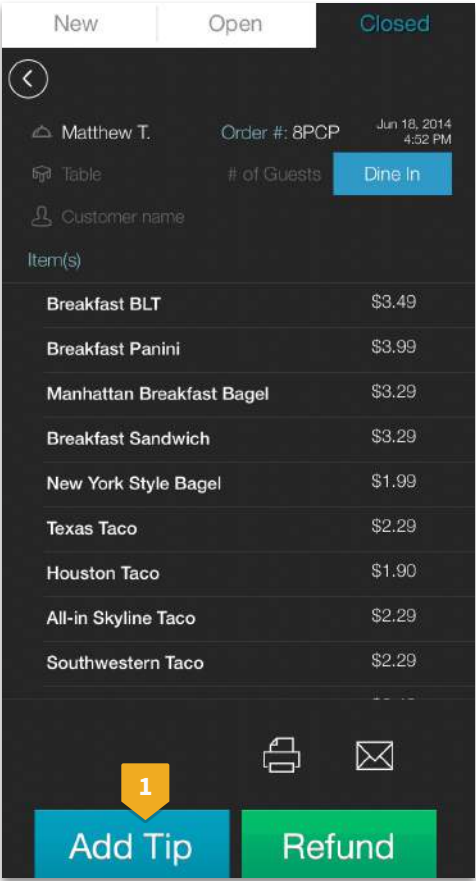
New	Open	Closed
<div>receipt   customer   server   table</div> <div>My</div>		
May 21, 2014		
11:41 PM Matthew T.		\$4.80 OIE7 >
5:03 AM Matthew T.		\$6.30 EI6O >
4:46 AM Matthew T.		\$118.15 5CSB >
4:33 AM Matthew T.		\$2.78 A9B8 >
April 2, 2014		
8:02 AM Matthew T.		\$17.03 VPNV >
February 18, 2014		
4:24 PM Matthew T.		\$13.43 BZHC >
January 30, 2014		
3:02 PM Matthew T.		\$12.78 9RMZ >

2

New	Open	Closed
<div>receipt   customer   cashier   cc la...</div> <div>My</div>		
June 18, 2014		
4:01 PM Matthew T.		\$10.67 FDPT > 3
June 18, 2014		
6:31 AM Matthew T.		\$7.90 HA1V >
June 18, 2014		
3:02 PM Matthew T.		\$12.78 9RMZ >

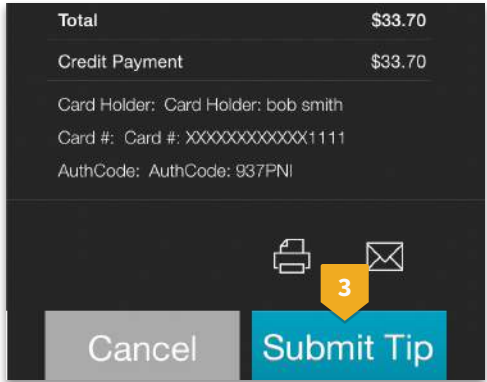
- 1
- Lookup all open orders by tapping on the “Open” tab. Use the tabs below to filter between your orders and all orders in the system. The order are sorted based on most recently updated first.
- 2
- Search for a closed order by the receipt #, employee name, customer name, last 4 digits of the credit card or authorization code.

REGISTER: ADJUSTING A TIP > SINGLE ORDER



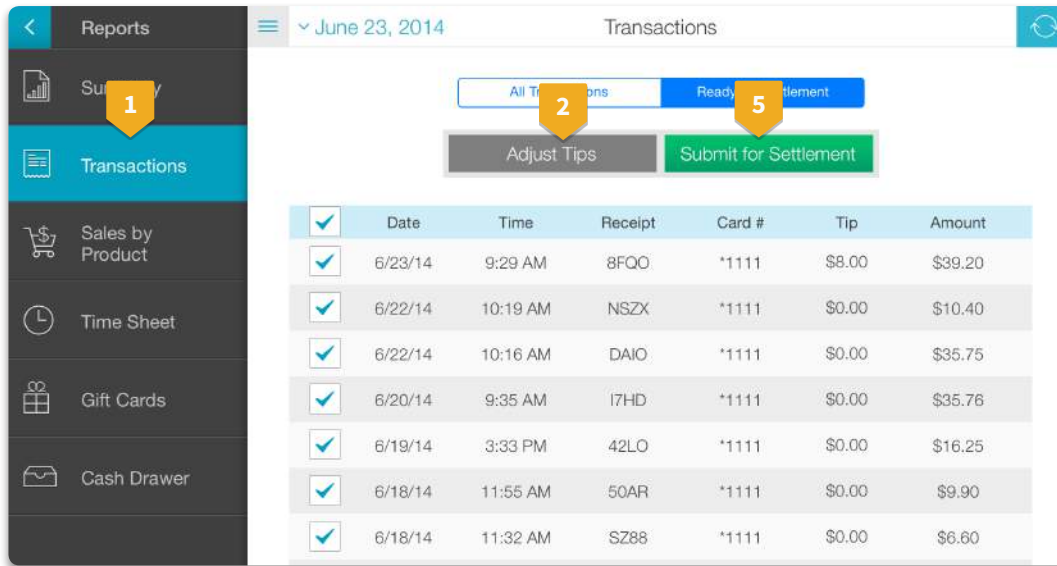
To adjust the tip for a single order, select it from the closed order list:

- 1 Tap on the “Add Tip” button
- 2 Enter the tip amount
- 3 Tap on “Submit Tip”

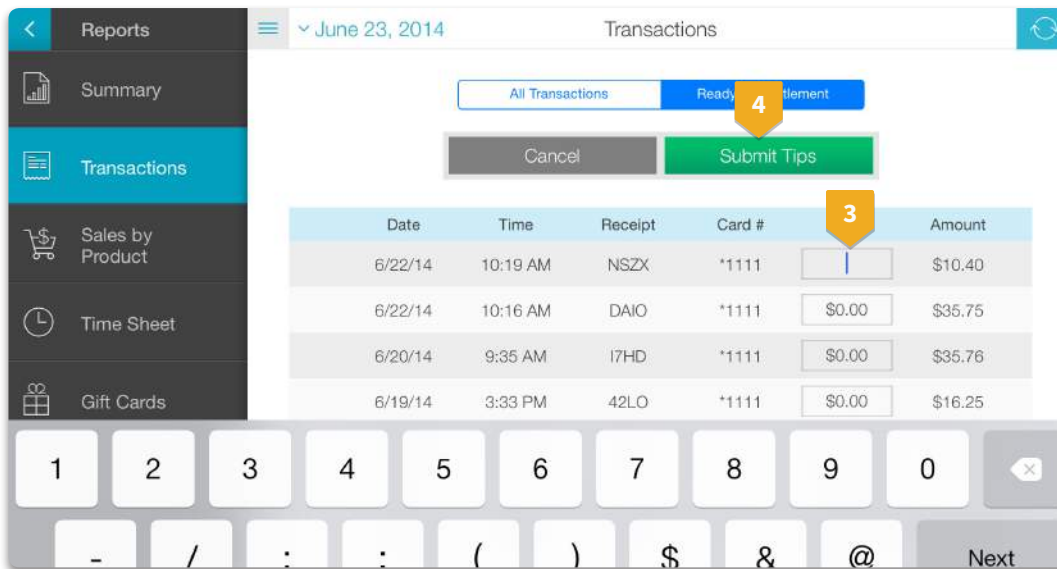




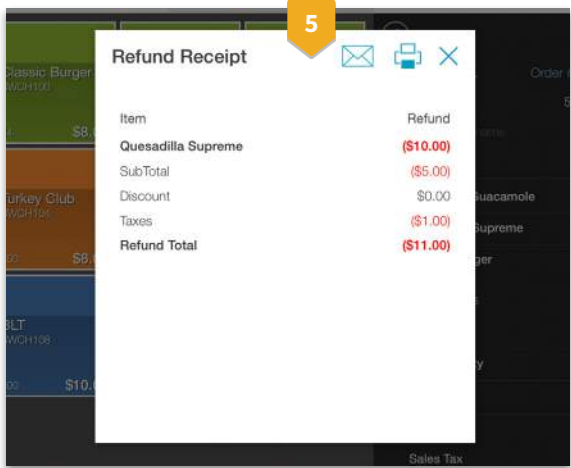
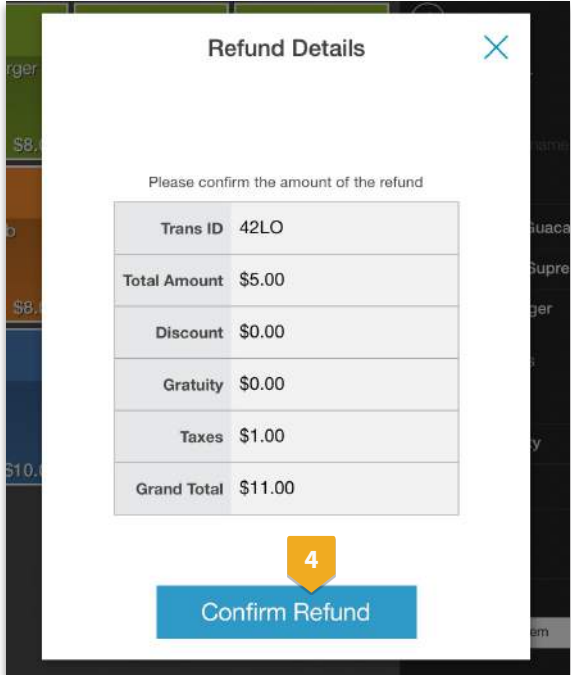
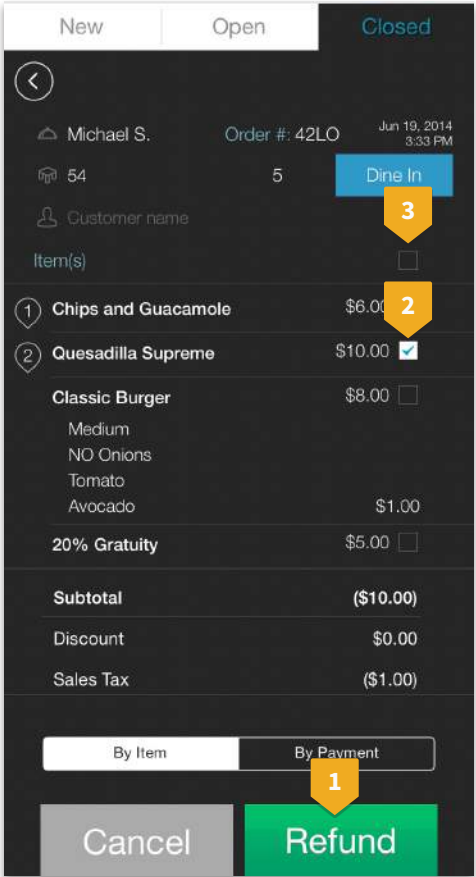
# REGISTER: ADJUSTING A TIP & SETTling TRANSACTIONS



