As you open with your New Point of Sale System this document will provide a quick start guide to your operation. A great resource with additional training documents and helpful how-to topics is available at [HERE](#) or going to https://postraining.info from any browser or directly from your point of sale terminal.

Step 1: Ensure All employees Have been Loaded and Assigned a Swipe Card (IF Applicable) and Pin as required to login to the system

- **Learn how to add employees here >>** [Adding-an-Employee-BR.pdf (postraining.info)](#)
- **Learn how to schedule shifts here >>** [Shift-Schedules-BR.pdf (postraining.info)](#)

Step 2: Timekeeping – Clocking In And Out

- Your employees will use the POS to clock in/out and this is required prior to entering an order.
- The employee will enter a pin or use the employee swipe card and press clock in/out.

Step 3: Assign Your cash Drawer

- **You will assign the cash drawer to your primary cashier for the shift/day.**
- **Sign into the POS using your PIN or Swipe Card.**
- **If not prompted, press Not Set under Tills.**
- **The staring amount is $100, but this can be adjusted manually or changed by sending the new default amount to pos_support@brixholdings.com and we will adjust the starting amount.**
- **Assign the till to your opening cashier.**
- **Employees will share the use of the till throughout the shift/Day.**
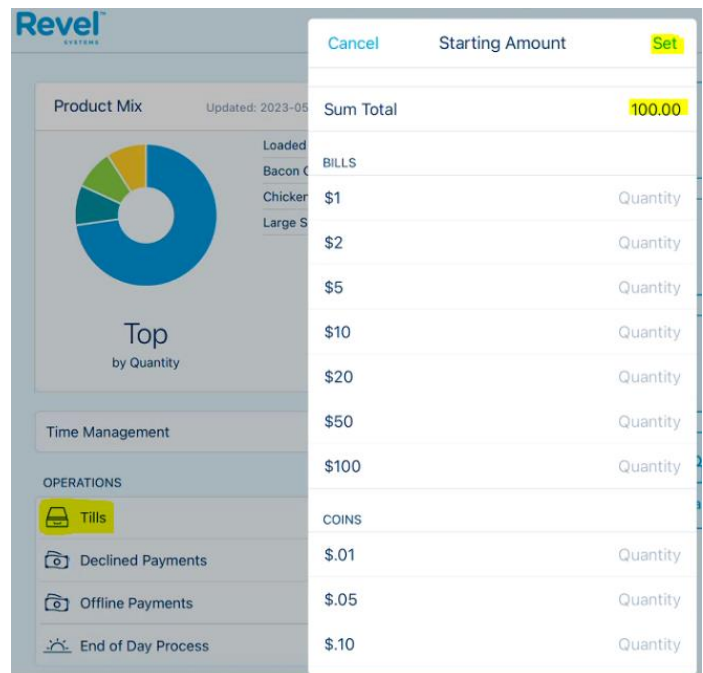
Step 4: Basic Order Entry

- Take some time and get familiar with the POS station and the organization of categories, subcategories (where applicable) and the payment screen.
- As we use Call Names in the system versus order #s for more personalized service suggested service steps are as follows:
    1. Welcome your customer to your store!
    2. Press New Order icon from Dashboard.

3. **Place all orders as the customer requests and confirm any modifications needed.**
4. **When the customer is ready to pay ask the form of payment ask method of payment. If cash proceed to the pay screen. If Credit Card press Fast Credit.**
5. **The system will prompt for a Call Name.**
6. **Ask your customer if they would like a printed receipt, emailed receipt, or no receipt and press the appropriate selection.**
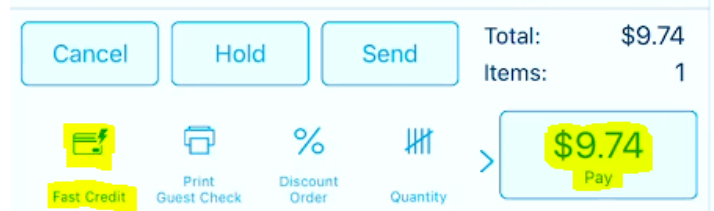
Step 5: Cash Drawer Reconciliation – Mid Day

If you choose to do a midday cash drawer RECONCILIATION, please check out this helpful how to regarding End of Shift procedures: End-of-Shift-BR.pdf (postraining.info)

