

xenial

A Global Payments Company

Pocket Reference Guide

**Encounter POS
Management 2.0**

Table of Contents

CLOCKING IN/OUT	5
OPENING THE SYSTEM FOR THE DAY / LOGGING ON TERMINALS.....	6
ORDER ENTRY MANAGER FUNCTION SCREEN ...	7
LOGGING ON A CASHIER	8
SINGLE WINDOW DRIVE-THRU.....	9
DOUBLE WINDOW DRIVE-THRU.....	10
DELETING AN ITEM	11
SUBSTITUTING ITEMS	12
OVERRINGING AN ORDER.....	13
EMPLOYEE MEALS	14
ENTERING WASTE	15
CREDIT PAYMENTS / MANUAL ENTRY.....	16
SKIMS / PULLS	18
THE MANAGEMENT CONSOLE	19

CLOSING AN INSERT.....	20
ENTERING A BANK DEPOSIT.....	21
ENTERING INVENTORY COUNTS.....	22
CLOSING THE CREDIT CARD BATCH.....	23
CLOSING A SHIFT.....	24
COMPLETING THE DAILY CLOSE.....	25
ADDING AN EMPLOYEE.....	26
TERMINATING AN EMPLOYEE.....	27
EMPLOYEE TIME ALTERATIONS.....	28
CLOSING PAYROLL.....	29
ADDING A NEW MANAGER/CARD.....	30
CHANGING A PRICE.....	31
RECEIVING INVENTORY.....	32
TRANSFER INVENTORY IN / OUT.....	33
PASSWORD IS NOT WORKING.....	34
NEW MANAGER CARD NOT WORKING.....	34

MANAGER TERMINAL IN INCORRECT MODE ...	35
ORDERS NOT GOING TO KITCHEN SCREENS.....	36
GENERAL INFORMATION	37
NOTES	38
CONTACTING SUPPORT	39

CLOCKING IN/OUT

Clocking In / Out

- Enter the **Badge number**
- Select **Clock In/Out** button

Note: If a Manager card is required, swipe card through card reader before performing the actions above.

If you use a Fingerprint Reader (Biometrics)

Clocking In / Out

- Enter the **Badge number**
- Select **Clock In/Out** button
- Place finger on fingerprint reader for verification

Note: One minute must go by between clocking in and out.

OPENING THE SYSTEM FOR THE DAY / LOGGING ON TERMINALS

Ensure there are no inserts logged on from the previous day. You can run an Insert Status Report from the “QUICK REPORTS” tab at the top of the management console.

Opening the day only requires that you log on an insert to begin taking orders.

Logging on an Insert

Once you have clocked in an employee that you want to operate the insert:

- Slide the Manager card in the terminal you wish to log on
- Select the **Manager** button
- Enter the **Badge number** you want to log on
- Select **Log On**

You are now ready to take orders. Repeat these steps at each terminal you want to log on.

ORDER ENTRY MANAGER FUNCTION SCREEN

Insert Status Buttons:

- **Log On:** Logs on a new or existing insert.
- **Log Off:** Logs off an insert. This allows the insert to be logged back on at a later time or moved to a new terminal to continue sales.
- **Deactivate:** Deactivating an insert ends the sales on this insert. If you choose to log the same employee back on after the insert has been deactivated it will assign a new insert number.

Set Routing: The selection of communication to the kitchen screens.

Terminal Update: Updates your terminal with any changes made to the POS system.

Note: When performing a terminal update, one terminal should be completed and verified before updating all remaining terminals.

LOGGING ON A CASHIER

Reminder: Employee must be clocked in before you are able to log them onto an insert.