- 1 To adjust tips for multiple orders, select “Transactions” in the Reports section and tap on the “Ready for Settlement” tab
- 2 Tap on the “Adjust Tip” button
- 3 Adjust the tip amounts for multiple orders
- 4 Once you are done, tap “Submit Tip” to bulk adjust the tips
- 5 To batch out at the end of the day, select the transactions you want to settle and tap on the “Submit for Settlement” button

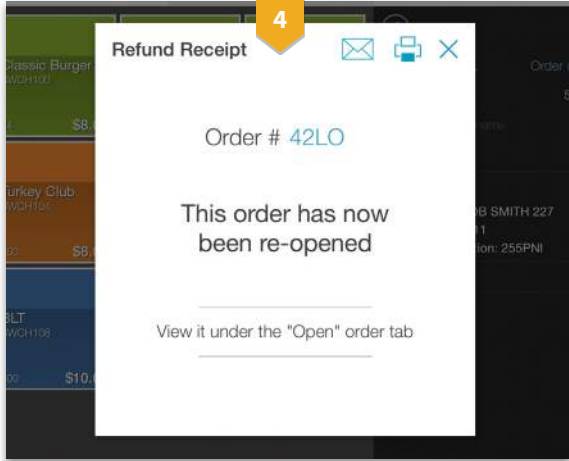
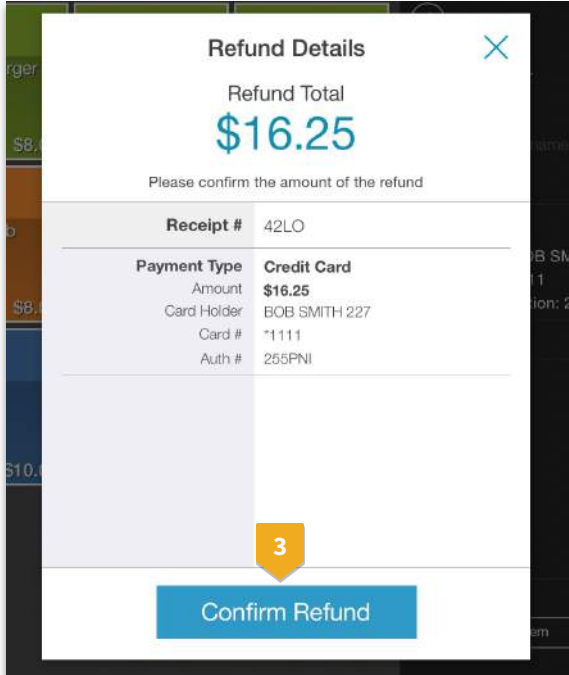
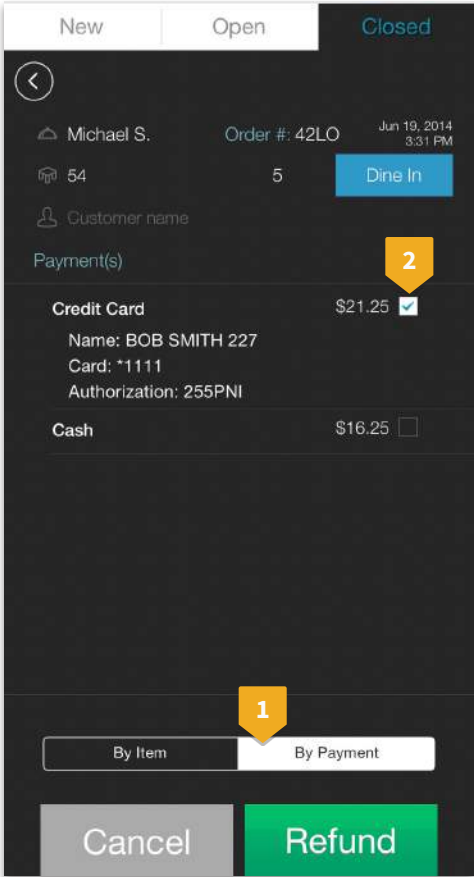


# REGISTER: ISSUING AN ITEM REFUND



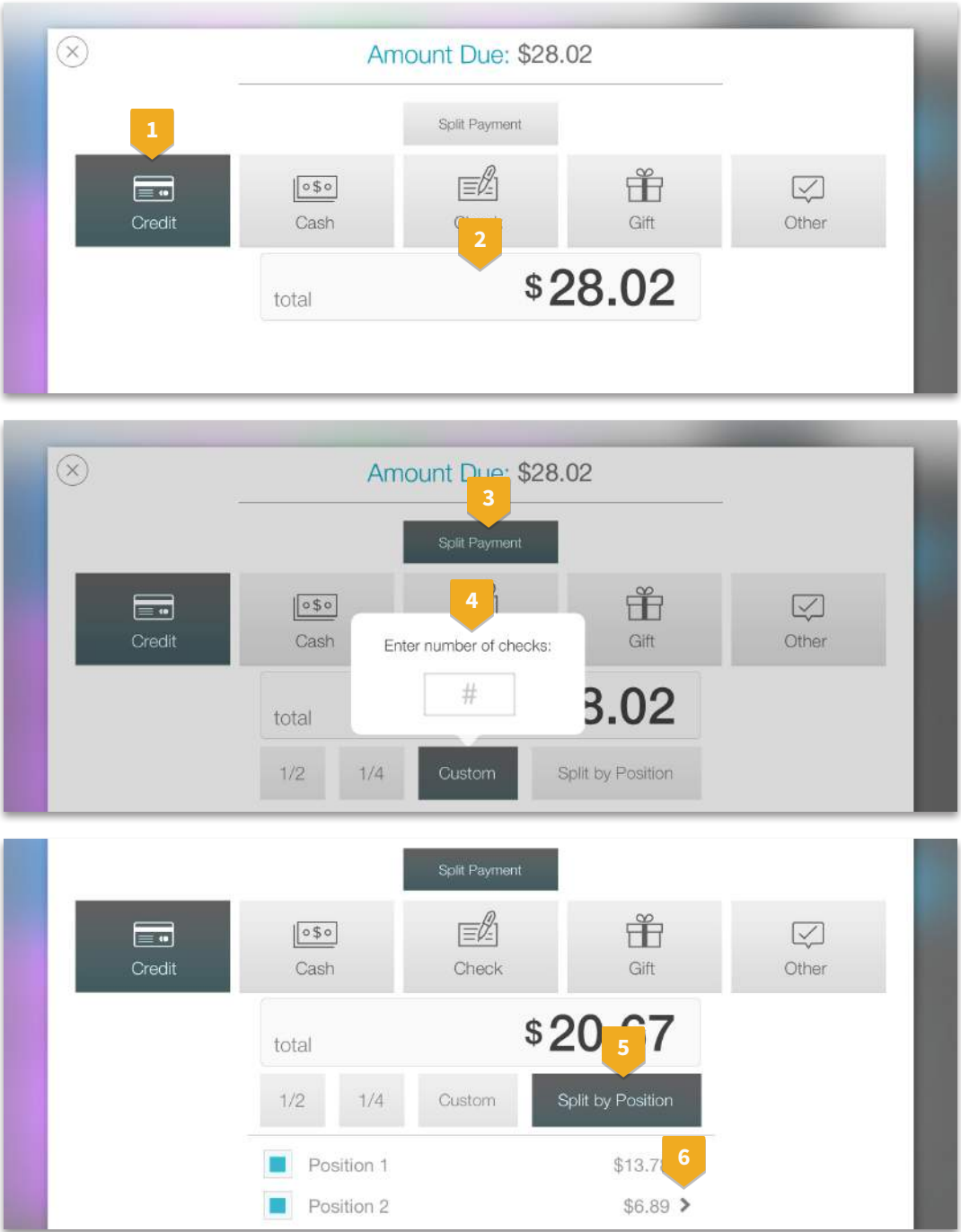
- 1 To issue a refund, tap on the “Refund” button
- 2 Select the items you want to refund
- 3 Tap “Select All” if you want to refund the entire order
- 4 Confirm the Refund amount
- 5 Print or e-mail the refund receipt