Step 6: End of Day Reconciliation

Each night an End of Day procedure MUST BE performed, follow this helpful how to regarding End of Day procedures: End-of-Day-Procedures-BR.pdf (postraining.info)
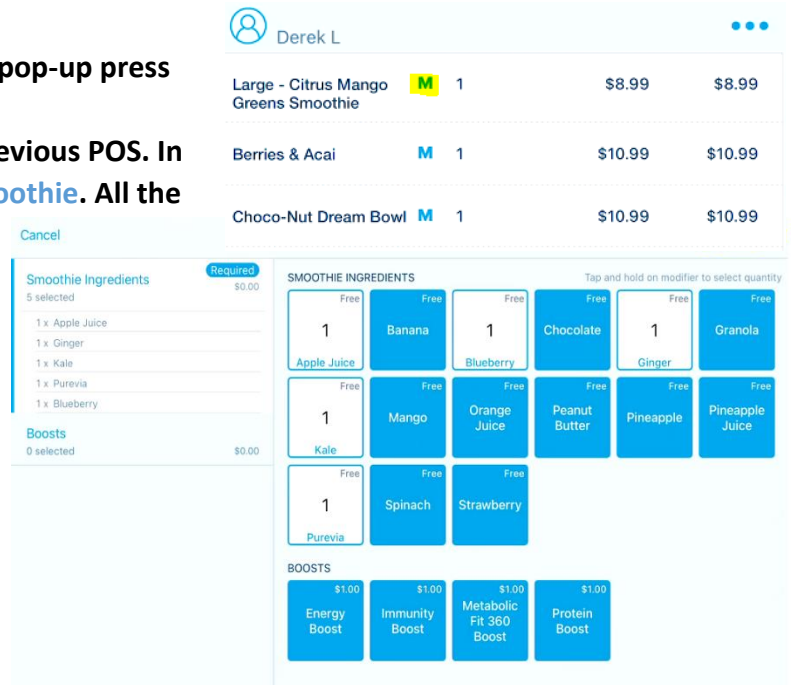
Note: this must be performed to capture all sales data and ensure all payments are processed accordingly.

1) Log into the iPad POS and from the dashboard screen tap End of Day Process; this will start the process

2) Walk through all the open tasks/steps to complete the end of night process. This will walk you through:

- closing all 0.00 balance orders
- reconcile any open orders.
- closing any offline payments
- any declined payments
- processing all credit cards
- confirming all employee timecards
- closing the till for the day
- Printing the file report

3) Once this process is finalized, you will be able to print a report call the sales report. This will show you all sales data for the entire day and the deposit total at the bottom by looking at "cash due house".

A Note About Order Modifications:

Most items will not automatically pop open for modification as the items are less likely to be modified and speed of service is primary in the point of sale. In the event an item must be modified (i.e. – Create Your Own Bowl) you can follow the below steps:

1. If the modifier screen did not automatically pop-up press the **M** on the transaction screen.
2. Modifications are different than with the previous POS. In this example of our Citrus Mango Green Smoothie. All the ==default== modifiers are ==highlighted== for the product. Removing an item the customers does not want can be done by just pressing the ingredient to remove. If the customer wants a quantity of more than one you would LONG PRESS on the item to select the quantity. This will also <u>charge the customer</u> for 'additional' ingredients or toppings accordingly. if you see issues with recipes or pricing, please email pos_support@brixholdings.com

A Note About Credit Card Tips & Tip Pooling:

As Cash Tips are handled differently at the store level and should not be included in the cash drawer, Credit Card Tips are set up for Tip Pooling in Revel. Your customer facing credit card device will prompt the customers for a tip when the payment process begins. Tip Pooling is the act of gathering your Credit Card Tips earned by your employees and the redistributing based on the hours that they worked. If you want this enabled, PLEASE email pos_support@brixholdings.com.

- **Management and Ownership is not included in the Tip Pool. The roles that participate are:**
  - Cashiers / Crew Members
  - Keyholders
  - MOD's (non-salaried)
- **The calculations for Tip Pooling are set for weekly by standard, if daily is needed, please email pos_support@brixholdings.com.**
- **All roles are distributed based on an algorithm of hours worked for a specific employee as a percentage of total hours worked for those employees in the pool. The tips Owed to the individual employees are this percentage applied to the total tips received during the Daily/Weekly time frame.**

- **For calculating the Tips Owed on a Daily/Weekly basis go to your management console in Revel. Tip Pooling should only be done by a manager and only after all orders are closed and everyone has checked out. You must hit save. If you do not hit save it will not go to the payroll report.**

A Note about Voids:

It is important to void all practice and training checks during your go live date. If you'd like to remove an item from an unpaid order, but the item has already been saved to the order, you will need to process a void.

1. **Open the order.**
2. **From the left side, double tap the name of the item.**
3. **Tap REMOVE the item from the overlay window.**
4. **Enter the reason for the void and then tap, OK.**
5. **Once all items have been removed close the order by clicking Done in the upper right of the screen.**

A Note About Discounts:

Adding discounts can be done by either the item or the whole order.

To add discounts by order:

1. **Open the order.**
2. **On the bottom left of the screen you Bar that has 4 small icons. One looks like a % sign.**
3. **Click on the icon, at the bottom you will see "scan".**
4. **Click on Scan, type in the coupon number and hit ok or select the desired discount button.**
5. **Continue to the pay screen.**

To add discounts by item:

1. **Tap on the item.**
2. **Go to discount item under pricing options.**
3. **Tap on the 3 ellipsis (dots) and hit scan. Type in the coupon code and hit add or the desired discount button.**
4. **Continue to the pay screen.**

To remove a discount from an item:

1. Tap on the discounted item.
2. Go to discount item under pricing options.
3. Tap on the 3 ellipsis (dots) and hit Remove Discounts.

A Note About Support:

Revel Hardware Support

- **Dial Support Line: (415) 744-1433**
- **Select Option "1"**
- **You will be asked to input your Revel Unique Identifier. Your RUID is in the POS Information window. To bring up the window, double tap the Revel logo in the upper left corner of your screen.**

Internet Support

- **Contact your local internet service provider or network technician**

Adyen Credit Card Device Support

Email: pos_support@brixholdings.com or call 469-480-2643

Item Configuration, System Functionality and Training

- **FranConnect ticket or pos_support@brixholdings.com**
- **For emergencies call Derek Linders, 214-302-5968**