Front Counter Terminals

- Slide the Manager card in the terminal you wish to log on
- Select the **Manager** button
- Enter the **Badge number** you want to log on
- Select **Log On**
- You are now ready to take orders

Drive-Thru Terminals

- Use the same process as you would on the front counter terminals
- The order taker can be logged on using an order taker number (Usually 299 or 300)
- Make sure both terminals are logged on
- You are now ready to take DT orders

SINGLE WINDOW DRIVE-THRU

Order Taking

- Enter in the order
- Select **Total** button to receive the total amount
- Select **New Order** to store the order

Cashier Functions

- Select **Oldest Unpaid** to display the next order to cash out
- Enter in the amount tendered and select the appropriate payment button to cash out the order
- Once the vehicle is served at the window, select the **Served** button

Note: You may also use the quick payment buttons to cash out the order (i.e. \$5, \$10, Exact Change)

If paying with a CC or GC, you will enter in the amount, swipe the card and process the card using the associated payment type button.

DOUBLE WINDOW DRIVE-THRU

Order Taking

- Enter in the order
- Select **Total** to receive the total amount
- Select **New Order** to store the order

Cashier Functions

- Select **Oldest Unpaid** to display the next order to cash out
- Enter in the amount tendered and select the appropriate payment button to cash out the order

Serving the Order

- Select **Oldest Unserved** to display the next paid, unserved order
- Once the vehicle is served at the window, select the **Served** button

DELETING AN ITEM

Deleting an item from the build area

- Simply select the **Clear** button

Deleting an item in the order area

- Highlight the item you want to delete by touching it in the virtual receipt
- Select the **Delete** button

Note: If the item you choose to delete is part of a value meal, it will break up the value meal.

Deleting an item after subtotal may require a Manager card. If so, simply slide your Manager card through the card reader and then select the **Delete** button.

SUBSTITUTING ITEMS

Substituting Items in Build Area

- **Highlight** the item you wish to substitute
- Change panel to the desired item screen
- Select the item to substitute with

Note: Some requirements may exist. (i.e. An item may only be substituted with another from the same category or may not be substituted with a higher priced item.)

Substituting Items in Virtual Receipt Area

- **Highlight** the item you wish to substitute
- Select the **Substitute** button
- Change panel to desired item screen
- Select the item to substitute with

Note: If you fail to select the **Substitute** button and attempt to replace an item, the system will add the new item to the order and no substitution will occur.

OVERRINGING AN ORDER

(Refund)

Whole Order Overring in Order History

- Select the **Order +/-** buttons until you find the order you wish to Overring (or enter the order number followed by **New Order**)
- Slide the Manager card through the card reader
- Select **Overring**

Individual Item or Overring Not in Order History

- Select **New Order**
- Slide the Manager card, and select **Overring**. (Make sure **ORNG** displays at the top of the virtual receipt)
- Enter in the items you wish to Overring
- Select **Total**
- Enter in the exact amount displayed and then select the appropriate tender button

EMPLOYEE MEALS

Employee Meals / Full Order Discounts

- Enter in the order, select **Total**
- Navigate to the discounts panel
- Slide Manager card through the card reader
- Select the appropriate discount button
- Select the **Total** button

Individual Employee Meal Discounts

(If individual employee meal discount applies)

- Enter in the order, select **Total**
- Navigate to your discounts panel
- Slide Manager card through the card reader
- Enter the badge number
- Select the employee meal discount button
- Select the **Total** button

ENTERING WASTE

Whole Waste (at Order Entry Terminal)

- Select **New Order**
- Slide Manager card through the card reader
- Select **Waste** (Make sure **WSTE** displays at the top of the virtual receipt)
- Enter in the items you want to waste
- Select **Waste** again
- Waste ticket will print out with retail \$ amount

Note: When wasting any item from the order entry screen, all inventory included in the associated recipe will be wasted. It is recommended to enter this from a front counter terminal so that speed of service is not affected.