# REGISTER: ISSUING A PAYMENT REFUND (RE-OPENING AN ORDER)



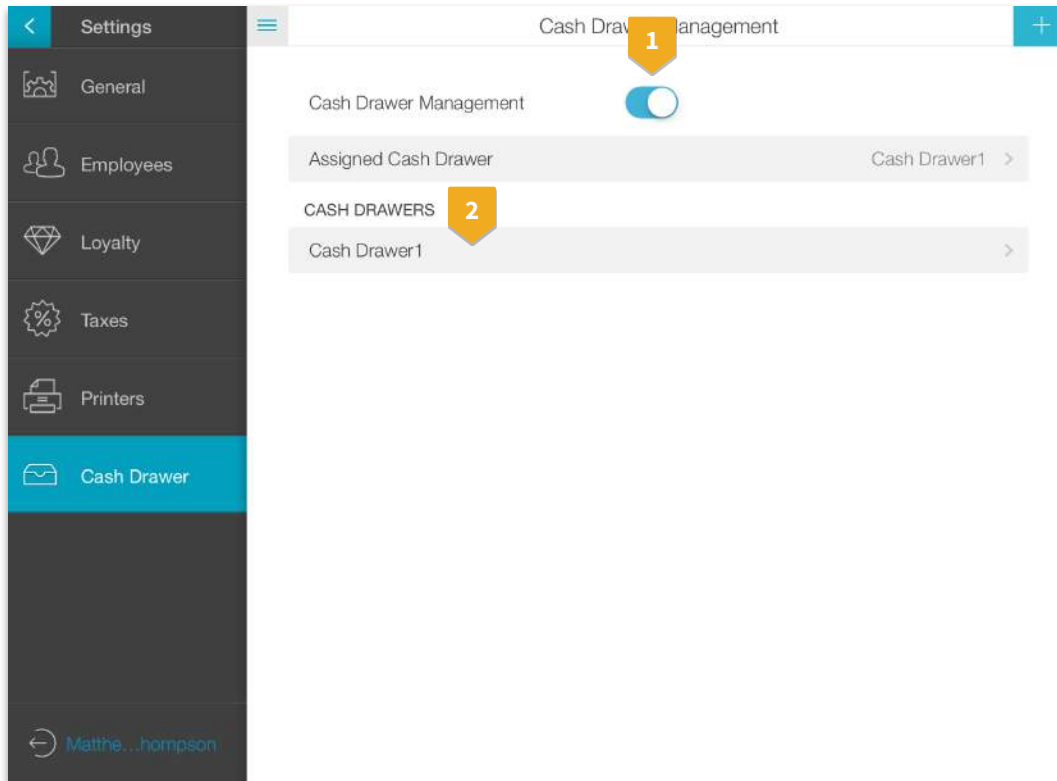
- 1 Select the "By Payment" tab
- 2 Select one or more payments
- 3 Confirm the Refund amount
- 4 Print or e-mail the refund receipt

# REGISTER: PAYMENTS



- 1 Select the payment type
- 2 If you want to enter a partial payment for an order, tap on the amount field to edit the value
- 3 Tap on the “Split Payment” tab to split the order by fraction or by position
- 4 The custom button allows you to specify a custom fraction (e.g. split 5 ways)
- 5 Tap on the “Split by Position” button and select one or more positions to pay out.
- 6 Tap on the right of each position row to view the item details for this position

# CASH DRAWER: SETTINGS

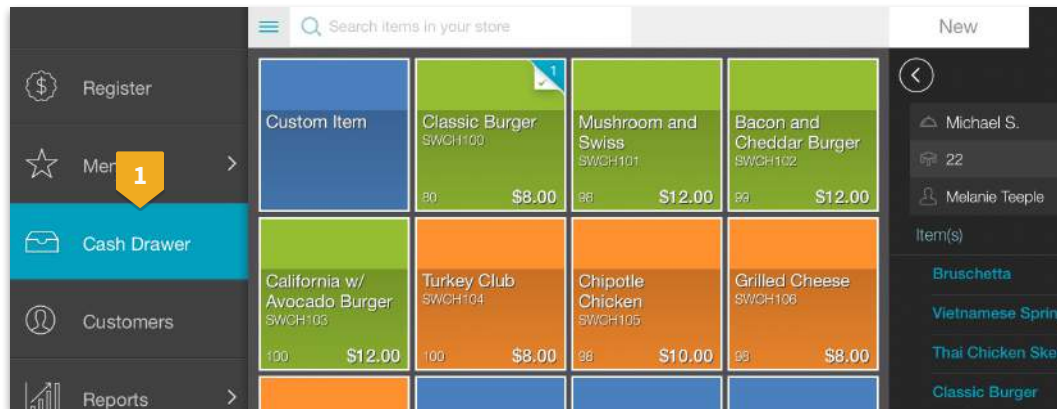


**1** To use the cash drawer feature, enable the feature in Settings

**2** Select the cash drawer you want to manage from this iPad

Multiple iPads can manage one cash drawer but an iPad can only manage a single cash drawer during a shift

# CASH DRAWER: ACTIONS

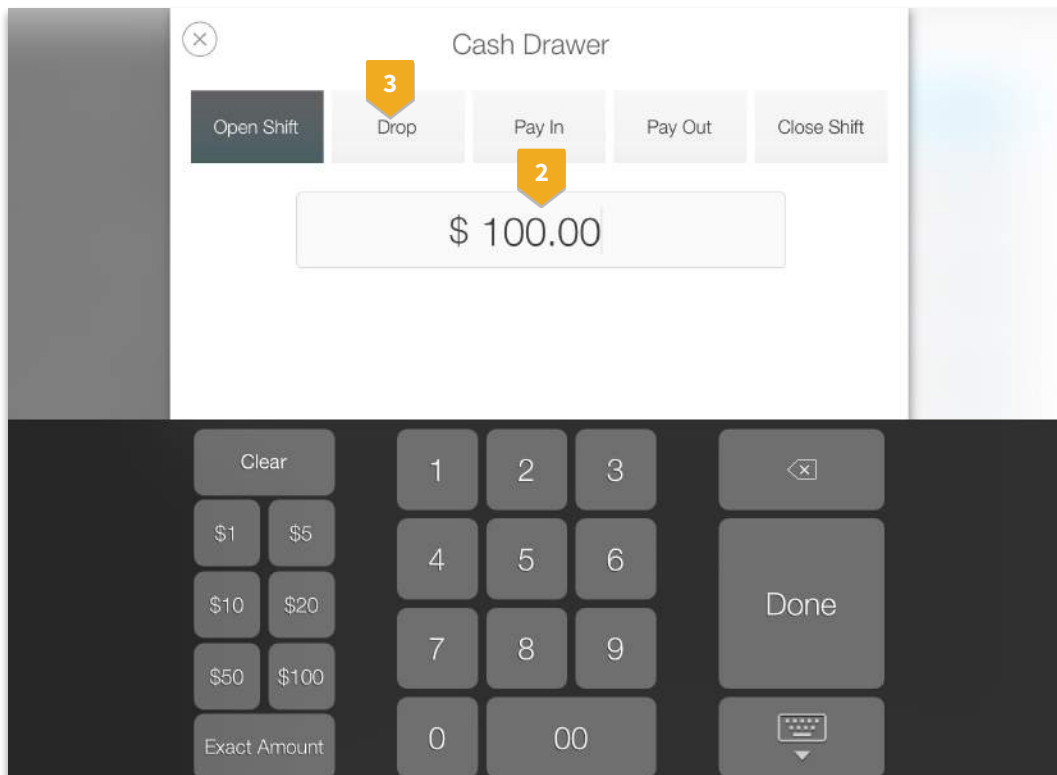


1 Select the Cash Drawer from the left navigation menu

2 Enter an opening shift amount

3 Use the drop, pay in and pay out buttons to track cash in and out of your cash drawer. At the end of each shift, count the cash in the drawer and enter the closing shift amount

If you have the cash drawer feature enabled, you cannot run any cash sales until you have entered an opening shift amount



# CASH DRAWER: REPORTS

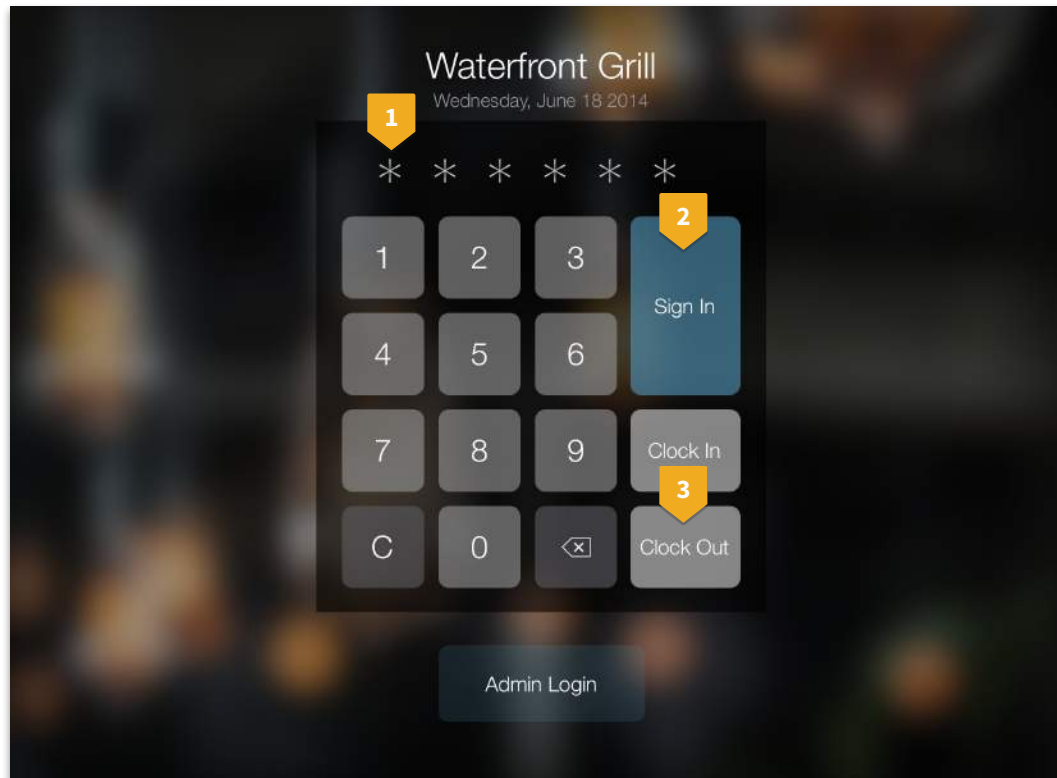
The screenshot shows the 'Cash Drawer' report for 'March 09, 2014'. A left sidebar contains navigation options: Reports, Summary, Transactions, Sales by Product, Time Sheet, Gift Cards, and Cash Drawer (highlighted). The main area displays a table with transaction details. Three orange callout boxes are present: Box 1 points to the 'Shift #1' dropdown; Box 2 points to the 'Opening Cash Amount' row; Box 3 points to the 'Net Cash in Drawer' row.

Type	# of Transactions	Amount
Opening Cash Amount		\$100.00
No Sales	5	\$0.00 >
Sales	5	\$90.60 >
Refunds	1	(\$8.80) >
Drops	1	(\$20.00) >
Pay Ins	1	\$50.00 >
Pay Outs	2	(\$55.25) >
Closing Cash Amount		\$156.65
Net Cash in Drawer		\$156.65
Difference		\$0.00

Additional information at the top right of the report area:  
Opened by: Tony Henderson | 4:25 pm  
Closed by: Brittany Smith | 10:28 pm

- 1 Select the shift for the cash drawer report
- 2 Tap on an individual row to view details for each transaction of that type
- 3 “Difference” is the Net Cash in Drawer (actual) – Closing Cash Amount (calculated)

# TIMESHEETS: CLOCKING IN & CLOCKING OUT



- 1 Enter your PIN and clock-in to start tracking hours
- 2 During the shift, you can sign out and sign in multiple times
- 3 At the end of your shift, logout of the Register to go back to the login screen and clock out to end your shift

Employees of Type “Other” remain on the login screen after clocking in since they don’t have access to the talech Register



# TIMESHEETS: REPORTS

1

Reports

June 23, 2014

Time Sheet

Summary

Transactions

Sales by Product

Time Sheet

Gift Cards

Cash Drawer

JOHN LEE

Clock-In	Clock-Out	Time	Tips	Total Sales
	Total	0 hrs 0 min	\$0.00	\$0.00
Add Shift				

PAUL TROUT

Clock-In	Clock-Out	Time	Tips	Total Sales
	Total	0 hrs 0 min	\$0.00	\$0.00
Add Shift				

ASHLEY TAGGART

The time sheet report lists the hours worked for each employee in your business along with tips and sales during the shift. This report is also available on [talech.com](http://talech.com)

- 1

The time sheet report is based on calendar day (midnight to midnight) based on the employee's clock-in time
- 2

To add a shift, tap on the “Add Shift” button and a new row will appear
- 3

To edit hours, tap on the clock in or clock out field and use the time picker to adjust the hours worked
- 4

To delete a shift, swipe to the left and tap on the delete button.

Transactions

Sales by Product

Time Sheet

Gift Cards

Cash Drawer

Clock-In	Clock-Out	Time	Tips	Total Sales	
Now	Done	8:55pm	3 hrs 3 min	\$0.00	\$0.00
		2:44pm	3 hrs 55 min	\$0.00	\$0.00
		Total	6 hrs 58 min	\$0.00	\$0.00

3

1 51  
2 52  
3 53 AM  
4 54 PM  
5 55  
6 56  
7 57

Clock-Out	Time	Tips	Total Sales	
3:54pm	10:54pm	7 hrs 0 min	\$0.00	\$0.00
Total	7 hrs 0 min	\$0.00	\$0.00	

Summary

Receipts

Sales by Product

Time Sheet

ROBERT SMITH

Clock-In	Clock-Out	Time	Tips	Total Sales
am	4:58pm	7 hrs 6 min	\$0.00	\$0.00
	Total	7 hrs 6 min	\$0.00	\$0.00

4

Add Shift

Delete

# REPORTS

Reports	All Employees	Summary	June 23, 2014
Summary			
Transactions			
Sales by Product			
Time Sheet			
Gift Cards			
Cash Drawer			
Michael Smith			

TOTALS	
Receipts	2
Sub-total	\$35.00
Discounts	\$0.00
Loyalty	\$0.00
Refunds	\$0.00
<b>Net Revenue</b>	<b>\$35.00</b>
Tax	\$3.50
Tip	\$8.00
Gratuity	\$4.80
<b>Net Collected</b>	<b>\$51.30</b>
TAXES	
Taxable Revenue	\$35.00
Non-taxable Revenue	\$0.00
Sales Tax	\$3.50

Keep track of your business through the Reports section:

**Summary:** Get a daily summary of sales and receipts. Get breakdown of sales by payment type, product category and employee.

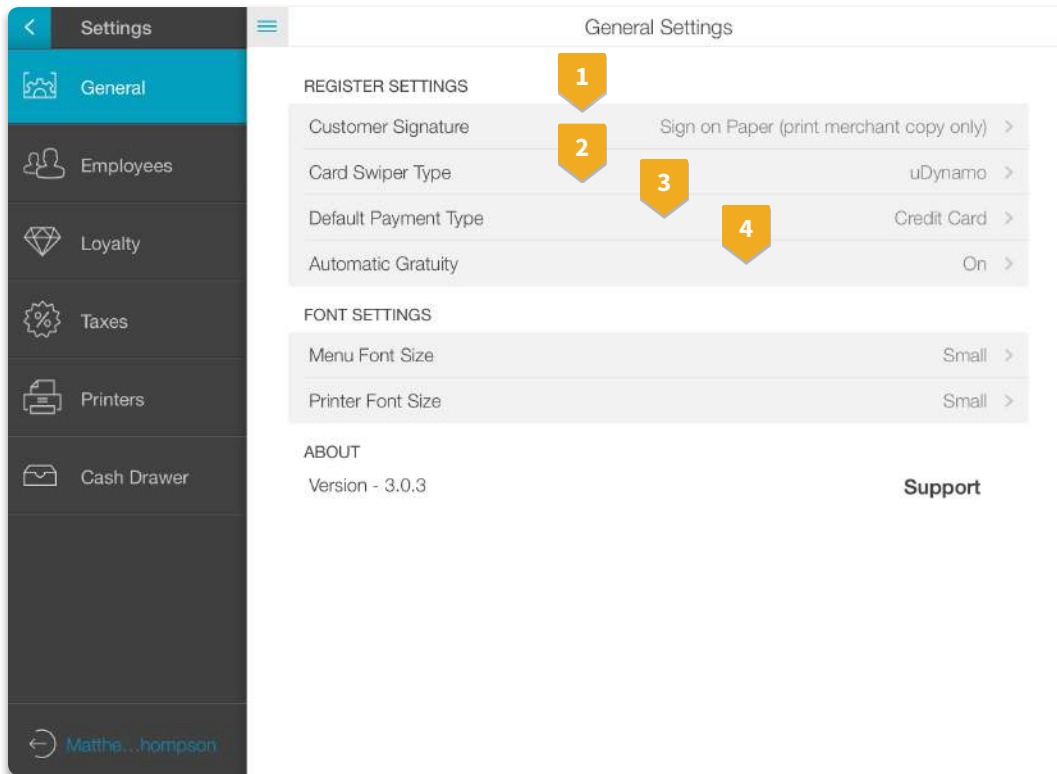
**Transactions:** View all closed receipts for a given day. Bulk settle and adjust tips.

**Sales by Product:** View all products sold for a given day along with total revenue and quantity sold.

**Time Sheet:** View hours worked per employee. Add and edit employee hours.

**Cash Drawer:** View all transactions in and out of your cash drawer per shift

# SETTINGS: OVERVIEW



**1** The customer signature setting controls how customers sign on receipts and apply tips. This is a per device setting:

Select “Sign on device” if you want customers to sign and apply tips on the device. You cannot adjust tips later with this option.