Raw Waste (from the Management Console)

- Select **Inventory** tab
- Select **Tasks** tab
- Select **Waste Items**
- Enter waste counts and select **Submit**

CREDIT PAYMENTS / MANUAL ENTRY

Credit Card / Gift Card / School Card

- Swipe card through the card reader
- Select the appropriate tender button

Multiple Forms of Payment (Partial Payment)

- Enter in the \$ amount they want to apply first
- Swipe card through card reader
- Select the appropriate tender button
- Repeat steps above until order is paid in full
- If including cash, it must be entered last

Manual Credit Card Payment

Method 1:

- Select the "Credit Card" button
- A number pad will pop up. Enter in the card number and select "Enter"
- Another number pad will pop up. Enter in card's expiration date (mmyy) and select "Enter"

Method 2:

- Enter 4 digit expiration date (MMYY) and select the @ button (If month begins with a zero the “0” will not display)
- Enter the credit card number as it appears on the card and select the **Credit** button

Note: You cannot perform partial payment with this method of manual entry

SKIMS / PULLS

If an insert begins to accumulate too much cash, you can set up events that warn or require money to be pulled from the insert. These pulls are called skims and can be done at any time from the POS terminal. Skims will automatically be deducted from the insert close screen when counting out your insert.

Skim an Insert (at Order Entry Terminal)

- Slide the Manager card through the card reader
- Type in the amount you wish to skim (e.g. 10000 for \$100.00)
- Select the **Skim** button

Skim an Insert (from the Management Console)

- Select **Sales** tab
- Select **Tasks** tab
- Select **Add Skim** button and enter skim amount
- Choose the insert you pulled the skim from
- Select **Add Record**

THE MANAGEMENT CONSOLE

Logging into the Management Console can be done locally or remotely.

Logging onto the Management Console Locally

- Slide the Manager card through the card reader
- Select the **Manager** button
- Select the **Penguin** Icon or Company Logo

Logging onto the Management Console Remotely

- Open your web browser
- Once the proper security settings are in place, use the following URL:
<https://manager.penguinpos.com>

Logging into the Management Console

- Type in your **Username/Password**
- Click **Login**

CLOSING AN INSERT

Inserts can be closed from the “INSERT CLOSE” tab located at the top of the management console.

Note: Inserts must be “Logged off” or “Deactivated” before closing.

- Click **Insert Close**
- Select an insert to close from the dropdown menu
- Count the insert and fill in the appropriate information
- Check the over/short amount and verify it is correct, if acceptable then continue
- If there is a discrepancy you do not agree with, DO NOT close the insert. Call **XENIAL SUPPORT.**
- Click **Submit**

ENTERING A BANK DEPOSIT

Navigating to Add Deposit

- Click **Sales**
- Click the **Tasks** tab
- Click **Add Deposit**

Entering a New Deposit

- Enter **Bag ID**
- Enter **Deposit Amount**
- Click **Add Record**

Note: Clicking the box for **Use Currency Calculator** will provide you with a tool to count your money.

Place the total amount of currency in each related field and it will calculate the grand total automatically (i.e. If you have “5” \$10 bills you would input 5 into the \$10 column.)

ENTERING INVENTORY COUNTS

Navigating to Inventory Physical Count

- Click **Inventory** tab
- Click **Tasks** tab
- Click **Count Items**

Inventory Physical Count

- Choose your **Sorting Method**
- Use the drop down to select your **Frequency**
- Click **Submit**

Entering Inventory

- Enter your counts for each item
- Use **First / Previous / Next / Last** buttons to scroll through the pages of inventory if needed
- Click **Submit** when finished

Note: You must enter a count for every item. If you have a zero quantity for an inventory item you must enter "0" as a count for that item.

CLOSING THE CREDIT CARD BATCH

Navigating to the Credit Card Batch

- Click the **Sales** tab
- Click the **Tasks** tab
- Click **Electronic Payment Manager**

Closing the Current Credit Card Batch

- Click the **Close Current Batch** button

The system will then close the credit card batch. This may take several minutes depending on your connection to the Internet.

View Batch Reports

- Use the **Report for:** drop down box to select the Batch Report you wish to view
- Select your **Report Format**
- Click **Report – All Transactions** or **Summary Report**

CLOSING A SHIFT

Navigating to the Shift Close

- Click the **Sales** tab
- Click the **Tasks** tab
- Click **Shift Close**

Closing a Shift

Shift closes include all inserts closed at the time of the shift close and any deposits made during that shift.