Select “Sign on paper” if you want customers to sign and apply tips on paper receipts

**2** The card swiper type is a per device setting

Select uDynamo if your card swiper connects to the headphone/audio jack on your iPad

Select iDynamo if your card swiper connects to the power interface on your iPad

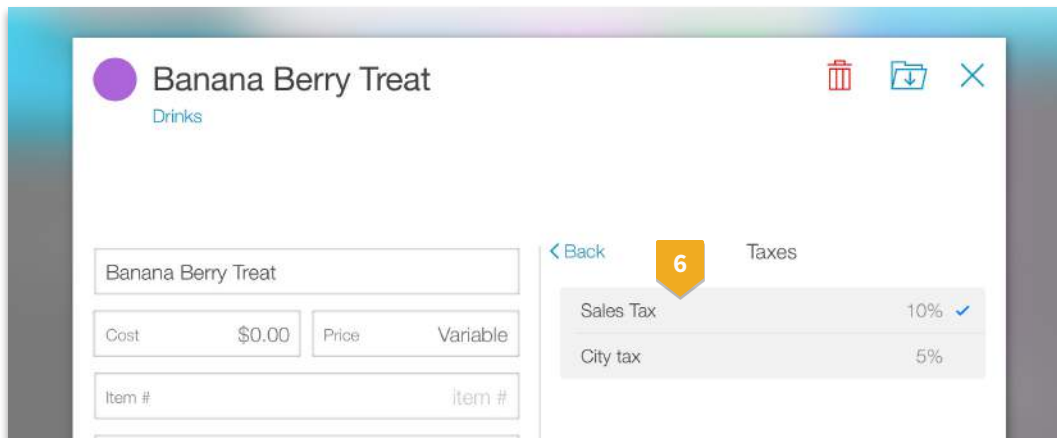
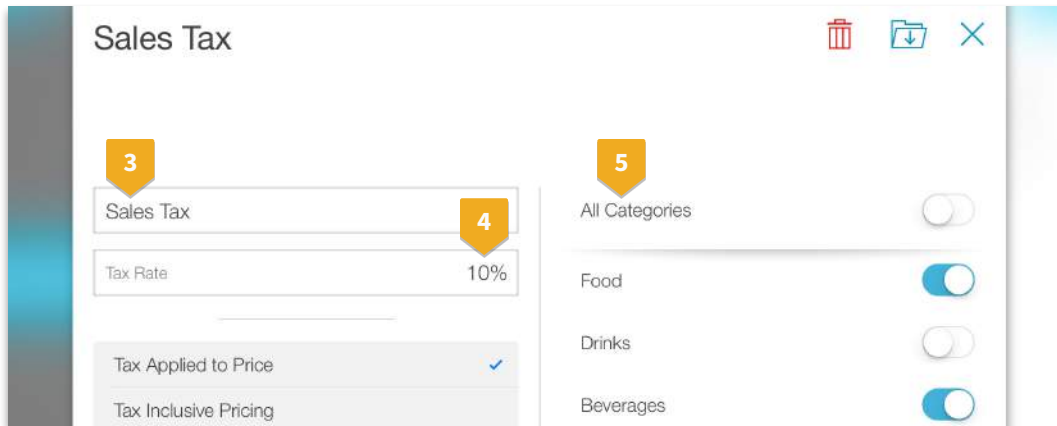
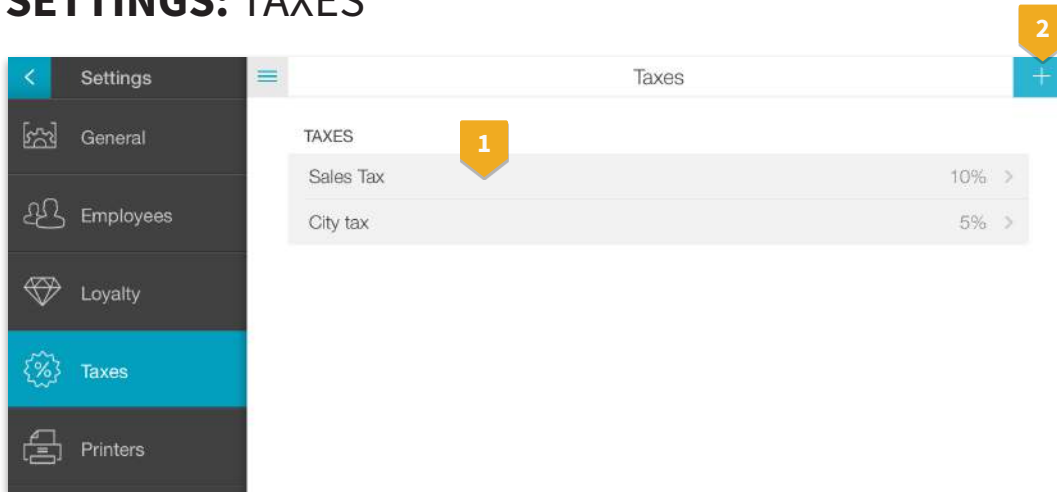
**3** The Default Payment Type is a per device setting

It controls the default payment tab selected when you tap on the Pay button in the Register

**4** Automatic Gratuity is a global setting

To apply an automatic gratuity for larger groups, specify the Gratuity percentage and the minimum number of guests to apply a gratuity

# SETTINGS: TAXES



1 Tap on an existing tax to review details and make changes

2 Tap the add button to create a new tax

3 Specify the tax name and tax rate

4 Select how taxes are added to item prices. Take the following example where your item price is \$10 and your tax rate is 10%.

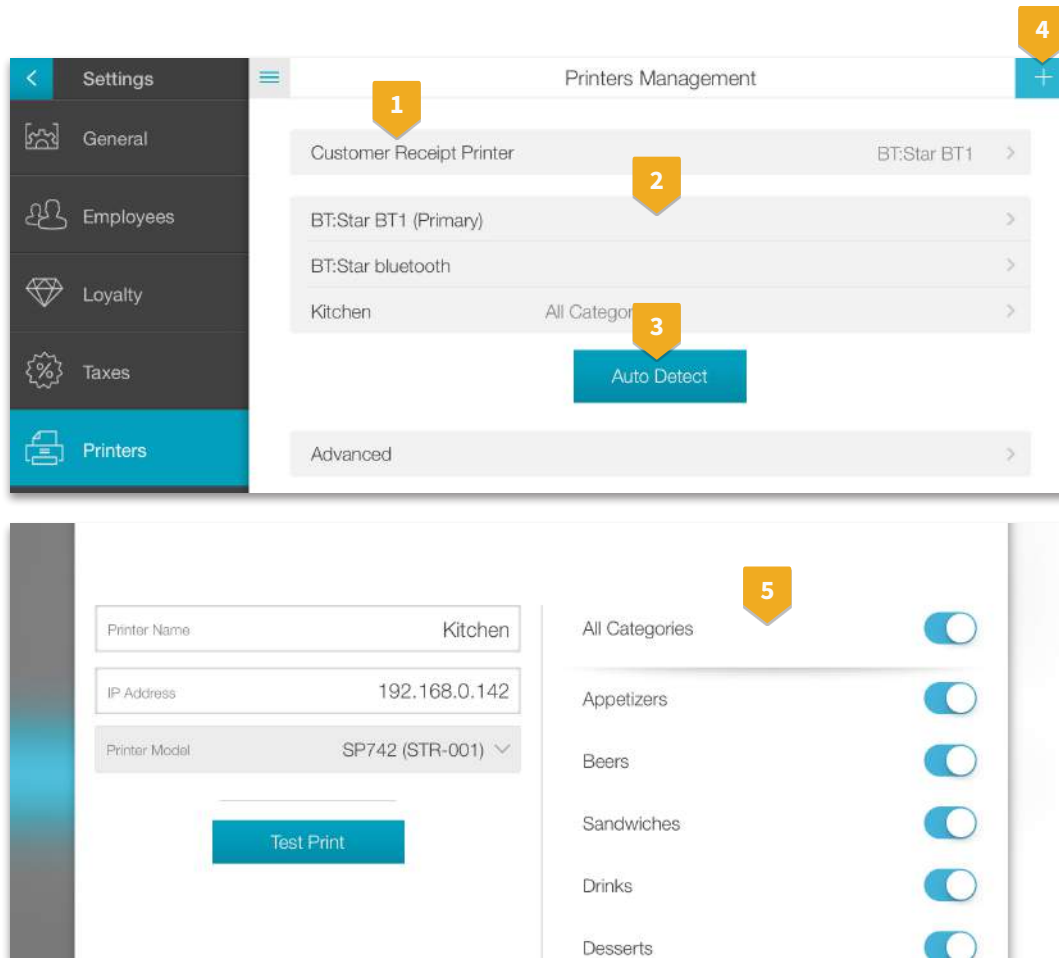
If you select “Tax applied to item price” then the total is: \$10 (item price) + \$1 (tax) = \$11

If you select “Tax included in item price), then the total is \$9.09 (adjusted item price) + \$0.91 (tax) = \$10.

5 You can control the tax setting per category (e.g. alcohol tax is only applied to the “Liquor” category)

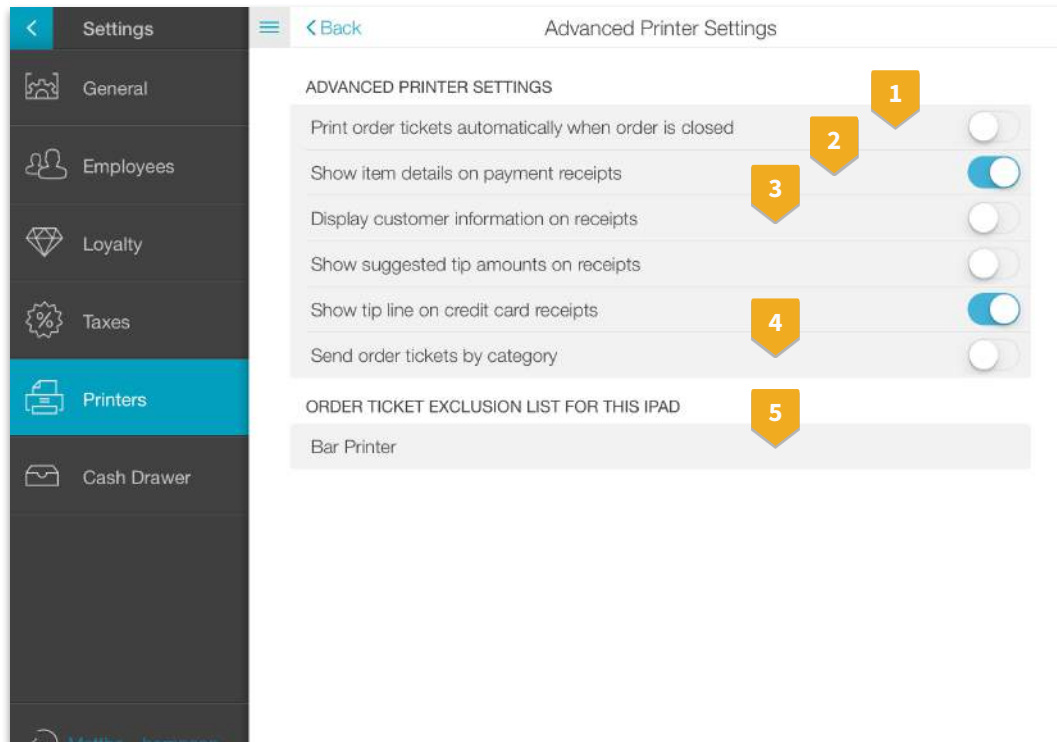
6 You can override the default category tax setting at the item level

## SETTINGS: PRINTERS



- 1 Tap on “Customer Receipt Printer” to select your receipt printer from the list of available printers
- 2 Tap on a printer in the list to view and edit printer settings
- 3 Tap on “Auto Detect” to find all the printers in your business
- 4 Tap on the add button to manually add a printer
- 5 Configure which categories are printed on order tickets for a particular printer (e.g. you can only send food orders to the kitchen printer and drink orders to the bar printer)

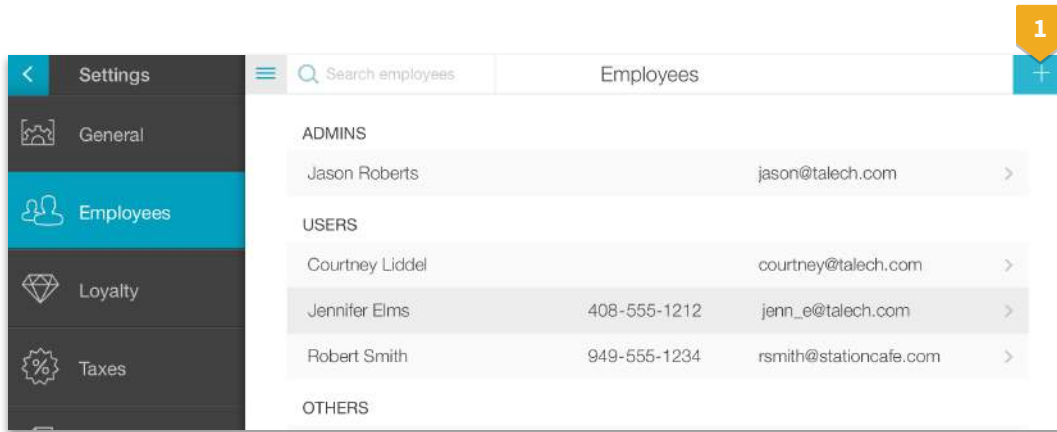
## SETTINGS: PRINTERS > ADVANCED SETTINGS



### Printer Advanced settings:

- 1 This allows you have order tickets automatically print when an order is closed. This is typically common in quickserve establishments.
- 2 Turn this OFF if you would like to have only the tip and total printed on credit card receipts
- 3 This prints the customer name, address and phone number at the bottom of the receipt. This is typically used by restaurants that have delivery service.
- 4 Turn on this setting if you want to control the timing of categories sent in order tickets.
- 5 The order ticket exclusion list setting overrides the order ticket category settings for a printer. For example, you may want drink tickets sent from all iPads in a restaurant to print to the bar printer. However, drink tickets from the bar iPad should not print to the bar printer.

# SETTINGS: EMPLOYEES



**Tap on an employee name to view and edit employee information**

**1** Tap on the add button to add a new employee

**2** Select the employee type:

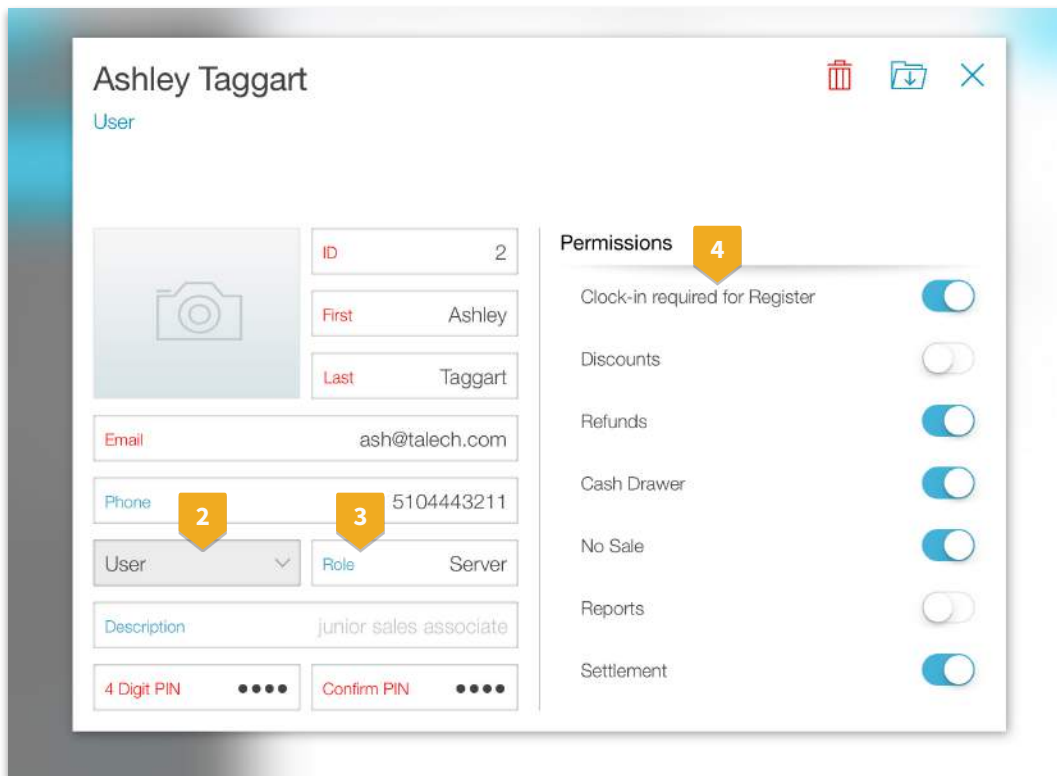
“Admin” has full access to the system including talech.com.

“User” can only take orders and apply discounts. You can control access through permissions

“Other” can only use the talech Register to clock-in and clock-out. You can assign this role to kitchen staff or other employees for logging hours worked.

**3** “Role” and “Description” are optional fields to describe the employee’s job functions.

**4** Set the clock-in flag to ON if you require that employees must clock-in before taking order and running sales



# MENU MANAGEMENT: ADDING ITEMS

Classic Burger

Sandwiches

1

Classic Burger

Cost

\$2.00

Price

\$8.00

Item #

SWCH100

Barcode #

2

barcode

Track Qty.

84

Category

Sandwiches

>

Color

Green

>

Taxes

>

Variations

>

Add-Ons & Exclusions

3

>

You can manage your menu through the talech Register app or through [talech.com](https://talech.com)

Go to “Menu” under “Settings” and tap on the “Add” button

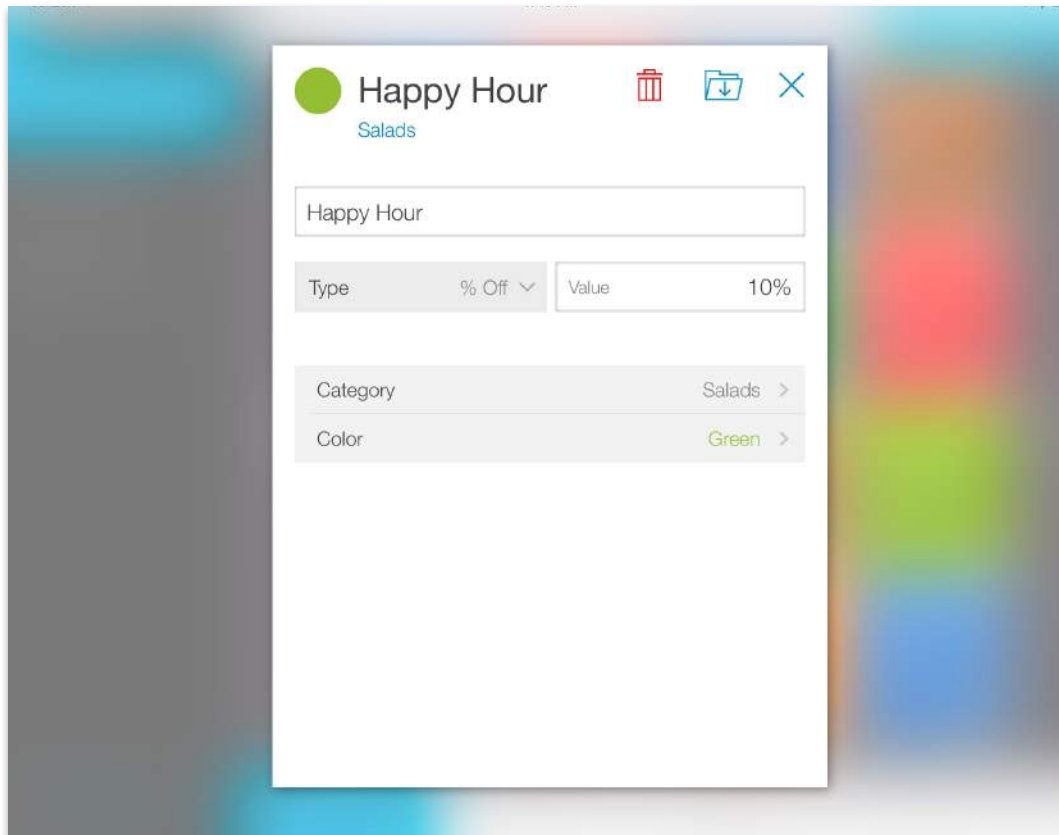
- 1

Add a Product: Specify a product name and price. You can optionally enter the cost, item # and barcode #.
- 2

If you want track inventory, enable “Track Quantity” and enter the quantity.