Enter any additional shift deposit under **Cash Deposits Made this Shift** area if applicable.

Bank Deposits

- Enter **Bag ID**
- Enter **Amount**

Safe Count

- Enter **Safe Count** amount
- Enter verifying manager's **Username / Password**
- Verify totals and click **Submit**

COMPLETING THE DAILY CLOSE

Navigating to the Daily Close

- Click the **Sales** tab
- Click the **Tasks** tab
- Click **Daily Close**

Completing the Daily Close

- Use the drop down to select your **Labor End Date** and **Time** (if enabled)
- Click **Submit**

Note: You may customize which tasks you require to be completed before the daily close will allow a user to process the close.

If the requirements are not met, you will be presented with a list of tasks to complete before the **Daily Close** process can begin.

You can also be permitted to bypass these requirements by providing a reason for the daily close override. Contact your database administrator to request the ability to bypass daily close requirements.

ADDING AN EMPLOYEE

Navigating to Edit Active Employee

- Click the **Labor** tab
- Click the **Maintenance** tab
- Click **Edit Active Employee**

Adding a New Employee

- Click **New**
- Choose a **Badge Number**
- Enter basic information and any optional information by clicking through the tabs
- Click **Add Record**

Required Fields: Badge Number, First Name, Last Name, Birthday, Hire Date, SSN, and a Pay Rate. The Pay Rate option is in the **Payroll** tab.

Note: Employee birthday defines the age for labor restrictions.

If a school is selected, the employee's school and school schedule will also affect labor restrictions.

TERMINATING AN EMPLOYEE

Navigating to Edit Active Employee

- Click the **Labor** tab
- Click the **Maintenance** tab
- Click **Edit Active Employees**

Terminating an Employee

- Select an employee by using **Quick Search**
- Check the **In-Active** box (this prevents employee from being able to clock in or out)
- Click the **Termination** tab
- Select a **Termination Date**
- Enter any additional information regarding the employee's termination
- Click **Submit**

Note: If you set an employee to **In-Active** status they will no longer be able clock in or out. To restore the ability to clock in or out, deselect the **In-Active** check box.

EMPLOYEE TIME ALTERATIONS

Navigating to Edit Clocksets

- Click the **Labor** tab
- Click the **Tasks** tab
- Click **Edit Clocksets**

Editing Employee Time

- Choose the employee you wish to edit using the **Quick Search** drop down menu
- Select the day to edit using the drop down menu next to the employee's name

Edit Existing Clockset

- Edit the date and time for the desired clockset
- Click **Submit**

Add New Clockset

- Click the **+** button next to **Add A Row**
- Enter additional clockset information
- Click **Submit**

CLOSING PAYROLL

Navigating to Payroll Close

- Click the **Labor** tab
- Click the **Tasks** tab
- Click **Close Payroll**

Closing Payroll (If Auto-Payroll Close is not enabled)

- Enter effective **End Date** or choose the day by selecting the calendar icon
- Enter effective **End Time**
- Click **Submit**

If you enter the wrong effective date and/or time of close or you have made changes to an employee's clocksets before processing your payroll:

- Click the **Labor** tab
- Click the **Tasks** tab
- Click **Re-Close Payroll**
- Enter effective **End Date** and **End Time**
- Click **Submit**

ADDING A NEW MANAGER/CARD

Navigating to the Active System User/Password Edit

- Click the **System** tab
- Click the **Configuration** tab
- Click **Active System User/Password Edit**

Adding a New Management Console User

- Click **New**
- Fill in the information under the **User Access** tab
- Click **Add Record**

Assigning a Manager Card to a User

- Click the **POS Access** tab
- Type in the number found on the front of an unused Manager Card
- Select a **POS Access Level** from the drop down
- Click **Submit** or **Add Record** if it is a new Manager entry

CHANGING A PRICE

Note: If your franchise is using Xenial's Menu Maintenance (MM) web portal to maintain your prices, you will not be able to view the below options. Please contact your database administrator to change a price.