## MENU MANAGEMENT: ADDING DISCOUNTS

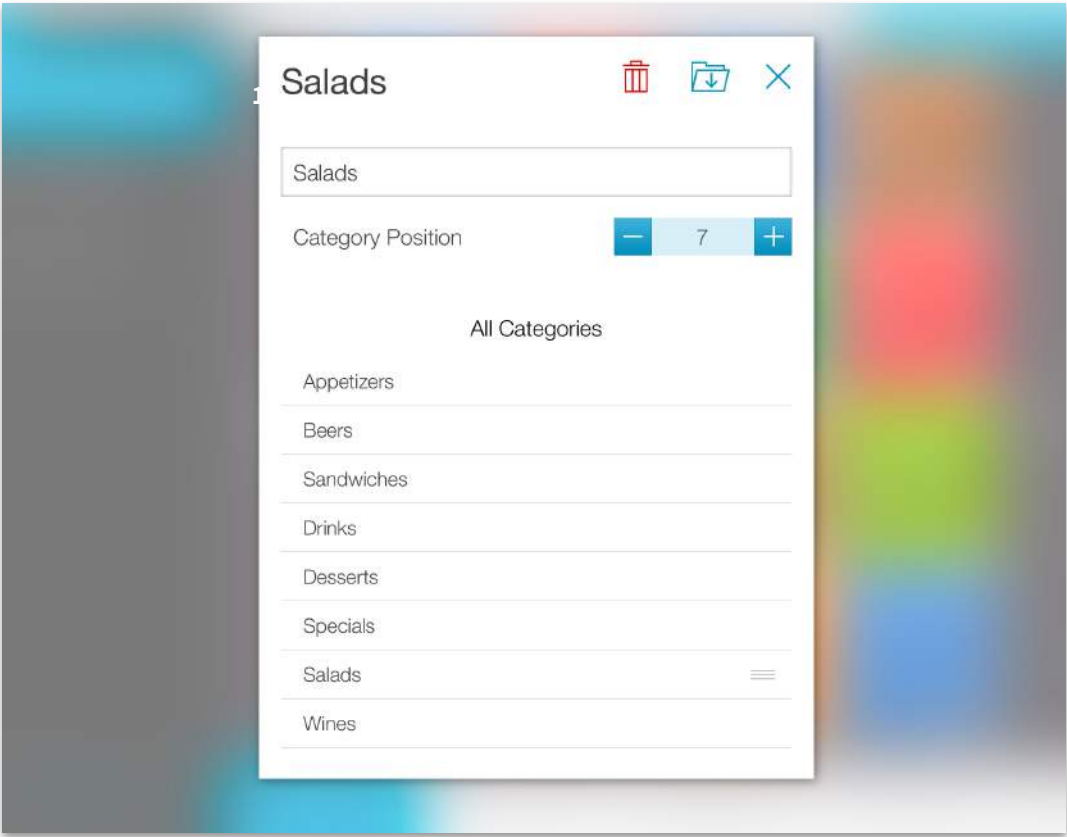


The screenshot shows a modal window for adding a discount. At the top left is a green circular icon. To its right is the text 'Happy Hour' in bold, with 'Salads' in a smaller blue font below it. Further right are three icons: a red trash can, a blue folder with a downward arrow, and a blue 'X' for closing. Below this header is a text input field containing 'Happy Hour'. Underneath the input field are two columns of settings. The first column has a 'Type' label and a '% Off' dropdown menu. The second column has a 'Value' label and a text input field containing '10%'. Below these are two more rows. The first row has a 'Category' label and a 'Salads' dropdown menu with a right arrow. The second row has a 'Color' label and a 'Green' dropdown menu with a right arrow.

### Add an Order Discount:

Specify a discount name, discount type and value. An order discount is applied towards the entire order. The Category setting only control which category is this discount located it. Global discounts are applicable to all products within the order regardless or category.

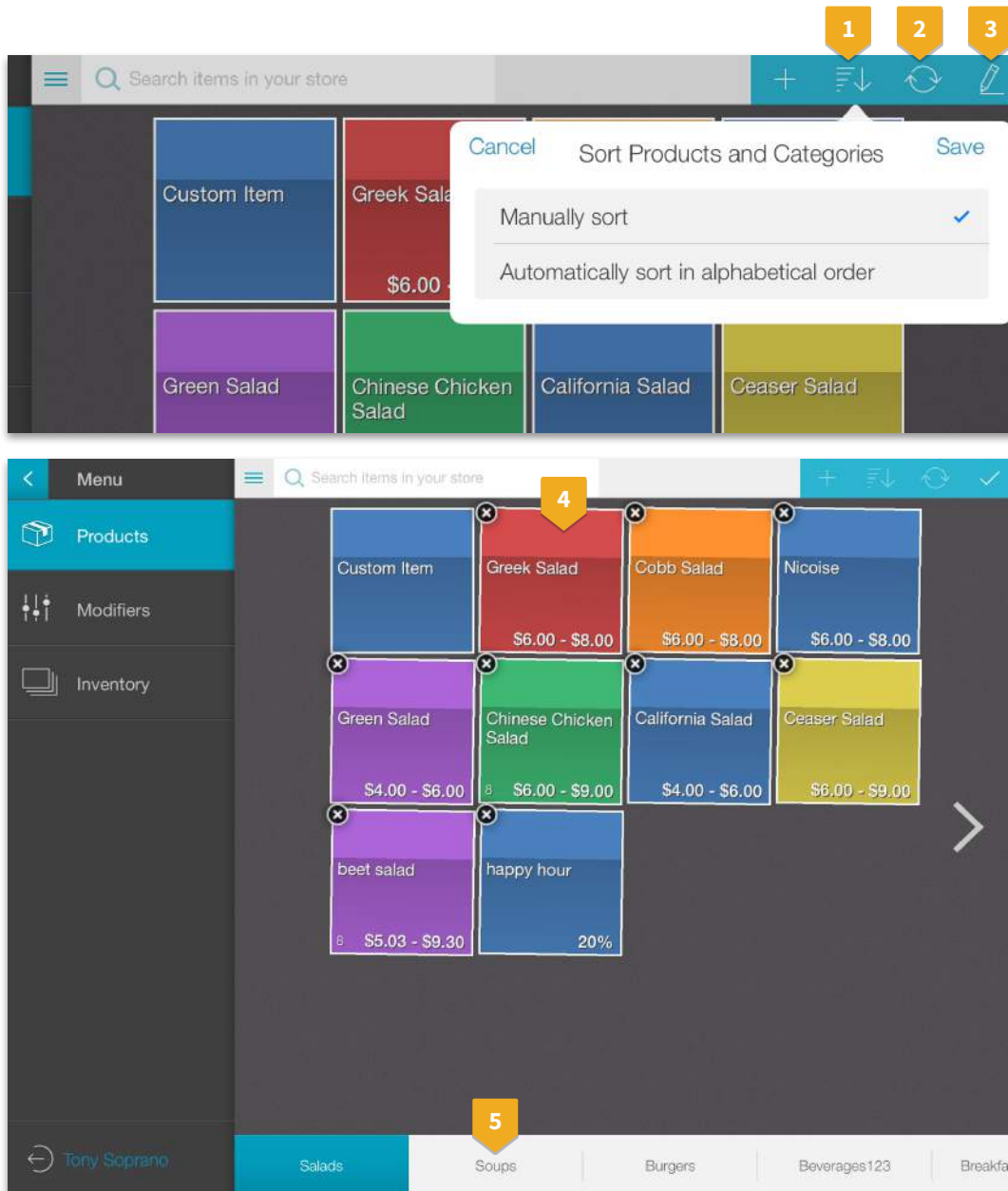
# MENU MANAGEMENT: ADDING CATEGORIES



## Add a Category:

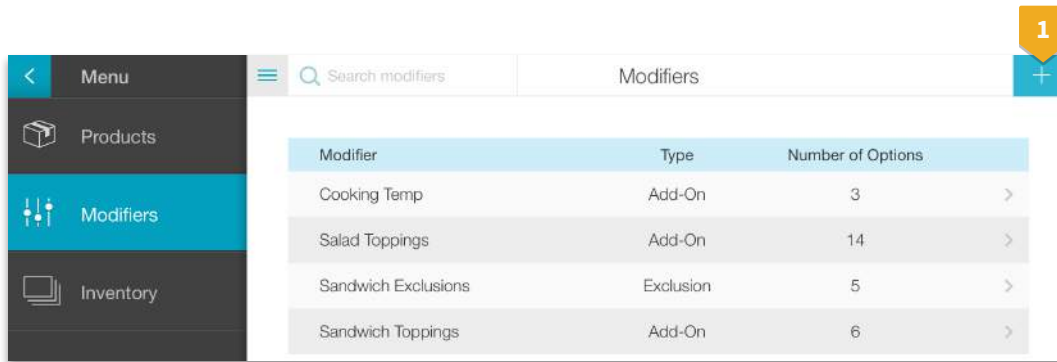
Tap on the Category tab. The position number is the horizontal position of the category as it appears in your register.