Navigating to Edit Products

- Click the **Sales** tab
- Click the **Maintenance** tab
- Click **Edit Products**

Changing a Price

- Use the **Quick Search** drop down or the text search to find the item
- Highlight the **Price** field. Add a new price
- Click the **SUBMIT** button
- Perform a **Terminal Update** at one terminal
- Verify the item is working correctly
- Perform a **Terminal Update** on the remaining terminals

Note: Follow the same steps above to edit the price of a Value Meal under **Sales > Maintenance > Edit Value Meal**.

RECEIVING INVENTORY

Navigating to Receive Items

- Click the **Inventory** tab
- Click the **Tasks** tab
- Click **Edit Inventory Received**

Inventory Received

- Select **Start New Session** or use the **Session** drop down menu to resume a previous session
- Select your vendor from **New Session Vendor**
- Enter any additional comments
- Enter **New Session Invoice Total**
- Click **Submit**
- Enter your counts / cost for each item
- Use **First / Previous / Next / Last** buttons to scroll through the pages of inventory if needed
- Click **Submit** when finished

***Note:** Xenial also offers the ability to receive against a purchase order and also an electronic ordering module.*

TRANSFER INVENTORY IN / OUT

Navigating to Inventory Transfer Menus

- Click the **Inventory** tab
- Click the **Tasks** tab
- Click **Inventory Transfer In** or **Inventory Transfer Out**

Transferring Inventory

- Select the inventory item using the **Inventory Item** drop down menu
- Select the **Vendor** if applicable
- Select the **UOM** (Unit of Measure)
- Enter the **Quantity**
- Choose your **Transaction Type**
- Select the location using the **To** drop down menu (Locations can be setup under **Inventory > Maintenance > Edit Transfer Location**)
- Enter any additional comments
- Click **Submit**

PASSWORD IS NOT WORKING

- Is the **CAPS LOCK** or **NUM LOCK** on or off on your keyboard?
- Do you have the correct **USERNAME** and/or **PASSWORD**? (Consult your supervisor)

Note: Xenial Support does not reset passwords; please contact your supervisor for assistance.

NEW MANAGER CARD NOT WORKING

- Did you complete a **Terminal Update** after adding the new card to the system with a card that is currently working?
- Did you remember to add a POS access level when adding the new card to the system?

While swiping the card through the card reader does the word “card” display in the bottom corner? This may be a result of the card number being entered incorrectly in the system or a Terminal Update has not yet been performed.

MANAGER TERMINAL IN INCORRECT MODE

Manager Terminal Looks like an Order Entry Terminal

- Slide the Manager card through the terminal
- Select the **Manager** button
- Select the **Penguin** Icon or Company Logo

Manager Terminal is Displaying the Management Console Screen

- Select the **POS** Icon in the top right of the display

ORDERS NOT GOING TO KITCHEN SCREENS

- Select **Terminal Update** on the terminal
- Slide your Manager card through the card reader
- Select your current routing from the menu
- Check the receipt that prints to make sure your router option is set to the appropriate setting (not at “0”)

GENERAL INFORMATION

What type of paper do the receipt printers use?

The paper is 3-1/8th inch, fax-quality, thermal paper.

Should I call Xenial Support when I see an ERROR?

You should always call Xenial Support for any ERROR. It is important that Xenial knows about the error, so that it can be prevented from happening in the future.

When closing an Insert, Shift, or Day and there is a discrepancy.

If there is a discrepancy you do not agree with, do not finish the closing process and call Xenial Support first.

Manager Cards (System M and 15) should be in the restaurant safe at all times and accessible to all Manager when calling.

xenial

*A **Global Payments** Company*

XENIAL and the Xenial Logo are trademarks of
Global Payments Inc.

Visit us at
www.xenial.com