# MENU MANAGEMENT: EDIT YOUR MENU



- 1 Tap the sort button to control how your products and categories are sorted
- 2 Tap the reload button to download the most up to date version of your menu
- 3 Tap on the “Edit” button to move and delete items. Tap “Done” once you have finished making changes to your menu.
- 4 To move an item, press and hold the item card and drag it to its new position
- 5 To modify your category settings, press and hold the category name

# MENU MANAGEMENT: MODIFIERS



Modifier	Type	Number of Options
Cooking Temp	Add-On	3
Salad Toppings	Add-On	14
Sandwich Exclusions	Exclusion	5
Sandwich Toppings	Add-On	6

1 Tap on the “+” button to add a new modifier

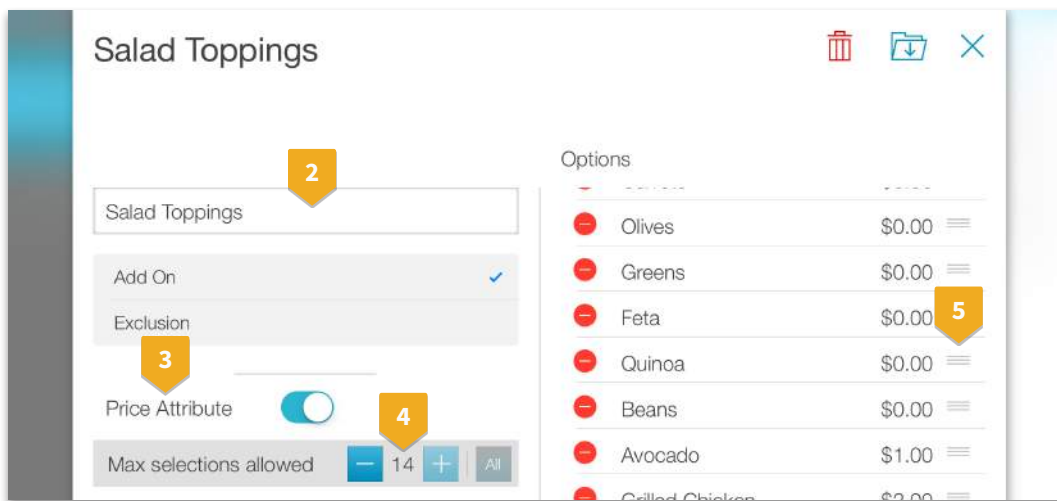
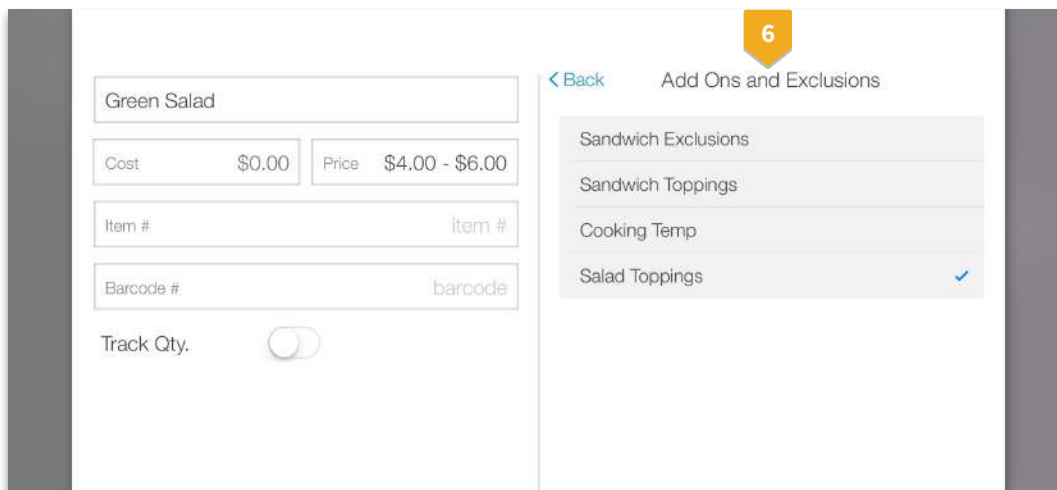
2 Specify a modifier name and choose your modifier type as “Add-On” or “Exclusion”. For exclusions, you do not need to add a NO in front of the option name. This will be added automatically on the order ticket when you add an exclusion to an item.

3 Enable the “Price Attribute” flag and enter a value if your add-ons have prices.

4 Select the maximum number of add-ons that can be applied

5 Drag and move a modifier to reorder its position

6 To apply this modifier to an item, select it from the Add-ons and Exclusions list on the product details screen.

# MENU MANAGEMENT: VARIATIONS

Peanut Butter Twist

Drinks

Peanut Butter Twist

Cost\$0.00Price\$3.69

Item #item #

Barcode #TN5BV5BT

Track Qty.

< Back

Variations

Size

Drink Size

Spice Level

1

2

Cost\$0.00Price\$3.69

Item #item #

Barcode #TN5BV5BT

Track Qty.

Select All

Small

Medium

Large

Add new option

3

4

Edit Price & Quantity

Peanut Butter Twist

Drinks

Options	Cost	Price	Item#	Barcode#	Qty
<input checked="" type="checkbox"/> Medium	\$2.00	\$4.00			0
<input checked="" type="checkbox"/> Large	\$3.00	\$6.00			0
<input type="checkbox"/> Small	\$0.00	\$0.00			0

Variations allow you to create multiple versions of a single product based on price or quantity differences. This simplifies your top level menu and allows you to group sales by the base product (e.g. drink size, salad size)

- 1

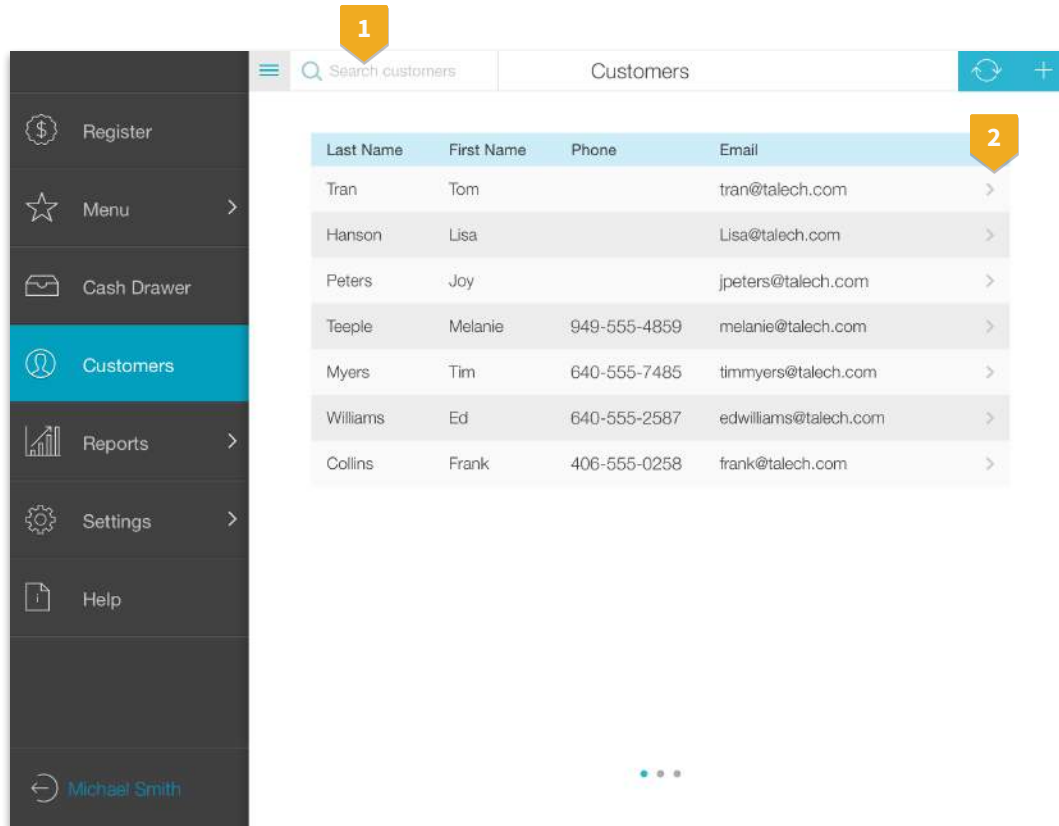
To edit an existing variation, tap on the variation name
- 2

To create a new variation, select the add button
- 3

Select the options you want to apply to this product. This is useful if you have a single variation with multiple options but only a subset apply to a product. You can apply multiple variations to a single product (e.g. portion size and cooking temperature)
- 4

Tap on the “Edit Price and Quantity” button to edit quantity and price values for each option

## CUSTOMERS: SEARCH FOR A CUSTOMER



1 Search for a customer using their first name, last name, e-mail or phone number

2 Tap on the customer to view and edit their information. If you want to add this customer to an order, tap on the user icon again to close the customer panel

# CUSTOMERS: LOYALTY PROGRAM

<

Settings

General

Employees

Loyalty

Taxes

Customer Loyalty Program

1

Loyalty Program

2

VIP Program

Loyalty Campaign Name

Visits to Redemption

Redemption Value

5

\$10.00

Melanie Teeple

0

2

\$19.00

days since last visit

total # of visits

average \$ per visit

Melanie

Teeple

melanie@talech.com

M: 6504443333

H: home phone

F: fax number

123 Elm street

apt / suite

Palo Alto

Ca

94306

Map

notes

VIP Program

Every 5 Visits

3

Join

Open

Closed

Receipt	Time	Total
A8KR	Jun 19, 2014 2:43 PM	\$50.10
NVVC	Jun 19, 2014 11:09 PM	\$6.60

With talech you can create a simple loyalty program based on number of visits

- 1
- Go to Loyalty under Settings, and enable the loyalty program
- 2
- Enter a program name, minimum number of visits to redemption and the discount offered
- 3
- Tap on the “Join” button to enroll a customer in the program. Tap “Redeem” to use the reward amount towards an order